



PDG SOFTWARE Inc.



PDG Shopping Cart Quick Start Guide



PDG SHOPPING CART

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PDG Software, Inc.
<http://www.pdgsoft.com>

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Introduction

The best way to deal with the future is to create it yourself.

___ Tom Peters, management guru and author of "In Search of Excellence"

Welcome to the PDG Shopping Cart Quick Start Guide.

This guide will give you a head start on configuring PDG Auction for your web store.

NOTE: This Quick Start Guide assumes a correct installation! For installation details, refer to the Auction Installation Guide that was included with your download.

Quick Start Overview

In general, this guide is divided into the following major areas:

1. Test drive (to confirm the installation was correct and to familiarize you with how the auction works)
2. Configuring auction options
3. Setting up users and auctions within the Administrator
4. Linking your web site to PDG Auction functions.

We have included in the download a file named "auction_index.html." This file can be customized by adding your own HTML code for creating your auction home page. All the necessary links for calling PDG Auction functions have been provided for you on this page.

Getting Help

We are here to support you in all of your PDG Software needs. Our technical support staff is available to you via our web site at <http://www.pdgsoft.com> and through e-mail at support@pdgsoft.com. Also you may reach us directly by phone at (770) 270-0062.



An overview of the PDG Shopping Cart Quick Start Guide

Welcome to the PDG Shopping Cart Quick Start Guide.

This guide will give you a head start on configuring PDG Shopping Cart 1.5 for your web store.

NOTE: This Quick Start Guide assumes a correct installation! For installation details, refer to the PDG Shopping Cart Installation Guide that was included with your download.

Quick Start Overview

In general, this guide is divided into the following major areas:

5. Test drive (to confirm the installation was correct and to familiarize you with how the shopping cart works)
6. Configuring cart options
7. Embedding cart functionality in your web site.

Getting Help

We are here to support you in all of your PDG Software needs. Our technical support staff is available to you via our web site at <http://www.pdgsoft.com> and through e-mail at support@pdgsoft.com. Also you may reach us directly by phone at (770) 270-0062.



End

Test Drive

Taking PDG Shopping Cart for a test drive



This guide assumes a correct installation. If your cart has not been installed correctly, you will not be able to do the Test Drive.

For installation details, refer to the PDG Shopping Cart Installation Guide that was included with your download.

Remember, the technical support staff at PDG Soft, Inc. will install your software for free. All you need is a domain name and Internet Service Provider.

Our technical support staff is available to you via our web site at:


<http://www.pdgsoft.com>

and through e-mail at support@pdgsoft.com. You may also reach us directly by phone at (770) 270-0062.

If you have already installed Cart 1.5, note that you should also copy at least one of your own product images into your "images" subdirectory for use during this Quick Start.

To begin, connect to your ISP, then type www.yourwebstorename.com/cart.html as the URL address. The following screen should appear.

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 pages 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 widow will appear.

Adjust the size of both browser windows by clicking on the  icon in the upper right hand corner of the browser windows

Welcome to PDG Shopping Cart

We at PDG Software would like to thank you for installing PDG Shopping Cart. This introductory page jump starts you on your way to configuring the cart for your Web store. Of course, we are here to help you along the way, if needed. You can reach our Technical Support Team using the support form at support.pdgsoft.com. Additionally, be sure to visit our [Web site](#) for the latest information regarding new releases.

So, now that my cart is installed, what do I do next?

Follow this simple checklist to get started with your cart:

1. Take the cart for a test drive to familiarize yourself with its basic operation.
2. Configure the cart to operate as your store requires using the Administrator.
3. Define (add) the products you are going to sell.
4. Link your Web store to the cart so that customers can begin shopping.

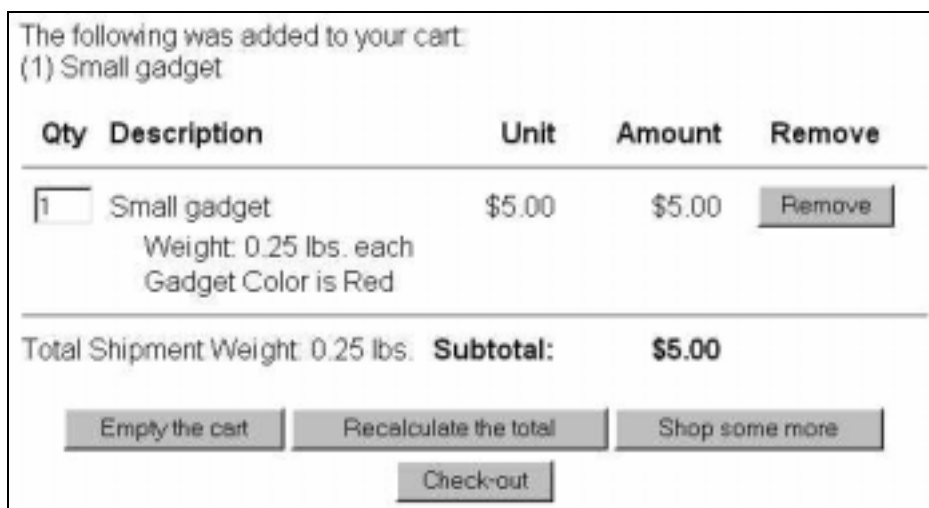
<p>1. Test Drive the Cart</p> <p>Use the sample products below to test drive your cart:</p> <table border="0"> <tr> <td>Small Gadget \$5.00 order</td> <td>Huge Widget \$25.00 order</td> </tr> </table> <p>Try the cart's search feature. Enter the word "gadget" below and press Search!:</p> <p><input type="text"/> <input type="button" value="Search!"/></p>	Small Gadget \$5.00 order	Huge Widget \$25.00 order	<p>2. Configure PDG Shopping Cart</p> <p>The Cart's Administrator is like your store's "main office".</p> <p>To enter your Administrator, click the link below:</p> <p>Enter your cart's administrator **use LETMEIN for the password</p> <p>In the future, access your Administrator by pointing your browser to: http://www.domain.com/CartConfig</p>
Small Gadget \$5.00 order	Huge Widget \$25.00 order		

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



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

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



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 check out.

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

You are ordering:

Qty	Description	Unit	Amount
(1)	Small gadget Weight: 0.25 lbs. each Gadget Color is Red	\$5.00	\$5.00

Total Shipment Weight: 0.25 lbs. **Subtotal:** **\$5.00**

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 with 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 (US only):

OR Providence:

Postal Code:

Country:

Shipping Information

Shipping Method: UPS Ground

Please ship this order to the billing address.

Or ship to:

Name:

Street Address line 1:

Street Address line 2:

City:

State (US only): Non US Address

OR Providence:

Postal Code:

Country: United States

Click To Continue
Clear

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.

Please verify that the following information is correct. If it is not, then use your browser's back arrow and make the necessary changes. After you have verified that the information is correct, please supply the necessary payment information to place your order.

Qty	Description	Unit	Amount
(1)	Small gadget Weight: 0.25 lbs. each Gadget Color is Red	\$5.00	\$5.00
Total Shipment Weight: 0.25 lbs.		Subtotal:	\$5.00
		Shipping & Handling:	\$4.40
		Sales Tax (7.000%):	\$0.35
		Total:	\$9.75

Customer Information

Billing To:	Shipping To:
John Smith 1111 Elm St. Atlanta, GA 30328 United States	John Smith 1111 Elm St. Atlanta, GA 30328 United States Deliver via UPS Ground

Please Provide Payment Information

Method of payment

Credit Card Information
(Fill out only if paying by credit card on-line.)

(Credit Card) Type of Credit Card

(Credit Card) Credit Card Number

(Credit Card) Expiration Date

Check Information
(Fill out only if paying by check on-line.)

(Check) Bank Name

(Check) Routing #

(Check) Check #

(Check) Account #

Here the customer verifies their order information and enters their payment information.

When the customer clicks on the "Submit the order" button the order, depending on whether the payment is via credit card or check, it is then verified and accepted or declined by the payment processor and the following screen appears.

Note that these options are configured in the Payment Methods section of the Administrator and since these settings have not been configured, you may see an error. Simply use your browsers 'Back' button to return to the previous page.

```

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 e-mail

Your invoice number is I00055.

Qty Description                               Unit      Amount
-----
1.00 (A0001) Small gadget                     45.00     45.00
      * Weight: 0.25 lbs. each
      * Option: Gadget Color is Red

-----
Total Shipment Weight: 0.25 lbs.  Subtotal:           45.00
                                   Shipping & Handling:    44.40
                                   Sales Tax (7.000%):      30.35
                                   Total:                   49.75

Order placed at: Tue Feb 15 15:30:42 2000

Order placed at: Tue Feb 15 15:30:42 2000

Ship/Deliver To:
John Smith
1111 Elm St.
Atlanta, GA 30328
United States
Shipping Method: UPS Ground
E-mail: jsmith@pdgsoft.com

Bill To:
John Smith
1111 Elm St.
Atlanta, GA 30328
United States

Payment Information: Secure
CardType: Visa
CardNumber: xxxxxxxxxxxxxx1111
CardExpire: xx/xx
    
```

This completes the customer's purchase transaction and you can see how easy it is for customers to use the shopping cart.

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

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

 End

Configuring Shopping Cart 1.5

Quick configuration settings to get you started

This guide assumes a correct installation. If your cart has not been installed correctly, you will not be able to do the Test Drive.

The Administrator is like your store's "main office." From there you configure your cart's options, products, payment methods, and shipping methods.

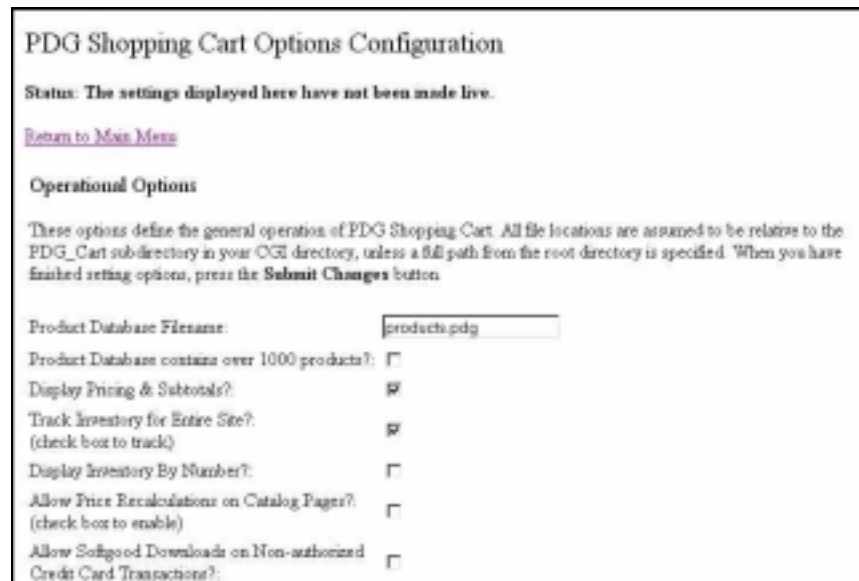
If you haven't already done so, connect to your ISP, then type `www.yourwebstorename.com/cart.html` as the URL address.

When the welcome screen appears, click on the "Enter your cart's administrator" link.

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



Click on "Cart Options." The following screen will appear.



Make form queries in GET format?	<input type="checkbox"/>
Create Relational-Ready CSV File? (Adds invoice to each record):	<input type="checkbox"/>
Weeks Until Carts Expire:	<input type="text" value="6"/>
Decimal places in prices?	<input type="text" value="2"/>
Minimum Subtotal of Order to Accept	<input type="text" value="0.00"/>
Minimum Weight of Order to Accept	<input type="text" value="0.00"/>
Order Log File:	<input type="text" value="order.log"/>
Order Log CSV File:	<input type="text" value="order.csv"/>
CSV Delimiter:	<input type="text" value=""/>
Invoice Number Prefix:	<input type="text" value=""/>
Weight Label: (unit of weight)	<input type="text" value="lbs."/>
Origin ZIP Code for UPS Shipments (US only):	<input type="text" value="12345"/>
Merchant ID for NBDS merchants:	<input type="text" value=""/>
Frequent Shopper Points Label:	<input type="text" value=""/>
Shipping Charge Label:	<input type="text" value=""/>
Invoice Number Prefix:	<input type="text" value=""/>
Weight Label: (unit of weight)	<input type="text" value="lbs."/>
Origin ZIP Code for UPS Shipments (US only):	<input type="text" value="12345"/>
Merchant ID for NBDS merchants:	<input type="text" value=""/>
Frequent Shopper Points Label:	<input type="text" value=""/>
Shipping Charge Label:	<input type="text" value=""/>
Invalid Option Selection Error Message:	<input type="text" value=""/>
Complete URL to a SSL Secure PDG Shopping Cart Executable:	<input type="text" value=""/>
Complete URL to PDG Shopper Log Executable:	<input type="text" value=""/>
Display 'Shop Some More' button?:	<input checked="" type="checkbox"/>
Complete URL of Destination of 'Shop some more' Button:	<input type="text" value=""/>
<input type="button" value="Submit Changes"/> <input type="button" value="Reset Changes"/>	

The cart comes pre-configured with certain basic options already set. For now, accept these defaults. You can come back and customize them later.

Scroll down to the section entitled, "E-Mail Notification Options. It should be similar to the screen below.

E-Mail Notification Options

These settings allow you to specify who receives confirmation e-mails and how they look. All file locations are assumed to be relative to the PDG_Cart subdirectory in your CGI directory, unless a full path from the root directory is specified. When you have finished setting options, press the **Submit Changes** button.

E-mail Customer Notifications To:	<input type="text" value=" CUSTOMER "/>
Template File for Customer Notifications:	<input type="text" value="Templates/Customer.Email"/>
E-mail Vendor Notifications To:	<input type="text" value="yos@yoswebsite.com"/>
Template File for Vendor Notifications:	<input type="text" value="Templates/Vendor.Email"/>
Sendmail Client Program Location:	<input type="text" value="bin/exa"/>

Enter your email address in the "E-mail Vendor Notifications To:" field.

Click on the "Submit Changes" button.

If your web host is running NT servers, scroll down to the section entitled Windows NT/95 E-mailer Configuration. It should be similar to the screen below.



The screenshot shows a web form titled "Windows NT/95 E-mailer Configuration". It contains a paragraph of text explaining that the settings are for Windows NT specific e-mailers and provides URLs for Stalker Lab's Mail.exe, GeoCiel's URL, and Blat's URL. Below the text are three input fields: "Windows Sendmail Client Program" with a dropdown menu showing "Blat.exe", "E-mail Server" with the text "mail.pdgsoft.com", and "From Address for Sent E-mails" with the text "you@yourwebsite.com". At the bottom of the form are two buttons: "Submit Changes" and "Reset Changes".

Fill in this section with the appropriate information from you ISP and enter your email address in the "From Address for Sent E-mails" field.

Click on the "Submit Changes" button.

Click on the "Return to Main Menu Link".

Click on "Make Changes Live"

Congratulations. You have configured your general options.

Return to the Merchant Administrator.

 End

Entering Products

Adding products in the Products section

Now you can add one of your products to the Products section.

On the Merchant Administrator page, click on "Products." The following screen should appear.

PDG Shopping Cart Available Products

Status: The settings displayed here have not been made live.

[Return to Main Menu](#)

This is a list of available products for the customer. Press the **Remove** button to remove a product from the list. Press the **Details** button for a product to see specific configurations for that product, such as available options and product weight. To add a product, complete the form entries and press the **Add** button. When adding a product, make sure its product code is unique.

Product Code	Description	Price	Options From	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>
A0001	Small gadget	5.00	<input type="button" value="Details"/>	<input type="button" value="Remove"/>
A0002	Huge Widget	25.00	<input type="button" value="Details"/>	<input type="button" value="Remove"/>
A0003	Thing	15.00	<input type="button" value="Details"/>	<input type="button" value="Remove"/>

Enter a Product Code (sku number) for your product similar to the examples shown on the page, e.g. A0004.

WARNING! Do not enter quote marks, slashes, dollar signs or any other illegal characters.

Good Characters

In general, one should stick to the basic 26 upper- and lowercase letters, and the 10 digits 0-9, plus the dash and the underscore (for a total of 64 characters:

ABCDEFGHIJKLMNOPQRSTUVWXYZ

abcdefghijklmnopqrstuvwxyz

1234567890_-

Illegal Characters

Name	Character	Name	Character
Question mark	?	Colons	:
Ampersand	&	Vertical Bars	
Angle brackets	< >	Asterisks	*
Spaces		Square brackets	[]
Double quotes	"	Curly brackets	{ }
Single quotes	'	Parentheses	()
Slashes	/ \	Comma	,
Plus signs	+	Exclamation Points	!
Equal signs	=	"at" symbol	@
Percent signs	%	Tilde	~
Hash marks	#	Backquote	`
Semicolons	;		

Other characters are used at your own risk.

Description

Enter a brief description of your product, i.e. just the product name or title. For example, Cool T-shirt or Greatest Hits of the 90's.

Price

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 show in the following example.

PDG Shopping Cart Available Products

Status: The settings displayed here have not been made live.

[Return to Main Menu](#)

This is a list of available products for the customer. Press the **Remove** button to remove a product from the list. Press the **Details** button for a product to see specific configurations for that product, such as available options and product weight. To add a product, complete the form entries and press the **Add** button. When adding a product, make sure its product code is unique.

Product Code	Description	Price	Options From	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>
A0001	Small gadget	5.00	<input type="button" value="Details"/>	<input type="button" value="Remove"/>
A0002	Huge Widget	25.00	<input type="button" value="Details"/>	<input type="button" value="Remove"/>
A0003	Thing	15.00	<input type="button" value="Details"/>	<input type="button" value="Remove"/>
A0004	Cool T-shirt	14.95	<input type="button" value="Details"/>	<input type="button" value="Remove"/>

Click on the "Details" button. The following screen will appear.

PDG Shopping Cart Product Definition

Status: The settings displayed here have not been made live.

[Return to product listing](#), or [Return to Main Menu](#)

Product Settings

These are the general settings for the product. The inventory for this product may be controlled from the Main Menu, since inventory numbers are always kept current. If this is a new product, it must be "made live" before inventory can be added.

Product Code: A0004

One-line Description:

Keywords:

Unit Price:

Taxable Price:

Additional Unit Shipping:

Weight: lbs.

Unit Of Measure Label:

Enter a weight for your product, e.g. 1.0

Enter an amount for "Number of Items Per Box:" e.g. 1

Enter the URL of the Product Image for the picture 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.

In the "Specific Product Text" box, type in your long description of the product. For Example: This is the coolest t-shirt we have available. One size fits all.

Note that for this Quick Start these settings are sufficient. When actually entering products for your store, you may customize these settings. See the User Guide for details.

Click on the "Submit Changes" button, then scroll down to the "Track Inventory" section.

Check the box next to the "Track Inventory for Product" field and click on the "Submit Changes" button.

Click on the "Return to Main Menu Link".

On the Merchant Administrator page, click on "Make Changes Live"

 End

Setting Inventory Options

Basic Inventory Options

From the Merchant Administrator page, click on the Inventory button. The following screen should appear.

You can see that you have added a product to your inventory, but you have no quantity in stock.

Current Inventory for PDG Shopping Cart

[Return to Main Menu](#)

You can control the inventory live from this page. All changes affect PDG Shopping Cart instantly. To change just one product's inventory settings, press the **Change** button next to the product to change. To change all inventory settings, press the **Submit All Changes** at the bottom of the page.

Product Code	In Stock:	Do Not Allow Backordering?	Do Not Display in Searches If Out Of Stock?
A0001	<input type="text" value="3"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
A0002	<input type="text" value="1"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
A0003	Display Inventory By Options		
A0004	<input type="text" value="0"/>	<input type="checkbox"/>	<input type="checkbox"/>

Enter a quantity of product. For example, 6 then click on the "Submit" button.

Click on the "Return to Main Menu Link".

Click on "Make Changes Live"

 End

- - - - -

Setting Shipping Options

Basic Shipping Options

From the Merchant Administrator page, click on the Shipping button.

PDG Shopping Cart Shipping Costs Configuration

Status: These settings are live.

[Return to Main Menu](#)

Shipping Methods

These rules describe the shipping methods that will be made available to customers. Press the **Remove** button next to a listed shipping method to remove it. To add a rule, fill in the form entries and select **Add**. You may specify if a particular shipping method costs extra, or if PDG Shopping Cart needs to collect separate shipping information. For delivery methods such as downloading, collecting extra shipping information may not be required.

Rule #	Description	Additional Cost	Add cost from UPS?
1	UPS Ground	0.00	Yes - Ground Residential
	Yes Requires Shipping Info		
	No Add Subtotal Rules?		
	No Add Weight Rules?		
	No Add Quantity Rules?		
<input type="button" value="Remove"/>			
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="No"/>
<input type="checkbox"/>	Requires Shipping Info		
<input type="checkbox"/>	Add Subtotal Rules?		
<input type="checkbox"/>	Add Weight Rules?		
<input type="checkbox"/>	Add Quantity Rules?		
<input type="button" value="Add"/>			

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

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

For the moment, disregard the Custom Buttons and Frames buttons.



Payment Methods

Setting your Payment Methods

From the Merchant Administrator page, click on the Payment Methods button.

Status: These settings are live.

[Return to Main Menu](#)

These settings allow you to configure the available payment methods for your Web store. To add a new rule, fill out the form fields and select **Add**. To remove a rule, select the **Remove** button next to the rule.

Rule #	Method Description	Specifiers	
<input type="checkbox"/>	<input type="text"/>	No extra info No auth service non-SSL conx only	<input type="button" value="Add"/>
1	Secure	Credit Card on all conx	<input type="button" value="Remove"/>

Now you can configure a payment method using the following procedure.

1. Enter a rule number, e.g. 1.
2. Enter a description, e.g. Credit Card
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 auth service."
5. From the third drop down menu under specifiers, select the option shown below.



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

You are now ready to embed Shopping Cart functionality on a web page.

Close the Cart Administrator.



Embedding Cart Functions

Embedding Cart functionality in your web pages

Now that your cart is configured and your products are defined, you should link your site to PDG Shopping Cart so that customers can begin shopping.

This is also referred to as "integrating" or "embedding" the cart into your Web store. It is important to note that your Web store pages and PDG 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 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 check-out, etc.

Embedding Shopping Cart functionality in your web site can be done in two-ways.

1. If you are using either Microsoft FrontPage or NetObjects Fusion as your HTML editor for creating your web pages, you can download and install the PDG Shopping Cart Component for it. This will make developing and maintaining your 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 functionality 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 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 your static pages that you have created yourself.

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:

```
<a href="http://www.domain.com/cgi-bin/shopper.exe?pre-add=action&key=XXX">Order</a>
```

Use your Web store's domain and specify the appropriate CGI directory.

Note that if your site resides on an NT server, then the shopper reference is correct.

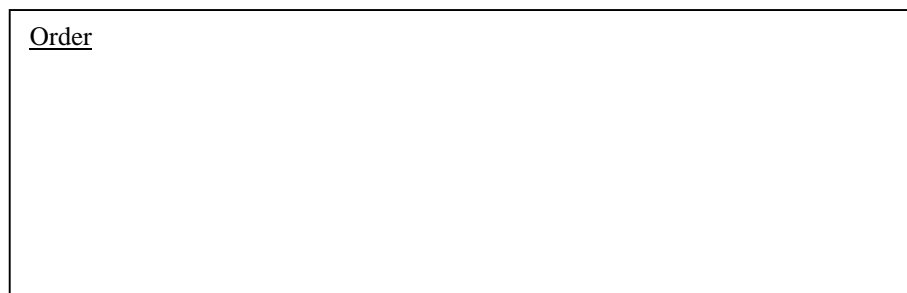
If your store resides on a UNIX server, then you should use either "shopper" or "shopper.exe". Finally, replace XXX with the product code of the product you are calling.

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

```
<a href="http://www.domain.com/cgi-bin/shopper.exe?pre-add=action&key=A0004">Order</a>
```

Save your test file, then upload it to your root directory on your host server.

Open your browser, then open the file. Viewed in a web browser, it would look like the following:



Click on the Order link. A screen similar to the following should appear, but displaying the image of your product, along with the associated product data.



Order Link Using an Image

To add a link using an image:

Place the product image on your test page.

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 and product number:

`http://www.yourdomain.com/cgi-bin/shopper.exe?preadd=action&key=XXX`

Remember to replace XXX with the product code of the product you are calling.

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

``

PDG Plugins

If you are using either Microsoft FrontPage or NetObjects Fusion as the HTML editing tool for creating your web site, you can download either the FrontPage Component or the NetObjects Fusion component from www.pdgsoft.com and embed cart functionality using the component.

This will make developing and maintaining your site much faster by eliminating the need to write portions of HTML code when embedding cart functionality in your website.



