PDG Shopping Cart 2002

Quick Start Guide

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Cart 2002 Quick Start Guide

Getting Started with PDG Shopping Cart 2002

Welcome to the PDG Shopping Cart 2002 Quick Start Guide. It will give you a head start on getting Cart 2002 configured for your Web store.

For more detailed information on setup and implementation of your Cart, refer to the PDG Shopping Cart 2002 User Guide.

Overview

In general, the PDG Shopping Cart 2002 Quick Start Guide is divided into the following sections:

- Test drive (to confirm the installation was correct and to familiarize you with how the Cart works)
- Configuring PDG Shopping Cart's operational options
- Setting up products within the Administrator
- Configuring shipping methods and rules within the Administrator
- Creating payment methods within the Administrator
- Embedding PDG Shopping Cart functions into your Web store
- PDG Web design components

Test Drive

This guide assumes that you have correctly installed PDG Shopping Cart. If your Cart has not been installed correctly, you will not be able to do the Test Drive.

Note: You should have copied at least one of your own product's images into the "images" subdirectory of your Web store's root directory for use during this Quick Start.

In order to begin the Test Drive, open your Web browser and point it to:

www.[yourwebstorename].com/cart.html

The following screen should appear:

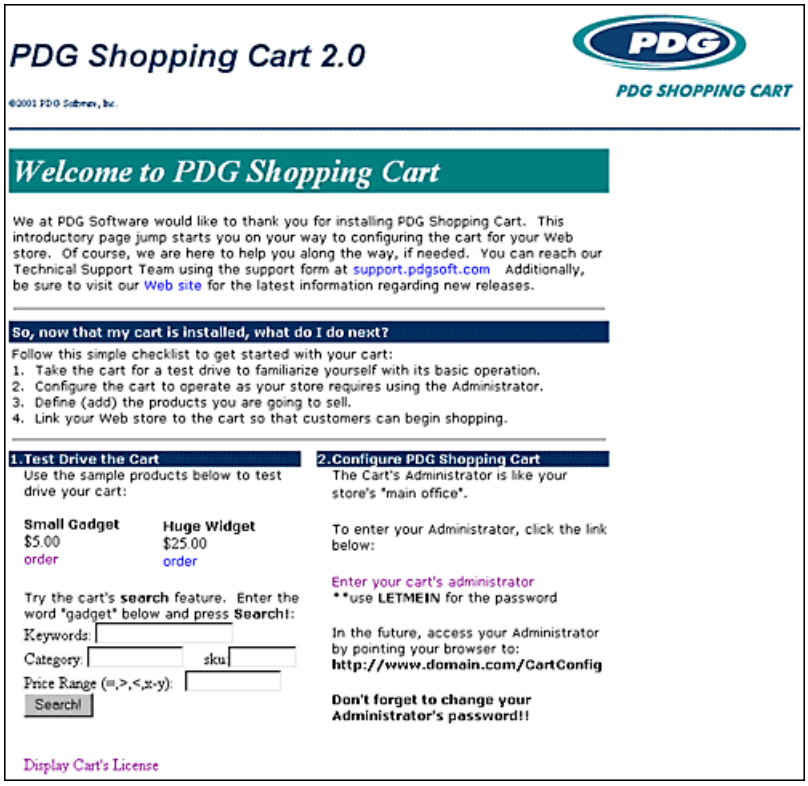


Figure 1-1 PDG Shopping Cart Welcome Page

Note: While going through the Test Drive, you might find it helpful to run the Quick Start in one browser window while viewing the Merchant Administrator in another browser window.

To accomplish this, press and hold down the "Ctrl" button on your keyboard and press the "n" button. A new browser window will appear. Adjust the size of both browser windows by clicking on the 'Restore' icon in the upper right hand corner of the browser windows.

Click on the "order" link. The following screen should appear:

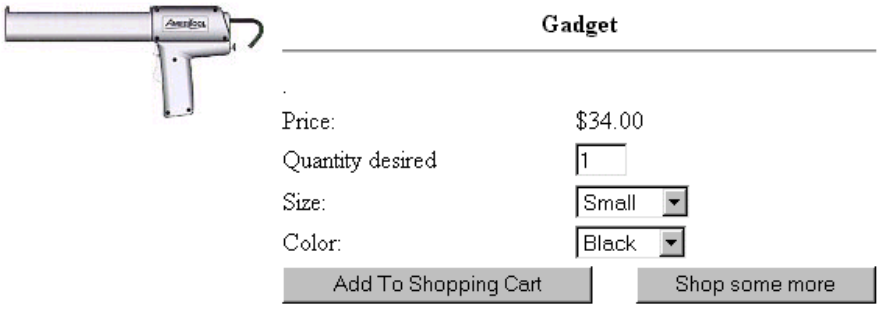


Figure 1-2 Sample AddItem Page

This is a sample page of what a customer would see when ordering a product from your Web store. You can customize this HTML template later.

Select a gadget color, then click on the "Add to Shopping Cart" button. The following screen will appear.

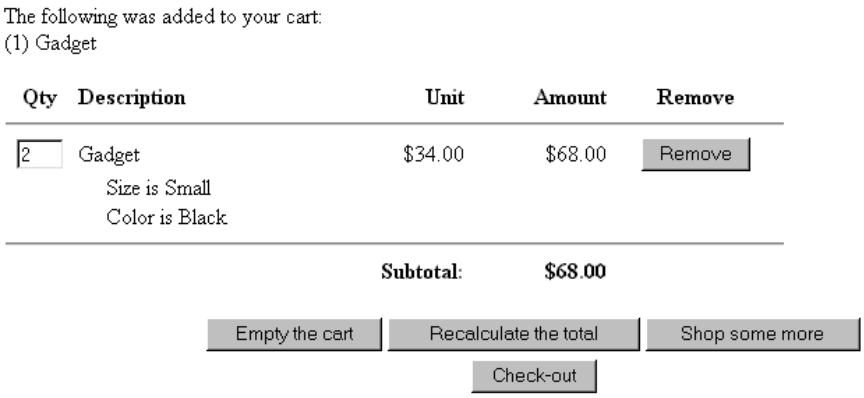


Figure 1-3 Sample Basket Page

This is a sample screen of the customer's Shopping Cart. The customer can change the quantity of the item ordered, recalculate the total, remove the item from the Cart, or proceed to checkout.

Click on the "Check-out" button. The following screen will appear for the customer to enter Contact, Billing, and Shipping information. Note that payment information is handled ***after*** this screen.

Qty	Description	Unit	Amount
(1)	Gadget Size is Small Color is Black	$34.00	$34.00
		Subtotal:	**$34.00**

Please provide us with the following information so we may process your order promptly. If any items are missing, we may not be able to process your order. Most importantly, please ensure your email address is correct, as this is how we will notify you if any problems occur while processing your order.

When you have finished, please click the 'Continue' button to continue submitting your order.

Contact Information

Please ensure this information is correct. We have no other method of notifying you in case of order problems.

Name:

Email:

Billing Information

If paying by credit card, then your billing name should match the name on the credit card and your billing address should match your credit card's billing address.

First Name:

Last Name:

Street Address line 1:

Street Address line 2:

City:

State: Non US Address

Province (for non-USA address):

Postal Code:

Country: United States

Figure 1-4 Sample Checkout page

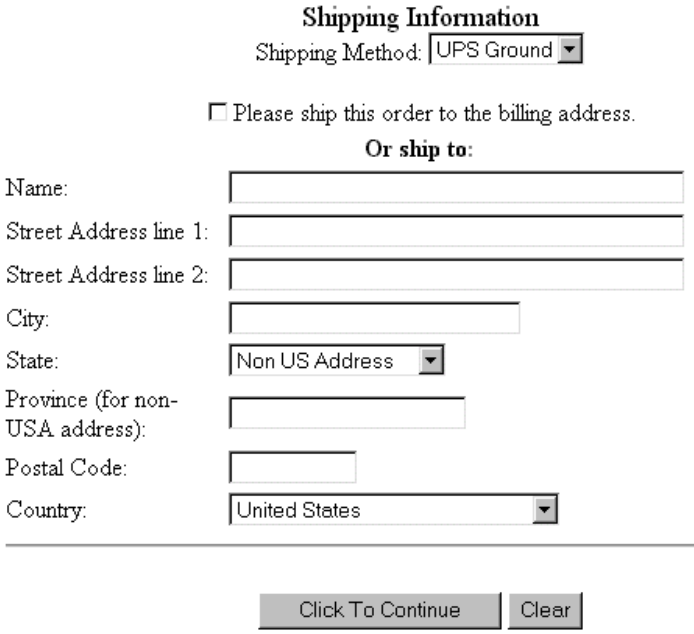


Figure 1-4 (Cont.) Sample Checkout page

Fill in this form as if your were actually ordering the gadget, then click on the "Click To Continue" button. The following screen will appear.

Figure 1-5 Sample Verify page

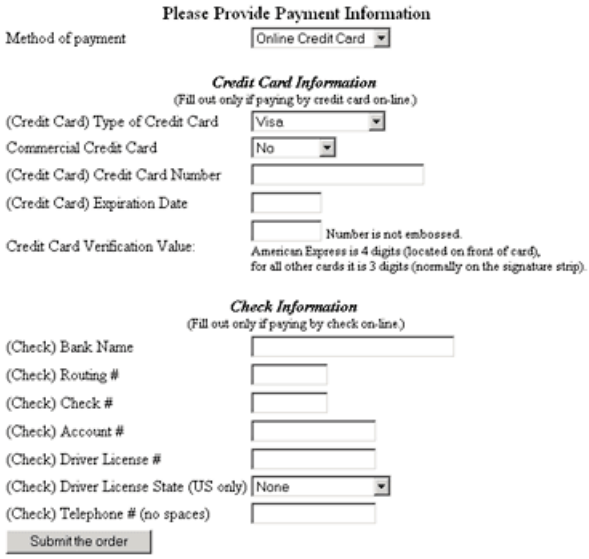
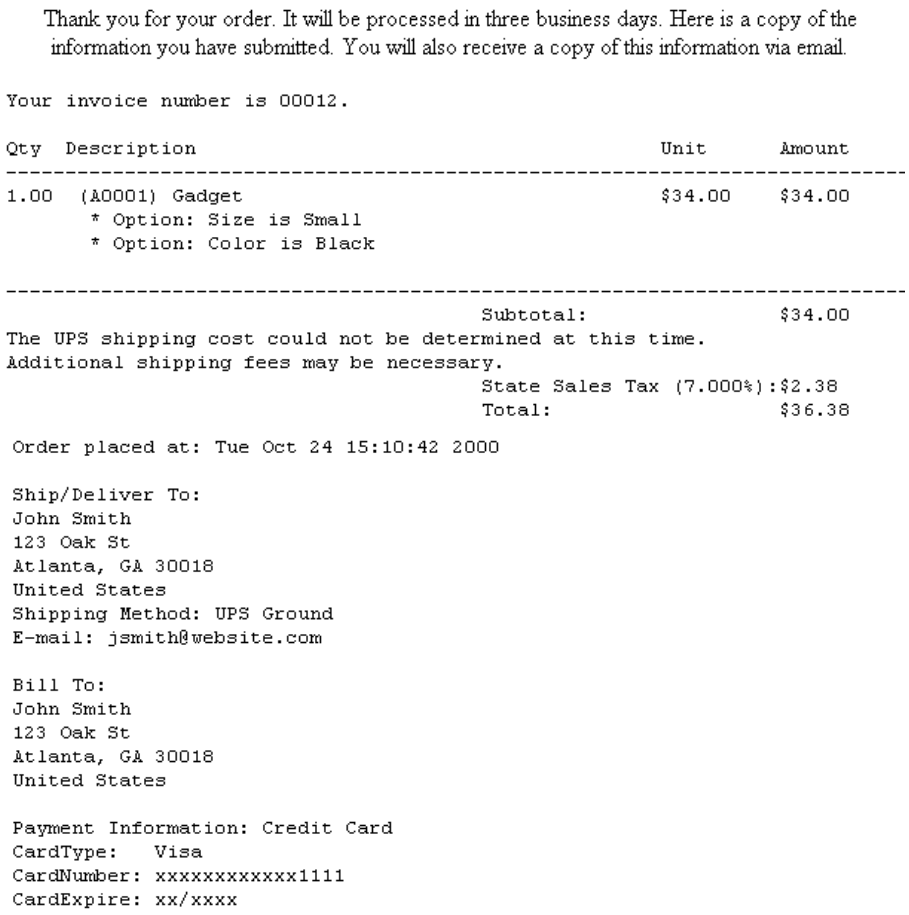


Figure 1-5 (Cont.) Sample Verify Page

Here, the customer will verify his order information and supply his payment preference and information.

When the customer clicks on the "Submit the order" button, several things occur. If the payment is by online check or credit card, the appropriate authorization service is invoked. If the method of payment is not approved, the 'Credit Deny' page is displayed, at which point the customer will have go through the Checkout process again. If payment is approved, confirmation e-mails are sent to the customer and vendor (**Note**: you must configure your E-mail settings, first). Also at this point, either the 'Thank You' or 'Credit Accept' page is displayed (depending upon the method of payment selected at Checkout).



Thank you for your order. It will be processed in three business days. Here is a copy of the information you have submitted. You will also receive a copy of this information via email.

Your invoice number is 00012.

Qty	Description	Unit	Amount
1.00	(A0001) Gadget * Option: Size is Small * Option: Color is Black	$34.00	$34.00

Subtotal:	$34.00
The UPS shipping cost could not be determined at this time. Additional shipping fees may be necessary.	
State Sales Tax (7.000%):	$2.38
Total:	$36.38

Order placed at: Tue Oct 24 15:10:42 2000

Ship/Deliver To:
John Smith
123 Oak St
Atlanta, GA 30018
United States
Shipping Method: UPS Ground
E-mail: jsmith@website.com

Bill To:
John Smith
123 Oak St
Atlanta, GA 30018
United States

Payment Information: Credit Card
CardType: Visa
CardNumber: xxxxxxxxxxxx1111
CardExpire: xx/xxxx

Figure 1-6 Sample Credit Accept Page

It should be noted that the payment methods are configured in the Payment Methods section of the Merchant Administrator. Please see 'Configuring Payment Methods' later in this Quick Start Guide for details about configuring payment methods.

Note: For more detailed information about configuring your Web store's payment methods, see 'Payment Methods' in Chapter 9 of the PDG Shopping Cart User Guide.

This completes the customer's purchase transaction and you can see how easy it is for customers to purchase items from your Web store using PDG Shopping Cart.

Now that you have finished this section of the Test Drive, please continue to the next section, 'Configuring PDG Shopping Cart 2002.'

Please remember that details about configuring Cart 2002 are available in the PDG Shopping Cart 2002 User Guide.

Configuring PDG Shopping Cart 2002

The Merchant Administrator is like your Web store's "main office." It is from there that you configure your Cart's options, products, payment methods, and shipping methods.

If you haven't already done so, connect to your ISP, and point your browser to:

www.[yourwebstorename].com/cart.html

When the welcome screen appears, click on the "Enter your cart's administrator" link on the right-hand side of the page.

Enter the Cart's default password, "LETMEIN" and the following screen should appear.

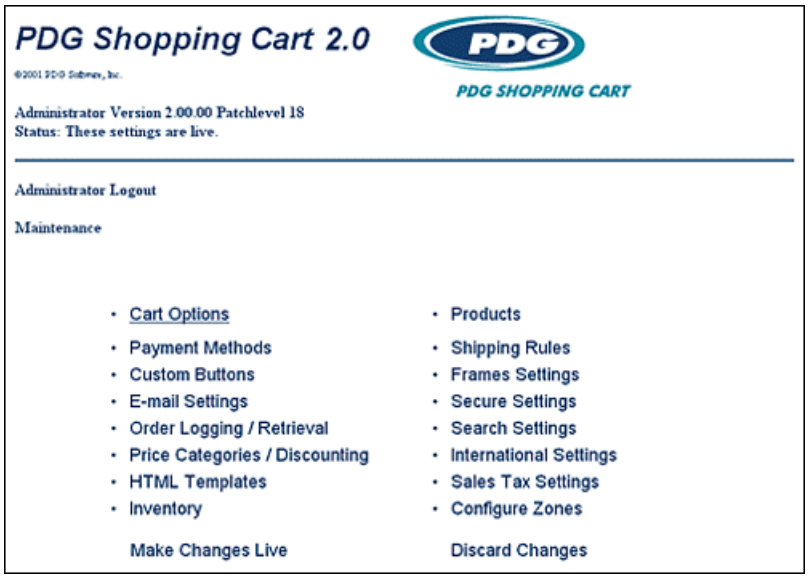


Figure 1-7 PDG Shopping Cart Administrator Menu

Click on the "Cart Options" link. The following screen will appear:

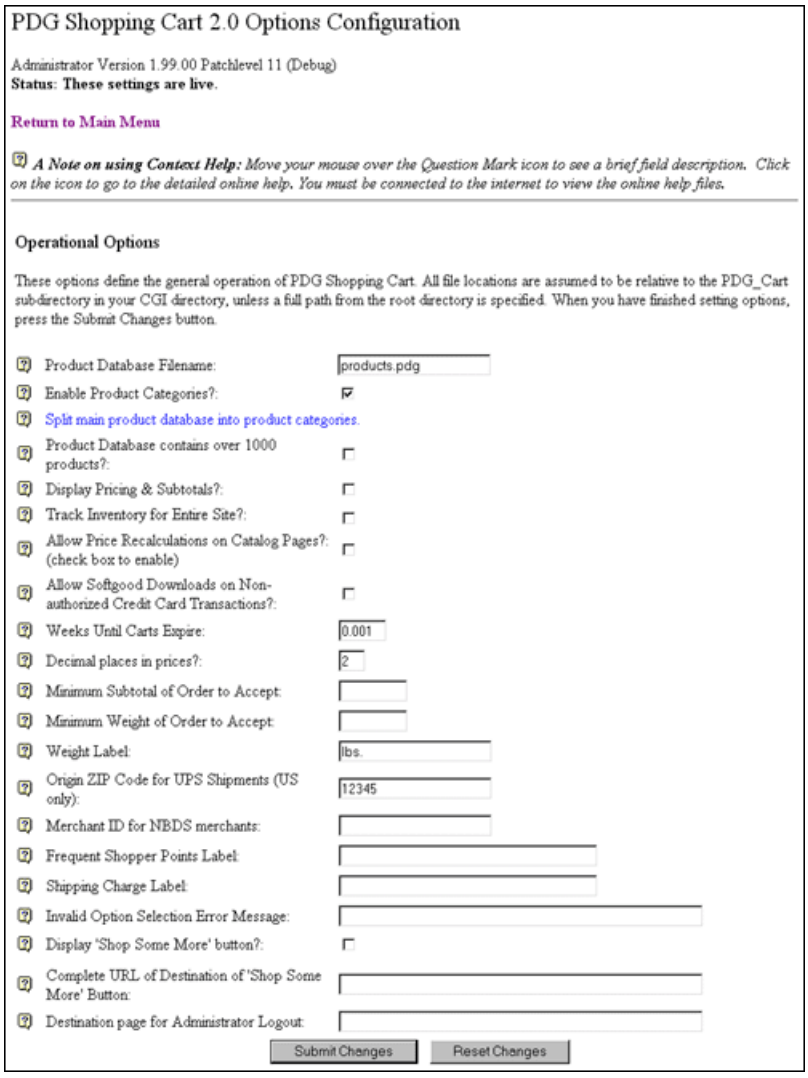


Figure 1-8 PDG Shopping Cart Options Configuration Page

The Cart comes pre-configured with certain basic options already set. For the time being, you should accept these defaults. For now, simply enter your ZIP code in the "Origin ZIP Code for UPS Shipments" field. You can come back and customize the other options later. Click "Submit Changes."

Next, go back to your Merchant Administrator's main menu. Click on the link entitled "E-Mail Settings." The following screen should be displayed:

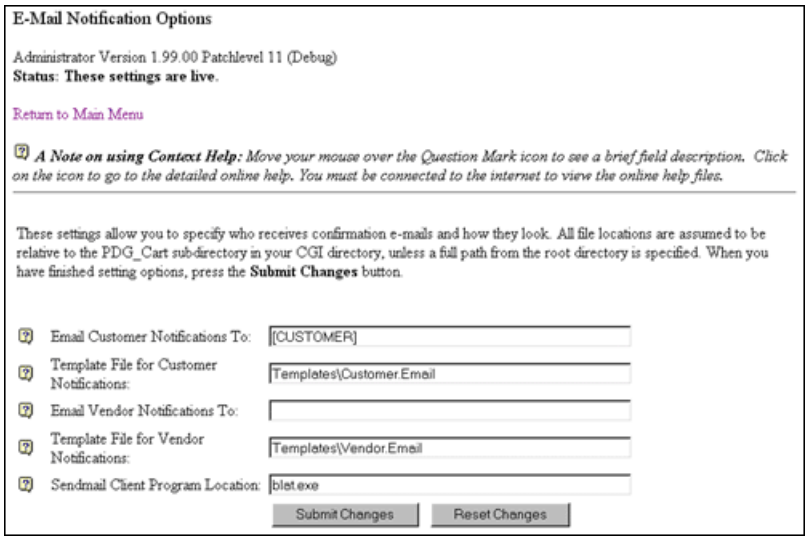


Figure 1-9 E-mail Settings

Enter your e-mail address in the “E-mail Vendor Notifications To:” field. Click on the “Submit Changes” button.

If your Web store is located on a Windows NT server, scroll down to the section entitled “Windows NT/95 E-mailer Configuration.”

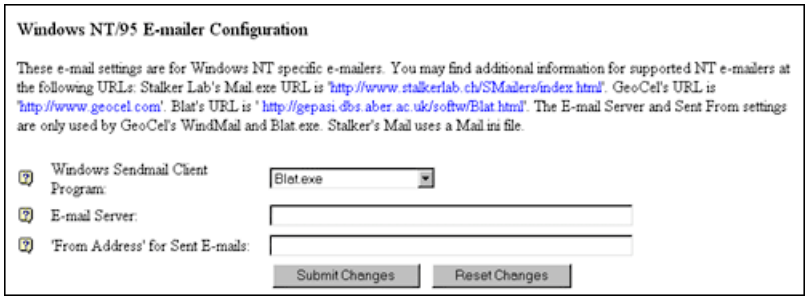


Figure 1-10 Windows 95/NT E-mail Settings

Fill in this section with the appropriate information from your Web host and enter your e-mail address in the “From Address for Sent E-mails” field. Click on the “Submit Changes” button.

Next, click on the “Return to Main Menu” link, and finally, click on “Make Changes Live.”

Congratulations. You have configured your Shopping Cart’s general options. Return to the Merchant Administrator by clicking the “Return to Main Page” link.

Entering Products

Now you can add one of your Web store's products to the Products section of your Shopping Cart.

From your Merchant Administrator's main menu, click on "Products." The following screen should appear.

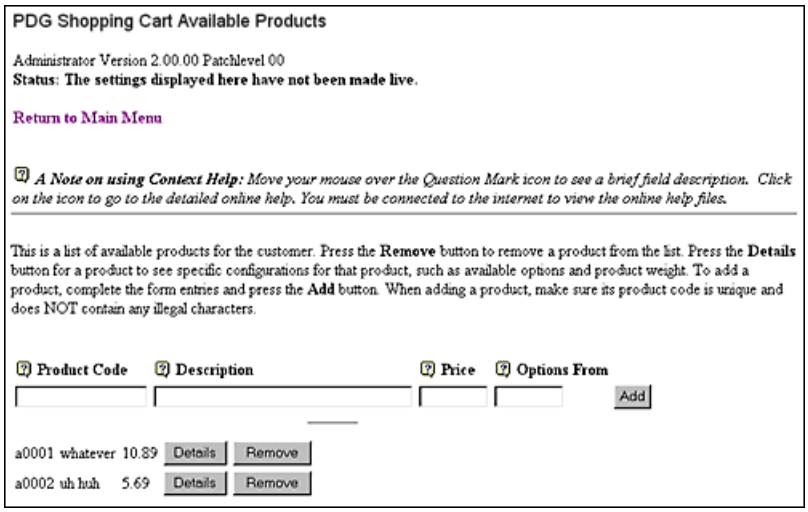


Figure 1-11 PDG Shopping Cart Available Products

Enter a 'Product Code' for your product similar to the examples shown on the page (e.g.: A0003).

Note: When entering product codes, do not enter quotation marks, slashes, dollar signs or any other illegal characters. For a complete list of illegal characters, see 'Maintaining Products' in Chapter 6 of the PDG Shopping Cart User Guide.

Enter a brief description of your product (i.e.: This will generally be the product name or title. For example, "Cool T-shirt" or "Greatest Hits of the 90's").

Enter a price for the product without a dollar sign (e.g.: 14.95)

Click on the "Add" button and your product should appear at the bottom of the list as shown in the following example.

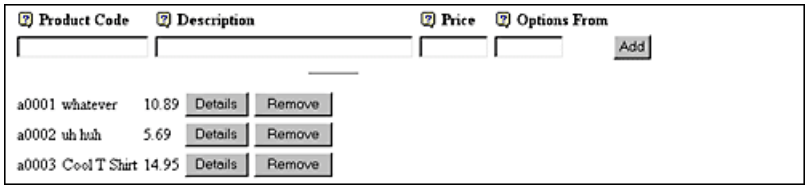


Figure 1-12 New Product Added

Click on the “Details” button. The following screen will appear.

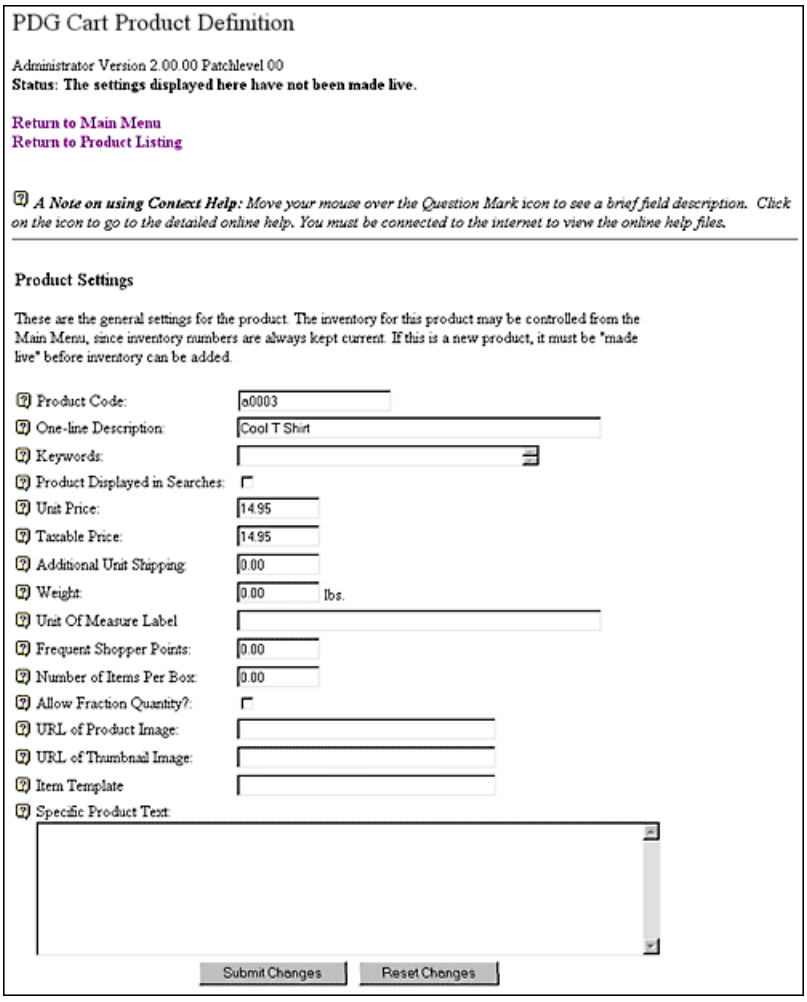


Figure 1-13 PDG Shopping Cart Product Definition Page

Enter the numerical weight for your product, but omit the weight’s value (i.e.: oz., Kg., lbs. and so forth).

Enter the “URL of Product Image” for the image file of the product. This entry should be in the format of:

/images/productname.jpg

or

/images/productname.gif.

Note that you should already have created a product picture in “.jpg” or “.gif” format and placed it in the “images” subdirectory of your Cart.

In the “Specific Product Text” box, type in your long description of the product without quotation marks. For Example:

This is the coolest t-shirt we have available. One size fits all. Machine washable.

Click on the "Submit Changes" button. Next, click on the "Return to Main Menu" link, and finally, click on the "Make Changes Live" link.

Configuring Shipping

From the Merchant Administrator's main menu, click on the "Shipping Rules" link. The following screen should appear:

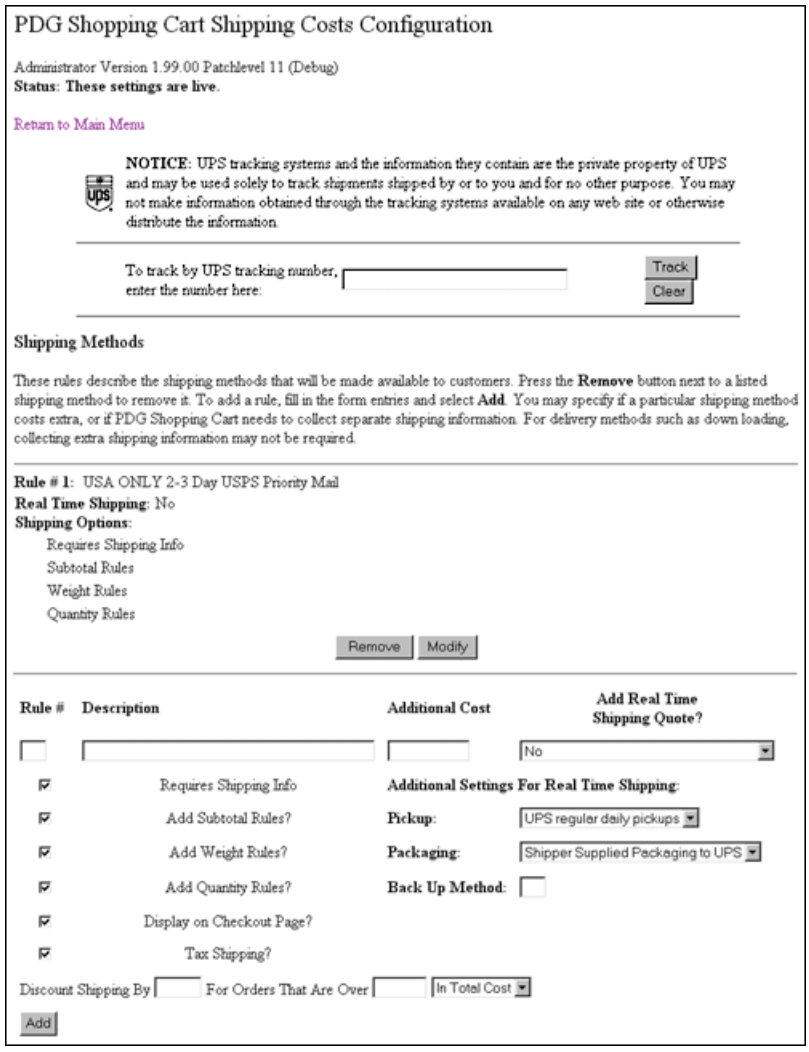


Figure 1-14 PDG Shopping Cart Shipping Cost Configuration

Here, you would normally enter the various shipping options that you will make available to your customers. You can modify these rules later.

For the Quick Start, simply accept the default and click on the "Return to Main Menu" link.

For the moment, disregard the “Custom Buttons,” “Frames Settings” and other links on the Administrator’s main menu.

Configuring Payment Methods

From the Merchant Administrator’s main menu, click on the “Payment Methods” link. The following screen should appear:

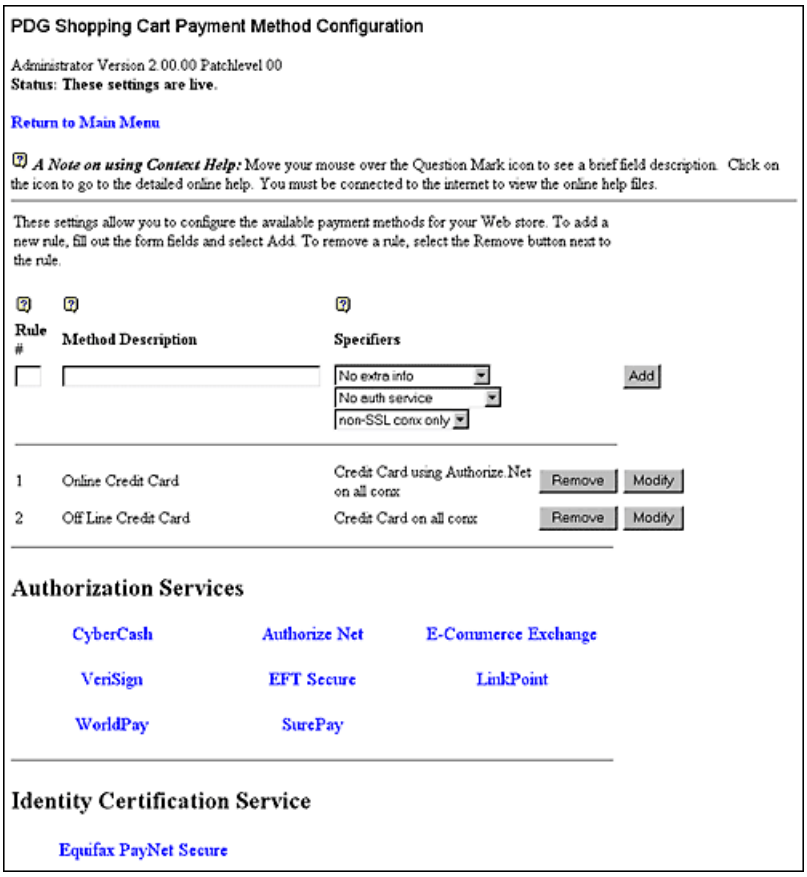


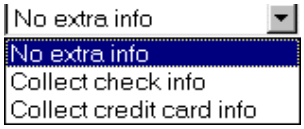
Figure 1-15 PDG Shopping Cart Payment Method Configuration

The top part of the Payment Method Configuration page consists of several entry fields that are used to add new Payment Methods to your Web store’s configuration. Below this section are the payment methods that have already been configured. This is the section that you will be working with for this Quick Start.

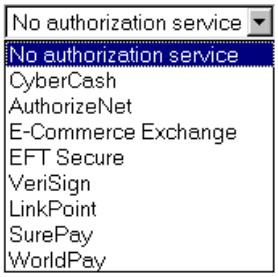
The bottom section of this page contains links to the payment authorization configuration pages. These are discussed in your PDG Shopping Cart User Guide.

For now, let's just enter a few simple payment methods. Follow these steps to begin configuring the payment options your Web store customers will have to choose from.

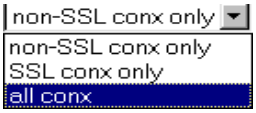
1. Enter a rule number, (i.e.: 2). These numbers simply determine the order in which the payment methods will appear on the
2. Enter a payment description, (i.e.: Mail Check)
3. From the first drop down-menu under "Specifiers," select the option shown below.



4. From the second drop-down menu under "Specifiers," select, "No authorization service."



5. From the third drop-down menu under "Specifiers," select the option shown below, "all conx."



6. Click the Add button.
7. Click on the "Return to Main Menu" link, then click "Make Changes Live."

Note: If you will be using an online payment processor, you will have to configure PDG Shopping Cart 2002 appropriately. Each of the eight payment authorization services that PDG Shopping Cart is compatible with has its own configuration page. See the "Payment Methods" section in Chapter 9 of the PDG Shopping Cart user guide for details.

Close the Merchant Administrator.

Embedding the Shopping Cart's Functionality

Now that your Cart is configured and you know how to define products, you should link your site to the Shopping Cart so that customers can begin purchasing items from your Web store.

This step is referred to as "integrating" or "embedding" the Cart into your Web store. It is important to note that your Web store pages and the Shopping Cart are actually two separate entities. Therefore, integrating the Cart into your store is really the act of creating links that "call" PDG Shopping Cart 2002 into action.

These links are words or images (including buttons) that add products to the Cart, display the Cart's contents, let customers proceed to checkout, etc.

Embedding the Shopping Cart's functionality into your Web store can be done in two ways.

1. If you are using either Microsoft FrontPage, NetObjects Fusion, or Macromedia's Dreamweaver or UltrDev as your HTML editor for creating your Web pages, you can download and install the PDG Component for it. This will make developing and maintaining your Web site faster by eliminating the need to write the HTML code.
2. You can enter the HTML code directly into your Web site using your existing HTML editor.

For this Quick Start, we will show you how to enter the HTML code directly. This is so you can quickly view the Cart's operation using the product you entered earlier in the Quick Start.

If you haven't already done so, create a blank, 'test' web page for you to use during this portion of the Quick Start

Order Link

This is usually the initial link which calls PDG Shopping Cart 2002 into action. It displays the chosen product on the PreAdd page and allows the customer to specify the quantity and options for the product. Usually this link is placed somewhere adjacent to the product description or image on the static pages that you have created to display the product.

Note: You may also use the Item HTML template that is provided to display your products. See 'HTML Template Files' in Chapter 12 of the PDG Shopping Cart User Guide.

Order Link Using Text

To add this link using text (for example, a link from the word “Order”), the HTML code would be in the following format:

Order

It is important that you use your Web store's domain and specify the appropriate CGI directory.

Note that if your site resides on an NT Web server, then the shopper reference is correct. If your store resides on a UNIX server, then you should use either “shopper” or “shopper.cgi.”

Finally, replace “XXX” with the actual ‘Product Code’ of the product you are calling as defined earlier.

So for this Quick Start, your finished code would be similar to the following:

Order

Save your test file, then upload it via FTP to your Web site’s root directory on your Host server.

Open your browser, then point it to the ‘test’ file that you just created. Viewed in a Web browser, it would look like the following:

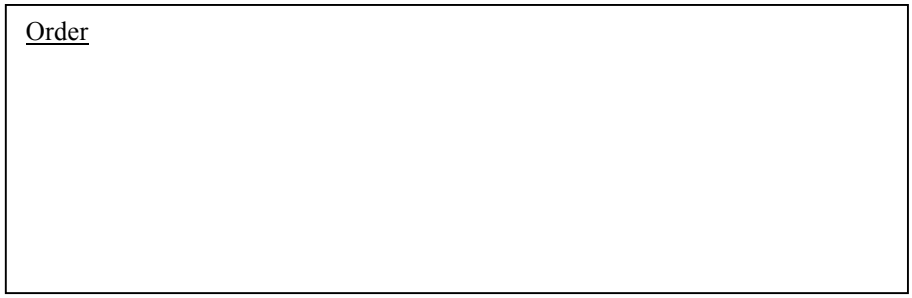


Figure 1-16 ‘Test’ Web Page Containing an Order Link

Click on the “Order” link. A screen similar to the following should appear, displaying the image of your product, along with the associated product data that you entered earlier.

Figure 1-17 Sample PreAdd Page

Creating Order Links Using an Image

To add the 'Order' link using an image, you must first place the product image on your test page. Now you will need to create a link to your Shopping Cart from the image. There are two ways of doing this: you can use one of the PDG Web development components, or you can write the HTML code into the page yourself.

Most HTML editors have a tool which allows you to create a "hot spot" over an image. This hot spot is the link. Once the hot spot is "drawn" over the image, a dialog box should appear asking you to enter the URL for the hot spot link. You should enter the following, substituting your domain name, CGI directory and product code:

http://www.[yourwebstorename].com/cgi-bin/
shopper.exe?preadd=action&key=XXX

Remember to replace "XXX" with the product code of the product that you are attempting to link to.

If you are not using an HTML editor, then you should code the HTML like this, substituting your domain name, CGI directory, product number, and location of the image:

<a href="http://www.domain.com/cgi-bin/
shopper.exe?preadd=action&key=XXX"><img src="[location of image]"
border="0">

PDG Plugin Components

If you are using either Microsoft FrontPage, NetObjects Fusion, or Macromedia Dreamweaver or UltraDev to develop your Web site, you can download a special component from www.pdgsoft.com. Once it is installed, you can use the component to make calls to your Shopping Cart at the click of a button.

Using the component will make developing and maintaining your site much faster by eliminating the need to write portions of HTML code when embedding cart functionality into your Web site.

All of the PDG Web design components are free to download and come equipped with their own documentation.

A Final Word

Now that you have completed the Quick Start, you can continue the process of adding products to Cart 2002 and embedding Cart 2002 functionality in your Web store. For more detailed setup instructions, consult the 'PDG Shopping Cart 2002 User Guide.'

We hope you develop a profitable Web business and thank you for using PDG Shopping Cart.

End