
PDG Commerce *4.0*

Upgrade Guide

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PDG Commerce 4.0 Upgrade Overview

Preparation for Upgrading

Please follow this guide to upgrade an existing installation of PDG Commerce to PDG Commerce 4.0. By following the enclosed instructions, you will have your Web store upgraded quickly.

Preparing for Upgrade

Prior preparation can prevent future headaches, so we recommend that you run through the following checklist before beginning the installation process:

- Make sure you know the operating system (OS) of the server on which the Web store resides (this will be Windows 2000 / NT or some version of UNIX).
- Verify that your current PDG Commerce installation is proper and functional.
- Have your FTP user ID and password handy so that you can access your Web store's host server.
- This manual assumes that you have a basic understanding of zip/unzip utilities and file transfer protocol (FTP) programs. If not, you may want to enlist additional help or familiarize yourself with these programs before proceeding.
- **MAKE A COMPLETE BACKUP OF YOUR WEB STORE, SPECIFICALLY INCLUDING ALL OF THE PDG_COMMERCE FILES.**

 *End*

Installing PDG Commerce 4.0

An explanation for upgrading to PDG Commerce 4.0



This chapter will guide you through the installation of your PDG Commerce 4.0 upgrade. Prior to beginning the outlined steps, you should make sure that you have downloaded the correct archive for your web server's operating system. Currently, PDG Commerce is compatible with Windows 2000, 2003, and NT, Linux, Solaris, BSDI, FreeBSD, and Digital UNIX versions of UNIX.

This installation guide assumes you have working a knowledge of archiving programs, such as WinZIP, and FTP programs such as WS_FTP.

A Note Before Installation

It cannot be stressed strongly enough, how important it is that your Web store's server have the proper permissions set, not only for security reasons, but also to ensure proper operation of Commerce. Many errors in functional operation of Commerce can be traced to having improper permissions set on the Commerce directories or files, particularly the 'PDG_Commerce' directory. Some common problems that may be due to permissions problems include PDG Commerce being unable to open the license file, unable to save changes made in the Administrator, or unable to log orders.

If your Web store is running on a UNIX server, the proper permissions for the 'PDG_Commerce' directory should be for the tightest security that allows PDG Commerce to run properly. You should first try "700", and check for functionality. If that does not work, next try "770". Finally if that does not work, try "777," or "d-rwxrwxrwx" (full permissions).

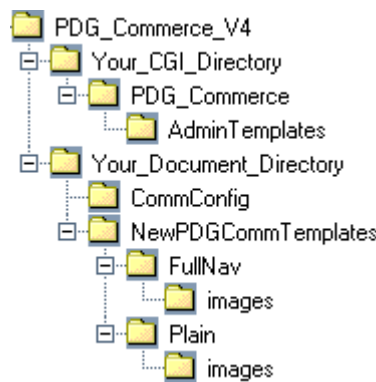
Note that PDG Commerce is a server-side program. No client-side version of it exists. In order for PDG Commerce to operate properly, it is necessary to

have a Web server program running on the machine on which you want Commerce to run, and the pages must be viewed through that server. Simply previewing them in your HTML editor on your local machine is not enough, because the static and dynamic elements will not work together properly.

Unzipping the Archive

If you have not already done so, download the upgrade archive of PDG Commerce from PDG Software's website. The zip file that you will download is referred to as an "archive."

Next, extract the archive files using a zip/unzip utility such as WinZip. Your extracted archive should have the following structure:



Sample Upgrade Archive Structure

Along with the 'Your_CGI_Directory' and 'Your_Document_Directory' sub-directories, there will also be some '.pdf' files. These '.pdf' files contain the software manuals and the license agreement and can be viewed using Adobe Acrobat Reader.

Performing the Upgrade

Using an FTP program (such as WS_FTP) start a session and connect to your Web store's host server. On the "local" side of your FTP session, locate the directory containing the PDG Commerce files that you extracted from the archive.

Updating the CommConfig Directory

On the "remote" side, locate the CommConfig directory.

Upload the contents of the local "CommConfig" directory to the remote side. The GIF and JPG graphics files should be transferred as binary, and the html files, cascading style sheets (.css), and Javascript (.js) file should be transferred as ASCII. Overwrite any existing file with the new one from the upgrade

archive. Ensure read permissions are enabled for these new files on the server.

Note: When upgrading to PDG Commerce 4.0, you must delete the `pdgadminNN4.css` file located within the `CommConfig` folder.

Updating the CGI Files

Upload the new cgi programs found in the local “`Your_CGI_directory`” to your web server’s `cgi-bin` directory. These new programs should replace the old versions. The programs in particular you are updating are: ‘`commerce`’, ‘`commconfig`’, ‘`commercelog`’, and ‘`redirect.`’ Note that you may need to change the file extensions on the new cgi programs to match your existing files. These are to be uploaded as binary, and should have read and execute permission turned on.

Updating the PDG_Commerce Files

The `sslconx` file located within the `PDG_Commerce` folder needs to be updated or installed. This file will be called ‘`sslconx`’ for a UNIX server and ‘`sslconx.exe`’ for Windows. Upload ‘`sslconx`’ as binary into your `PDG_Commerce` folder. Ensure that it has read and execute access.

Updating the Administrator Templates

On your web server, locate the “`AdminTemplates`” directory inside your ‘`PDG_Commerce`’ folder. Upload the contents of the local “`AdminTemplates`”, from the upgrade archive, to the remote one. As all of the files are html, upload them as ASCII. These new files should replace the old versions. Ensure they have read permission.

Updating the PDGCommTemplates

If you plan to use PDG Commerce’s new Site Design feature, and you do not already have a `PDGCommTemplates` folder in the root directory of your web site, transfer the entire folder from the download in ascii format to your server’s root directory. If you do already have a `PDGCommTemplates` folder in the root directory of your web site, transfer **only** the files that do not already exist in the folder on your web server. Subfolders of the `PDGCommTemplates` folder contain skins available for use in your Commerce Administrator.

If you plan to use PDG Commerce’s new Site Design feature, and you did not already have a `PDGCommTemplates` folder in the root directory of your web site, you will need to transfer your template files. Currently, your `Templates` folder will be located inside your `PDG_Commerce` folder, or in your web site’s root directory. Transfer the `Templates` folder in ascii format to your local desktop. Open the `Templates` folder on your server and delete all files

except for the e-mail templates, and rename the folder to EmailTemplates. Browse to the PDGCommTemplates folder you just created in the root of your web site and open it. Open the Templates folder on your local desktop, and transfer all files except the e-mail templates in ascii format from the local desktop to the server.

If you are upgrading from PDG Commerce version 1.x, you will need to modify your CheckOut.html and Verify.html templates. Open each template in a text or HTML editor, and find the following code:

```
<form method=post action="SCRIPT_NAME">
```

Change this line so that SCRIPT_NAME becomes !---SCRIPT_NAME---, as the code has been changed in later versions of PDG Commerce to match the PDG tag format:

```
<form method=post action="!---SCRIPT_NAME---">
```

Save these files back to the appropriate Templates folder on your web site.

Note: If you do not see the SCRIPT_NAME code on the page, you do not need to make any changes.

Finalize the Upgrade

Now log in to your Administrator. You will be prompted to enter a login name. You should use the login name Admin with your current Administrator password. Make sure the new settings are live, by selecting “Make Changes Live”, and verify that it operates. Enter the ‘Database’ portion of the Administrator. If available, click the “Upgrade Database” button to upgrade your Commerce database to the latest usable version. If the button does not appear, you should see a message stating “You have the correct database for this version of Commerce”. Verify all other settings are correct, and ‘Make Changes Live’ if any changes were made. This completes the upgrade process.

Re-register with UPS

If you were using UPS OnLine® Tools with your PDG Commerce and were previously on a version released prior to 2003, you will need to re-register your UPS information within PDG Commerce. To begin this process, log into your PDG Commerce Merchant Administrator and choose “UPS Details” in the UPS section. From there, select the “Register” button and follow the instructions.

Assistance in setting the UNIX Permissions for the Executable Files

This section is included in this document to provide additional assistance for setting file permissions on UNIX type servers.

If you are setting the permissions yourself and your web server is on a UNIX based system, you can use the steps below to assist you. Note that you will have to set different permissions for different directory folders and files. If your ISP or Web site's host does not have a way for you to set these permissions yourself, you should contact them for assistance and provide them with the following settings information.

The following instructions assume that you are using the program, WS_FTP 8.03, to access your Web server. However, the process for changing permissions with your FTP client may vary.

You will need to connect with your Web server via FTP. In the 'Remote System' window of your FTP session, highlight the four executable files (CommConfig, Redirect, Commerce and CommerceLog). Using your mouse, right click on these files and scroll down to "Properties" and click. This displays a 'Properties' dialog box.

Keep in mind that this dialog box, when first displayed, sometimes shows the "last" settings that you configured (perhaps for files other than those associated with PDG Commerce). You can view the original settings of these files by clicking the "DirInfo" button on the Remote System window prior to making any permission changes.

From this dialog box, you can now set file permissions are required by the upgrade process described in this document.

You will also need to ensure that your CGI and 'CommConfig' directories have "read and "execute" permissions enabled for all three user groups. You should also enable the "write" permission for your Owner group.

Assistance in setting the Windows Permissions for the Executable Files

Since you will be overwriting existing files during the upgrade, you probably will not need to change the permissions to allow your Commerce files to execute. However, if the files do not execute properly, you will need to change the permissions. You can find further instructions in the PDG Guide to Windows 2000 Permissions or PDG Guide to Windows NT Permissions, located at <http://www.pdgsoft.com>. If your ISP or Web site's host does not have a way for you to set these permissions yourself, you should contact them for assistance and provide them with the appropriate manual.

Logging In to the Commerce Administrator

When you are ready to log in to your Commerce Administrator after completing the upgrade, you will be prompted to enter a login name. You should use the login name Admin with your current Administrator password. If you would like to set up additional user accounts, you may do so from the Users section of the Commerce Administrator.



End