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# *PDG Commerce* *4.0*

## *Quick Start Guide*

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# Commerce Quick Start Guide

*Getting Started with PDG Commerce 4.0*

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**W**elcome to the PDG Commerce Quick Start Guide. This guide will give you a head start on understanding, using, and administering PDG Commerce.

*For more detailed information on setup and implementation of your Commerce program, refer to the PDG Commerce User Guide.*

## Overview

In general, the PDG Commerce Quick Start Guide is divided into the following sections:

- Test drive (to confirm the installation was correct and to familiarize you with how Commerce works)
- Configuring PDG Commerce's operational options
- Setting up products within the Administrator
- Configuring shipping methods and rules within the Administrator
- Creating payment methods within the Administrator
- Viewing the Store Builder feature of PDG Commerce
- Configuring Site Design mode within the Administrator
- Creating customer accounts and categories
- Embedding PDG Commerce functions into your Web store
- PDG Web design components

## Test Drive

This guide assumes that you have correctly installed PDG Commerce. If your Commerce program 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:

**<http://www.webstorename.com/commerce.html>**

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 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 "Basic Functions" link in the blue box on the left side of the page. On the page that is displayed, click the 'Order' button in the "Order/ More Info" section of the page. The following screen should appear:

[www.pdgsoft.com](http://www.pdgsoft.com)  
[PDG Software](#)



Small Gadget  
 (A0001)

This is a small gadget. This gadget will wash your car for you once a week, without any prodding. Also capable of ordering pizza every Friday evening.

Price: \$5.00

Availability:

Quantity:

Price with your options:

### 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.

Click on the 'Submit' button. The following screen will appear.

[www.pdgsoft.com](http://www.pdgsoft.com)  
[PDG Software](#)

The following was added to your cart: (1.00) Small Gadget

Qty	Description	Unit	Amount	Remove
<input type="text" value="1.00"/>	 <a href="#">Small Gadget</a>	\$5.00	\$5.00	<input type="button" value="Delete"/>
Subtotal:			\$5.00	

### 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 'Checkout' button. The following screen will appear, asking the customer to log in as an existing customer, register for a new account, or check out as a guest:

[www.pdgsoft.com](http://www.pdgsoft.com)  
**PDG Software**

You have the option of logging in, registering or proceeding to checkout (without logging in or registering). Please select one of the actions listed below, then fill in the necessary information to continue with the checkout process.

---

User Name:

Password:

---

Customer Category Registration Code:

---

I do not want to register or login. I just want to checkout!

**CheckOut Select page**

Later we will cover registering users. For now, click the 'Checkout' button next to "I do not want to register or login. I just want to checkout!."

The following screen will appear for the customer to enter Contact, Billing, and Shipping information. Note that payment information is handled *after* this screen.

[www.pdgsoft.com](http://www.pdgsoft.com)  
**PDG Software**

Guest, You Are Ordering:

Qty	Description	Unit	Amount
(1.00)	<a href="#">Small Gadget</a>		\$5.00
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 while processing 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:

Phone:

---

**Billing Information**

For 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:

Address line 1:

**Top of Sample Checkout page**

Fill in this form as if your were actually ordering the gadget, then click on the 'Submit' button.

The following screen will appear.

[www.pdgsoft.com](http://www.pdgsoft.com)  
**PDG Software**

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
(1.00)	<a href="#">Small Gadget</a>		\$5.00
			Subtotal: \$5.00
			Shipping & Handling: \$5.00
			GA Sales Tax (7.000%): \$0.35
			<b>Total: \$10.35</b>

**Billing To**  
 P/O TEST  
 542  
 Scot, GA 30084  
 United States of America  
[support@pdgsoft.com](mailto:support@pdgsoft.com)

**Shipping To**  
 P/O TEST  
 542  
 Scot, GA 30084  
 United States of America  
 Deliver via Standard Shipping

---

**Please Provide Payment Information**

---

Method of payment:

**Credit Card Information**  
(Fill out only if paying by credit card online.)

(Credit Card) Type of Credit Card:

(Credit Card) Credit Card Number:

(Credit Card) Expiration Date:

**Top of 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’ 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.html page is displayed, at which point the customer will need to supply different payment information. If payment is approved, confirmation e-mails are sent to the customer and vendor. Also at this point, either the ThankYou.html or CreditAccept.html page is displayed (depending upon the method of payment selected at Checkout).

**Note:** you must configure your E-mail settings in order for the customer and vendor emails to be sent. E-mail settings will be covered later in this guide.

Thank you for your order.

Below 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: 000002.

Qty	Description	Unit	Amount
(1.00)	<a href="#">Small Gadget</a>		\$5.00
		Subtotal:	\$5.00
		Shipping & Handling:	\$5.00
		GA Sales Tax (7.000%):	\$0.35
		<b>Total:</b>	<b>\$10.35</b>

<b>Billing To</b>	<b>Shipping To</b>
PDG TEST	PDG TEST
test	test
test, GA 30084	test, GA 30084
United States of America	United States of America
support@pdgsoft.com	Deliver via Standard Shipping

**Payment Information**

Card Number: 0000000000000000-1111  
 Card Expire: 00/00

**Sample Credit Accept Page**

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 the Payment Methods section of the PDG Commerce 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 Commerce.

Now that you have finished this section of the Test Drive, please continue to the next section, “Configuring PDG Commerce.”

*Please remember that details about configuring PDG Commerce are available in the PDG Commerce User Guide.*

# Configuring PDG Commerce

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

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

**<http://www.webstorename.com/commerce.html>**

When the welcome screen appears, click on the “Administration” link in the blue box on the left side of the page. Next click on the “Enter Your Commerce Administrator” link.

Enter Commerce’s default login, “Admin”, and password, “LETMEIN” to access your Administrator. Please remember that passwords are case sensitive. You will immediately be prompted to change your Commerce Administrator password.

After that, the Main Menu will be displayed:



## PDG Commerce Administrator Menu

Click the “Company Information” link. The following screen will be displayed:

Company Information	
Web Site Name:	<input type="text" value="www.pdgsoft.com"/>
Web Site Logo (image): <a href="#">upload image</a>	<input type="text"/>
Web Site Text:	<input type="text" value="Your Company Slogan Here"/>
Company Name:	<input type="text" value="PDG Software, Inc."/>
Company Street1:	<input type="text"/>
Company Street2:	<input type="text"/>
Company City:	<input type="text"/>
Company State/Province:	<input type="text"/>
Company Postal Code:	<input type="text"/>
Company Country:	<input type="text"/>
Company Email:	<input type="text"/>
Company Phone:	<input type="text"/>

## PDG Commerce Company Information Page

Enter the name of your web store in the “Web Site Name” field. If you want, go ahead and enter the url of a company logo in the “Web Site Logo” field, and any additional brief text (e.g., company slogan) you would like displayed with your web store name in the “Web Site Text” 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:

### E-mail Settings

Enter your e-mail address in the “E-mail Vendor Notifications To:” field. Fill in this page with the appropriate information from your Web host. If you choose “PDG Mailer” or “blat” as your Email Program, you must fill in the “Email Server Address” field. If you chose “sendmail or qmail” as your Email Program, you must fill in the “Sendmail Client Program Location” field. Enter your store name in the “Full name from which e-mails are sent” field, and enter your e-mail address in the “From Address for Sent E-mails” field. Click on the “Submit Changes” button.

**Note:** All fields explained in the above paragraph are required. If these fields are not filled in properly, Commerce will not send emails to the vendor or customer after a successful order.

Next, click on the “Return to Main Menu” link, and click on the link entitled “Order.” The following screen should be displayed:

Order Logging Settings	
Do not include Credit Card Data in Emails or Order Logs: <small>* You can change this setting in the 'Commerce Options' section.</small>	<input checked="" type="checkbox"/>
Log Orders to Database:	<input type="checkbox"/>
Order Log text File:	<input type="text"/>
Order Log CSV File:	<input type="text"/>
Order Log XML File:	<input type="text"/>
CSV Text Delimiter:	<input type="text" value="*"/>
CSV Delimiter:	<input type="text" value="."/>
Invoice Number Prefix:	<input type="text" value="I"/>
Invoice Header File:	<input type="text"/>
<input checked="" type="checkbox"/> Create Relational CSV File. <small>*Adds invoice numbers to each record</small>	
<input type="checkbox"/> Create One Line CSV File.	
<input type="checkbox"/> Add One-Line Product Description to CSV File. (does not work with One Line CSV)	
<small>Note: Maintaining any of the log files above is an optional service in PDG Commerce. If you elect to log orders from your web store, PDG strongly advises that you utilize GPG Encryption Software to encrypt such data. For details please visit: <a href="http://www.pdgsoft.com/keyman_encryption.htm">http://www.pdgsoft.com/keyman_encryption.htm</a>.</small>	
<input type="button" value="Submit Changes"/>	

### Order Settings

Enter a file name in the “Order Log text File” field. Later, you may also configure Commerce to create a CSV or XML formatted order log. You may use any file name and you do not need to create this file. Commerce will automatically create this file within your site’s PDG\_Commerce folder. For now, just fill in the first field and click on the “Submit Changes” button.

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

Congratulations. You have configured your Commerce’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 Commerce. From your Merchant Administrator’s main menu, click on “Products.” You will be presented with a list of your current product categories. The following screen should appear.

**PDG Commerce - Product Category**  
www.pdgsoft.com  
 Administrator Version 4.00.01 Patchlevel 25 A  
 Database Version: 2.25

Status: These settings are live.  
[Return to Main Menu](#)

[Inventory](#)      [Data Import/Export](#)      [Edit User Defined Field Names](#)

**Commerce has 2 product categories.**

Commerce will only display 50 product categories at a time (the list is sorted by category code). You can start the list at any product category, just type in a starting code and click the "Start at Category" button.

[Start at Category](#)

**Add A New Product Category**

Category Code:       Category Description:       [Add](#)

**Product Categories**

*STG	Inactive Products Category	<a href="#">View Products</a>		
TEST	Test Category	<a href="#">View Products</a>	<a href="#">Details</a>	<a href="#">Remove</a>

**Display a Specific Product**

Enter Code of Product to Display:  [Display Product](#)

### PDG Commerce Available Product Categories

Each product category will be listed by its unique category code. Take a moment to view the details of a category, by clicking the ‘Details’ button next to the TEST “Test Category” product category. The following screen should appear.

**Product Category TEST Details**

Product Category Description:

Product Category Store Builder Template:

Product Category Image URL:

Product Category Parent Code:

Product Category Specific Text:

[Submit Changes](#)

**Product Category TEST Quantity Discounts**

[View ALL Quantity Discounts](#)

[Edit For ALL Customer Categories](#)      [Edit/View Selected Quantity Discount](#)

Copy [Select Customer Category](#) quantity discount from product category code  to this product category's [Select Customer Category](#) customer category quantity discount table [Copy Selected Discount](#)

Copy ALL discounts from product category code  [Copy ALL Discounts](#)

### Details of a Product Category

Here you can set specific details about a product category, such as a description and a category image, as well as customer category quantity discounts. This information is used in the Store Builder feature of PDG Commerce, which we will examine in more detail later. For now, we will leave the sample category alone. Click “Back to Main Product Page” to return to the product category list.

Let’s create a new product category. In the text field under “Product Category Code”, enter “SAMP”. In the text field under “Category Description”, enter “Sample Product Category”. Now click the “Add” button. The Product Categories List page should refresh, with your new SAMP category now in the list.

**PDG Commerce - Product Category**  
www.pdgsoft.com  
 Administrator Version 4.00.01 Patchlevel 25 A  
 Database Version: 2.25

Status: These settings are live.  
[Return to Main Menu](#)

[Inventory](#)      [Data Import/Export](#)      [Edit User Defined Field Names](#)

**Commerce has 3 product categories.**

Commerce will only display 50 product categories at a time (the list is sorted by category code). You can start the list at any product category, just type in a starting code and click the "Start at Category" button.

[Start at Category](#)

**Add A New Product Category**

Category Code	Category Description	
<input type="text"/>	<input type="text"/>	<a href="#">Add</a>

**Product Categories**

*STG	Inactive Products Category	<a href="#">View Products</a>		
TEST	Test Category	<a href="#">View Products</a>	<a href="#">Details</a>	<a href="#">Remove</a>
SAMP	Sample Product Category	<a href="#">View Products</a>	<a href="#">Details</a>	<a href="#">Remove</a>

Product Category list with Newly Created Category

Now we will create a sample product in this new product category. Click on the product category code “SAMP” or the ‘View Products’ button to view the products in this category. The next page that loads will look like this.

**PDG Commerce - Available Products**  
 www.pdgssoft.com  
 Administrator Version 4.00.01 Patchlevel 25 A  
 Database Version: 2.25

Status: These settings are live.  
[Return to Main Menu](#)  
[Return to Product Categories](#)

[Inventory](#)      [Data Import/Export](#)      [Edit User Defined Field Names](#)

SAMP has 0 products.

Commerce will only display 50 products at a time (the list is sorted by product code). To move forward or back in the list use the selections below and click 'Position in List'.  
 Currently viewing products starting at position 1.  
[Go To Beginning](#)    [Position Product List](#)

**Add A Product**

Product Code	Description	Price	Options From
Maximum of 20 characters (restricted to A-Z and 0-9)	Maximum of 255 characters		Share From Product Code
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Add](#)

**SAMP Products**

#### Product Listing within a Product Category

This page will list all the products in your SAMP category (which is empty at the moment). The ‘Inventory’ button will take you to the Inventory Tracking page. The ‘Data Import/Export’ button will take you to the product importing and exporting page, allowing you to import and export existing products from spreadsheet/CSV format. The ‘Edit User Defined Field Names’ button will let you name your user defined data, depending on what kind of data you will decide to store in these fields (e.g. “MSR Price” or “ISBN Number”). For now, let’s create a new product.

Near the bottom of the page, enter a “Product Code” for your product. This code will be appended to the category code to form that product’s unique sku. For this example, enter in a Product Code of “0001”, a description of “Cool T-Shirt”, and a price of “14.95”. Now click the “Add” button. The page should refresh, with your new product added to the list.

**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 the chapter on maintaining products in the PDG Commerce User Guide.

Click on the ‘Details’ button. The following is the top portion of the screen that will appear.

Product Settings	
<b>A0001:</b> <a href="#">Softgood</a> <a href="#">Inventory</a> <a href="#">Cust. Cat.</a> <a href="#">Price</a> <a href="#">Discount</a> <a href="#">Option</a> <a href="#">User Defined</a>	
Product Code:	<input type="text" value="A0001"/>
Product Category:	A000 (Gadgets & Widgets)
<a href="#">Move To</a>	<input type="text" value="Gadgets &amp; Widgets (A000)"/> ▾
One-line Description:	<input type="text" value="Small gadget"/>
Keywords:	<input type="text"/>
Product Displayed in Searches:	<input checked="" type="checkbox"/>
Unit Price:	<input type="text" value="5.00"/>
Taxable Price:	<input type="text" value="5.00"/>
Additional Unit Shipping:	<input type="text" value="0.00"/>
Minimum number to order:	<input type="text" value="0.00"/>
Maximum number to order:	<input type="text" value="0.00"/>
Weight:	<input type="text" value="1.00"/> lbs.
Unit Of Measure Label	<input type="text"/>
Frequent Shopper Points:	<input type="text" value="25.00"/>
Number of Items Per Box:	<input type="text" value="1"/>
Product Dimensions:	Height: <input type="text" value="0.00"/> Length: <input type="text" value="0.00"/> Width: <input type="text" value="0.00"/>
Allow Fraction Quantity?:	<input type="checkbox"/>
URL of Product Image: <a href="#">upload image</a>	<input type="text" value="/CartConfig/gadget1.gif"/>
URL of Thumbnail Image: <a href="#">upload image</a>	<input type="text" value="/CartConfig/gadget1_th.gif"/>

#### Partial PDG Commerce Product Definition Page

On this page, you can enter in various detailed information concerning your products. For now, we are going to enter in only a small amount of additional information.

For the “Weight” field, enter in “1”.

For the “URL of Product Image” field, you can click the “upload image” link to upload an image. You will be prompted to browse to the file, which will be automatically uploaded to your web server.

For the “URL of Thumbnail Image” field, you can click the “upload image” link to upload an image. You will be prompted to browse to the file, which will be automatically uploaded to your web server.

In the “Specific Product Text” box, type in your more detailed description of the product without quotation marks. This field may also contain HTML code. For Example:

**A fabulous ultra-cool t-shirt. 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:

**Add A New Shipping Method**

Rule #	Description	Additional Cost
<input type="text"/>	<input type="text"/>	<input type="text"/>

---

General Shipping Settings	Real Time Shipping Settings
<input checked="" 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="checkbox"/> Do Not Display on Checkout Page?	Real Time Carrier: <input type="text" value="None"/> Real Time Method: <input type="text" value="None"/> Pickup: <input type="text" value="Not Applicable"/> Packaging: <input type="text" value="None"/> Back Up Method: <input type="text"/>

*\* You Can Use a Combination of General and Real Time Shipping*

Discount Shipping By  For Orders That Are Over  In Total Cost

[Add Shipping Method](#)

**Configure Shipping Carrier Options or Shipping Tables**

[USPS Configuration](#)   
 [UPS Configuration](#)   
 [DHL Configuration](#)   
 [Rules for Tables](#)

## Partial PDG Commerce Shipping 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.

# Configuring Payment Methods

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

**Add a Payment Method**

Rule #	Method Description	Specifiers	
<input type="text"/>	<input type="text"/>	<input type="text" value="No extra info"/> <input type="text" value="No auth service"/> <input type="text" value="non-SSL conx only"/>	<a href="#">Add</a>

---

**Payment Methods**

Rule	Name	Description		
1	mail check	Offline/3rd party processing on non-SSL conx only	<a href="#">Remove</a>	<a href="#">Modify</a>
2	credit card	Credit Card on non-SSL conx only	<a href="#">Remove</a>	<a href="#">Modify</a>

---

**Authorization Services**

<a href="#">USA ePay</a>	<a href="#">Payflow</a>	<a href="#">CyberSource</a>
<a href="#">LinkPoint</a>	<a href="#">WorldPay</a>	<a href="#">Authorize.Net (AIM)</a>
<a href="#">PayPal Payments Standard (IPN)</a>	<a href="#">Sage Payment Solutions</a>	<a href="#">CyberCash</a>
<a href="#">PayPal Payments Pro</a>	<a href="#">metacharge</a>	<a href="#">TrustCommerce</a>
<a href="#">Moneris</a>	<a href="#">SkipJack</a>	<a href="#">Innovative Gateway</a>
<a href="#">PayByTouch</a>	<a href="#">QuickBooks Merchant Services</a>	<a href="#">viaklix</a>

## PDG Commerce Payment Method Configuration

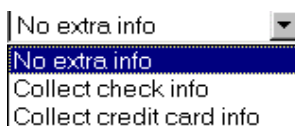
The top part of the Payment Method Configuration page consists of several entry fields that are used to add new Payment Methods to your Web store’s

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.

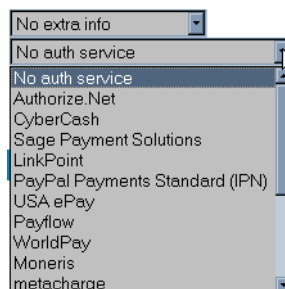
The bottom section of this page contains links to the payment authorization configuration pages. These are discussed in your PDG Commerce User Guide.

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

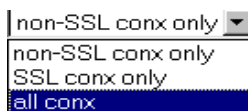
1. Enter a rule number, (i.e.: 1). These numbers simply determine the order in which the payment methods will appear to the customer during the checkout process.
2. Enter a payment description, (i.e.: Mail Check)
3. From the first drop down-menu under "Specifiers," select "No extra info."



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 Commerce appropriately. Each of the payment authorization services with which PDG Commerce is compatible has its own configuration page. See the chapter on payment methods in the PDG Commerce User Guide for details.

Close the Merchant Administrator.

# Store Builder

PDG Commerce has the ability to dynamically generate some or all of the web catalog pages for your web store. This ability, called Store Builder, ensures that when you change your product catalog, you do not have to manually change your catalog web pages. We will now take a quick tour of the Store Builder, with the sample templates and sample products.

To begin, return to your Web site's commerce.html page. When the welcome screen appears, click on the "Basic Functions" link in the blue box on the left side of the page. Next click on the 'Enter Store' button or "Begin Shopping" link.

The initial Store Builder page will display a list of all the product categories in your catalog.

[www.pdgsoft.com](http://www.pdgsoft.com)  
**PDG Software**

## Product Categories

[Sample Product Category](#)

[Test Category](#)

### Store Builder's Product Category List

This page is based on a template and is completely customizable by you. This includes everything from the background and the table, to frames and style sheets. As you add and remove product categories, this page will automatically update to reflect the new category list.

Now click on the "Test Category" link, to view products in that category (B000). PDG Commerce will now generate a product list Web page for that category.



Sample Store Builder Product List

This Web page shows PDG Commerce’s ability to list out products, with one product per line. Here you can enter in quantities in the edit boxes, and click the ‘Add Whole Page’ button to add all requested products to your basket. Again, this page is template-based and completely customizable.

Now use your browser’s back arrow to return to the Store Builder’s main Web page, the category list page. Now click on the “Sample Product Category” link. This is the category you created earlier using the Merchant Administrator. Note that you never specifically created any Web pages for this category or its products. Store Builder is doing all of this for you.

[www.pdgsoft.com](http://www.pdgsoft.com)  
**PDG Software**

[Cool T-Shirt](#)

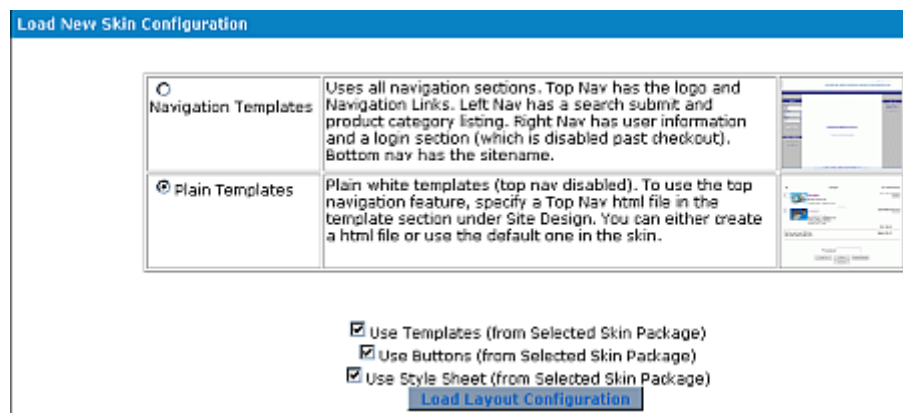
powered  
by  
pdgsoft.com

**Default Store Builder Product List**

This Store Builder page demonstrates a different style of product listing. Here the product list is laid out over the page. If thumbnail URLs had been provided for the products, the thumbnail images would also be displayed. This page, like the other pages, is template based and completely customizable.

## Changing Skins

PDG Commerce allows you to change the appearance of your web site with the click of a button in the Commerce Administrator using skins. From the main menu of your Commerce Administrator, click the “Site Design” link. The following screen should appear:



**Web Site Design Screen**

By default, your Commerce program is using the Plain Templates skin. Click the radio button next to the Navigation Templates skin, and click the ‘Load Layout Configuration’ button. Make changes live and return to your web site’s commerce.html page.

**Note:** The Plain Templates are located in the PDGCommTemplates/Plain folder in your web site’s root directory. The Navigation Templates are located in the PDGCommTemplates/FullNav folder in your web site’s root directory.

When the welcome screen appears, click on the “Basic Functions” link in the green box on the left side of the page. Next click on the ‘Enter Store’ button or “Begin Shopping” link.

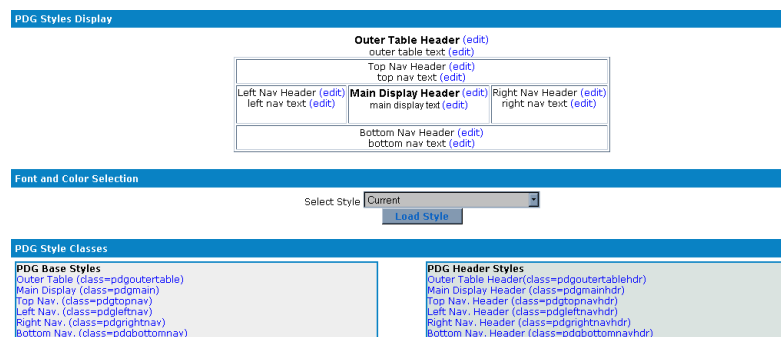
Now the Store Builder appears, but this time it is displayed using the Navigation Template:



### Store Builder’s Product Category List

All PDG Commerce templates will be displayed with the above format now that you have changed to the Navigation Templates skin.

Now let’s change the colors of the Right Navigation bar in this skin. In your Commerce Administrator, click on the “Site Design” link. At the bottom of the Web Site Design page, click the “Style Settings” link. The following screen should appear:



### Style Settings page

From this page, click the “Right Navigation (class=pdgrightnav)” link to enter the specific style settings for the Right Navigation bar in this skin. The following screen should appear:

**Select Fonts and Colors for .pdgrightnav**


font-family:


font-size:  12 pt

font-weight:  bold


font-style:


text-decoration:


color:   [more colors](#)

background-color:   [more colors](#)

**Select Hyperlink Colors .pdgrightnavlnk**

:link   [more colors](#)

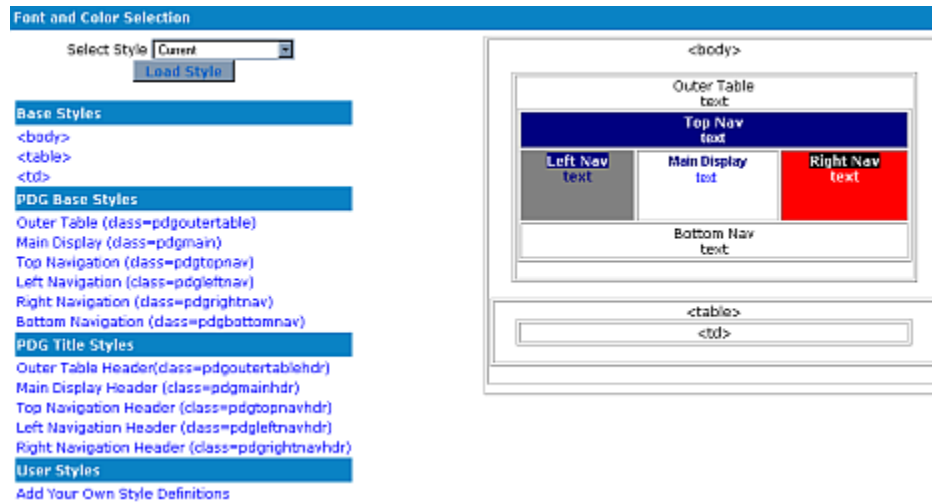
:visited   [more colors](#)

:hover   [more colors](#)

### Colors and Fonts page for Right Navigation

In this section you may set the font attributes and color, background color, and hyperlink colors. Change the font color to white by clicking the small white box in the color palette next to the “color” field. Change the background to red by clicking the small red box in the color palette next to the “background-color” field. Click the ‘Submit Changes’ button.

You will be returned to the Style Settings page. This time, click the “Right Navigation Header (class=pdgrightnavhdr)” link. The same Fonts and Colors page will appear. The Right Navigation Header class will change the attributes of the header sections of the Right Navigation bar on the Navigation Templates. Change the background color to black by clicking the small black box in the color palette next to the “background-color” field. Click the ‘Submit Changes’ button. You will be returned to the Style Settings page, where you will see your changes made to the sample template image on the right side of the page:



Style Settings page showing current template settings

Make changes live, and return to your Store Builder page. You will now see the color attributes of the Right Navigation bar changed according to the new settings:



Store Builder's Category List with new template settings

The style changes made to different portions of your template files will be applied to all templates displayed by PDG Commerce in the current skin. You may save your current settings before switching to a different skin. To save your current settings, click on the “Site Design” link from your Commerce Administrator’s Main Menu. In the “Save Current Skin Configuration” section of the Web Site Design page, enter a name for your settings and click the ‘Save Current Configuration’ button:



### Save Current Skin Configuration

After you have saved your skin settings, you will see your skin’s name listed in the “Load New Skin Configuration” section of the Web Site Design page, as it has now become an option to restore this skin to your web site.

This concludes the Quick Start tour. Now we will move on to manually adding PDG Commerce functionality into static and other pre-created Web pages.

## Creating Customer Accounts and Categories

PDG Commerce allows you to create different customer categories for pricing and discounts, as well as register new users. To access customer maintenance, click the “Customers” link on your Commerce Administrator’s Main Menu. The following screen should appear:

The screenshot displays the 'Customer Management' interface. At the top, there is a header 'Customer Management' and a dropdown menu for 'Number of customers to Display Per Page' set to '5'. Below this are two buttons: 'Add a New Customer' and 'View All Customers'. The next section is 'Find Specific Customer', which includes a sub-header and a prompt: 'Fill in as much of the bellow fields as you know and press the Submit button to find a specific customer.' This section contains five input fields: 'User ID', 'First Name', 'Last Name', 'Email', and 'Company Name', followed by a 'Submit' button. The third section is 'Browse Customer by Category', with a sub-header and a prompt: 'Select the category name below then click the "Browse Customer Category" button to view the customerz in that specific category.' It features a 'Category Name' dropdown menu set to 'Anonymous' and a 'Browse Customer Category' button. The final section is 'Customer Maintenance', which includes a prompt: 'Move ALL the Customers in the [Anonymous] to the [Anonymous]'. It has two dropdown menus for category selection and a 'Move Customers' button.

### Partial PDG Commerce Customers page

From this page you may manage existing customers, create new customers, move customers to different categories, delete customers, create, modify, and delete customer categories, as well as access customer pricing options. Let’s set a pricing discount for the Members category. As you can see, this category has a code of “xyz123”. This code can be used to register a specific customer to this category. Click the ‘Pricing’ button next to the customer category:

The screenshot shows the 'Customer Category Management' interface. It has a sub-header and a note: 'These settings will allow you to configure PDG Commerce’s Customer Category management capabilities.' Below this is a table with the following columns: 'Category Name', 'Deny Viewing of Products?', 'Allow Viewing of Prices?', 'Allow Checkout?', 'Allow Registration?', and 'Default?'. The table contains two rows: 'Anonymous' and 'Wholesale'. The 'Anonymous' row has checkboxes for 'Deny Viewing of Products?' (unchecked), 'Allow Viewing of Prices?' (checked), 'Allow Checkout?' (checked), and 'Allow Registration?' (checked), and a radio button for 'Default?' (selected). A 'Pricing' button is located to the right of the 'Anonymous' row. The 'Wholesale' row has checkboxes for 'Deny Viewing of Products?' (unchecked), 'Allow Viewing of Prices?' (checked), and 'Allow Registration?' (checked), and a radio button for 'Default?' (unchecked). Below the table is a 'Code: 1234' label and an 'Update Changes to Existing Customer Categories' button.

### Customer Category Management

From the page that appears, several options can be set. For a complete explanation of all discounts and options that may be set from this page, refer to the PDG Commerce User Guide. For now, set a 5% discount for all product categories (as shown below) and click the ‘Set Discounts for Members’ button.

**Customer Category Pricing**

Reset Pricing for ALL Product Categories for the Members Customer Category.

Discount Amount:

Apply Customer Category Discount to Shipping Cost

Apply the Discount Amount to both the Unit Price and Taxable Price for all Product Categories.

Apply the Discount Amount to the Unit Price and set the Taxable Price to Tax Exempt for all Product Categories.

Apply the Discount Amount to the Unit Price and do not change the Taxable Price for all Product Categories.

Apply the Discount Amount to the Unit Price and set the Taxable Price to the value entered below for all Product Categories.

This section allows you to set discounts for all products on the site. Once you have done this you can reset the prices for one or more product categories using the lower part of this page.

[Set Discounts for Members](#)

Product Category Code (Unit Price Discount:Tax Price Discount)	Customer Category Unit Price Discount (\$ or % off unit price)	Customer Category Taxable Price Discount (\$ or % off unit price)
SAMP (0.00:0.00)	<input type="text" value="0.00"/>	<input checked="" type="radio"/> Set Tax Price Discount To Unit Price Discount <input type="radio"/> Set as Tax Exempt <input type="radio"/> Set Tax Price Discount Manually <input type="text" value=""/>
TEST (0.00:0.00)	<input type="text" value="0.00"/>	<input checked="" type="radio"/> Set Tax Price Discount To Unit Price Discount <input type="radio"/> Set as Tax Exempt <input type="radio"/> Set Tax Price Discount Manually <input type="text" value=""/>

[Update Customer Category Pricing](#)

**Customer Management Configuration with 5% Discount**

Return to your Store Builder page. Follow the same steps as before to add the “Cool T-shirt” product to your basket. Click the ‘Checkout’ button. When the CheckOutSelect.html template page appears, enter the Members’ customer code (xyz123) in the “Customer Category Registration Code” field, and click the ‘Register’ button. The following screen should appear:

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[PDG Software](#)

**Fill in the Requested Information and Click "Register Me"**

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

**Customer Information**

Username:

Password:

Re-enter Password:

Email:

Company Name:

---

**Billing Information**

First Name:

Last Name:

Address line 1:

Address line 2:

City:

State/Province (US and Canada only):

**Partial PDG Commerce Registration page, using Plain Template**

Fill in the registration information for a test customer, then click the ‘Register’ button. Registering using the customer category code has automatically placed you in the Members category. Registering without a code would have placed you in the Anonymous category, since it is selected as default. The Checkout.html page is now displayed. Note that the basket on the Check-Out.html page indicates that the cost of the “Cool T-Shirt” is \$14.20, since a 5% discount has been applied for the customer category.

pdgtester, You Are Ordering:

Qty	Description	Unit	Amount
(1)	<a href="#">Cool T-Shirt</a> Weight: 1.00 lbs. each		\$14.20
Total Shipment Weight: 1.00 lbs.		Subtotal:	\$14.20

#### Basket information on CheckOut page

**Note:** When you originally clicked the ‘Add to Cart’ button for the T-Shirt, the price was displayed as \$14.95. However, had you logged in before viewing products, you would have seen your price of \$14.20 on the item details page.

## Embedding Commerce’s Functionality

In addition to utilizing the Store Builder feature of PDG Commerce, you can also manually add PDG Commerce functionality to your Web site. This is referred to as “integrating” or “embedding” Commerce into your Web store. These embedded links are words or images (including buttons) that add products to cart, display the cart’s contents, let customers proceed to checkout, etc.

Embedding Commerce’s functionality into your Web store can be done in two ways.

1. If you are using either Microsoft FrontPage or Macromedia’s Dreamweaver or UltraDev 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 Commerce’s operation using the product you entered earlier in the Quick Start.

**Note:** The links that will be covered in this section can also be found on your web site, with your domain name already included. To view those links, view the following page in your browser:

**<http://www.webstorename.com/commerce.html>**

In the blue box on the left side of the page, click the “Integration” link.

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

## Add to Cart Link

This is usually the initial link which calls PDG Commerce 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 the PDG Commerce User Guide.

## Add to Cart 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.webstorename.com/cgi-bin/commerce.exe?preadd=
action&key=XXX">Order</a>
```

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

Note that if your site resides on a Windows server, then the commerce reference is correct. If your store resides on a UNIX server, then you should use either "commerce" or "commerce.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:

```
<a href="http://www.webstorename.com/cgi-bin/commerce.exe?preadd=
action&key=TEST0001">Order</a>
```

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:



'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.



Sample PreAdd Page

## Creating Add to Cart 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 Commerce 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.webstorename.com/cgi-bin/commerce.exe?preadd=action&key=XXX`**

Remember to replace “XXX” with the product code of the product to which you are attempting to link.

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.webstorename.com/cgi-bin/commerce.exe?preadd=action&key=XXX"></a>
```

## Creating Other Action Links

You can also create links to provide customers with a way to view the current contents of their cart, to begin the check-out process, to register, to log in, and to log out. To place a “Display My Cart” link, use the code like the following:

```
For a text link: <a href="http://www.webstorename.com/cgi-bin/commerce.exe?display=action">My Cart's Contents</a>
```

-or-

```
For an image link: <a href="http://www.webstorename.com/cgi-bin/commerce.exe?display=action"></a>
```

To place a “Begin Check Out Process” link, use code like the following:

```
For a text link: <a href="http://www.webstorename.com/cgi-bin/commerce.exe?checkout=action">Check Out Now</a>
```

-or-

```
For an image link: <a href="http://www.webstorename.com/cgi-bin/commerce.exe?checkout=action"></a>
```

To place a “Register” link, use code like the following:

```
For a text link: <a href="http://www.webstorename.com/cgi-bin/commerce.exe?register=action">Register</a>
```

-or-

```
For an image link: <a href="http://www.webstorename.com/cgi-bin/commerce.exe?register=action"></a>
```

To place a “Log In” link, use code like the following:

For a text link: `<a href="http://www.webstorename.com/cgi-bin/commerce.exe?login=action">Log In</a>`

-or-

For an image link: `<a href="http://www.webstorename.com/cgi-bin/commerce.exe?login=action"></a>`

To place a “Log Out” link, use code like the following:

For a text link: `<a href="http://www.webstorename.com/cgi-bin/commerce.exe?logout=action">Log Out</a>`

-or-

For an image link: `<a href="http://www.webstorename.com/cgi-bin/commerce.exe?logout=action"></a>`

*For more detailed information on embedding Commerce’s functionality, refer to the “Commerce Actions” chapter of the PDG Commerce Technical Reference Guide.*

## PDG Plugin Components

If you are using either Microsoft FrontPage or Macromedia Dreamweaver or UltraDev to develop your Web site, you can download a special component from [www.pdgsoft.com](http://www.pdgsoft.com). Once it is installed, you can use the component to make calls to your Commerce 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 Commerce 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 and embedding Commerce functionality in your Web store. For more detailed setup instructions, consult the PDG Commerce User Guide. We hope you develop a profitable Web business and thank you for using PDG Commerce.

If you need additional help, you may find technical support at the following links:

- PDG Software searchable FAQ: <http://support.pdgsoft.com/cartfaq.asp>
- PDG Software Message Board: <http://msgboard.pdgsoft.com/cgi/yabb/YaBB.cgi>
- Support Request Submission: [https://support.pdgsoft.com/submit\\_request.htm](https://support.pdgsoft.com/submit_request.htm)

You may also call PDG Technical Support at 770-270-0062 extension 3.

