Squirrelcart v5.5.0 Documentation

Welcome to the help system for Squirrelcart v5.5.0!

This documentation can be downloaded in HTML, CHM, and PDF format on our **downloads page (http://www.squirrelcart.com/downloads.php)**.

Click a topic on the left to get started.

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1 Welcome!

Welcome to the help system for Squirrelcart v5.5.0!

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Click a topic on the left to get started.

2 Installation

2.1 Installation - Overview

This section describes how to install Squirrelcart for the first time. If you are upgrading from a prior version, please see the **upgrade instructions ({A1DD4491-5237-48ED-AE62-CA2E2635792C})**. Before you install Squirrelcart, it is important to understand the overall process. For this reason, we recommend reading through this section in it's entirety before starting your installation. The topics should be followed in the order that they appear.

> Lighthouse Development (the makers of Squirrelcart) offers installation services. Please see our pricing page for more information:
>
> **http://www.squirrelcart.com/pricing.php**

2.2 Step 1: Checking Requirements

Overview

Squirrelcart has some requirements that must be met in order to function properly. Check the list below, and make sure you meet the minimum web server requirements before attempting the installation. You should also make sure that you are familiar with the concepts listed under "Skill Required for Installation". If you are unsure how to check the requirements, ask your web host for assistance. If you are not familiar with the skills listed, we recommend that you have us install your cart for you.

Minimum Web Server Requirements

- PHP 4.3 or newer (PHP 5 is also supported)
- MySQL 4.1 or newer

Squirrelcart runs on every major server operating system - Windows, Linux, Unix, MacOSX.

Skill Required for Installation

Basic knowledge of *FTP*

This is needed to upload files and set a few permissions. You will need an *FTP* client in order to upload the files.

Ability to create a *MySQL* DB and User

This is usually done via your web hosts control panel.

Other Requirements

CURL or *fsockopen* support, and *OpenSSL* are required for the following

- UPS Developer Kit
- FedEx Web Services
- USPS Web Tools
- PayPal IPN and PDT features
- Some Payment Gateways Methods (see the page specific to your gateway for details)
- If you require a large number of product options for individual products or categories, you may need to have your web host increase the PHP setting **max_input_vars**, which defaults to a value of 1000.

GD 1.6.2 or higher is required for advanced graphic features

HTML editor

if you want to do any customizing of Squirrelcart's template files, you will need an HTML editor. A few are listed below for reference:

- **Dreamweaver (http://www.macromedia.com/software/dreamweaver/)**
- **CoffeeCup (http://www.coffeecup.com/free-editor/)**

2.3 Step 2: Gathering Information

In order to perform the installation, you will need the following:

1. ***FTP* server address, username and password**

   This is usually provided by your web host

2. **URL that you would like to use for your cart page.**

   The default URL is "http://www.example.com/store.php". You can change the name of your cart page, as long as it ends in ".php". You can also install it in a subdirectory, as in "http://www.example.com/store/index.php".

3. ***MySQL* Information**

   - **Hostname of your MySQL server (this is usually 'localhost')**
   - **MySQL database name**
   - **MySQL username and password for the database**

     If you do not have this information, you may be able to create the database and user account via a utility in your web hosting control panel. If you are unsure of the correct MySQL information, ask your web host for assistance.

4. **URL to your web host control panel, and the username and password for it**

   This information is optional, and is only needed if you do not have a MySQL database, username, and password.

2.4 Step 3: Uploading Files via FTP

This step assumes that you have an *FTP* client program, and are familiar with uploading files.

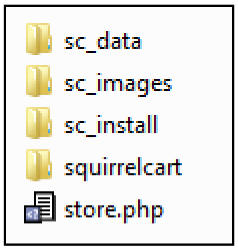
This step gets the files necessary to run Squirrelcart onto your server.

1. **Download distribution**

   If you have not already done so, download the Squirrelcart distribution file from our downloads page: **http://www.squirrelcart.com/downloads.php**

2. **Extract files**

   After downloading the distribution zip file, you will need to extract it using **7-Zip (http://www.7-zip.org/)**, **WinZip (http://www.winzip.com/)**, or another zip file utility. Once you extract it, you will see a folder named **upload**, containing the following:

   > The above is just an example. The contents of the upload folder may appear different than what you see above.

3. **Determine where to upload your files**

   The most common way to configure Squirrelcart is to have your *storefront* page (store.php by default) in the *web root* folder for your site. You can also install it within a sub-directory inside your web root. Once you have determined where you want your *storefront* page located, find the corresponding folder on your server from within your FTP client software. That folder will be the destination folder you will use to upload all of the squirrelcart files.

4. **Upload files**

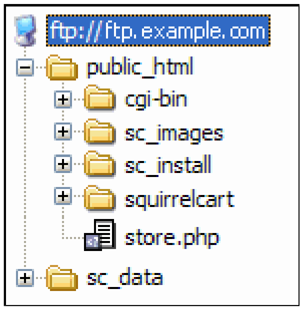
   Upload all of the files and folders from the **upload** directory to your destination folder. **DO NOT** upload the folder named **upload**, just upload the contents within that folder.

   > The **sc_install** folder contains a folder named **upgrade**, which is only used during the upgrade process. If you are performing a new installation, you may delete the **sc_install/upgrade** folder prior to uploading to save some time.

5. **Move the sc_data folder (optional)**

   The **sc_data** folder is used whenever Squirrelcart needs to store information in files. It is used for storing backups and other information. We recommend that you move it to the same level as your *web root* folder (not inside it!). This is recommended so that the backup and other files can't be accessed by others via the internet. If you do not have access to move the folder to the same level as your web root, you may have to ask your web host for assistance. In the example below, **public_html** is the web root. If you place your sc_data folder as it appears in the image below, the correct value for the **$sc_data_path** variable in your **config.php** file is:

   ```
   $sc_data_path = '../sc_data';
   ```



For more information on the sc_data folder, please see the topic "**Security > sc_data folder (Section 8.2)**".

2.5 Step 4: Creating MySQL User & DB

This step is optional. If you already have a *MySQL* username, password and database, you can skip this topic, and move on to the next topic.

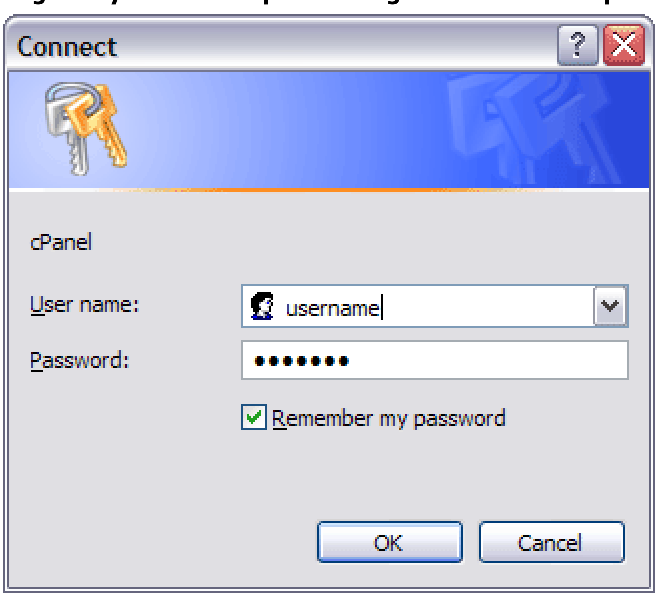
If you are unsure as to whether or not you have a MySQL user account and database already created, you should ask your web host before continuing.

The process for creating a MySQL user and database varies depending on your hosting company. For this reason, there is no one single way to handle this, so we will explain 2 of the more common methods below.

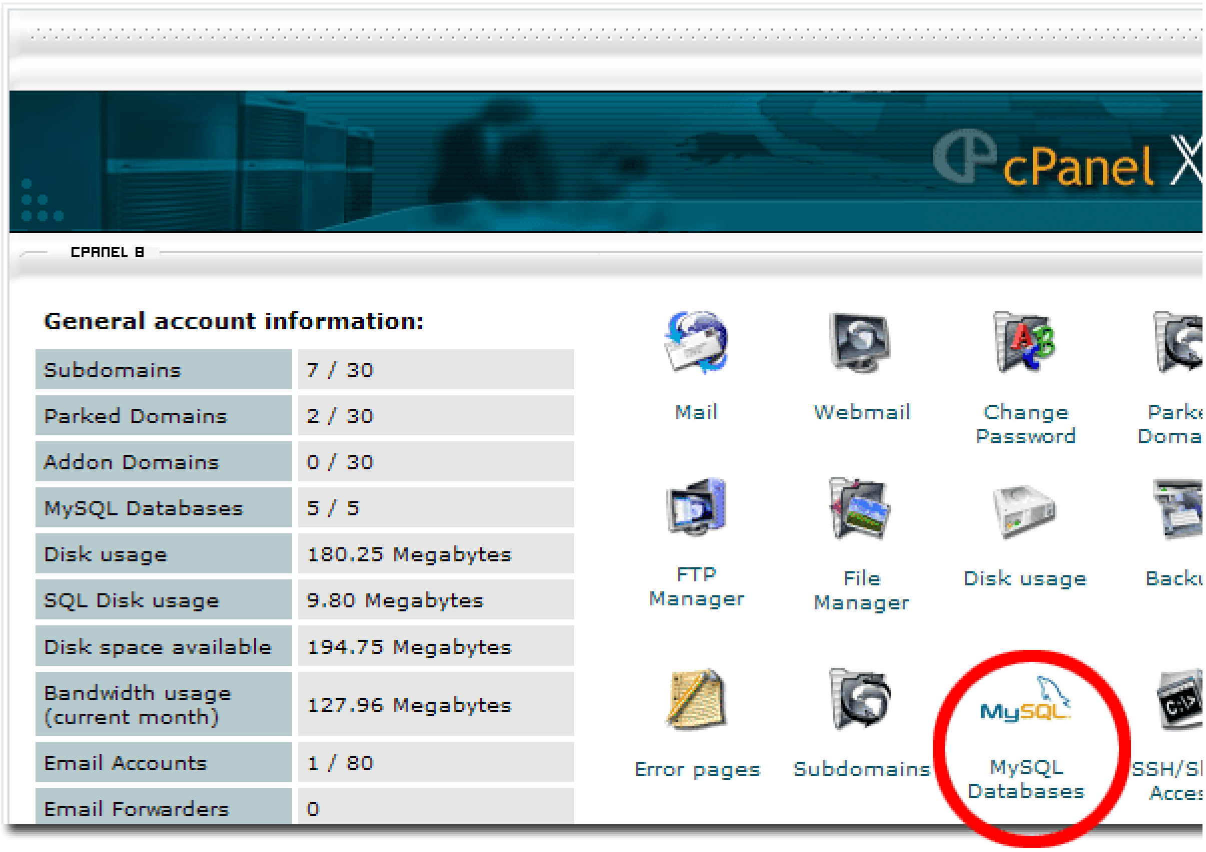
Method 1: Creating MySQL User and Database using a web hosting control panel

Many web hosts provide an interface to manage your hosting account. This interface is generically referred to as a "control panel". Typically, if a control panel is available for your account, the web host will send you a URL, username, and password for it. In the example below, we will describe how to create the MySQL user and database using a popular control panel called CPanel, which is common on many Linux based web servers.

1. Login to your control panel using the information provided by your web host

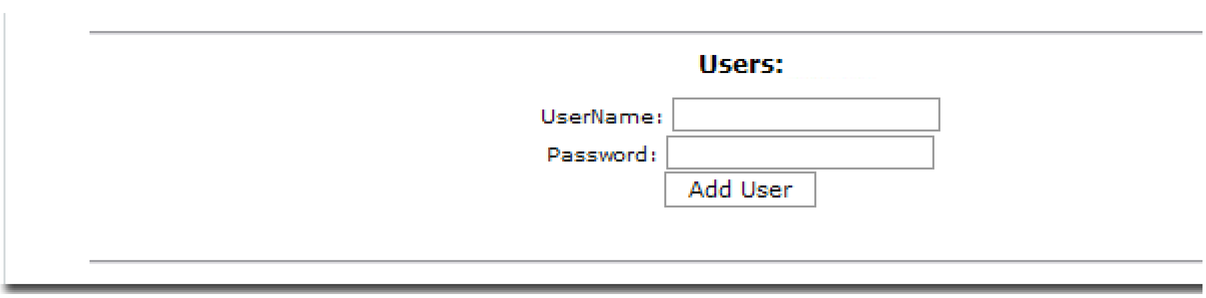


2. Click the MySQL Icon, which we've circled in the image below



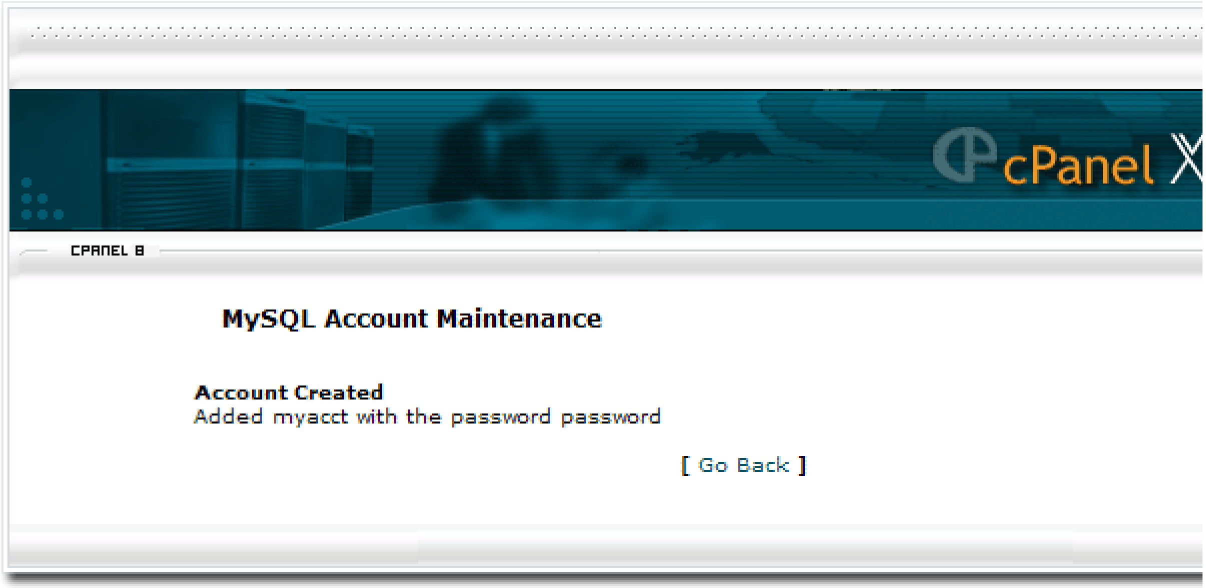
3. Create MySQL user account

You should see a form that looks like this:



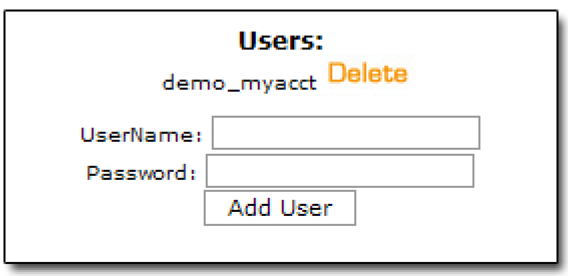
Enter a username and password. Be sure to write it down somewhere, and then click **Add User**

After clicking the **add user** button, you should get a message similar to this:



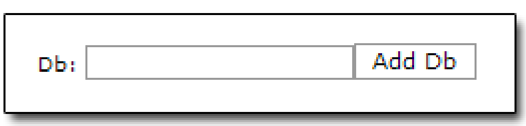
Click **Go Back** to return to the previous page.

Now, take a look at the users form you used to create the account. You should see your new user account listed above it. Note that in this example, the name of the account is **demo_myacct** even though you entered **myacct** for the new user. Many web hosts prefix the account name you use to login to the control panel in front of the mysql username, to ensure that the account is unique. The name displayed is the true name of the account that you just created. If it differs from what you originally typed in, then be sure to write down the way it appears after creation, as this will be the name we will use later on in Squirrelcart's configuration file.

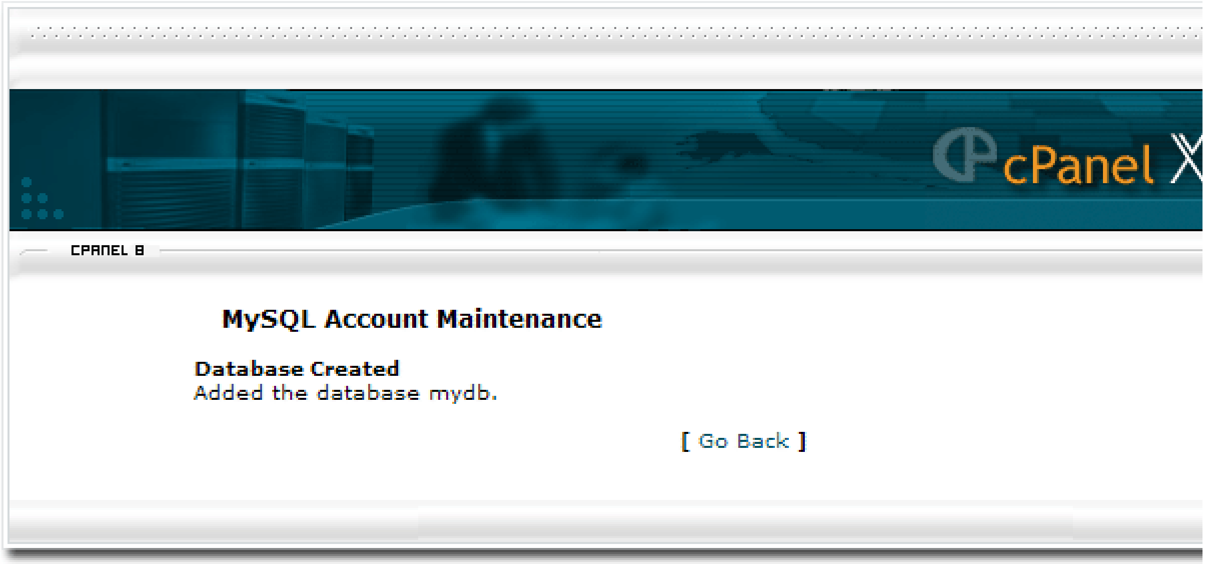


4. **Create the database**

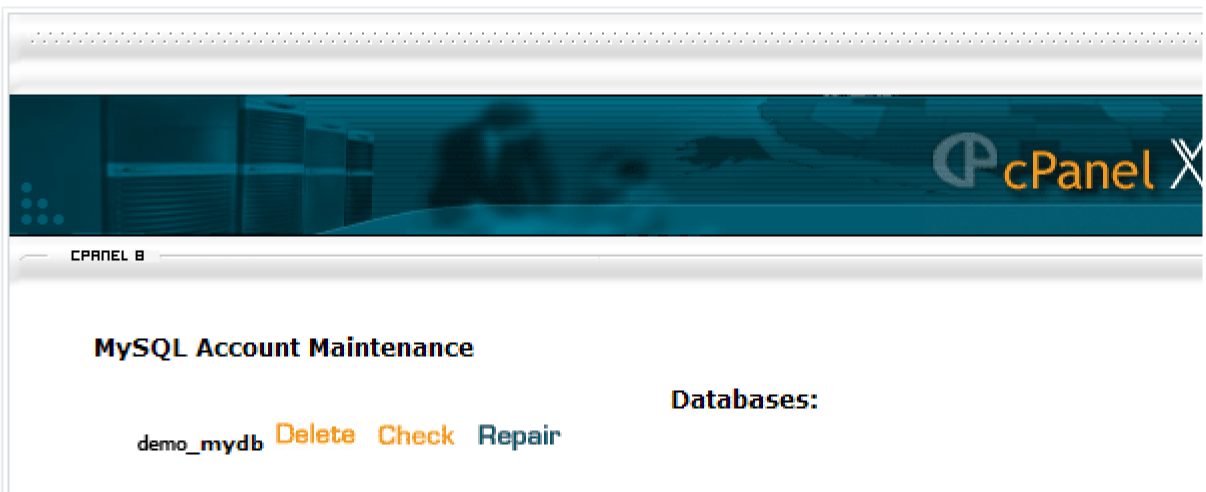
Look for a form that is similar to the one below:



Enter a name of your choosing for the database, and click **Add Db**. You should get a message indicating the database was created.

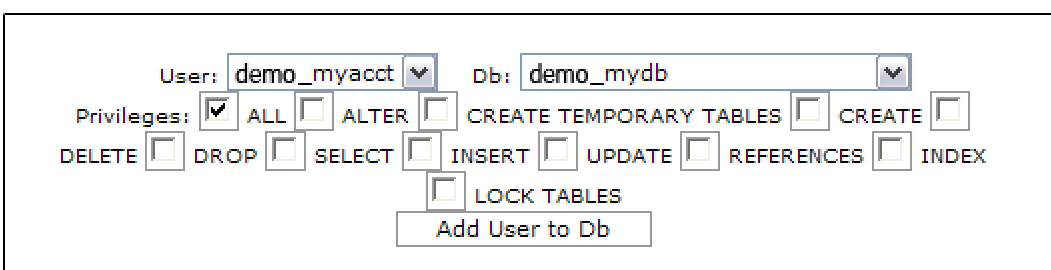


Click **Go Back**. Somewhere on that page, you should see your newly created database. Write down the name of the database, as it appears. It may be prefixed with your account name.



5. Grant permissions to the user

You're almost done. You've created the user, and the database. Now you need to assign permissions to allow the user to access the new database. Look for a section that looks like this:



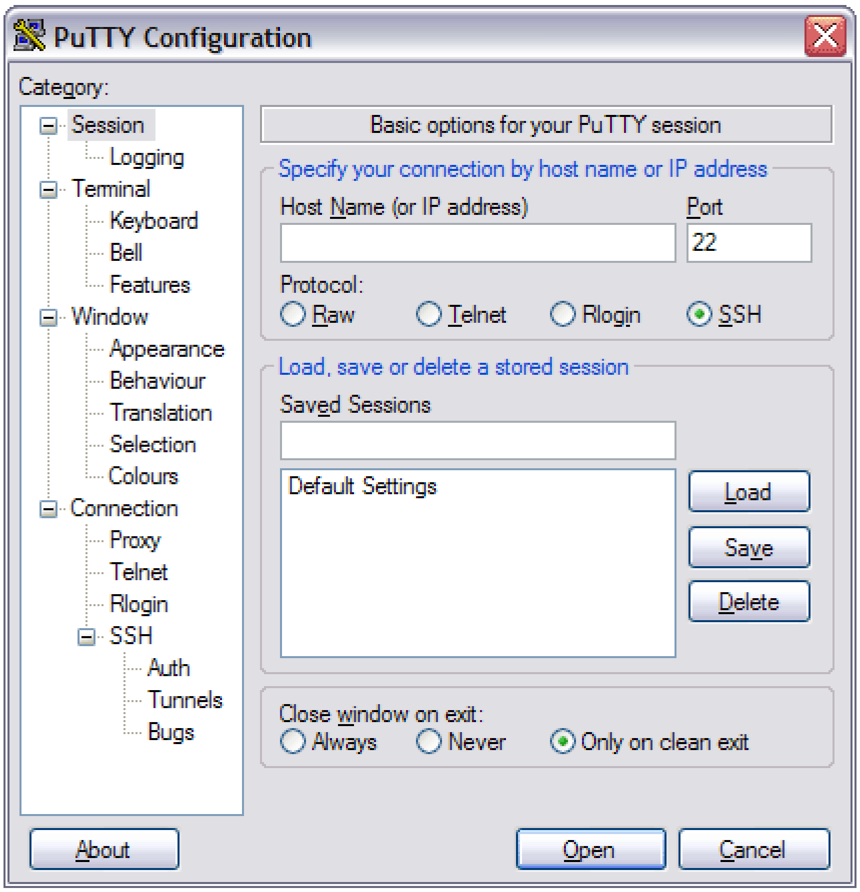
The account needs full rights to the database. Check the box next to **ALL**, and click **Add User to Db**.

Method 2: Creating MySQL User and Database using secure shell access (SSH)

1. Connect to your server via SSH

If you are unfamiliar with secure shell (SSH), please see the *SSH* topic in our glossary. Putty is a free program that you can use to connect to your server via SSH. You can download it from **http://www.chiark.greenend.org.uk/~sgtatham/putty/download.html**.

Once you have downloaded Putty, launch it. You should see a dialog box similar to this:



Enter your website's domain name or IP address in the **Host Name** field. Make sure **SSH** is selected in the Protocol section, and click **Open**. You will receive a login prompt. Enter the username and password for your hosting account, and you should be left at a prompt. If you cannot login, you may need to contact your web host for assistance.

2. Launch MySQL

After you login, you should be left at a prompt. Our prompt looks like this:

```
jailshell-2.05a$
```

Type **mysql -p** at the prompt, and hit enter. You will be prompted for a password. Enter the password and hit enter, and you should see something similar to:

```
jailshell-2.05a$ mysql -p
Enter password:
Welcome to the MySQL monitor.  Commands end with ; or \g.
Your MySQL connection id is 728375 to server version: 3.23.56

Type 'help;' or '\h' for help. Type '\c' to clear the buffer.

mysql>
```

3. Create the database

To create the database, enter **create database dbname;** where "dbname" is the name you want to call your database. Be sure to make the name unique. Press enter, and you should see:

```
mysql> create database mydb;
       Query OK, 1 row affected (0.23 sec)
```

4. Add user to DB

You're almost done. Now you need to create a user and assign permissions to allow that user to access the new database. This is done with one command, as follows:

```
mysql> GRANT ALL PRIVILEGES ON *.* TO 'newusername'@'localhost' IDENTIFIED BY
'password';
```

In the example above, replace **newusername** and **password** with a username and password of your choosing. Hit enter after typing the grant command.

You should now have a MySQL database, username, and password. Continue to the next topic.

2.6 Step 5: Installation Script

Overview

Squirrelcart's installation script performs the following steps:

- Tests PHP session support
- Verifies MySQL is available
- Prompts you to modify your configuration file
- Sets file and folder permissions
- Imports initial database structure and records into your database

Many of the steps the installation script performs are automatic. For steps that require your interaction, you will be provided with instructions and prompted for information. Because server configurations can vary, the screens you see while running the installation script may vary. We will go through a typical installation below. When the installation script has finished, you will be done with the installation process.

If you encounter problems setting permissions during the installation script process, you may be instructed to modify your configuration file and/or set permissions manually. If you see a message instructing you to do so, you can find topics to assist you in the **Installation > Additional Resources** section of this documentation.

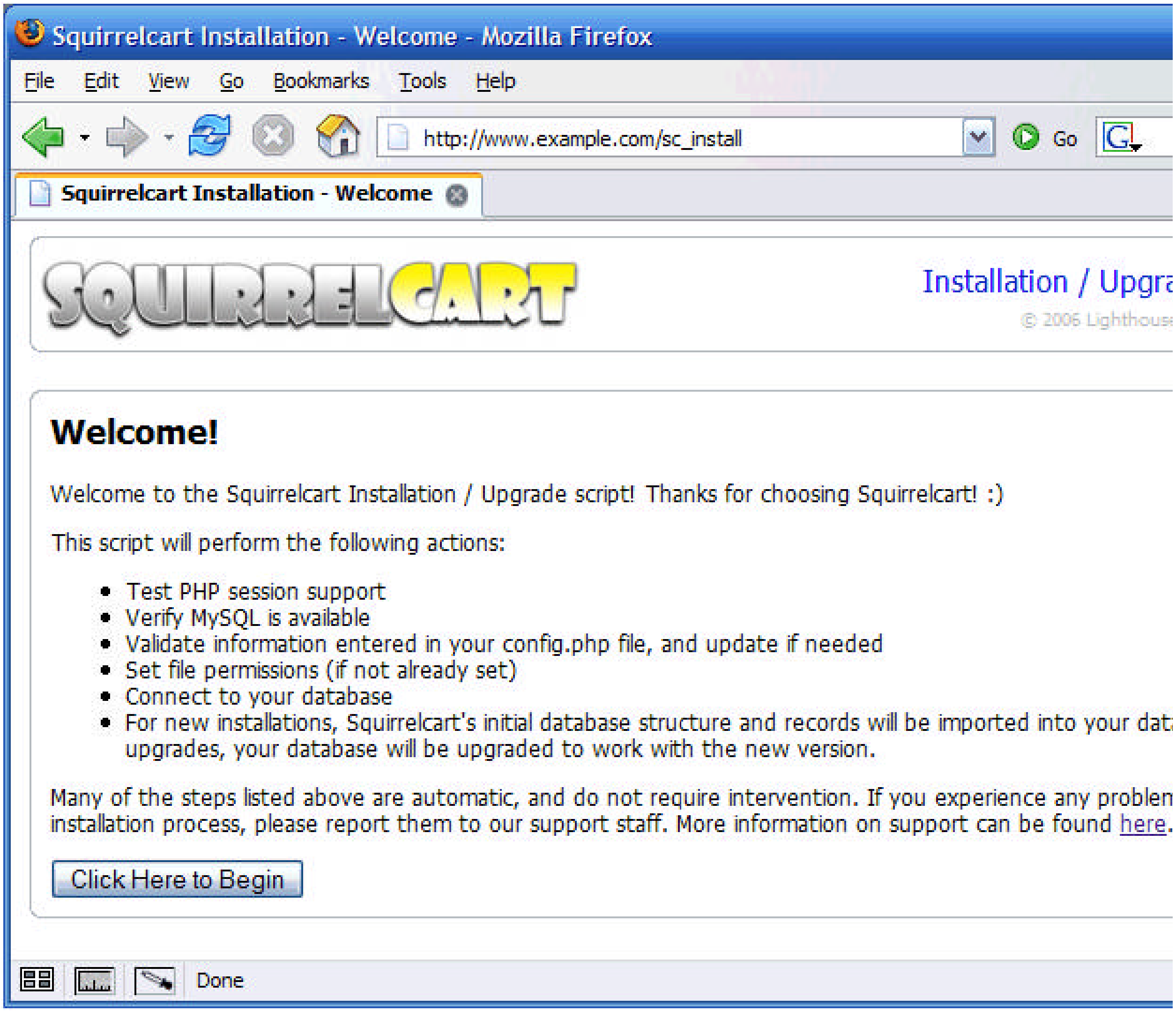
Launching the Installation Script

To open the installation script, open your browser and go to the URL that represents the location that you uploaded the sc_install folder to:

http://www.example.com/sc_install/

If permissions need to be set, the installation script may prompt you for your FTP authentication information. For this reason, if you have access to your website using a secure URL, we recommend that you use that URL for the installation process: https://www.example.com/sc_install

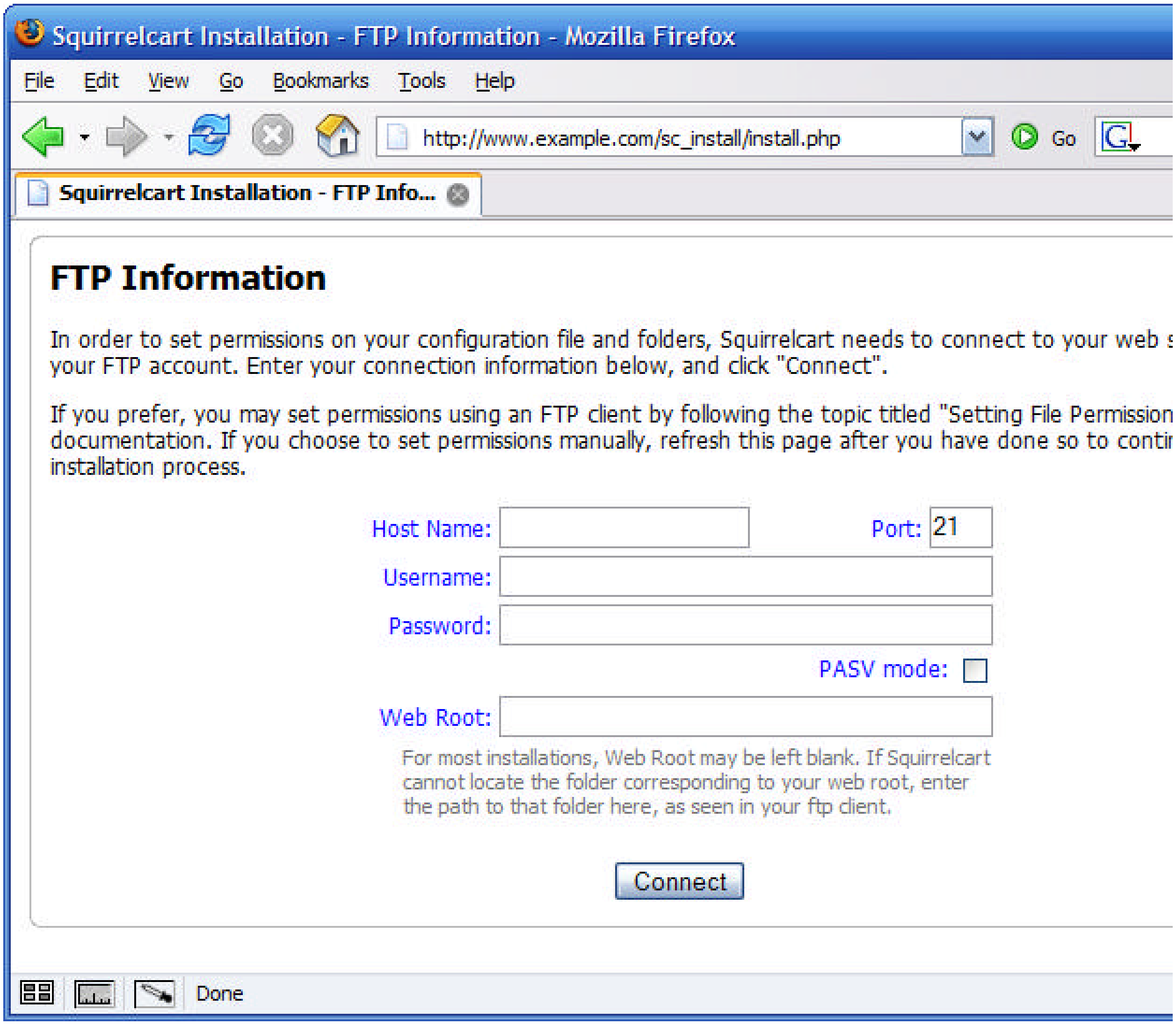
You will need to replace "example.com" with your domain name. You should then see the welcome screen.



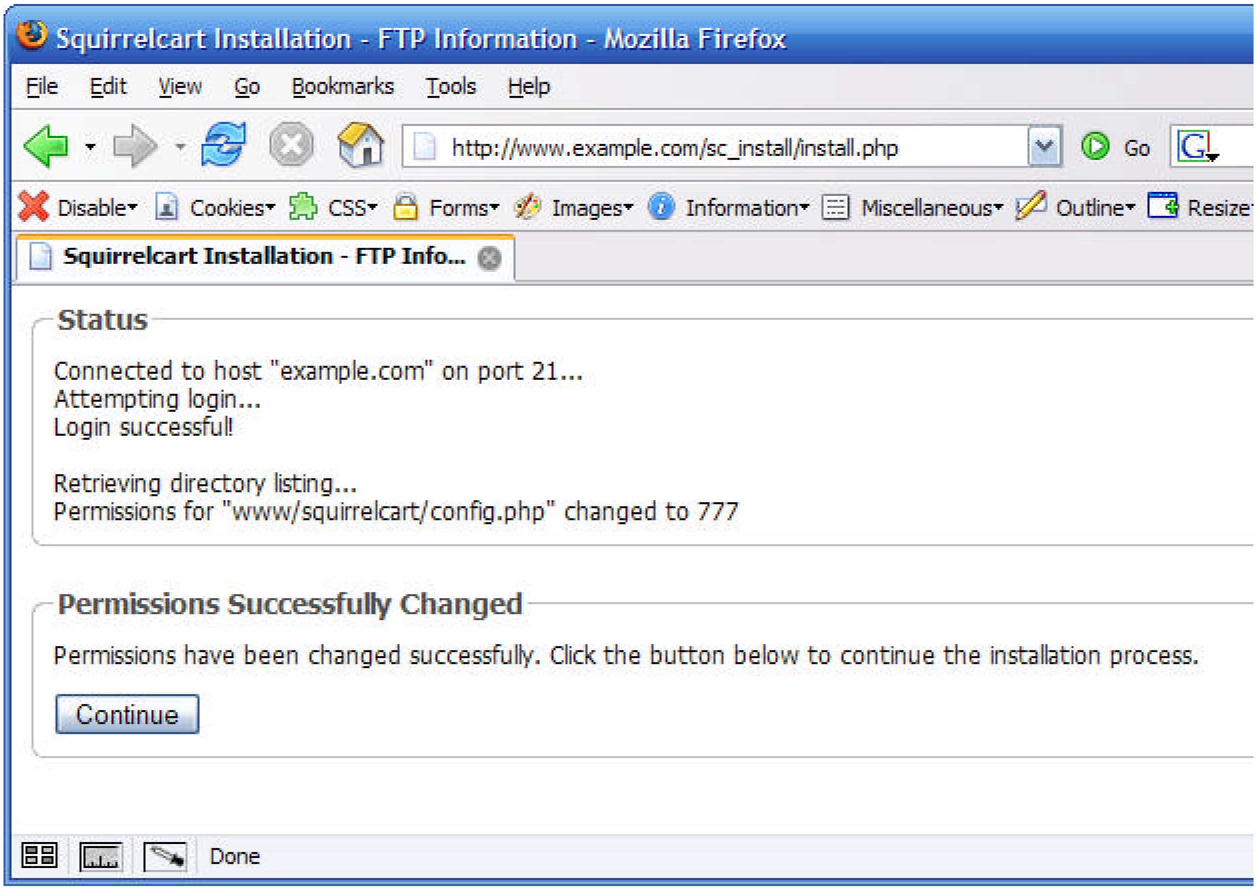
You will then need to click the **Click Here to Begin** button, and follow the instructions. We will provide an example walkthrough below.

Installation Script Walkthrough

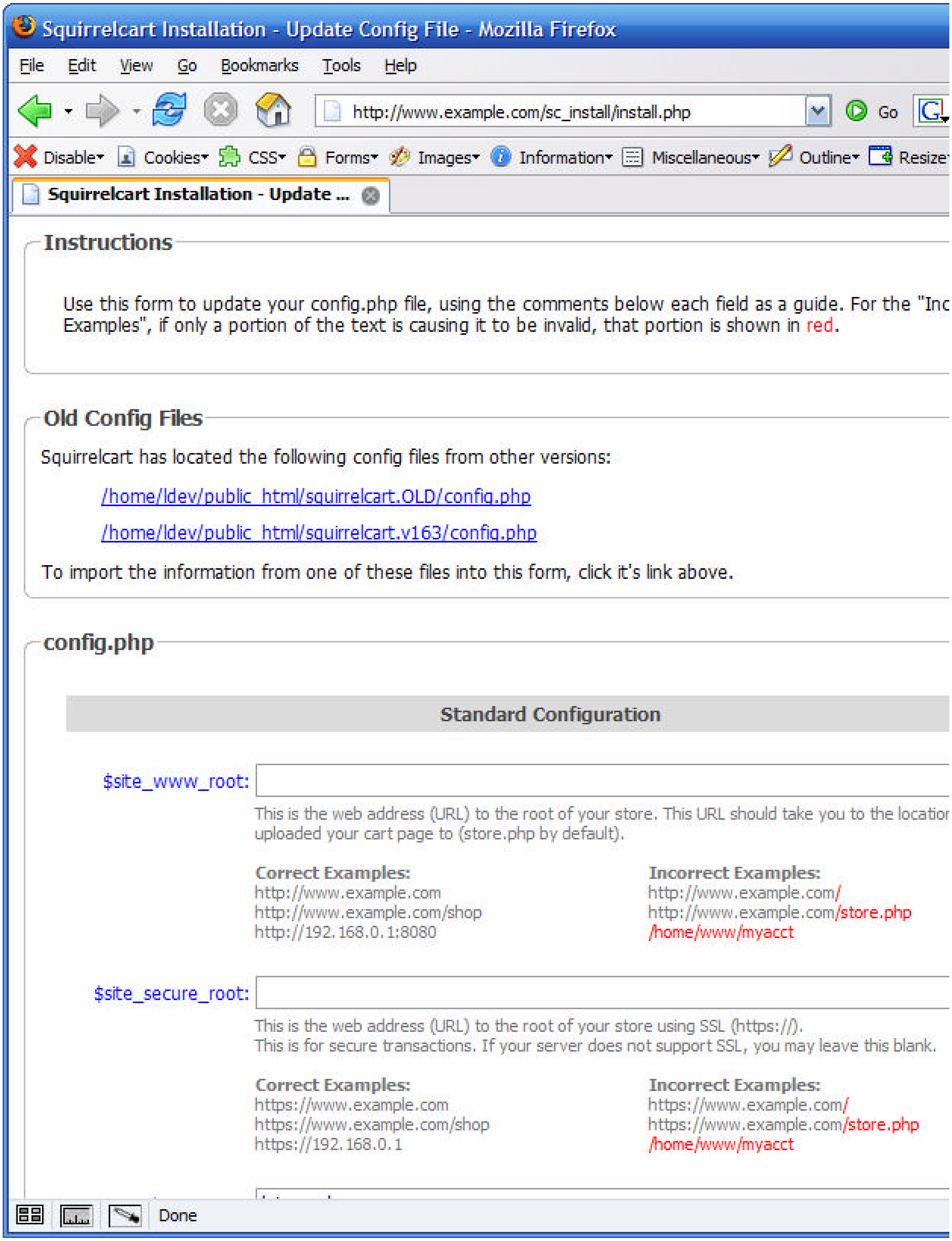
After clicking the **Click Here to Begin** button, the installation will find your **squirrelcart/config.php** file, and validate the information contained in it. Because this is a new installation, the initial check will indicate that changes need to be made to the file. The script then checks to see if it has permissions to write to the file. If it does not, you will see the following screen.



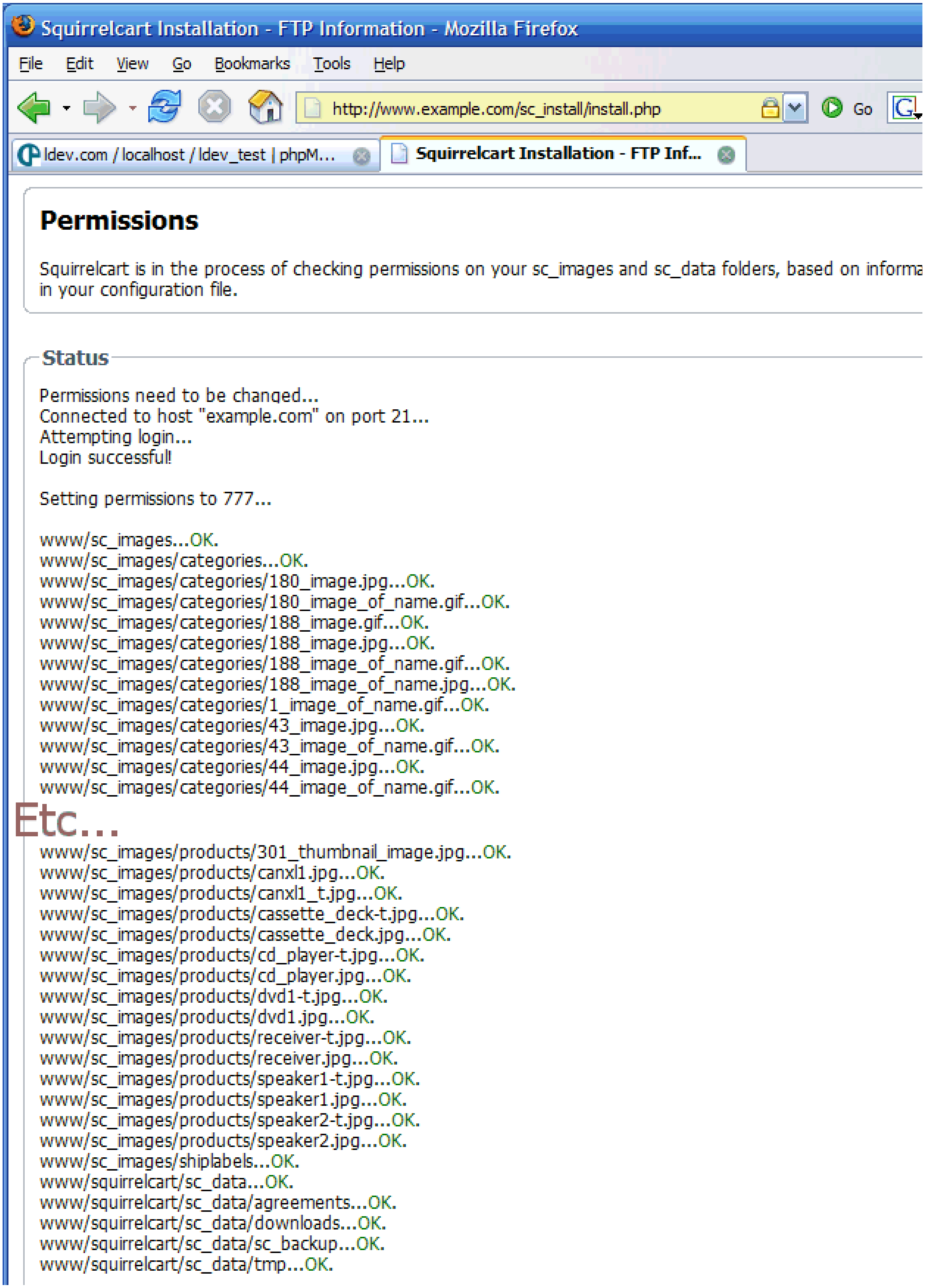
If you see this screen, follow the instructions and click **Connect**. If the information you entered was correct, you should see something like this:



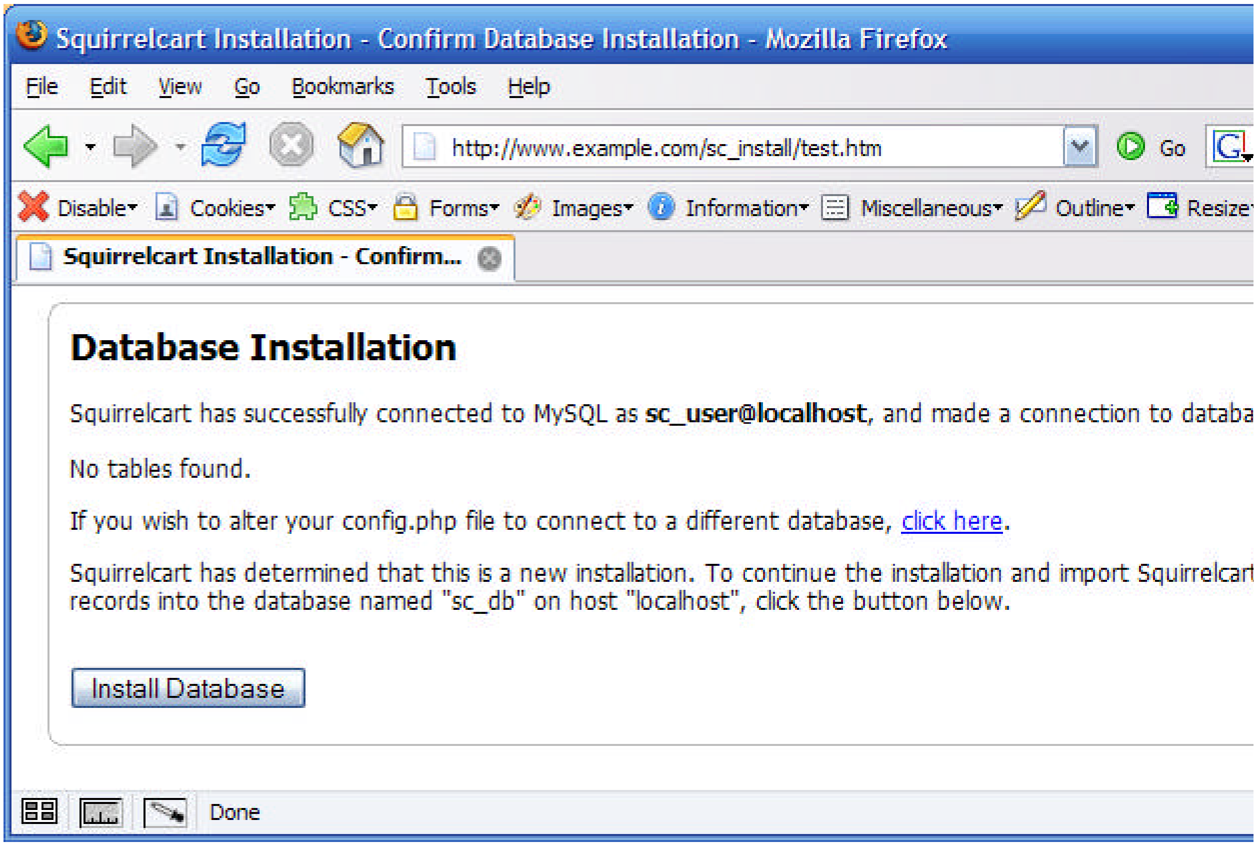
Click **Continue** and you should be taken to the configuration file form:



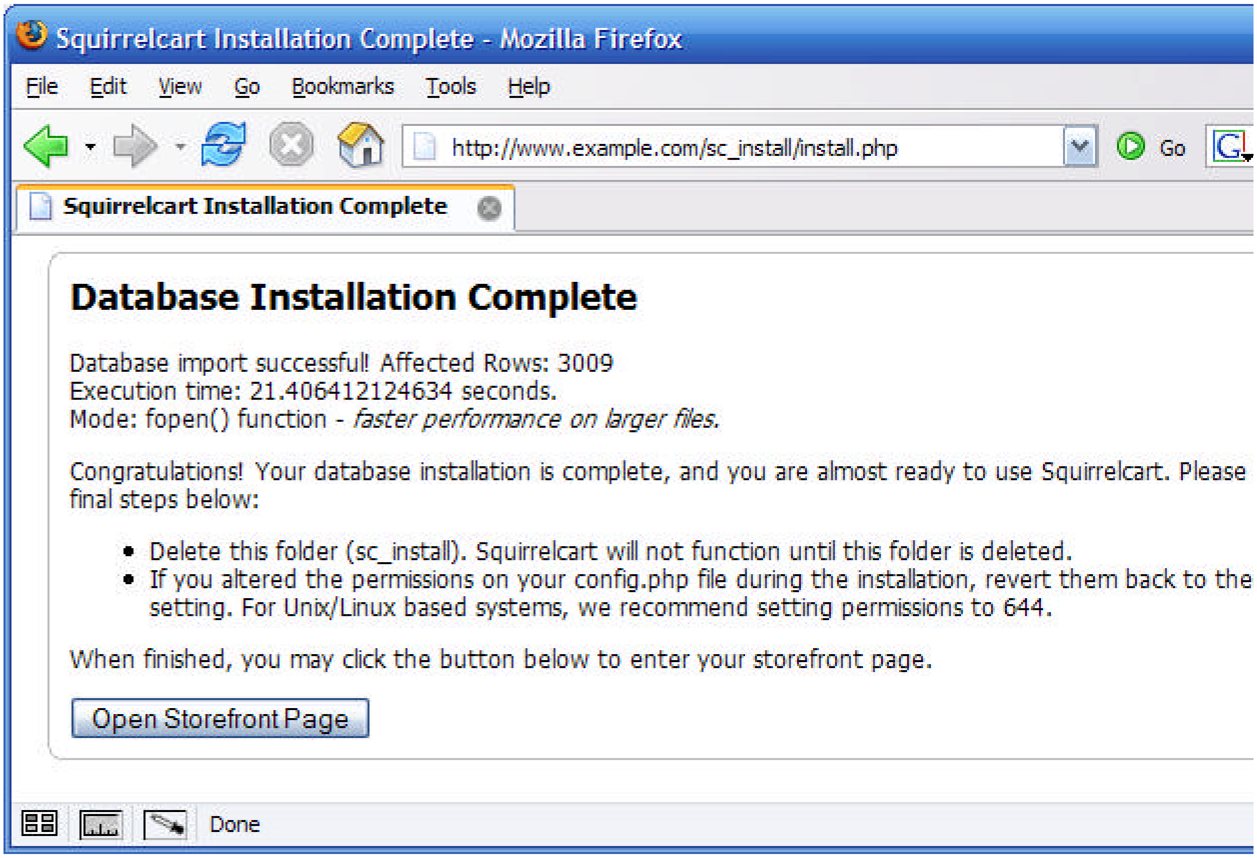
Follow the instructions on the form using the examples provided as a guide, and click the **Save Changes** button at the bottom of the page. If any of the fields fail validation, you will be prompted to correct them. Once you have submitted valid values, the config.php file will be updated. You will then see the following:


Squirrelcart Installation - FTP Information - Mozilla Firefox
File Edit View Go Bookmarks Tools Help
http://www.example.com/sc_install/install.php
Go
ldev.com / localhost / ldev_test | phpM...
Squirrelcart Installation - FTP Inf...
Permissions
Squirrelcart is in the process of checking permissions on your sc_images and sc_data folders, based on informa
in your configuration file.
Status
Permissions need to be changed...
Connected to host "example.com" on port 21...
Attempting login...
Login successful!
Setting permissions to 777...
www/sc_images...OK.
www/sc_images/categories...OK.
www/sc_images/categories/180_image.jpg...OK.
www/sc_images/categories/180_image_of_name.gif...OK.
www/sc_images/categories/188_image.gif...OK.
www/sc_images/categories/188_image.jpg...OK.
www/sc_images/categories/188_image_of_name.gif...OK.
www/sc_images/categories/188_image_of_name.jpg...OK.
www/sc_images/categories/1_image_of_name.gif...OK.
www/sc_images/categories/43_image.jpg...OK.
www/sc_images/categories/43_image_of_name.gif...OK.
www/sc_images/categories/44_image.jpg...OK.
www/sc_images/categories/44_image_of_name.gif...OK.
Etc...
www/sc_images/products/301_thumbnail_image.jpg...OK.
www/sc_images/products/canxl1.jpg...OK.
www/sc_images/products/canxl1_t.jpg...OK.
www/sc_images/products/cassette_deck-t.jpg...OK.
www/sc_images/products/cassette_deck.jpg...OK.
www/sc_images/products/cd_player-t.jpg...OK.
www/sc_images/products/cd_player.jpg...OK.
www/sc_images/products/dvd1-t.jpg...OK.
www/sc_images/products/dvd1.jpg...OK.
www/sc_images/products/receiver-t.jpg...OK.
www/sc_images/products/receiver.jpg...OK.
www/sc_images/products/speaker1-t.jpg...OK.
www/sc_images/products/speaker1.jpg...OK.
www/sc_images/products/speaker2-t.jpg...OK.
www/sc_images/products/speaker2.jpg...OK.
www/sc_images/shiplabels...OK.
www/squirrelcart/sc_data...OK.
www/squirrelcart/sc_data/agreements...OK.
www/squirrelcart/sc_data/downloads...OK.
www/squirrelcart/sc_data/sc_backup...OK.
www/squirrelcart/sc_data/tmp...OK.

Click **Continue** and you will see this:



Click the **Install Database** button, and you should then see something like this:



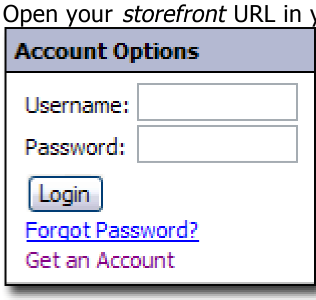
Follow the final instructions, and click the **Open Storefront Page** button to open your storefront.

2.7 Logging in for the First Time

In order to manage Squirrelcart, you will need to login with an account that has administrative privileges.

1. Login with default admin account

Open your *storefront* URL in your browser. You should see a login box on the left hand side of the page:



The default admin login information is as follows:

Username: **admin**
Password: **password**

Enter this information in the login form and click **Login**.

2. Change username and password

For security reasons, you should change your admin account username and password after your first login. To do so, click the **Account Details** link in the account options section, and fill out all the required fields. Be sure to remember your account information. You may want to write it down in a safe place.

> You can also login directly in the control panel by going to the URL:
> http://www.example.com/squirrelcart/

2.8 Testing

Before you continue, it is important to make sure that the installation went smoothly.

Test Storefront

Open your *storefront* page in your browser. Perform functions that you normally would as a customer. If you see any error messages, document them and open a support request with us before continuing. You can get more information about support here:

http://squirrelcart.com/support.php

2.9 Additional Resources

2.9.1 Modifying Config File Manually

Overview

Squirrelcart needs to know information about your server in order to function. This information is stored in the file **squirrelcart/config.php** on your server.

> Following this topic is not usually required for a typical installation. Squirrelcart's installation script gives you the option of modifying your configuration file in your browser. This ensures that you do not accidentally cause a syntax error in the file, and also validates every value entered. In the event that you need to modify your configuration file manually, this topic explains how to do so.

1. Open Configuration File

Open the file **squirrelcart/config.php** in your HTML editor. You should see the following:

```
<?php
/*********************************************************************************

    Squirrelcart configuration file

    Installer of cart needs to change the variables below to their appropriate val
    Values should go between single quotes, with a semicolon at the end of the lin

    Example:
    $var_name = 'your value goes here';
```

```
    Do not add trailing slashes at the end of path values.

    Configuration section starts below this header

*********************************************************************************
//
// This is the web address (URL) to the root of your store. This URL should take y
// the locationthat you uploaded your cart page to (store.php by default).
//
// Correct Examples:
// http://www.example.com
// http://www.example.com/shop
// http://192.168.0.1:8080
//
// Incorrect Examples:
// http://www.example.com/
// http://www.example.com/store.php
// /home/www/myacct
//
$site_www_root = 'http://www.ldev.ws:8000/sc_dev';

//
// This is the web address (URL) to the root of your store using SSL (https://).
// This is for secure transactions. If your server does not support SSL, you may l
// this blank.
//
// Correct Examples:
// https://www.example.com
// https://www.example.com/shop
// https://192.168.0.1
//
// Incorrect Examples:
// https://www.example.com/
// https://www.example.com/store.php
// /home/www/myacct
//
$site_secure_root = '';

//
// This is the filename of your main storefront page. It defaults to /store.php wh
// first installed.
//
// Correct Examples:
// /store.php
// /index.php
//
// Incorrect Examples:
// /shop/store.php
// http://www.example.com/index.php
//
$cart_page = '/index.php';

//
// This is the path to the folder you keep your images in, relative to the folder
// containing your cart_page. This is the folder that you upload the products,
// categories, and other image folders into
//
// Correct Examples:
// /sc_images
// /images/store
//
// Incorrect Examples:
```

```
// sc_images/
// http://www.example.com/sc_images
//
$img_path = '/sc_images';

//
// This is the name or IP address of the server that is running MySQL. localhost i
// default
//
// Correct Examples:
// localhost
// 192.168.0.1
// server03:6842
//
// Incorrect Examples:
// http://www.example.com
//
$sql_host = 'localhost';

//
// This is the username and password for the MySQL user that you created and added
// your squirrelcart database
//
$sql_username = 'root';
$sql_password = 'nortel';

//
// This should be set to the name of the database Squirrelcart is using
//
$db = 'sc_dev';

/*******************************************************************************

    Advanced Configuration Section

    The variables in this section are optional, and do not have to be changed for 
    installations

********************************************************************************
//
// This is used to specify your SMTP server host name, should you need to. Most
installs
// work fine with thie field left blank.
// You should only set this if Squirrelcart generates an error when attempting to
// email.
//
// Correct Examples:
// smtp.example.com Incorrect Examples:
// http://www.example.com
//
$smtp_host = '';

//
// This tells Squirrelcart where your sc_data folder is located. The path should b
// relative to what you specified for $site_isp_root.
// The default value for this field is squirrelcart/sc_data. We recommend you move
// folder so it is not within your public web root.
//
// Correct Examples:
// squirrelcart/sc_data
// ../sc_data
//
```

```
// Incorrect Examples:
// /squirrelcart/sc_data
// squirrelcart/sc_data/
// http://www.example.com/squirrelcart/sc_data
//
$sc_data_path = 'squirrelcart/sc_data';

//
// The $curl_opts and $curl_ssl_opts variables can be used to add extra CURL optio
when
// requesting pages using CURL.
// If your web server requires specific curl options for curl to function, regardl
of
// whether or not the URL being
// requested is secure (https://www.example.com) or not (http://www.example.com),
the
// options to the $curl_opts variable,
// and they will be used regardless of the URL being requested.
// If your web server requires special curl options only when accessing secure URL
// (https://www.example.com), add the options
// to the $curl_ssl_opts variable.
//
// The syntax for specifying the extra curl options is the same regardless of what
// variable you use.
//
// Example:
//        Your webhost provides the following code to you to set additional curl
options:
//            curl_setopt ($ch, CURLOPT_HTTPPROXYTUNNEL, TRUE);
//            curl_setopt ($ch, CURLOPT_PROXYTYPE, CURLPROXY_HTTP);
//            curl_setopt ($ch, CURLOPT_PROXY, 'http://192.168.1.130:3128');
//            curl_setopt ($ch, CURLOPT_SSL_VERIFYPEER, FALSE);
//
//         To use these options in Squirrelcart, you would specify the following f
//         $curl_opts:
//            $curl_opts[CURLOPT_HTTPPROXYTUNNEL] = TRUE;
//            $curl_opts[CURLOPT_PROXYTYPE]       = CURLPROXY_HTTP;
//            $curl_opts[CURLOPT_PROXY]           = 'http://192.168.1.130:3128';
//            $curl_opts[CURLOPT_SSL_VERIFYPEER]  = FALSE;
//
//         If your webhost instructed that these options are only needed for reque
//         secure URLs, you would set $curl_ssl_opts instead of $curl_opts.
//
$curl_opts = array();
$curl_ssl_opts = array();

/*********************************************************************************

    End of Configuration Section

    do not modify anything below this section!!!!!!

*********************************************************************************
?>
```

2. Modify the Configuration Variables

In the image above, the variables that you need to set appear in black text. You will be modifying the text following the variable name, that appears between the quotes. Instructions for setting each variable appears immediately above. Be sure to leave the semicolon after each line to avoid PHP parse errors. If you moved your **sc_data** folder, you will need to update the $sc_data_path variable in the advanced configuration section as well. After you have modified the file, save it.

3. **Test Changes**

   After you save your changes, you will need to test them. If you are modifying the config.php file during an installation, the installation process will inform you if any errors were found. If you are modifying your configuration file after Squirrelcart is already installed, open your *storefront* page in a browser. The URL for it should be equal to the URL you set for the $site_www_root variable, plus the name of the page specified in the **$cart_page** variable. In most cases, the URL would be similar to http://www.example.com/store.php.

   If all of your information was correct, you will see the normal content of the storefront page. If any variables failed validation, you will receive a fatal error message indicating what is invalid.

2.9.2 Setting File Permissions Manually

Overview

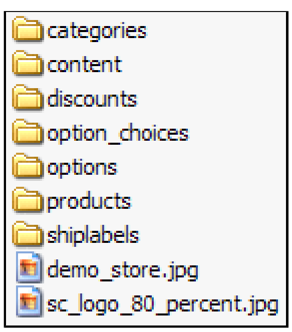
Squirrelcart needs access to upload images of your products, and other elements of your store. For this to work, we must assign permissions to the directories that Squirrelcart needs to write to. This is done differently depending on what operating system your server is running. If you are unsure of your operating system, ask your web host.

Setting permissions on a Unix / Linux based server

To set permissions, you will need to use the *FTP* client you used to upload your files. Because FTP clients vary, we are going to explain how this can be done in a typical FTP client. If you have difficulty, you may want to check the help within your particular client to see how you set permissions. A search for **permissions** or ***CHMOD*** should help. On a Unix based server, the command used to change permissions is called *CHMOD*. Most FTP clients call this command in the background, when you set file permissions.

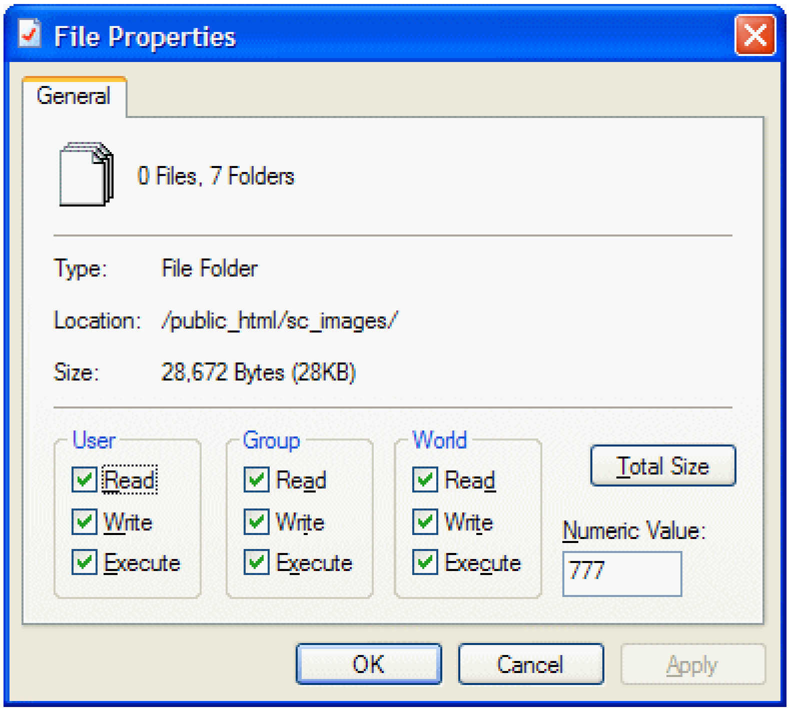
1. **Navigate to your images folder**

   With your FTP client, connect to your server and navigate to the **sc_images** folder that you just uploaded. In that folder, you should see the following:



2. **Set permissions on image folder**

   Select all the folders within the sc_images folder. With the folders selected, right click on them, and click **Properties**. In the dialog box, look for a section that shows permission information. Our dialog box from **FTP Voyager (http://www.ftpvoyager.com/)** looks like this:



The section pertaining to permissions is at the bottom, where the 9 checkboxes are. In your FTP client, you may see either checkboxes like these, a single field for a numeric value, or both. If you have checkboxes, check them all. If you have a numeric field, enter **777**. Then click **OK.**

> Your server may be setup to allow write access with more restrictive permissions of 755 or 775. You should use the most restrictive permissions that will still let PHP write to your server. If unsure of what permission settings to use, contact your web host for assistance.

3. **Image file permissions**

   Squirrelcart needs to be able to overwrite or delete the existing example images. In order for it to do so, you will need to open every folder within your **sc_images** folder, and set permissions for each file to **777.**

4. **Set permissions on sc_data folder**

   Repeat the same process on the **sc_data** folder, and all folders inside it. Set the folder permissions to **777**.

5. **Set permissions on config.php file**

   Squirrelcart needs to be able to modify your config.php file later on in the installation process. If you are in the middle of an installation/upgrade and wish to use the Installation / Upgrade script to modify your config.php file, locate this file and set permissions on it to **777: squirrelcart/config.php**

Setting permissions on a Windows based server

Setting permissions on a Windows server varies depending on your hosting company. On most servers, the default permissions are fine for Squirrelcart. You will only need to set permissions on a Windows server if you have problems uploading files in Squirrelcart's control panel. Some hosts allow you to set permissions through a hosting control panel. Others require that you contact them directly in order to set permissions. Because of this, there is no one way to explain how to set your permissions. If you encounter permission problems after the installation is complete, we recommend that you contact your host and explain to them that PHP on your server needs full permission to the folders in the first screen shot above.

3 Control Panel

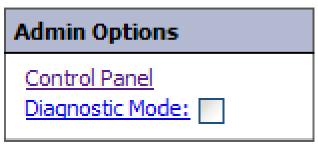
Loading the Control Panel

1. **Login as admin**

   In order to use the control panel, you must be logged in as a user with administrative privileges. The **Logging in for the First Time (Section 2.7)** topic explains how to login as admin.

2. **Click Control Panel link**

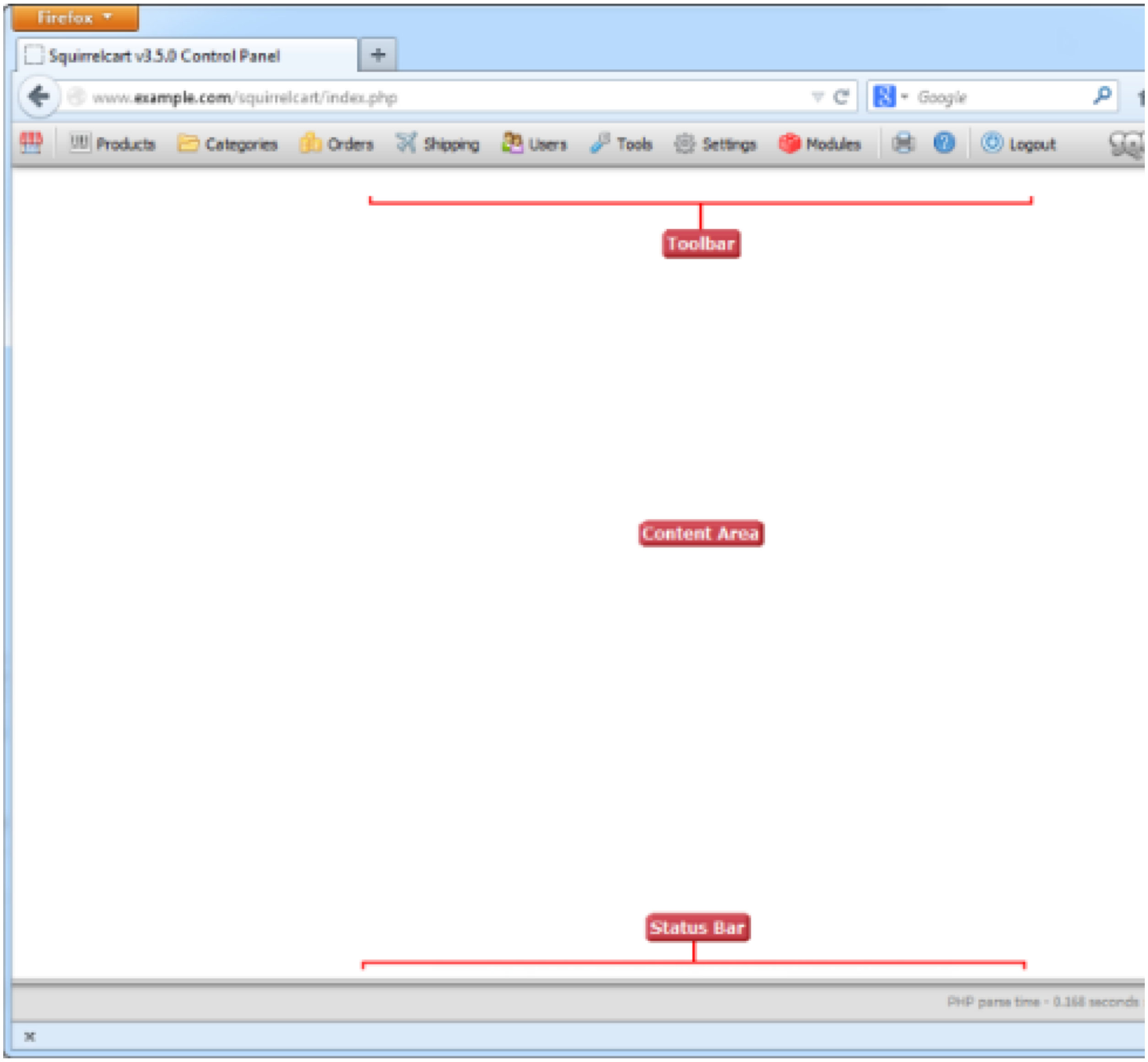
   After logging in, a new **Admin Options** navigation box should appear on your *storefront* page, which looks something like this:

   Click the **Control Panel** link

Control Panel Overview

All management activity is done using Squirrelcart's control panel. This is where you can change your settings, view your products, categories, orders, customers, and all other components of your store. The control panel consists of a toolbar, content area, and status bar.



Toolbar Overview

1. **Storefront**
   Link to *storefront* page

2. **Products**
   Link to menu used to manage your products and product options

3. **Categories**
   Link to menu used to manage your categories

4. **Orders**
   Link to menu used to manage orders

5. **Shipping**
   Link to menu used to manage all aspects of shipping, and to access shipping related tools

6. **Users**
   Link to manage users and groups

7. **Tools**
   Link to database tools and diagnostic utilities.

8. **Settings**
   Link to menu used to manage various settings

9. **Modules**
   Link to module specific settings

10. **Print**
    Link to print current page without the menu or copyright notice

11. **Help**
    Link to Squirrelcart help and support online

12. **Logout**
    Link to logout current user

13. **Version**
    This indicates the version of Squirrelcart your store is running

14. **Version Status Indicator**
    This indicates the status of your version compared to the latest available version of Squirrelcart.

    Green
    Indicates you are running the latest version of Squirrelcart

    Solid Yellow
    Indicates your version is 1 or more minor versions behind. Example: Your version is 5.3.**1** and the current version is 5.3.**6**

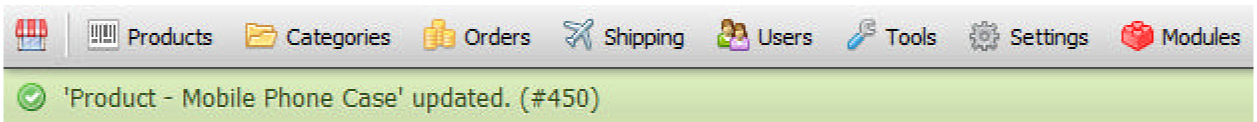
    Flashing Yellow
    Indicates your version is 1 or more intermediate versions behind. Example: Your version is 5.**3**.1 and the current version is 5.**5**.2

    Red
    Indicates that your version is one or more major versions behind. Example: Your version is 5.3.1 and the current version is 6.0.0

Status Messages

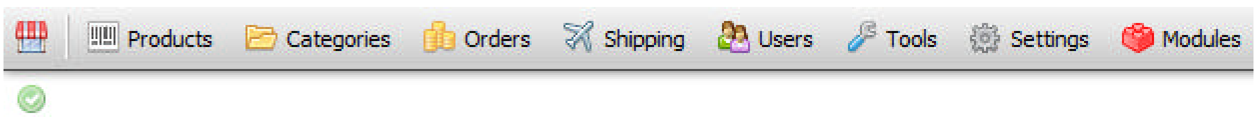
Squirrelcart displays status messages at the top of the page in an unobtrusive fashion. There are 5 different types of status messages, which are color coded based on their meaning.

Success Messages



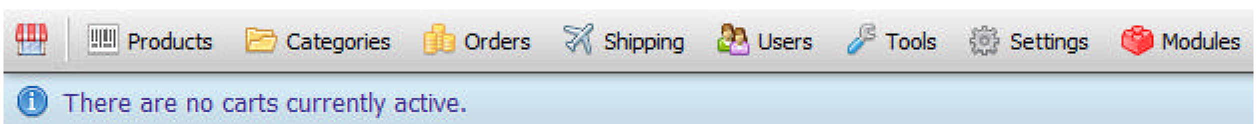
Success messages appear after an action you requested has been completed successfully. They appear in green.

Success messages automatically hide after they appear, so they do not get in your way. When hidden, a status icon remains in the upper left hand corner:



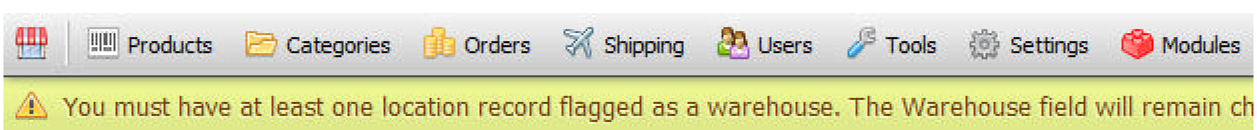
Moving your mouse over that icon will bring the status message back, in case you didn't have time to read it.

Info Messages



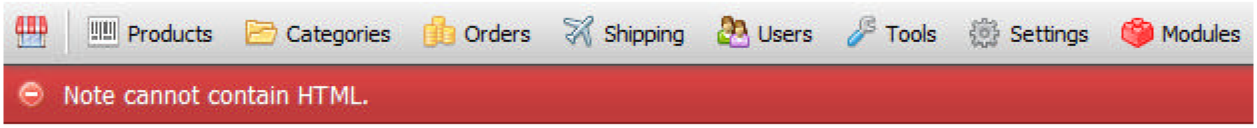
Info messages are informational only. They are used to provide general information that is not critical. They appear in blue.

Alert Messages



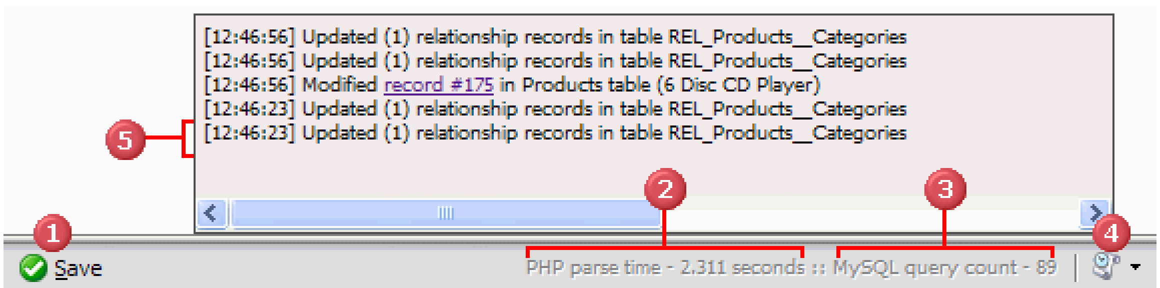
Alert messages are used to display warnings that are not technically errors. They may alert you to a minor problem that does not reach the level of an error.

Error Messages



Error messages indicate a problem has occurred, and appear in red.

Status Bar Overview



1. **Save Button**
   This button will appear whenever you are working on a record in the control panel. It is used to save your changes.

2. **PHP parse time**
   This shows the amount of time in seconds that it took PHP to put together the current page.

3. **MySQL query count**
   This shows the number of queries that were made against your database in order to put together the current page.

4. **History Button**
   Clicking this button will toggle the History Dialog window on and off.

5. **History Dialog**
   This dialog window shows you information about things that have been done in the control panel for this visit. Newer entries are on top. The record links that appear here provide a quick way to get back to a particular record you were working on to make additional changes.

4 Working With Records

4.1 Working With Records - Overview

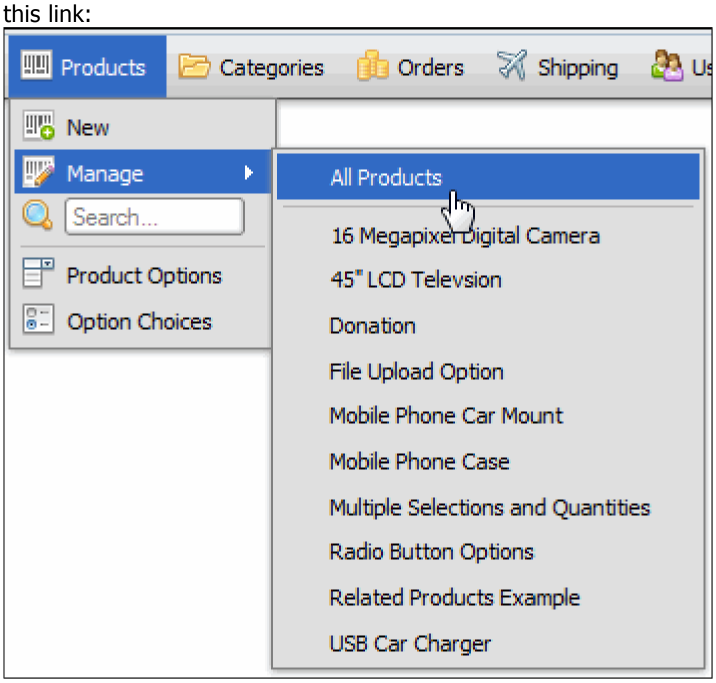
Overview

Almost all aspects of Squirrelcart rely on records in your database, which are used to store information such as Products, Categories, etc. This section describes how to work with those records.

4.2 Viewing Records

Choosing Records to View

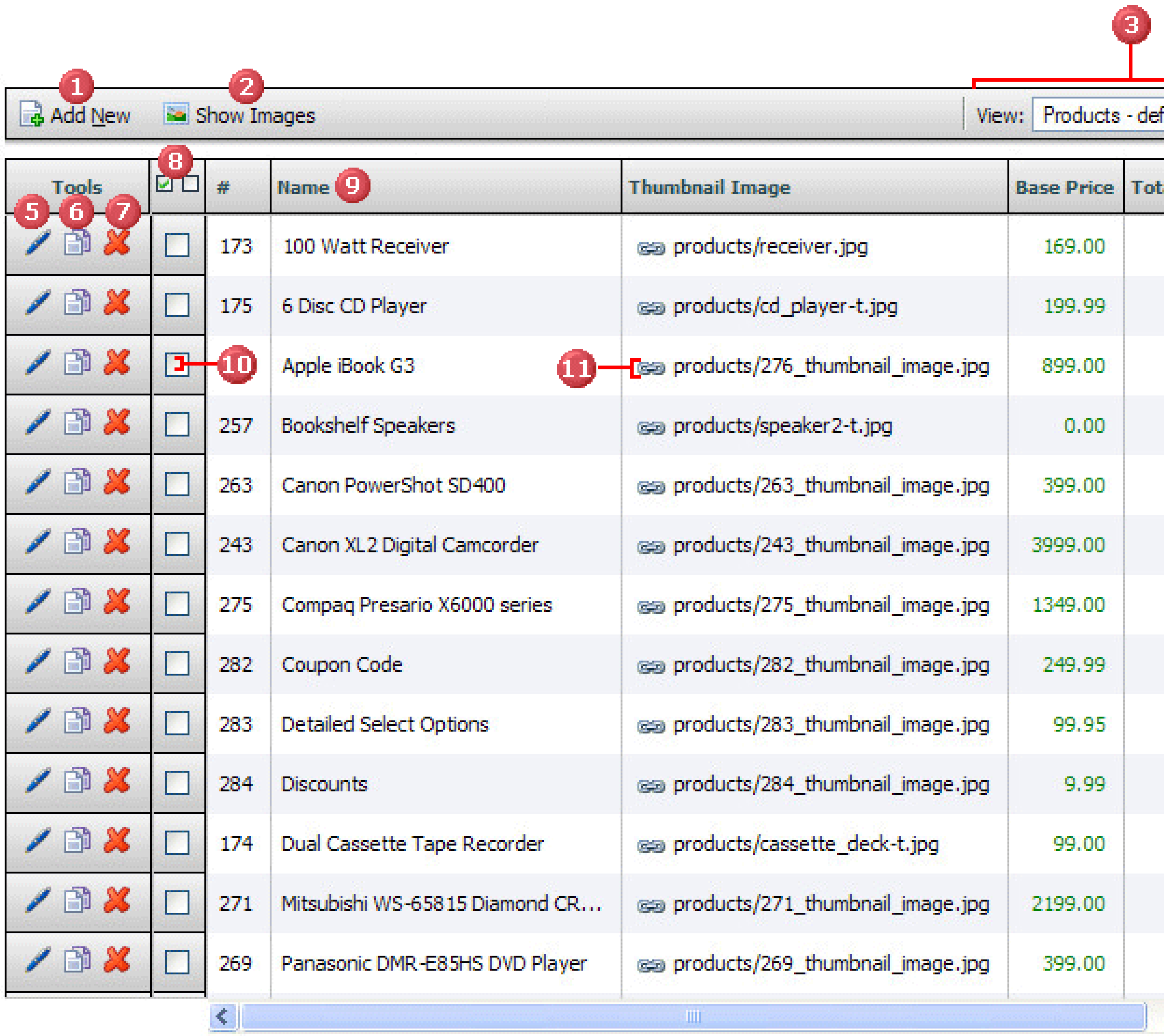
To view records, you will be clicking on different links in the menu system. For example, to view your products, click this link:



This will open a data grid showing the records for the option you clicked on, which is explained below.

Data Grid Overview

Squirrelcart uses a data grid to display your records. This allows you to scroll both horizontally and vertically without losing sight of the column labels or tools. Clicking anywhere on a row will open the corresponding record for viewing/editing in the content area.



1. **Add New Record**
   Add a new record to this table

2. **Show Images / Hide Images**
   For tables that have one or more image columns, this link will toggle the images on and off. When **on**, the images will be displayed inside the table cell.

3. **View Selector**
   This shows you the name of the open view. For tables that have multiple views, changing this field will switch to the selected view.

4. **Search Options**
   This is used to search the records in this view. Advanced search options can be viewed by clicking the small black arrow to the right of the search button.

5. **Edit / View Record**

   This link will open the record in the content area, for viewing / editing.

6. **Copy Record**

   This link will open a new record in the content area, copying all the values from the record that corresponds to the row that was clicked.

7. **Delete Record**

   This link will delete the record corresponding to the row that was clicked.

8. **Select / Deselect All**

   These links will select or deselect all records that are viewable on the page. This does not select records that are on subsequent pages.

9. **Column Header**

   This shows the name of the field for this column. Clicking a column header will sort the data by that column.

10. **Select Record**

    Checking this box will select this record. This is used in conjunction with links that act upon multiple records, such as **Delete Selected Records.**

11. **Link**

    This icon is a link. In this example, it will open the image for viewing/editing. In other cases, a link could open another record, a URL, or an email.

12. **Record Count**

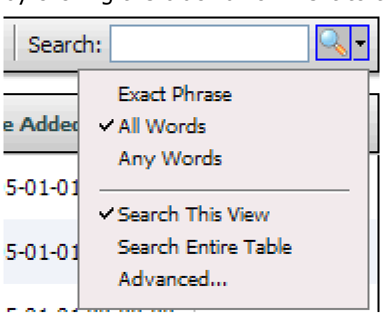
    This shows the total number of records in the view.

4.3 Searching Records

To search, you must be **viewing records (Section 4.2)** in a particular table in the **control panel (Section 3)**.

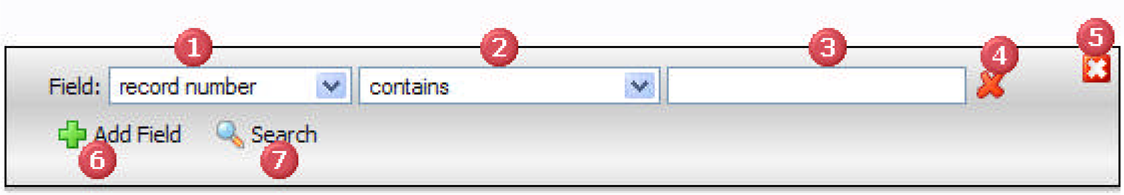
Standard Search

The standard search appears at the top right hand side of the data grid when viewing records. To search, enter your search terms in the search box and click the magnifying glass. You can control the type of search that is performed by clicking the black arrow next to the magnifying glass.



Advanced Search

The advanced search feature allows you to expand your search. You can limit search terms to certain fields, and specify different operators to control your results. To perform an advanced search, click the black arrow to the right of the magnifying glass (shown above), and select **Advanced...**



1. **Field Selector**
   This field is used to select the field you want to base your search on

2. **Operator**
   This field is used to determine how to match your search terms to this field. Options are:
   - **contains**
   - **does not contain**
   - **equals**
   - **does not equal**
   - **is greater than**
   - **is less than**
   - **is greater than or equal to**
   - **is less than or equal to**

3. **Search Text**
   This is where you enter your search terms.

4. **Remove Field**
   This button is used to remove fields from the search that were added using the **Add Field** button

5. **Close Advanced Search**
   This button will close the advanced search box

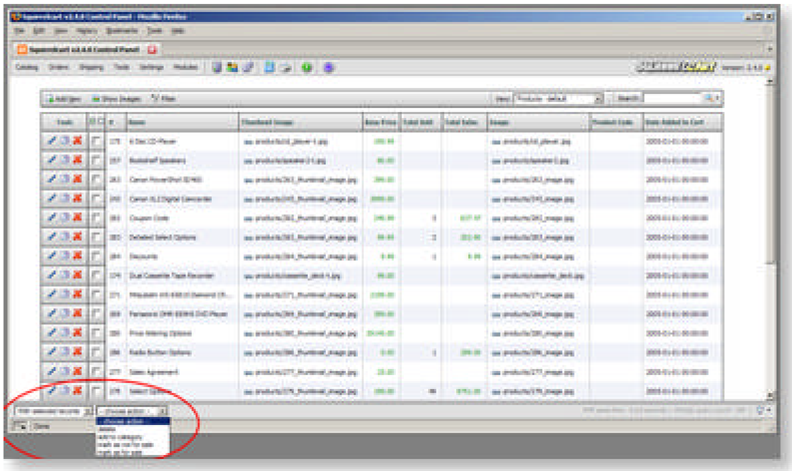
6. **Add Field**
   This button will add another search criteria row, so that you can search for terms on additional fields

7. **Search**
   This button will submit the search

4.4 Record Actions

Overview

Record Actions appear when viewing certain tables in the control panel, and allow you to perform actions on multiple records at once. The fields to perform record actions can be seen in the image below, in the bottom left corner of Squirrelcart's status bar.



The actions you can perform will vary based on the table you are viewing, and may take several minutes to complete if you attempt them on a large number of records.

Performing actions on selected records

1. Select at least one record in the table, using the checkbox that appears in the selection column.

2. Set the first record action field to "With selected records" (default)

3. Change the next field to choose the action you wish to perform

4. Follow the instructions that appear on screen

Performing actions on all records in a view

Squirrelcart allows you to perform actions on all records in a view, across multiple pages. This includes all records that are accessible at the time. For example, if the view you have open was generated by searching for records, only those records that matched the search criteria are considered to be part of the view, and only those records will be affected by any actions you perform.

1. Set the first record action field to "With all records" (default)

2. Change the next field to choose the action you wish to perform

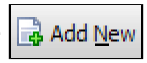
3. Follow the instructions that appear on screen

4.5 Adding Records

1. **View a Table**

   To add a record, you must be viewing a table. The **Viewing Records (Section 4.2)** topic explains this in detail.

2. **Click Add New**

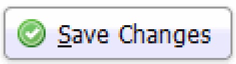
   While viewing records in the table you want to work with, click the 

 link. You will then see a blank form.

3. **Populate form fields**

   Fill out the form fields. If you need help with a certain field, position your mouse over it's name. You will see a popup window with an explanation of what the field controls, and how to populate it.

4. **Save Changes**

   Click 

 to create your new record.

> You can also save a record by pressing the key combination ALT-S

4.6 Modifying Records

1. **View a Table**

   To modify a record, you must be viewing a table. The **Viewing Records (Section 4.2)** topic explains this in detail.

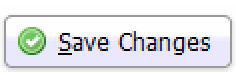
2. **Click Edit Link**

   While viewing a table, click the Edit link  next to the record you wish to modify. You can also click anywhere on the record's row.

3. **Modify form fields**

   Modify the record's form fields. If you need help with a certain field, move the mouse over it's name and a popup will appear with more information.

4. **Save Changes**

   Click 

4.7 Copying Records

1. **View a Table**

   To copy a record, you must be viewing a table. The **Viewing Records (Section 4.2)** topic explains this in detail.

2. **Click Copy Button**

   Find the row corresponding to the record you want to copy, and click the copy button in that row, in the left Tools column.

3. **Modify Fields**

   If needed, modify form fields.

4. **Click** Save Changes

4.8 Deleting Records

Deleting a Single Record

There are 2 ways to delete a single record.

With Record Open

1. Open the record you want to delete
2. Click Delete Record

With Record Closed

While viewing the table you want to work with, click the delete icon in the row that corresponds to the record you want to delete.

Deleting Multiple Records

Deleting multiple records is done via the **Record Actions feature (Section 4.4)**.

1. View the table you want to delete records from.
2. In the bottom left corner of the status bar, set the first record action field to "With selected records" (default)
3. Choose "delete" in the 2nd record action field

4.9 Image Fields

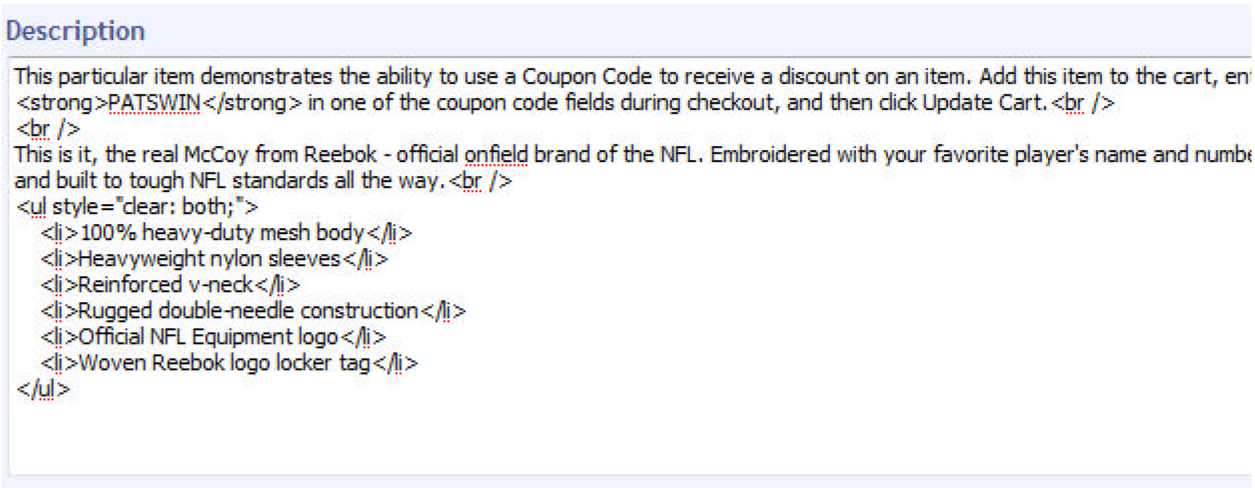
Some records contain special fields that allow you to associate images with them. Examples of these fields are the **Image, Thumbnail Image, Large Image**, and **Featured Image** fields on product records. Working with these special image fields is described in depth in the **Working With Images (Section 5.1)** section of the documentation.

4.10 Rich Text Editor

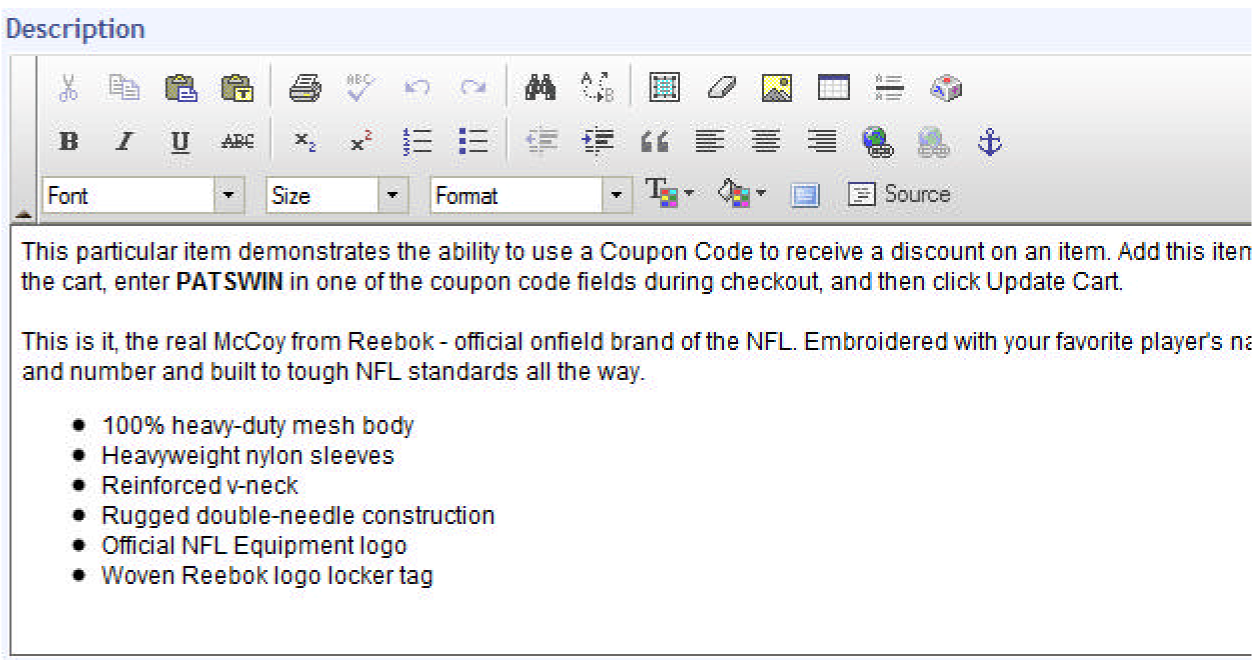
Overview

The Rich Text Editor allows you to easily add HTML to Product and Category descriptions, as well as other fields in Squirrelcart's control panel. It does not require experience with HTML, and allows you to work in a similar manner as you do in a word processor.

When this feature is enabled, it will turn your description fields from this:



to this!:

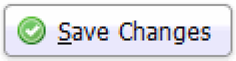


Enabling and Disabling

1. Open your **Store Settings (Section 6.1)** page

2. Locate the **Rich Text Editor** field in the **Control Panel** fieldset

3. To enable the Rich Text Editor, check the field. To disable it, uncheck it.

4. Click 

Viewing Source Code

If you wish to view the HTML code controlling what you see in the editor's design view, click the **Source** button in the editor's toolbar. To switch back, click the same button again.

PHP Code in Rich Text Editor Fields

Some fields in your control panel that make use of the rich text editor also support PHP code inside those fields. To prevent the editor from hiding that code and making it possible for you to accidentally delete it, all PHP code blocks that come built into these fields are surrounded by special brackets to make them visible in Squirrelcart. For example, this is what you will see when viewing the built in **New Products Content (Section 9.3.17.3.6)** record when the Rich Text Editor is enabled:

[php/]

If you see this text inside an editor field, it is a placeholder for content that will be shown via PHP. You should not delete these PHP code sections or you may get unexpected results. If you were to click the Source button in the editor to view the source code for the same field, you would see this:

```
[php<?php print sc_new_products_content() ?>/]
```

In this view, you can see that the [php/] text shown in design view actually contains PHP code inside it that is only visible in code view.

Further Documentation

You can find **documentation for using CKEditor (http://docs.fckeditor.net/FCKeditor_2.x/Users_Guide)** on their website.

4.11 Exporting Data

Overview

Squirrelcart supports exporting data **from any table (Section 4.2)** in the control panel, in several formats

Requirements

- PHP 5.1.0 or newer
- XLS and XLSX formats require PHP 5.2.0 or newer

Export File Formats

CSV - Comma Separated Values

This format is recommended. CSV files can be opened by all versions of Microsoft Excel and other spreadsheet applications. Performance when exporting to a CSV file is much better especially when exporting a large number of rows.

XLS - Microsoft Excel format, prior to 2007

This format works in all versions of MS Excel and has the most backwards compatibility with older versions of Excel.

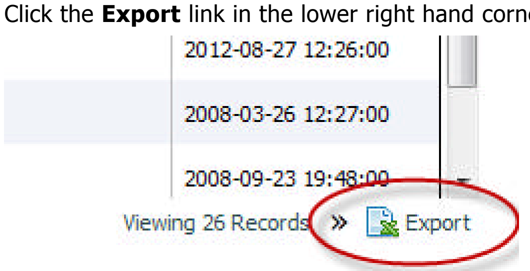
XLSX - Microsoft Excel format from 2007 onward

This is the default MS Excel format for Excel 2007 and newer.

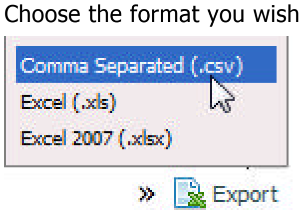
How to Export Data

1. **Open the table (Section 4.2)** or view you wish to export data from

2. Click the **Export** link in the lower right hand corner below the table:



3. Choose the format you wish to export to from the menu:



4. Save the file when prompted

Performance

Squirrelcart will grab records in groups of 1000 by default. The **Export Limit** setting found in the Control Panel fieldset on the **Store Settings (Section 6.1)** page controls this limit. Inceasing this number may make exports faster. However, the larger the number, the more memory it will take to create the export.

The CSV format streams data directly to your browser and is the best format to choose from a performance perspective. The XLS and XLSX formats are generated using a free library called PHPExcel. This library must open the entire spreadsheet in memory before it is sent to your browser. This may result in slower performance for large downloads. For very large downloads, the XLS and XLSX formats may fail to export completely if it requires more memory than your PHP server is configured to allow via it's memory_limit setting.

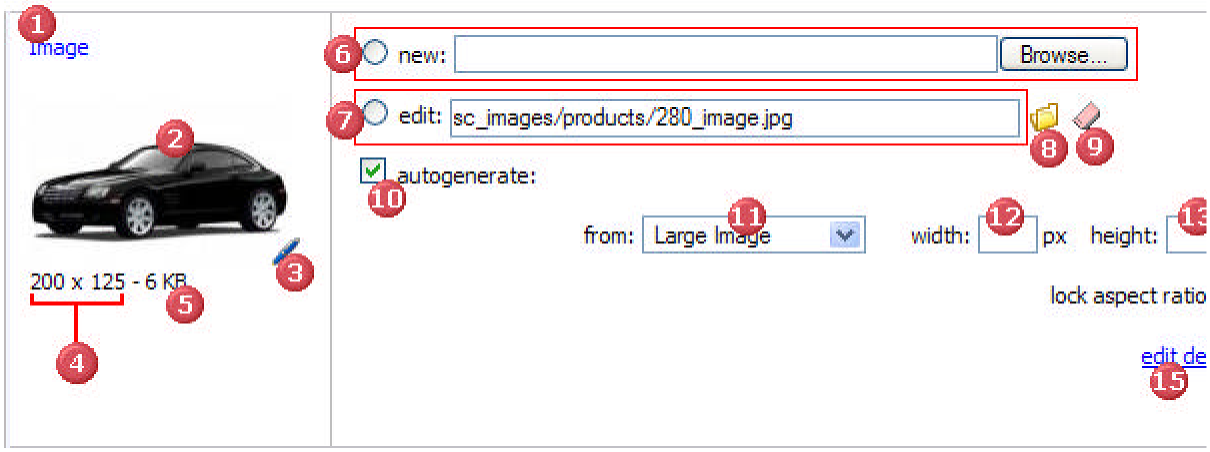
5 Working With Images

5.1 Image Field Components

Image fields appear on certain records, and allow you to associated an image file with a particular field. Some common records that contain image fields are Products and Categories. Squirrelcart supports all image types commonly used on the internet:

- gif
- jpg
- png

Please note that some components of image fields require *GD* v1.6.2 or newer, and will not be present if GD is not available. We will note which components require GD below.



1. Name of Field

2. Image

If the image is larger than this area, it will be resized to fit for display only. If *GD* is available, the resized image will look smoother.

3. Edit Link

Clicking this link will open the **image editor (Section 5.8.1)**

4. Dimensions

Actual dimensions of image in pixels. The first number is the width, and the second number is the height.

5. Filesize

6. New

This is used to upload a new image for this field

7. Edit

This is used to specify an existing image on your server, assigning it to the field. If an image has already been assigned to this field, it's path will appear here.

8. **Image Selector**
   This link will open the image selector to choose an image from your server

9. **Erase**
   This link will erase the image already listed in the edit field.

10. **Autogenerate [DEPRECATED]**
    This is used to autogenerate an image for this field from an image already specified on another field (or on this same field).

    > This feature will be removed in a future version. We recommend you use the Auto Size feature when possible.

    This field and the others below it (11 through 15) are not present when the recommended Auto Size feature is enabled. Items 11 through 15 are discussed in the Autogenerating Images section.

5.2 Uploading Images

You can upload images using Squirrelcart, or using *FTP*. This page explains both methods.

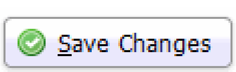
Uploading Images Using Squirrelcart

1. **Open a record with an image field**
   You will need to open a record, and navigate to an image field that you want to assign an image to. Refer to the **Working With Records ({B6B0C025-72B9-454C-8699-ABE11243A6BE})** section for guidance.

2. **Click the Browse Button**

3. **Locate the image**
   You should now have a dialog box asking you to select an image file. Locate the image that you want to upload on your computer, and select it. The field to the left of the browse button should populate with the path to the image file you just selected.

4. **Save Changes**

   Click 

   at the bottom of the page

5. **Confirm upload**

You should see something similar to this:

You will then be returned to the table that you were working on.

If you receive an error when attempting to upload, it is most likely due to a problem with permissions. Check the installation section to make sure you assigned permissions properly.

Uploading Images Using FTP

We recommend that you upload your images using Squirrelcart, as described above. You can, however, upload images in bulk via *FTP* if you wish.

1. **Determine which folder to upload to**

   You will need to upload your images to the correct folder within your images folder. This is the same **sc_images** folder that you uploaded during the installation. See below to determine which folder you will be using:

```
For products              --> sc_images/products
For categories            --> sc_images/categories
For options               --> sc_images/options
For option choices        --> sc_images/option_choices
```

2. **Upload your images**

   This varies depending on your FTP client. See your FTP Client's documentation for instructions.

3. **Change permissions (optional)**

   If you want to be able to modify (or overwrite) these images with Squirrelcart in the future, you will need to *CHMOD* each image file to 777. See the **Setting File Permissions (Section 2.9.2)** topic as a guide.

4. **Assign images to records**

After uploading your images, you will need to assign them to records. To do this, see the **Assigning Images to Record Field (Section 5.3)**s topic.

5.3 Assigning Images to Records

In order for a record to make use of an image, you must assign that image to it, using an image field. For example, if you have a product created and want a thumbnail image to be associated with it, you will need to assign an image to that product's record in the control panel. To assign an image, you must have a record open in **edit mode (Section 4.6)**, and it must contain an **image field (Section 5.1)**.

There are 4 ways to assign an image to a record.

Uploading a new image

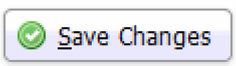
When you upload a new image using Squirrelcart, it automatically assigns that image to the record you are working on. For instructions on uploading images using Squirrelcart, see the topic titled **Uploading Image (Section 5.2)**s in this section.

Manually entering a path to an image already on your server

1. **Enter path to the image file**

   If you know the path to an existing image that you want to assign, you can type it in the **edit (Section 5.1)** field. Be sure to make the path relative to your storefront. For example, if your images folder is in your *web root*, and you have a product image named "cd_player.jpg", you would enter the path like this:

   sc_images/products/cd_player.jpg

2. **Click** 

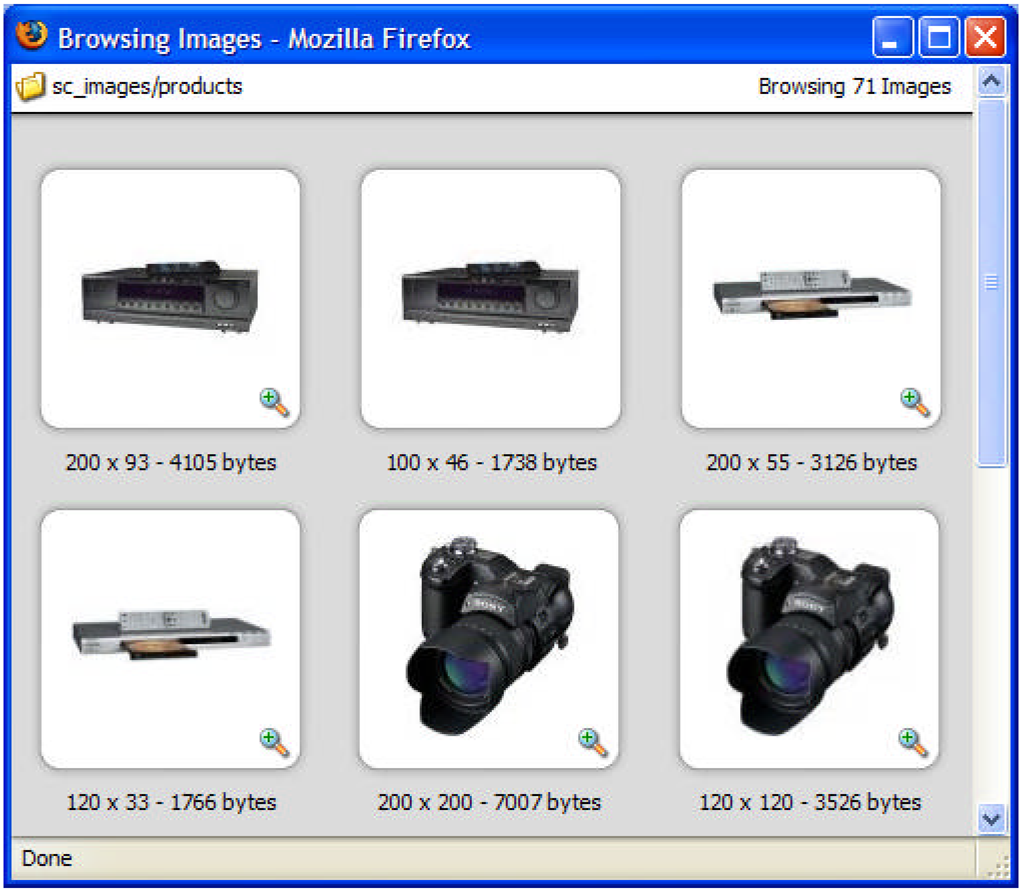
Assigning an image already on your Server

1. **Click the image selector link**

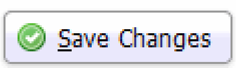
   Click the **image selector link (Section 5.1)** , which is to the right of the **Edit** field.

2. **Choose an image**

   You should see a popup window similar to this:



Click on the image you want to assign. The window will close, and the path to the image will automatically be entered in the corresponding edit field.

3. Click 

Auto generating an image from another image

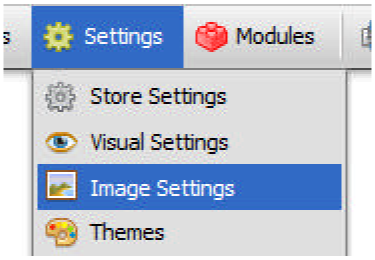
This option requires the *GD* extension, version 1.6.2 or newer. For instructions on Autogenerating images, see the Auto Generating Images topic in this section.

Please note: this feature is deprecated and will be removed in the future. We recommend using the **Auto Size feature (Section 5.5)** instead.

5.4 Image Settings

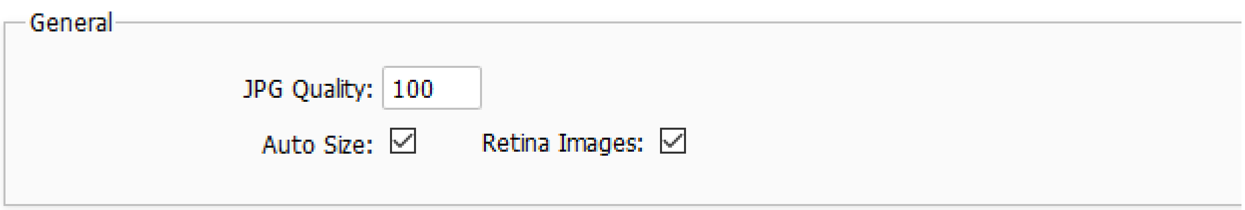
Overview

Settings controlling your images can be found in your control panel under **Settings > Image Settings**



The settings are explained below.

General



JPG Quality

This controls the quality of images generated using the *GD* library. Lower numbers result in smaller files. The recommended setting for this is 100.

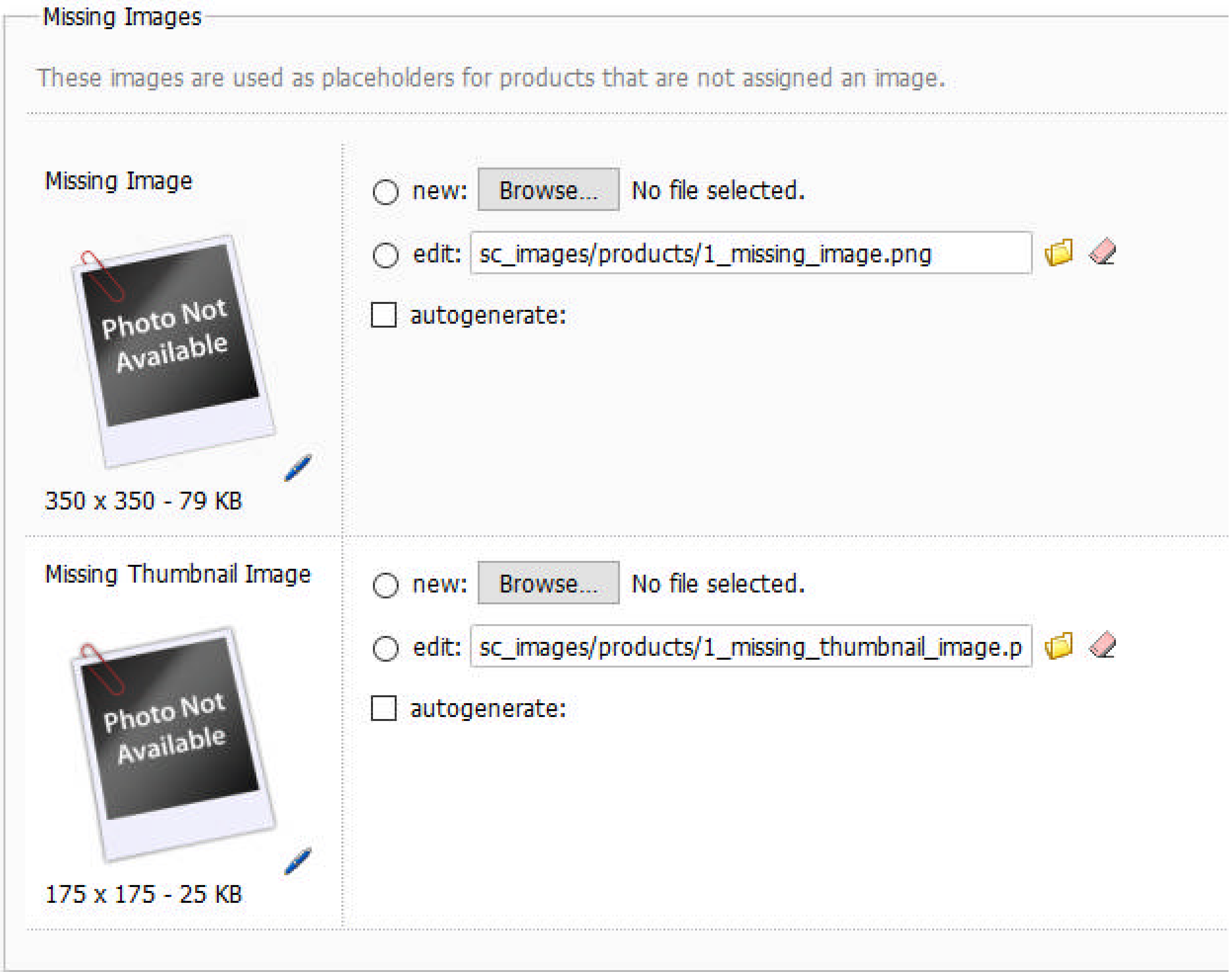
Auto Size

This turns on the Auto Size feature which will automatically create your thumbnail and other images using the largest image available. This feature is discussed in detail in the **Auto Size topic (Section 5.5)** in this section. When this field is checked, additional fieldsets will appear on the Image Settings page. These are all discussed in the **Auto Size topic (Section 5.5)**.

Retina Images

This feature is used to automatically generate images for screens that have high pixel density displays such as smart phones and tablets. This feature is discussed in **its own topic (Section 5.6)**.

Missing Images



The 2 image fields in this section are used when showing products and other elements that should have an image assigned but the image is missing.

5.5 Auto Size Feature

Overview

When products, categories, and other records are shown in your store, different sized images are used depending on where they are being displayed.

For example, when viewing products on a category page, small thumbnail images are used. When viewing a product on its own page, a bigger image is shown. When you click on that image to get a better view an even larger image is shown.

The Auto Size feature can be used to automatically generate multiple sized images from a large source image. This also can make your store look more professional by keeping your images all at a consistent size.

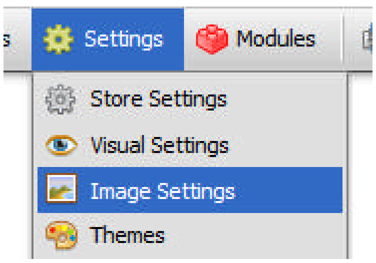
Requirements

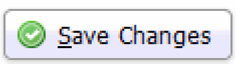
This requires the *GD* PHP extension which is extremely common and available on most PHP servers.

Enabling and Configuring

How to turn on this feature

1. Open your control panel
2. Click the **Settings > Image Settings** menu link

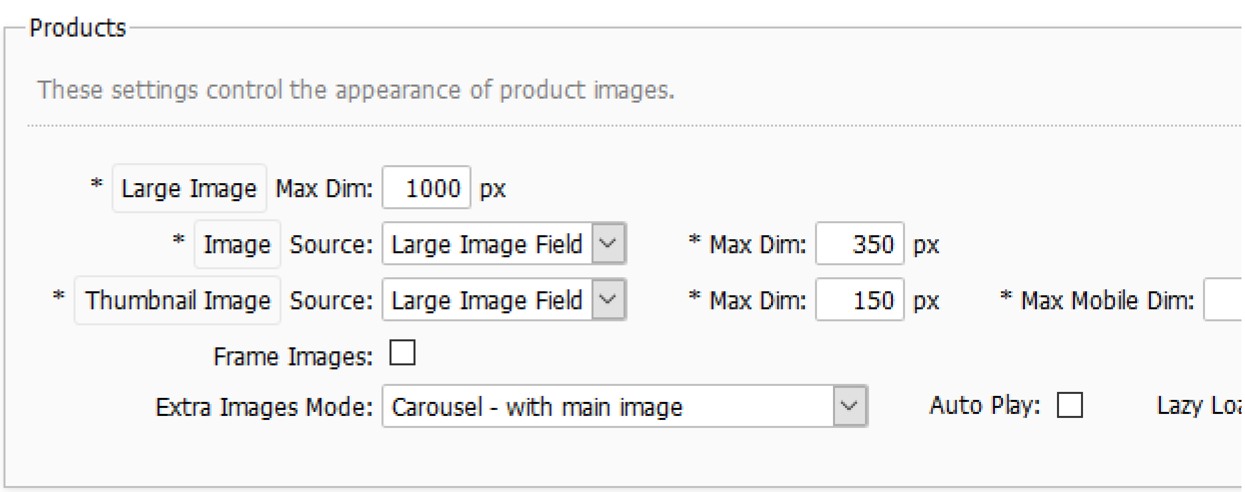


3. Check the **Auto Size** checkbox at the top of the page.
4. Click 

Configuration

With the **Auto Size** feature turned on, you'll see additional fieldsets on the Image Settings page (mentioned above). Each of these corresponds to different records that have images, such as products, categories, etc...

Settings for images are identical regardless of whether they are for a product, category, or other record. With that in mind, we will only cover the settings for the first fieldset "Products" below.



Product records in your control panel have image fields named **Large Image, Image,** and **Thumbnail Image.** In the above image notice how the first three rows start with these same values. The outlines around these words are to indicate that the settings that follow are for those particular image fields on your product records.

We will go over all of the settings and explain them below.

Large Image

Large Image Max Dim

This setting controls the size of your largest image. For products, the Large Image is seen when you click on the regular image while on a product's page. If you have this set to the recommend size of 1000px and upload a larger image, it will be reduced in size so that the largest side of the image is 1000px.

Image

Image Source

This setting controls which image will be used as a source for the regular product image. This can be set to any other image field on the product record, or to **Separate Field**.

When set to **Separate Field**, you'll be able to assign an image for the regular **Image** field on your product records.

When not set to **Separate Field,** the regular **Image** field on your product records will be hidden.

Max Dim

This works just like the **Large Image Max Dim** field mentioned above, but for the regular **Image.**

Thumbnail Image

Thumbnail Image Source

This works just like the **Image Source** field mentioned above, but for the Thumbnail Image.

Max Dim

This works just like the **Large Image Max Dim** field mentioned above, but for the Thumbnail Image.

Max Mobile Dim

This works just like the **Max Dim** field, but for mobile devices.

Other fields

For help with other fields mouse over the field names.

5.6 Retina Images (high pixel density)

Overview

Many smart phones, tablets, and other devices now offer screens with high pixel density displays. This makes things look sharper and more defined, and is achieved by having more pixels per square inch. Some screens have 2x the pixels, some 3x, and some even more.

When viewing regular images on these screens they can look blurry because the browser must enlarge them so they appear at the correct size.

Squirrelcart's retina image feature automatically serves larger images to devices having retina displays so that they appear sharp.

How it Works

Suppose a visitor loads a page that displays an image named "example.jpg" that is 300px X 600px in size:

```
<img src="sc_images/products/example.jpg" width="300" height="600" alt="" />
```

The request for the image file is directed (via .htaccess directives) to a PHP script. That script detects the capability of the device's screen to determine the pixel density. If the device has twice as many pixels as a standard display, the script will automatically serve a different image file to the device that is twice as large and has a filename ending in @2x to indicate this, such as **example@2x.jpg .** If the screen has three times as many pixels, an image 3 times larger is served with a filename ending in @3x.

These larger images are automatically created for most records in Squirrelcart when the Retina Image feature is enabled, via the **Auto Size feature (Section 5.5)**.

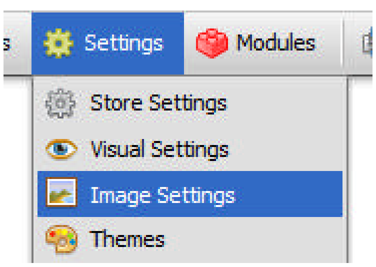
Requirements

- *GD* PHP extension
- Your web server must support mod_rewrite and .htaccess files

Enabling Retina Images

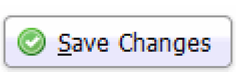
1. Open your control panel

2. Click the **Settings > Image Settings** menu link



3. Check the **Auto Size** checkbox at the top of the page if it is not already checked.

4. Check the **Retina Image** checkbox.

5. Click 

6. Connect to your server using an FTP client and navigate to the folder containing your Squirrelcart folder. For many users this is also your web root folder (public_html, www, htdocs, etc...)

7. Look for a file named "**.htaccess" .** If it does not exist you'll need to create it using a text editor. Add the following lines to that file and upload the changes to your server:

```
# Handle hi-res retina images
RewriteCond %{HTTP:Cookie} devicePixelRatio [NC]
RewriteRule \.(?:jpe?g|gif|png|bmp)$ squirrelcart/lib/retina-
images/retinaimages.php [NC,L]
```

8. These lines will redirect all image file requests to the retina image script. Reload your store page in your browser to make sure the lines you added did not cause any issues. Modifying htaccess files incorrectly can sometimes trigger fatal errors which would be very noticeable. If you notice any errors undo the changes.

Testing the retina images script

Because this feature is designed to be transparent to users it can be a little tricky to tell if it's working properly. Here's an easy way to confirm that the script mentioned above is doing its job. For this test you will need to devices, one with a standard display and one with a high pixel density display (smartphone, tablet, etc...).

1. Right-click and save this image to your computer and name it **test.jpg**

Example Image 1

2. Right-click and save this image to your computer and name it **test@2x.jpg**

Example Image 2

3. Using your FTP client upload both images to folder that contains the htaccess file you modified in step 7 above.

4. Open a browser on a device having a regular display and type the URL location corresponding to the first

example image. If your store is in the root of your website, the URL would be:
http://www.example.com/test.jpg

Because you are using a regular display you should see the **Example Image 1** load.

5. Open a browser on a device having a high pixel density display and type the same URL. Because you are using a high pixel density display you should see the **Example Image 2** load instead. If this happens the script is working properly.

Adding Retina Images Manually

The Retina Image feature will automatically generate the necessary @2x and @3x Image files for most images in Squirrelcart such as products, categories, options, etc....

It will not automatically generate these larger images for theme images, or for any image Squirrelcart is not aware of.

For example, if you'd like to serve larger versions of your logo to devices with high pixel density screens you can do so, but will need to create larger versions of the image and add the @2x and @3x suffix. The retina image script will work on these images as well.

For example, if your store logo image is 80px X 40px and is located here:
http://www.example.com/squirrelcart/themes/my-theme/images/store_logo.png

1. Create a version that is twice the size (160px X 80px), put it in the same location, and name it **store_logo@2x.png .**

2. Create a version that is three times the size (240px X 120px), put it in the same location, and name it **store_logo@3x.png .**

5.7 Auto Generating Images [DEPRECATED]

5.7.1 Components Overview

Overview

This feature can be used to auto generate an image from any other image field on the same record.

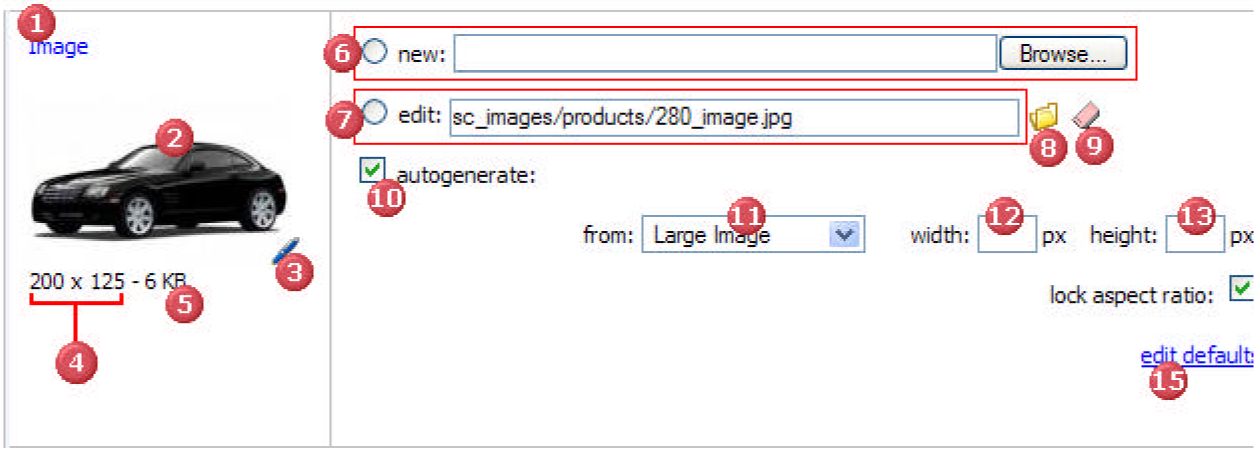
> This feature is deprecated as of version 5.0. We recommend using the new **Auto Size feature (Section 5.5)** instead.

Details

In Squirrelcart, it is possible to automatically generate different sized images for a record's image fields, based on an image already assigned to another image field. This saves time that would otherwise be spent resizing images in a graphics program. This feature requires *GD* v1.6.2 or higher. If you do not see the components 10 through 15 as described below, then your server does not meet this requirement.

Auto generating of images is done via image fields on database records. Below is a screenshot of the Thumbnail Image field from the Products table, for reference. Items 1 through 9 are discussed in the **Image Field**

Components (Section 5.1) topic.



10. Autogenerate Trigger

Checking this field initiates the autogeneration of this image, which is completed when you click **Save Changes**. After checking this field, the components 11 through 15 will appear.

11. From

This field controls which image the current image field's image will be generated from.

12. Width

The width of the new image in pixels

13. Height

The height of the new image in pixels

14. Lock Aspect Ratio

This will constrain the proportions of the autogenerated image, so that they match the source image. When enabled, you can only enter 1 dimension, and the other one will be calculated automatically.

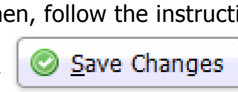
15. Edit Defaults

This link will open the default settings for autogenerating this particular image field.

5.7.2 Auto Generating Images - Walkthrough

In this section, we will explain how to use autogenerating, using the most common scenario. We will describe how to upload a single product image, and from that image we will autogenerate the other images for that product. Because image quality decreases when you enlarge an image, we recommend uploading the largest image, and auto generating the other smaller images from that image. For this reason, we will be uploading an image for the "Large Image" field, and will autogenerate the "Image", "Featured Image", and "Thumbnail Image" images from the image uploaded with the "Large Image" field.

1. Upload an Image for the **Large Image** Field

   Find an image you can test with, that is between 250 and 500 pixels wide. Then, follow the instructions for **uploading an image using Squirrelcart (Section 5.2)**, but DO NOT click 

. Instead, continue below.

2. Set the auto generate field components

    a. Check **autogenerate** field

    Check the **autogenerate** field within the **Image** image field, which is directly below the **Large Image** image field. When you check this field, the autogenerate components will appear directly below.

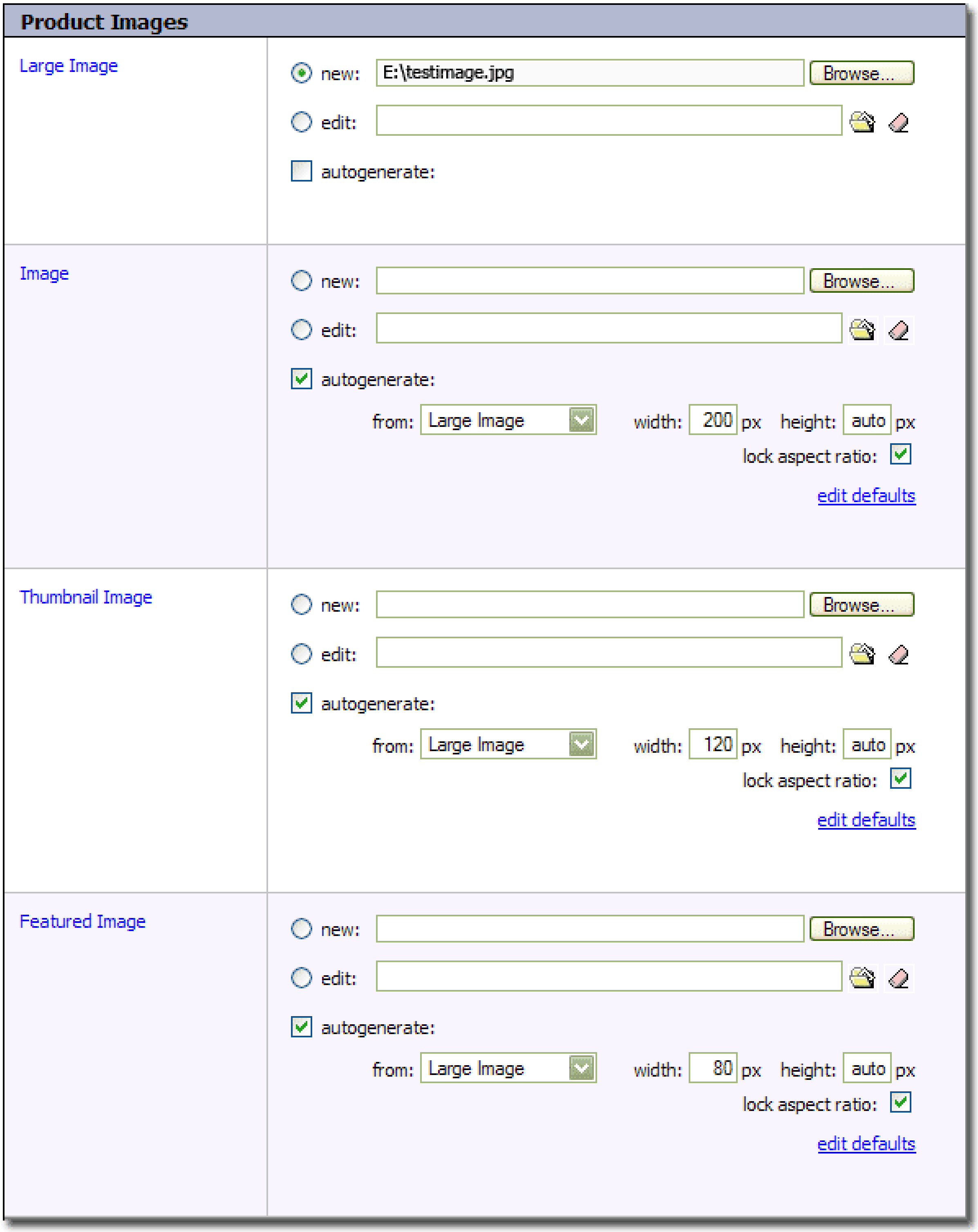
    b. Set the **from** field

    We will be autogenerating this image from the image that we are going to upload in the **Large Image** field. Set the **from** field to **Large Image**.

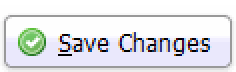
    c. Set the **width** field

    Click in the width field, and you should notice that the text **auto** appears in the height field. This is because **lock aspect ratio** is checked. For this example, enter 200 for the width.

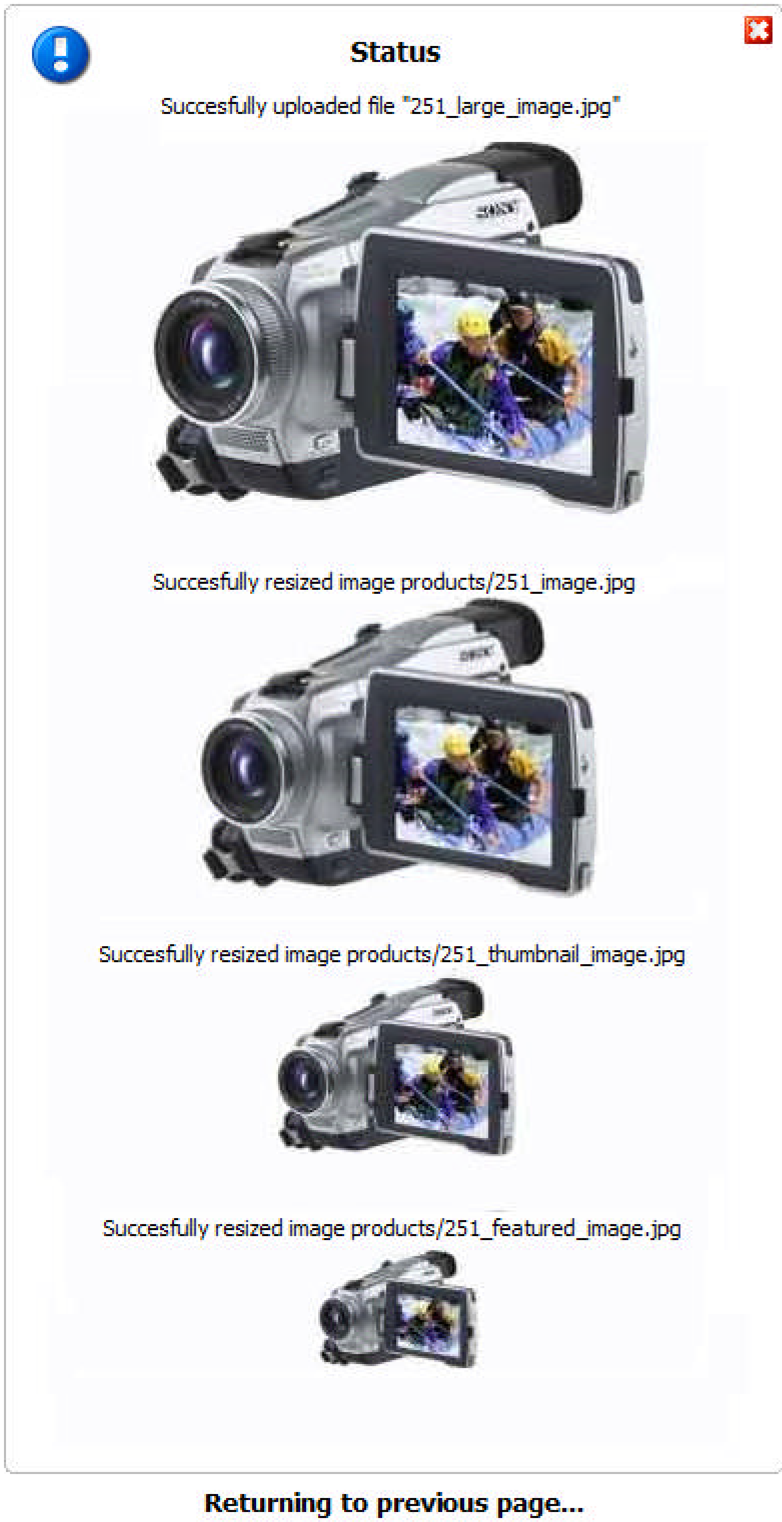
Repeat steps a, b and c above, for the **Thumbnail Image** and **Featured Image** fields. Use 120 and 80 for the widths, respectively. When done, your **Product Images** section should look like this:



3. Save Changes

Click 

to upload the **Large Image**, and autogenerate the others. You should see something similar to this:



Important Notes:

- In our example, we simultaneously uploaded an image, and autogenerated 3 others. You do not have to do this all in one step. At any time, you can autogenerate any image field's image from an image assigned to another image field on that record. Uploading at the same time is a convenience, but not a requirement.

- The quality setting for jpg images can be altered using the JPG Quality field on the **Visual Settings (Section 6.2)** form.

5.7.3 Auto Generating Images - Default Settings

As you get accustomed to autogenerating your images, you may find that you want to always autogenerate certain images. This can also be useful in ensuring that all your images for a ceratin image field have the same dimensions. In order to set the default autogenerating settings for an image field, navigate to that field, and click the **edit defaults** link, below the **autogenerate** field. You will see a popup window that looks like this:

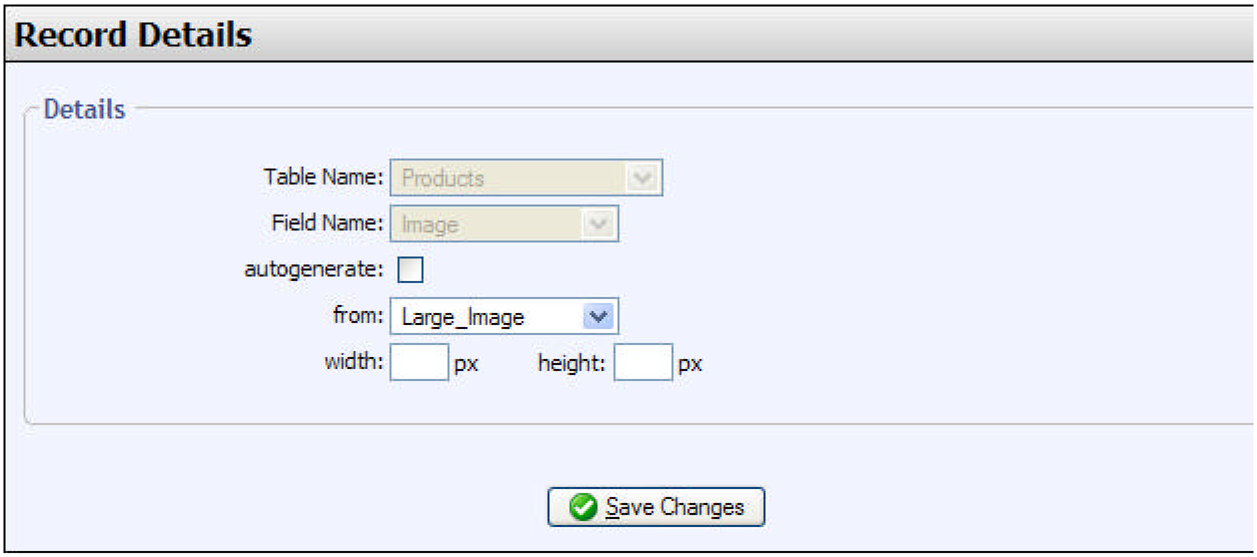


Table Name

The table that the image field is contained in. This field is read only.

Field Name

The field that the settings are for. This field is read only.

autogenerate

This field controls the default state of the **autogenerate** field for the corresponding image field. This setting only works on new records. For example, if this field is checked, and you create a new record, the "autogenerate" field will be automatically checked. After you submit the record, if you were to modify it, the field would not be checked

from

This field controls the default setting for the **from** field on the corresponding image field

width

This field controls the default setting for the **width** field on the corresponding image field. It is best to only set the width OR the height, not both.

height

This field controls the default setting for the **height** field on the corresponding image field. It is best to only set the width OR the height, not both.

5.8 Image Editing

5.8.1 Image Editing - Overview

Squirrelcart includes an image editor, to perform simple image manipulations. This will save you the time of working with a graphics program when you just need to perform a simple operation. This feature requires GD v1.6.2 or newer.

Before you can manipulate an image, you must put it in edit mode. You can do this in 2 ways:

Editing an image directly from it's record's table

1. **View records**

   View the records (Section 4.2) that contain the images you wish to manipulate.

2. **Locate image**

   Navigate through the records, until you see the image (or it's path) listed in the table.

3. **Click on the image**

   If the image itself appears, click it to launch the image editor. If the path to the image appears, click the icon to the left of it to launch the editor.

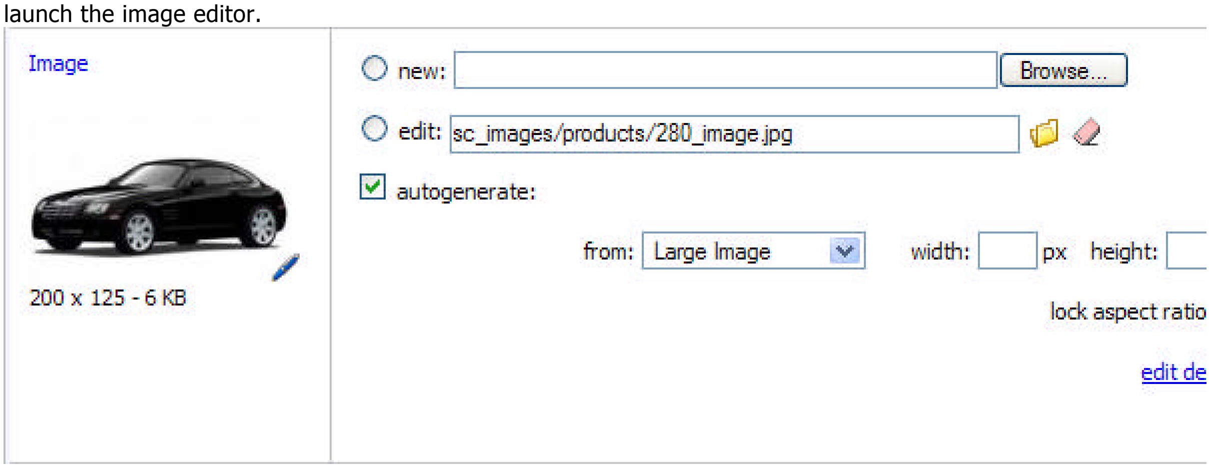
Editing an image directly from it's record

1. **Edit the record**

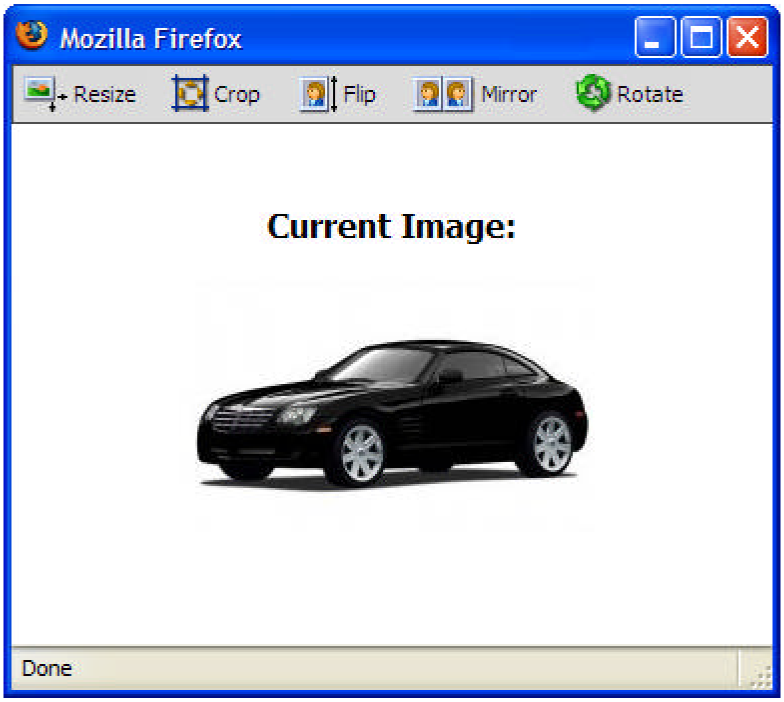
   Put the record that contains the image you wish to manipulate into **edit mode (Section 4.6)**.

2. **Click the image edit link**

   The image should appear on the left side of it's corresponding image field. Click the image or the pen icon to launch the image editor.



Once you have launched the image editor, it will look like this:



5.8.2 Resize

1. **Open Image**
   To resize an image, open it in the **image editor ({48498FE3-566C-4EE7-B89F-87CF0E616BA6})**.

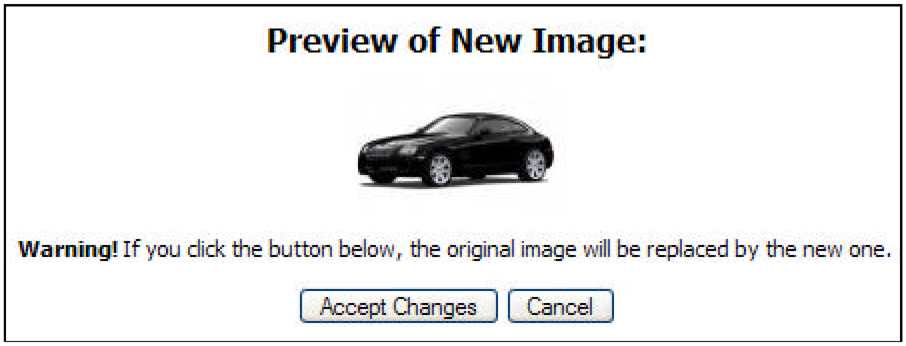
2. **Click the resize icon**
   The resize icon looks like this: 

3. **Enter a new width and height**
   If you wish to maintain the image's proportions, enter only 1 dimension. The other dimension will be automatically calculated when you submit your dimensions.

4. **Preview Changes**
   Click the 

button.

5. **Accept changes**
   A preview of the resized image will appear.



If it looks OK, click the **Accept Changes** button to save changes. If you want to try different dimensions, click the cancel button, and start over.

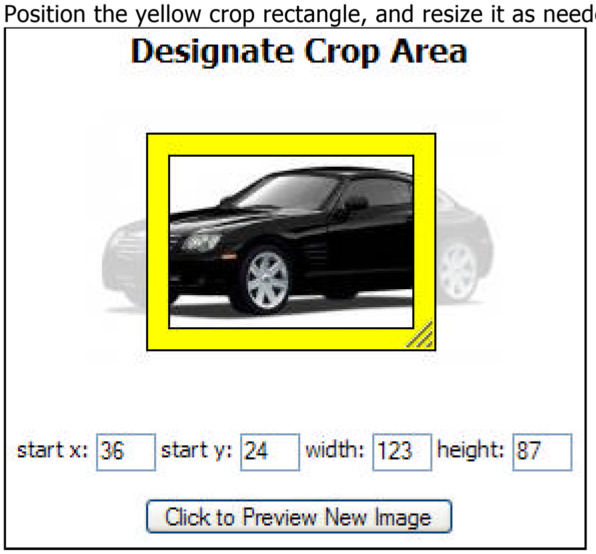
5.8.3 Crop

Crop will remove a portion of the image outside a rectangular selection.

1. **Open Image**
   To crop an image, open it in the **image editor ({48498FE3-566C-4EE7-B89F-87CF0E616BA6})**.

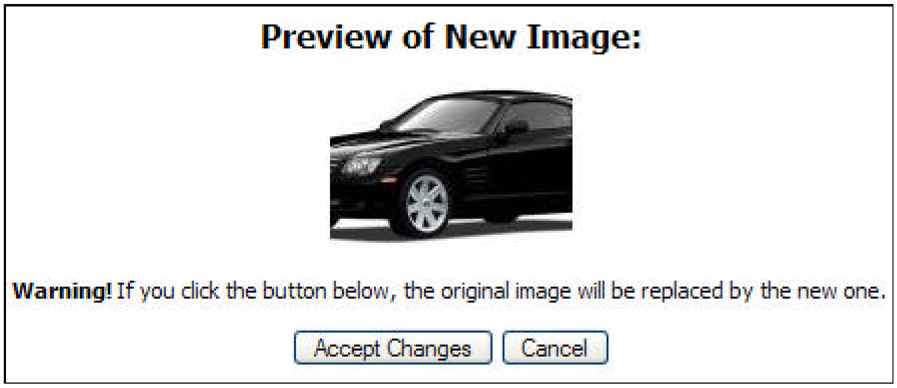
2. **Click the crop icon**
   The crop icon looks like this: 

3. **Designate Crop Area**
   Position the yellow crop rectangle, and resize it as needed using the handle in the bottom right corner.



   When done positioning the crop rectangle, click the **Click to Preview New Image** button

4. **Accept Change**
   A preview of the cropped image will appear.



If it looks OK, click **Accept Changes.** If you do not want to accept it, click **Cancel.**

5.8.4 Flip

1. **Open Image**
   To resize an image, open it in the **image editor ({48498FE3-566C-4EE7-B89F-87CF0E616BA6})**.

2. **Click the flip icon**
   The flip icon looks like this: 

3. **Accept changes**
   A preview of the flipped image will appear.

If it looks OK, click the **Accept Changes** button to save changes.

5.8.5 Mirror

Mirror flips an image on it's vertical axis.

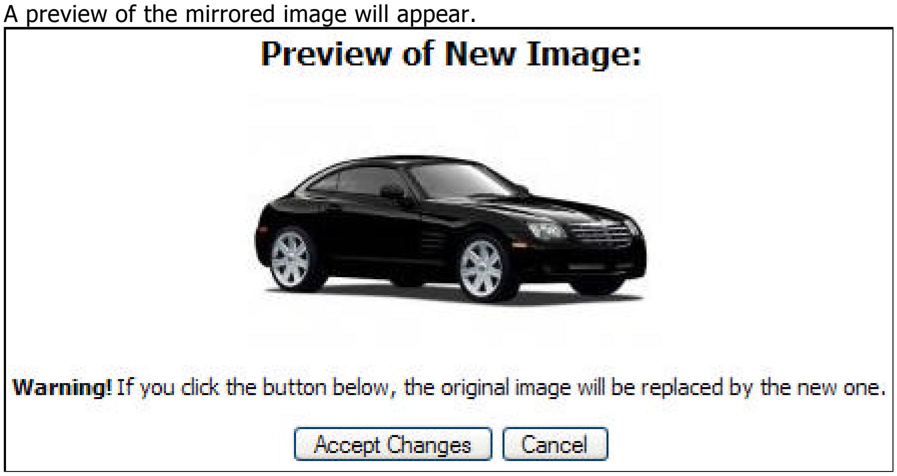
1. **Open Image**
   To mirror an image, open it in the **image editor ({48498FE3-566C-4EE7-B89F-87CF0E616BA6})**.

2. **Click the mirror icon**

The mirror icon looks like this: 

3. Accept changes

A preview of the mirrored image will appear.



If it looks OK, click **Accept Changes**. If not, click **Cancel**.

5.8.6 Rotate

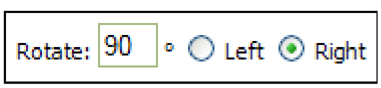
1. Open Image

To rotate an image, open it in the **image editor ({48498FE3-566C-4EE7-B89F-87CF0E616BA6})**.

2. Click the rotate icon

The rotate icon looks like this: 

3. Enter angle and direction of rotation



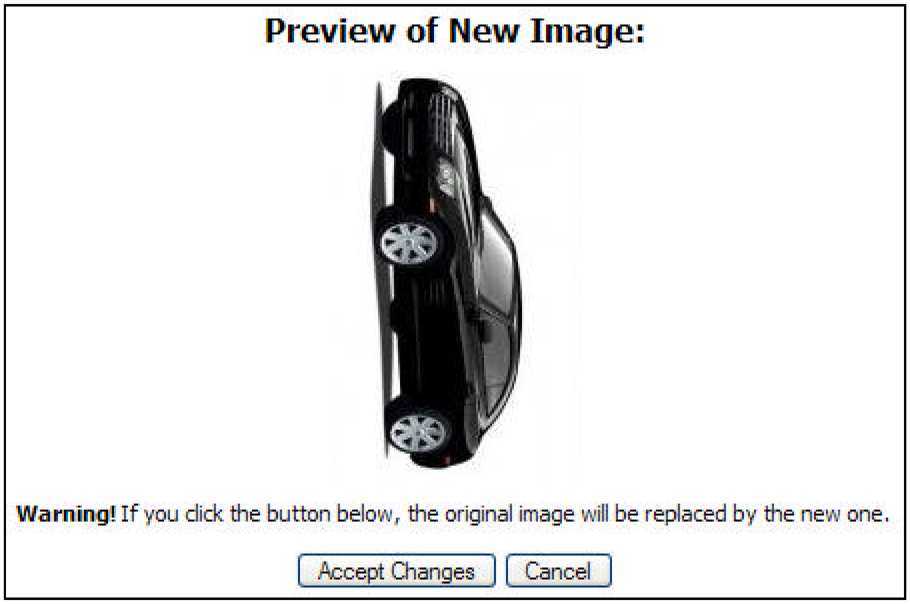
Enter an angle between 1 and 359 in the **Angle** field. Choose the direction of rotation, by clicking on the **left** or **right** radio button.

4. Preview Changes

Click the  button

5. Accept changes

A preview of the rotated image will appear.



If it looks OK, click **Accept Changes**. If not, click **Cancel**.

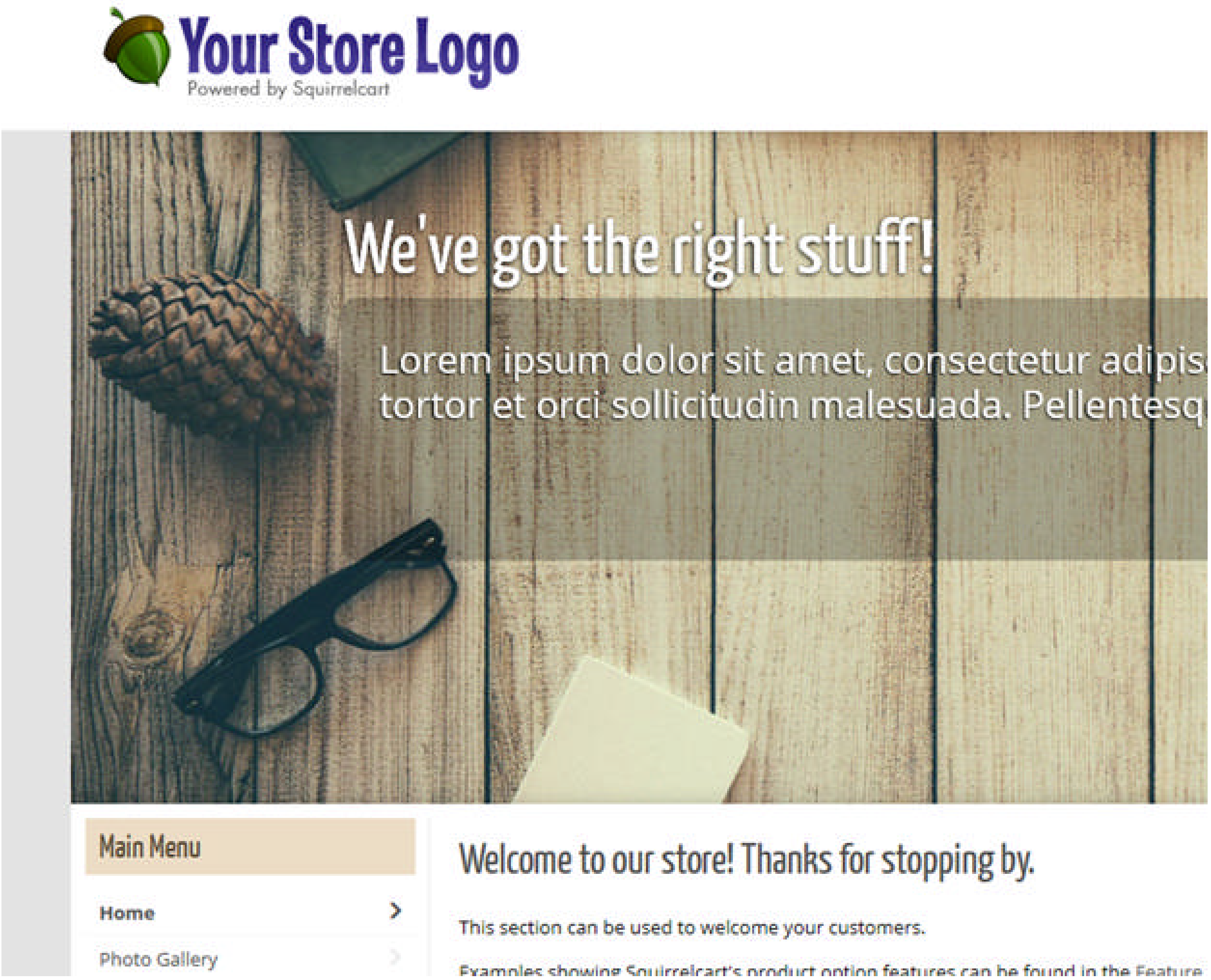
5.9 Missing Product Images

By default, if a product record is missing an image, Squirrelcart will display "Missing Images". See the **Missing Images** section of the **Store Settings (Section 6.1)** topic for more information.

5.10 Homepage Slideshow

Overview

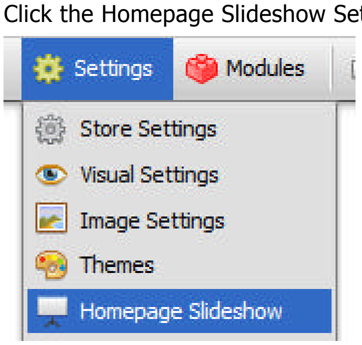
With this feature you can add a responsive (mobile-friendly) image slideshow to your store's homepage. Optionally, You can add titles, text, and links to your slides.

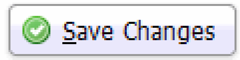


Enabling / Disabling the Slideshow

1. Enter your control panel

2. Click the Homepage Slideshow Settings link:



3. Use the **Enabled** field to turn the feature on or off, then click 

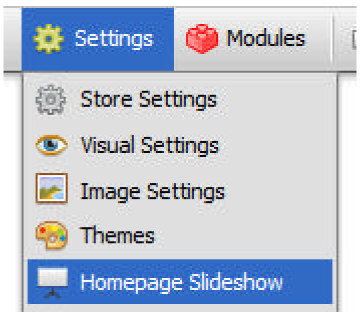
.

Working with Slides

Viewing slide records

1. Enter your control panel

2. Click the Homepage Slideshow Settings link:



3. Click the **Manage Slides** button

Creating or changing slides

1. Follow the above instructions to view your slide records.

2. If you'd like to create a new slide, click the **Add New** button. If you would like to edit an existing slide, click anywhere on the slide's row to open it in edit mode.

3. Enter a **Name.** This field is for your reference only and is not visible in the store.

4. Enter an optional **Title.** When specified, the title will appear on top of the slide image.

5. If you would like the slide to link to a page, set the **Link** and **Link Text** fields accordingly. The values shown for the **Link** field correspond to links created under the **Settings > Themes**, **Links** page. See the **Customizing > Themes > Links** section of this documentation for more information.

6. The **Align Text** field controls the alignment of both the Title and Description

7. Unchecking the **Enabled** field can be used to temporarily disable the slide without deleting it.

8. Assign an image to the slide using the **Background Image** fieldset. Recommended dimensions are 1246px X 464px. We recommend not putting text inside the image itself as it will not be easily readable on small screens.

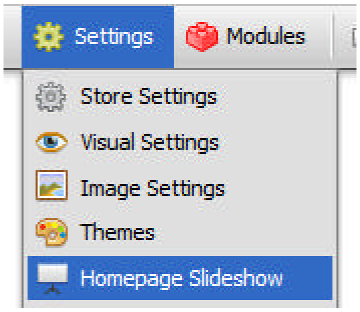
9. Enter an optional description in the **Description** field. This should be relatively short and no more than a couple

of lines.

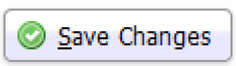
Controlling which slides appear in the slideshow

1. Enter your control panel

2. Click the Homepage Slideshow Settings link:

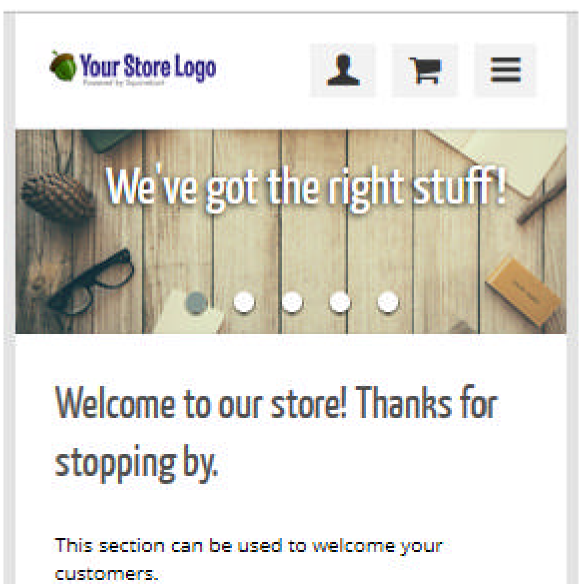


3. You can control which slides appear in the slideshow using the **Slides in This Slideshow** fieldset, by moving desired slides from the **Available Slides** field to the **Selected Slides** field. To control the order of your slides, select a slide in the **Selected Slides** field and move its position with the arrows to the right of the field.

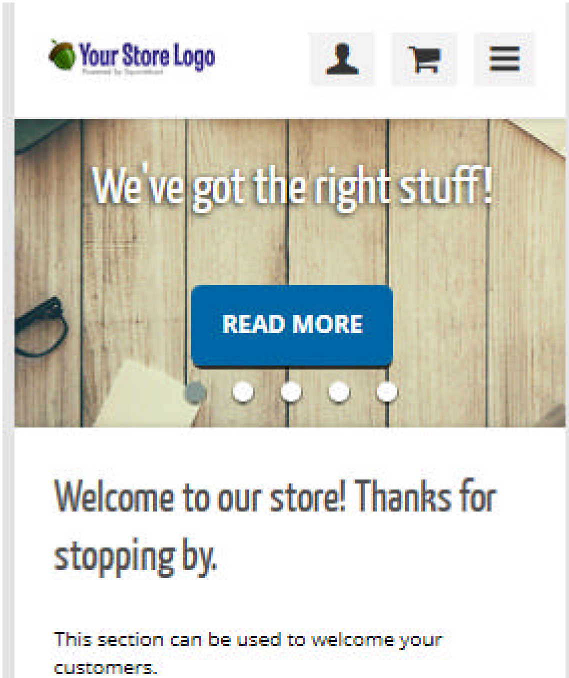
4. Click 

Responsive Design Changes

The recommended proportions for slideshow images work great on large screens. On small screens such as phones and small tablets, the slide images if left at the same proportions would look wide and short (especially if the device is in portrait orientation):



To improve the appearance of the slideshow on small screens Squirrelcart by default will crop the left and right sides of the image off to make the proportions of the image more appealing:



To disable this functionality in versions 5.6.0 and newer:

Uncheck the **Crop on Small Screens** field on your Homepage Slideshow settings page.

To disable this functionality in versions 5.5.x and earlier:

Add this CSS to your **style_custom.css.php stylesheet file (Section 9.3.14)**:

```
/* prevent cropping of slide show images */
@media screen and (max-width: 560px) {
    .slides_nocrop .slide {
        width: 100%;
    }

    .slides_nocrop .slide > img:first-child {
        margin-left: 0%;
    }

    .slides_nocrop .slide_info {
        margin-left: 5%;
    }

    #sc .slides_nocrop .slide h4 {
        margin-bottom: 0;
```

```
    }

    #sc .slides_nocrop .slide .btn,
    #sc .slides_nocrop .slide .btn:active {
        font-size: .8em;
        line-height: 1;
        padding: 8px;
    }
}
```

6 Configuration

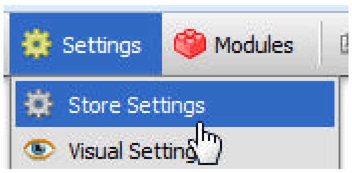
6.1 Store Settings

The Store Settings page allows you to change many different aspects of your store. This page will give you an overview of each section of the Store Settings page and it's purpose.

Opening the Store Settings Page

1. Open the **control panel (Section 3)**

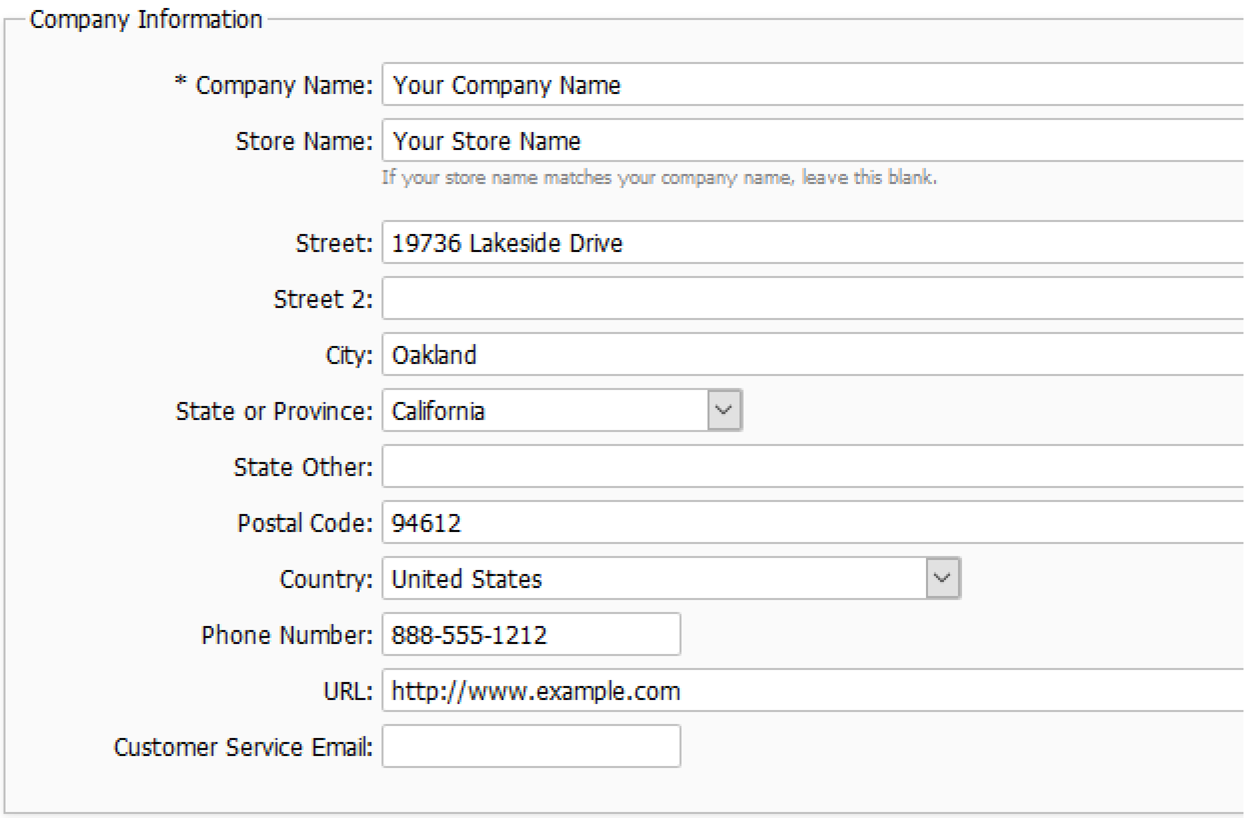
2. Click the Store Settings link in the toolbar:



Overview

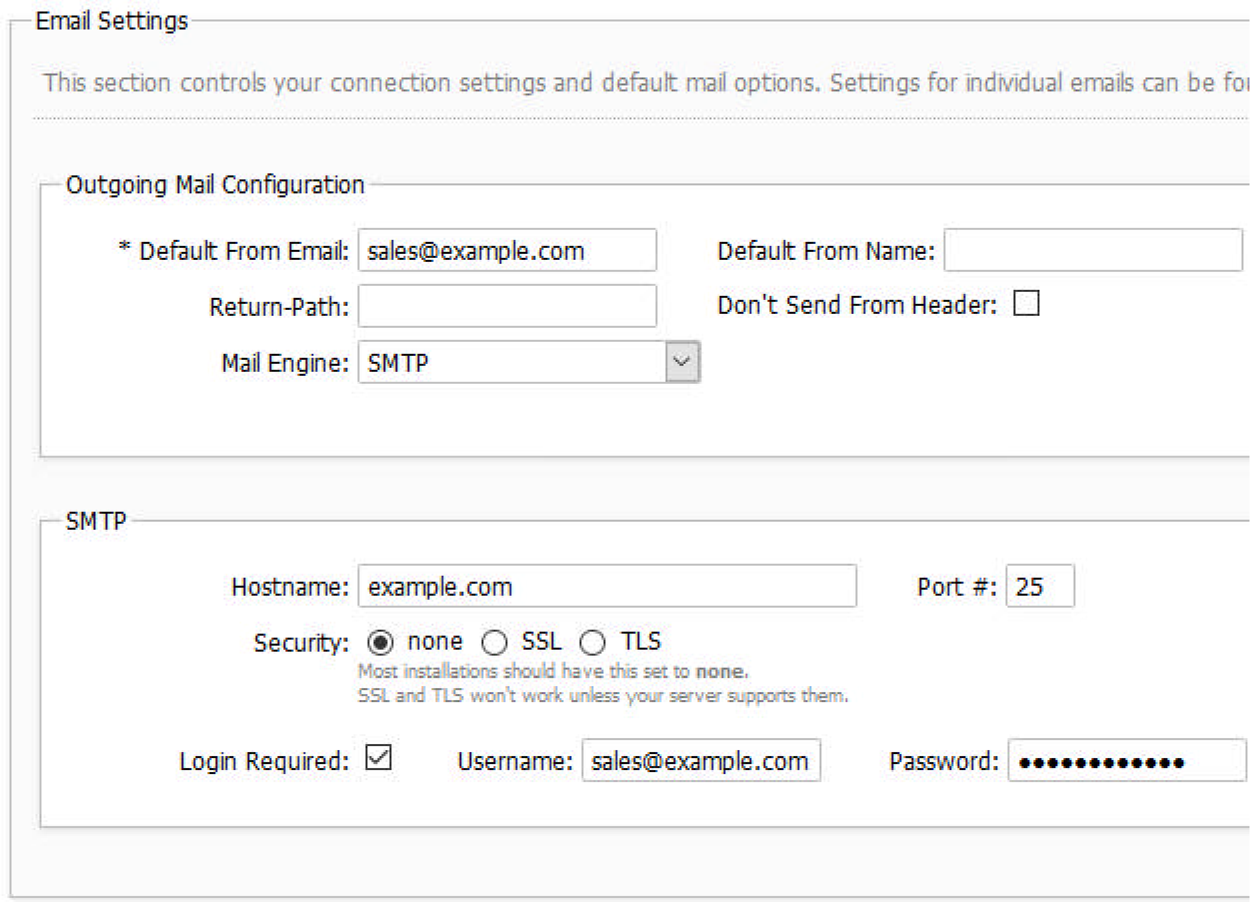
Company Information

Squirrelcart uses the information in this section whenever it needs information about your company. This information is used for various features throughout the cart. It is important that you fill this section out as accurately as possible.



Email Settings

This section controls the emails that Squirrelcart sends.



Outgoing Mail Configuration

Default From Email

This is the default email address that all your messages will come from, which can be overriden for certain messages using the **From Email** field for that message.

Default From Name

This is the default display name for emails sent from your store. If you leave this blank, your company name will be used.

Return-Path

This field is optional. It controls what will be used for the Return-Path email header for all emails sent from your store. If you leave this blank, the value specified in **Default From Email** will be used. Please note that it is not always possible to set the Return-Path header on all systems. If you've set **Default From Email** to an address that is not on your domain, you should definitely set this field to an address on your domain or some email providers (AOL especially) will block your messages.

Don't Send From Header

The From header controls the email address that emails appear to be from. Some web servers don't permit this header to be sent. Checking this field will prevent the From header from being set. This should remain unchecked for most installations.

Mail Engine

This field controls the way in which Squirrelcart sends emails. The default setting is *Built-in PHP mail() function*. Available values:

-Built-in PHP mail() function

-SMTP

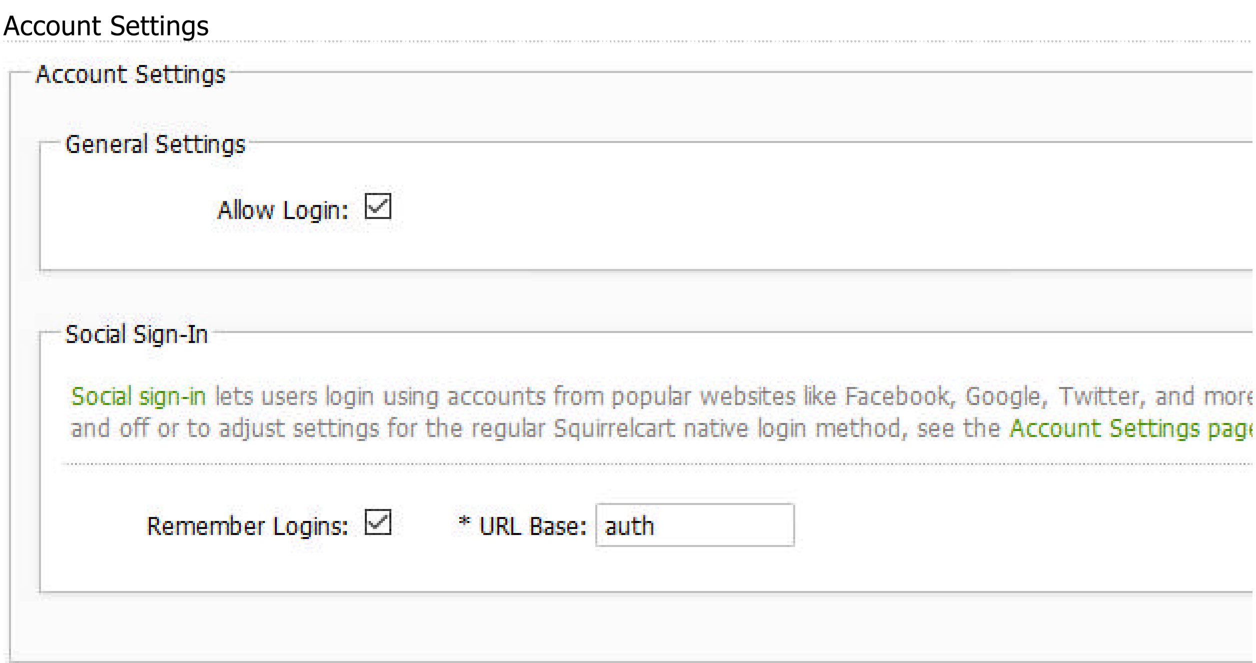
-Sendmail

SMTP is the most reliable method, and is recommended.

SMTP

When using the SMTP mail engine, set these settings to match the connection settings and credentials provided by your web host.

Documentation for controlling individual emails sent by Squirrelcart can be found in the **Managing Your Store > Automatic Emails** section of this documentation.



General Settings

Allow Login

This setting can be used to turn logins off for the entire store.

Social Sign-In

For more information about this feature and how to enable it, see the **Configuration > Social Sign-In** section of this documentation.

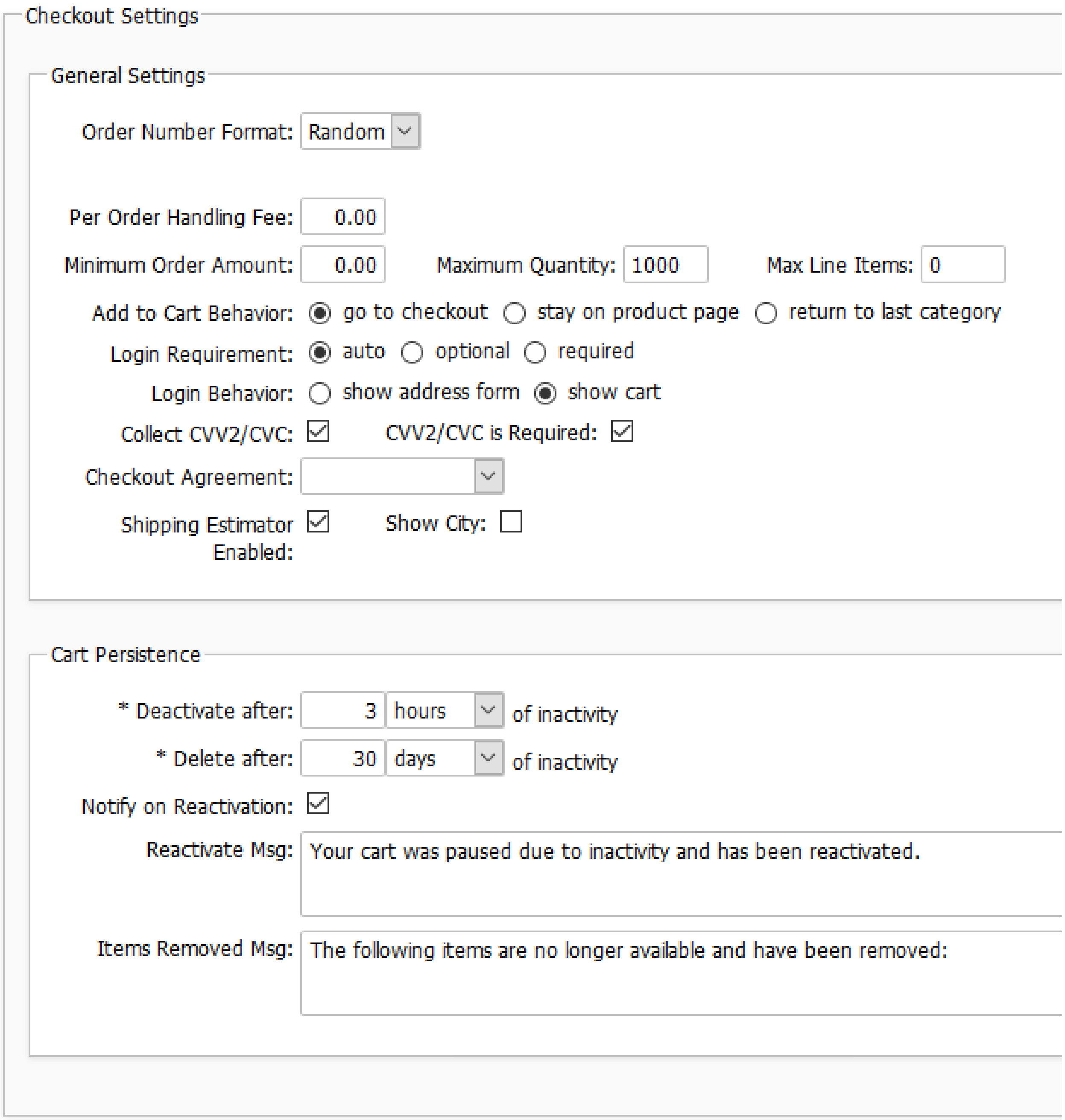
Remember Logins

This controls whether or not social logins are remembered on subsequent visits via a remember me cookie.

URL Base

This is used in authentication URLs for the social sign-in feature. We recommend not changing this field.

Checkout Settings



General Settings

Order Number Format

This field controls the format of your order numbers. Default value for this field is "Random". When set to "Random", the cart uses the Unix timestamp at the time of the order. When set to "Custom", the cart uses the value of the "Next Order Number" field, and increments the order numbers by the value of the "Increment by" field.

Per Order Handling Fee

This field is used to apply a handling fee to the entire order. For more information, see the **Handling and Order Fees topic (Section 6.7)**.

Minimum Order Amount

This field is used to enforce a minimum order total (before shipping, handling, and taxes).

Maximum Quantity

The default for this field is 1,000. Leave blank to accept the default. This field controls the maximum quantity allowed for a single item when it is added to the cart. The main purpose of this setting is to avoid ridiculous orders for millions of items, which could potentially cause problems with payment systems.

Important Note: Do not include commas in your value!!!

Max Line Items

This can be used to limit the number of unique line items a customer can have in their cart. Set to 0 for no limit.

Add to Cart Behavior

This field determines what will happen after a customer adds an item to the cart.

Login Requirement

This field determines if login is required in order to checkout.
Auto - Squirrelcart decides if logins are required based on the items in the order (downloads will trigger a login requirement).
Optional - customers have the option of logging in but don't have to.
Required - customers must login to place an order.

Login Behavior

This field determines what will happen after a customer logs in while checking out. If "show address form" is selected, the address form will be shown, populated with the information from the user's account. If "show cart" is selected, checkout form will be shown, along with the customer's address information above in small boxes.

Collect CVV2/CVC

If checked, the cart will prompt the customer for their CVV2/CVC code.

CVV2/CVC is Required

This forces the customer to enter their CVV2/CVC code in order to submit an order.

Checkout Agreement

This is used to assign an agreement to the final step of the checkout process. See the **Sales Agreement topic (Section 7.10)** for more information.

Shipping Estimator Enabled

This turns the shipping estimator on and off. See the **shipping estimator topic (Section 6.6.3.5)** for more information.

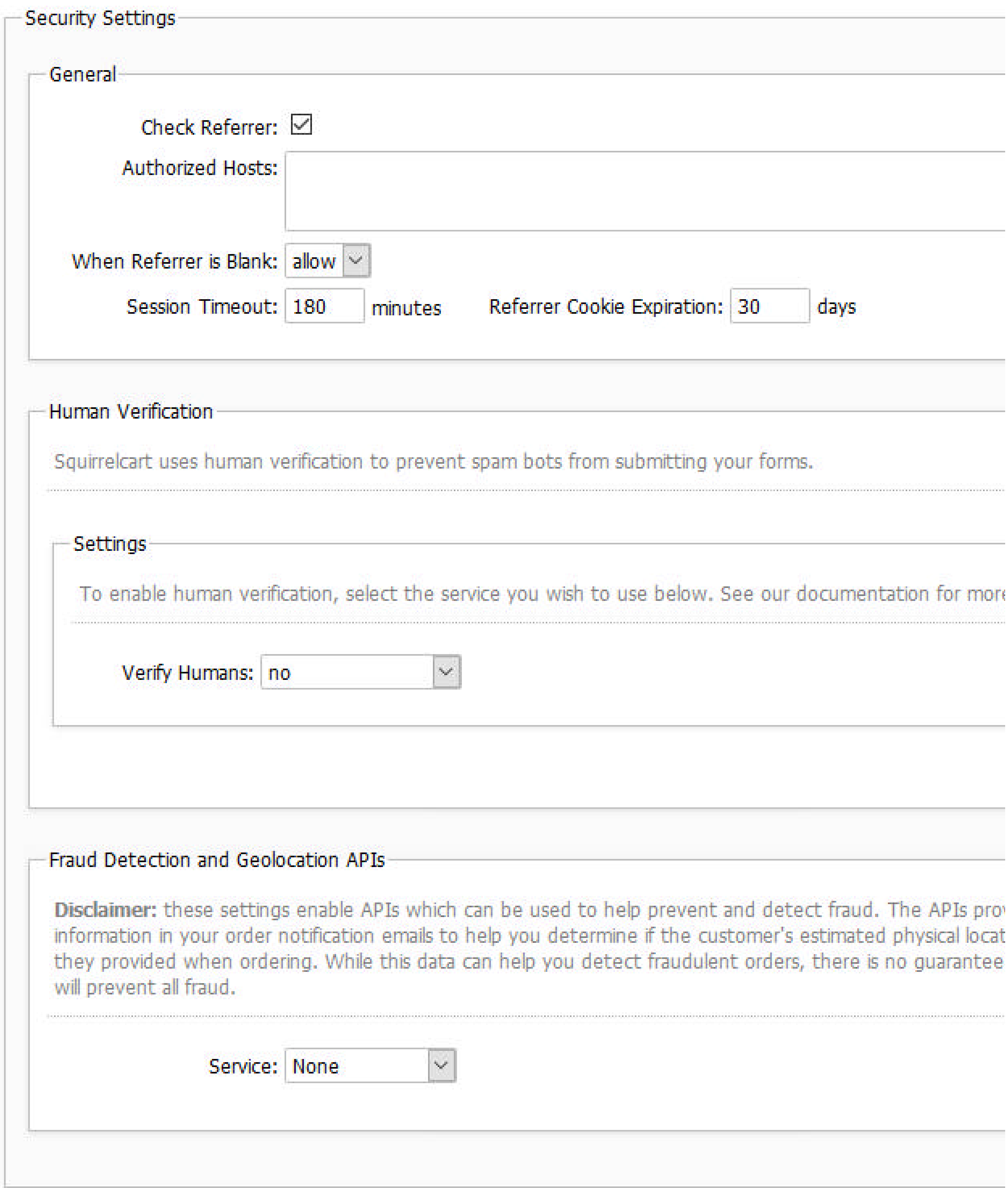
Show City

When checked, the shipping estimator tool will include a city field.

Cart Persistence

This section is discussed in **its own topic (Section 6.13)** in this section**.**

Security Settings



General

Check Referrer

This field determines whether or not Squirrelcart will check the referring URL when someone attempts to post data to the cart.

Authorized Hosts

Set value equal to a list of all authorized host names that can submit data (add items to cart, etc). Separate each hostname with a new line. If left blank, authorized hosts will default to what you specify as your www_root and secure_root in the config file.

When Referrer is Blank

Some browsers do not send a referrer. This field determines whether the cart will allow the form submission when a referrer is not sent with the request. Set to "allow" to allow the submission, and set to "deny" to block it.

Session Timeout

The value for this field should be a number equaling the amount of minutes a customer can be idle before their cart is abandoned. This number is also the amount of time that the cart will wait before restocking items that where added to a cart but never purchased. This only happens when "Use Inventory Control" is enabled. The default value for this field is 180.

Referrer Cookie Expiration

This field controls the length in days that the referrer cookie will be valid. This cookie is set to store the originating referral address that a customer used to visit your site. Storing this in a cookie allows Squirrelcart to retrieve it on subsequent visits to your site.

Human Verification

This is discussed in **its own topic (Section 8.4)**.

Fraud Detection and Geolocation APIs

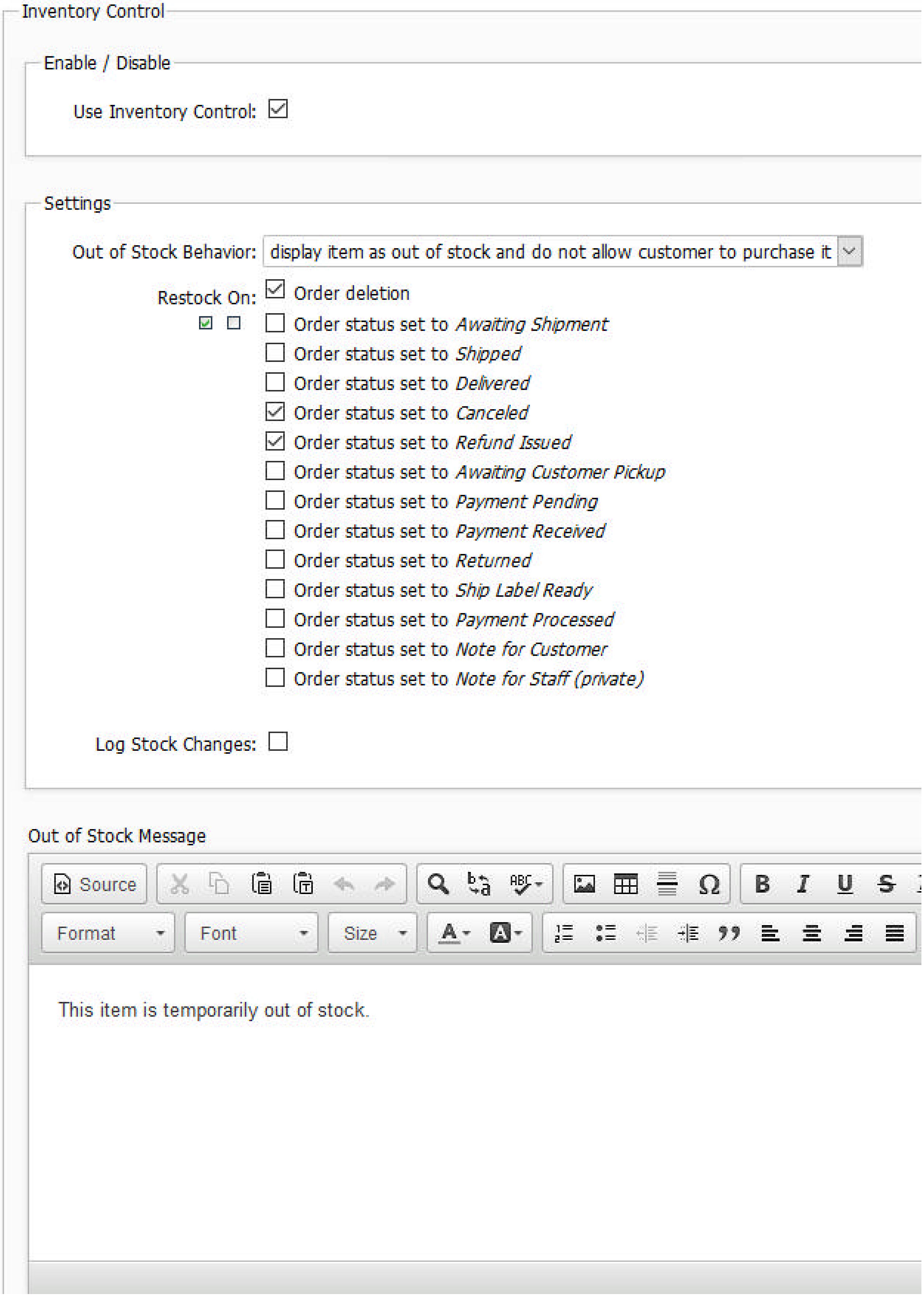
This is discussed in **its own topic (Section 8.5)**.

Access Restrictions

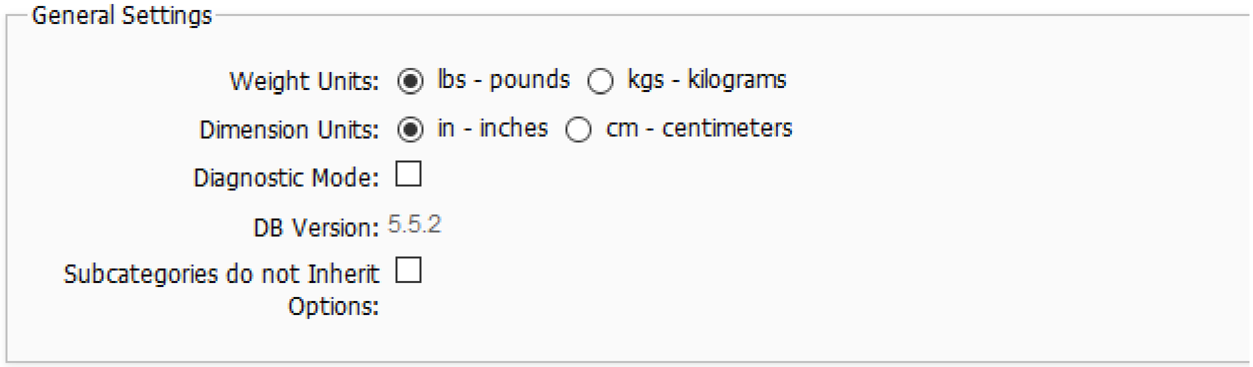
This is discussed in the **Managing Your Store > Access Restrictions** section of this documentation.

Inventory Control

This section is for the inventory control feature, which allows you to track the number of units you have in stock for each product in your database. Inventory Control has it's own section in the documentation.


Inventory Control
Enable / Disable
Use Inventory Control:
Settings
Out of Stock Behavior: display item as out of stock and do not allow customer to purchase it
Restock On:
Order deletion
Order status set to *Awaiting Shipment*
Order status set to *Shipped*
Order status set to *Delivered*
Order status set to *Canceled*
Order status set to *Refund Issued*
Order status set to *Awaiting Customer Pickup*
Order status set to *Payment Pending*
Order status set to *Payment Received*
Order status set to *Returned*
Order status set to *Ship Label Ready*
Order status set to *Payment Processed*
Order status set to *Note for Customer*
Order status set to *Note for Staff (private)*
Log Stock Changes:
Out of Stock Message
Source
Format
Font
Size
This item is temporarily out of stock.

General Settings



Weight Units

This defines the units that are used for weight fields.

Dimension Units

This defines the units that are used for dimensional fields (width, height, depth).

Diagnostic Mode

When this field is checked and you are logged in as a member of the "Store Admin" group, Squirrelcart will output diagnostic information to the browser during certain operations. This is useful for troubleshooting communications via CURL and other complex operations. See the Diagnostic Mode topic for more information.

DB Version

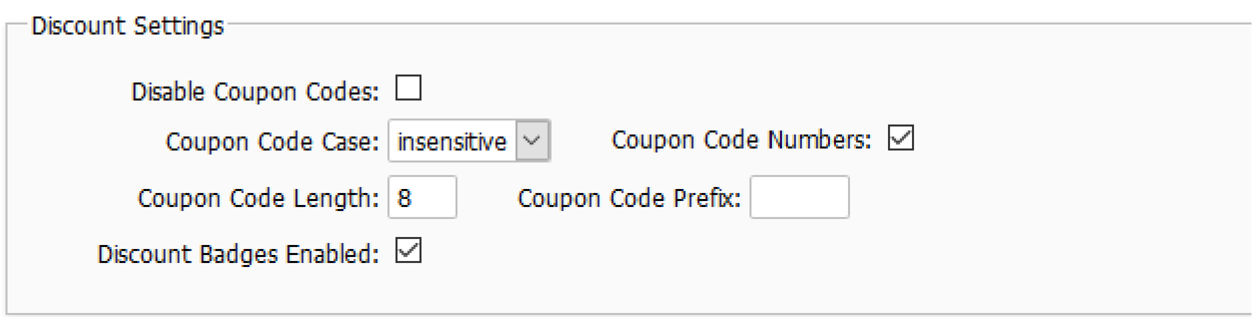
This field is read only, and displays the version number for your database, which should match the version number of your files in the top right corner of the page.

Subcategories do not Inherit Options

The recommended setting for this field is unchecked.

By default, options assigned to a category will trickle down through through subcategories and will apply to all products below. When this field is checked, category options will not pass down through subcategories, and only the product's primary category will be used to obtain options.

Discount Settings



Disable Coupon Codes

This field is used to stop the coupon code form from showing up at checkout.

Coupon Code Case

This field controls whether or not the coupon codes entered by your customers will be case sensitive. The default is case insensitive.

Coupon Code Numbers

This field controls whether or not numbers will be used when generating coupon codes.

Coupon Code Length

Default length of coupon codes generated by Squirrelcart

Coupon Code Prefix

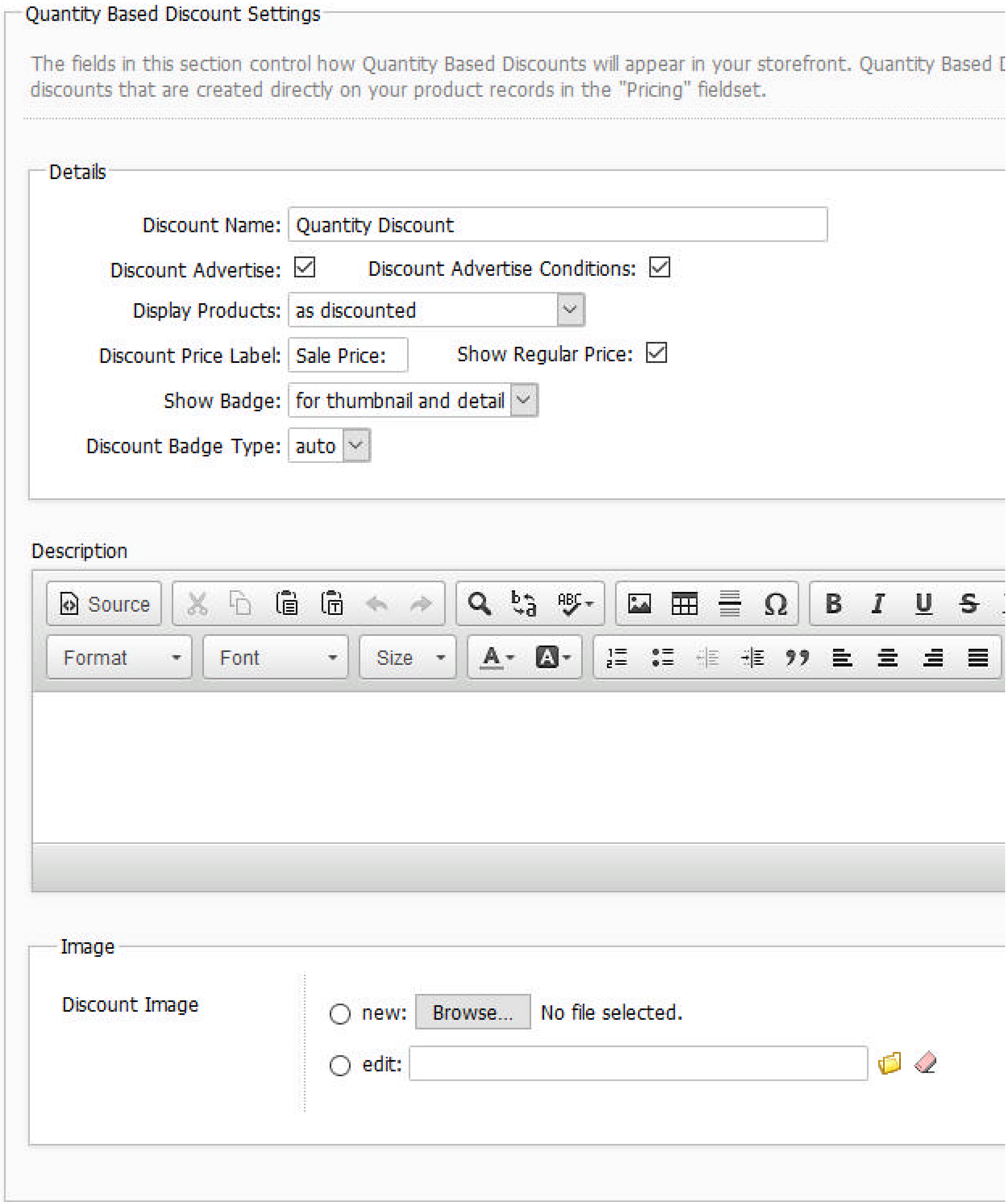
Default prefix for coupon codes generated by Squirrelcart

Discount Badges Enabled

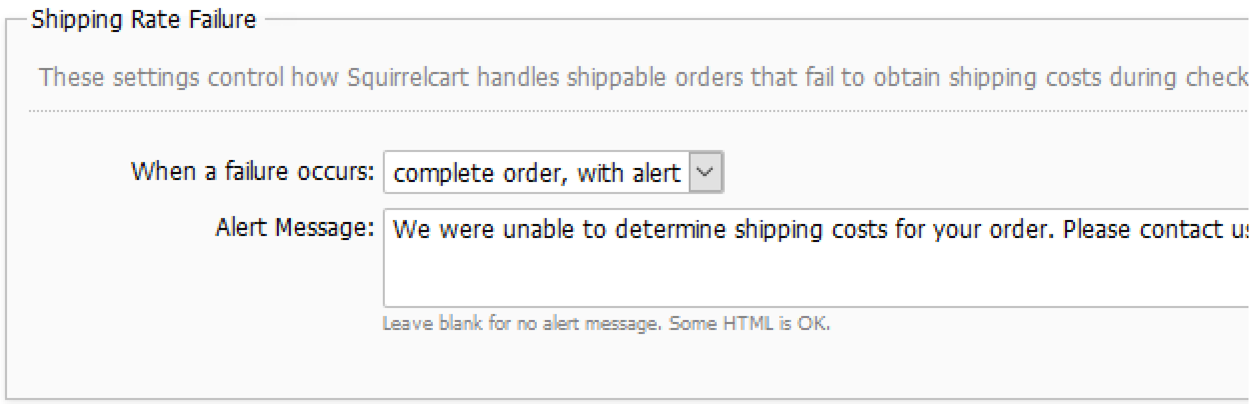
Unchecking this field will disable the discount badge feature, discussed in the **Discount Badges (Section 7.5.5)** topic.

Quantity Based Discount Settings

This section is used to control quantity based discounts for regular customers (non group members). This is described in detail in the "Managing Your Store > Quantity Based Discounts" section of this documentation.

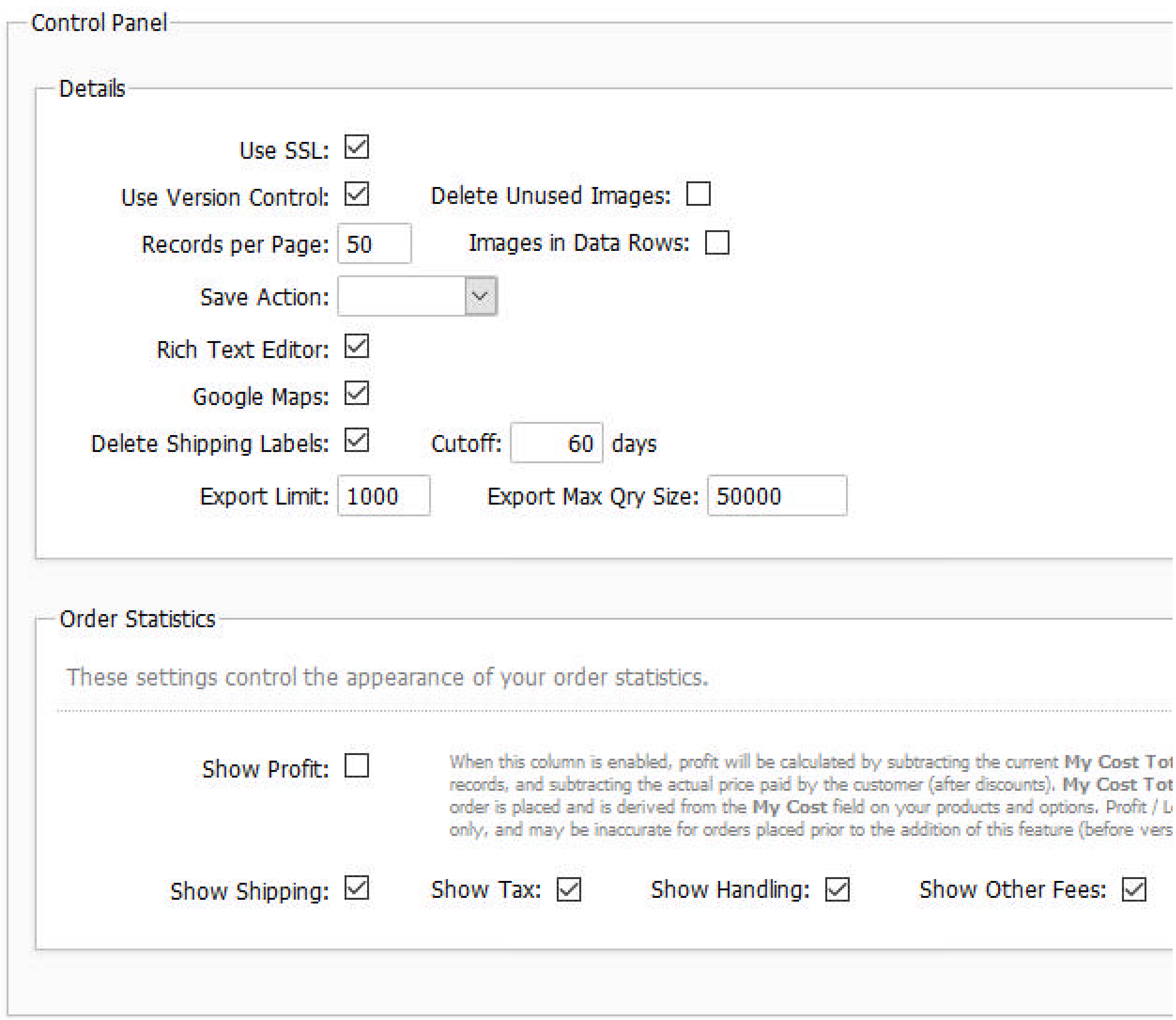


Shipping Rate Failure



These settings are discussed in the **Shipping > Rates - Overview topic (Section 6.6.3.1)**.

Control Panel



Details

Use SSL

Checking this box enables secure access to your control panel via SSL, provided that you specified a secure URL in your config file for the $site_secure_root variable.

Use Version Control

Enables or disables the use of Version Control. When enabled, your installation of Squirrelcart will compare the installed version to that of the most recent available, and indicate if an update is available.

Delete Unused Images

By default, this field is checked. When checked, the cart will:

Delete images associated with Products, Categories, and Product Options when the record using them is also deleted

Delete images associated with Products, Categories, and Product Options when a new image is uploaded, and the original image is no longer associated with any other records

If you uncheck this field, the cart will not delete unused images.

Records per Page

Set value equal to the number of records you want to display on a single page in the admin section.

Images in Data Rows

This field controls whether or not you want certain images to appear in the data grid that is used to navigate through your records. To enable, check the box, to disable, uncheck it.

Save Action

This sets the default action after saving a record.

Rich Text Editor

This setting controls whether or not the rich text editor will be used for fields that support it. This is explaned in the Rich Text Editor topic.

Google Maps

When enabled, Google maps will appear on your customer and order records in the control panel.

Delete Shipping Labels

When enabled, shipping labels will be deleted after the number of days specified in the **Cutoff** field.

Export Limit

This controls the number of records retrieved per query when exporting data via CSV (and other formats), and when creating database backup files. Increasing this number may decrease the speed of export operations but may also increase memory usage. The recommended value for this field is 1000.

Export Max Qry Size

This controls the maximum length of INSERT statements used when a database backup is created. The recommended value for this setting is 50000. If you are running out of memory when importing a backup file created via Squirrelcart, try lowering this setting.

Order Statistics

These settings control the appearance of your order statistics.

Show Profit

When this column is enabled, profit will be calculated by subtracting the current My Cost Total value of your order records, and subtracting the actual price paid by the customer (after discounts). My Cost Total is set at the time the order is placed and is derived from the My Cost field on your products and options. Profit / Loss data is an estimate only, and may be inaccurate for orders placed prior to the addition of this feature (before version 5.1.0).

Show Shipping

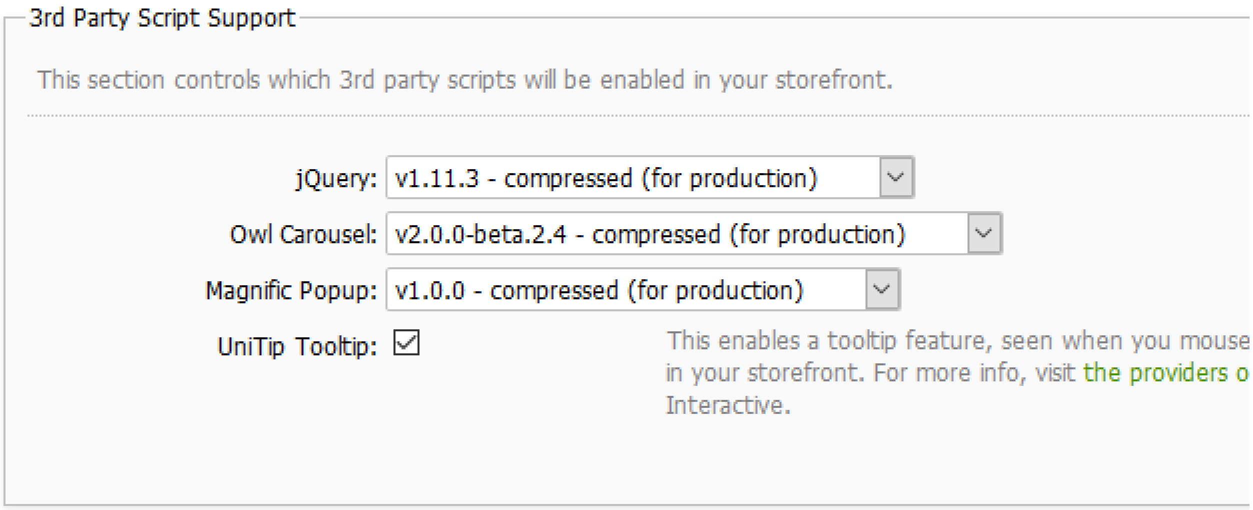
Show Tax

Show Handling

Show Other Fees

All of the above fields control the appearance of the order field of the same name.

3rd Party Script Support



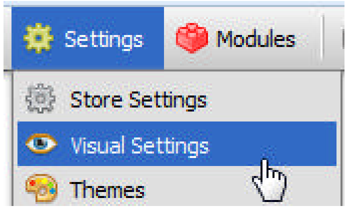
6.2 Visual Settings

The Visual Settings page is used to control certain aspects of your *storefront*.

Opening the Visual Settings Page

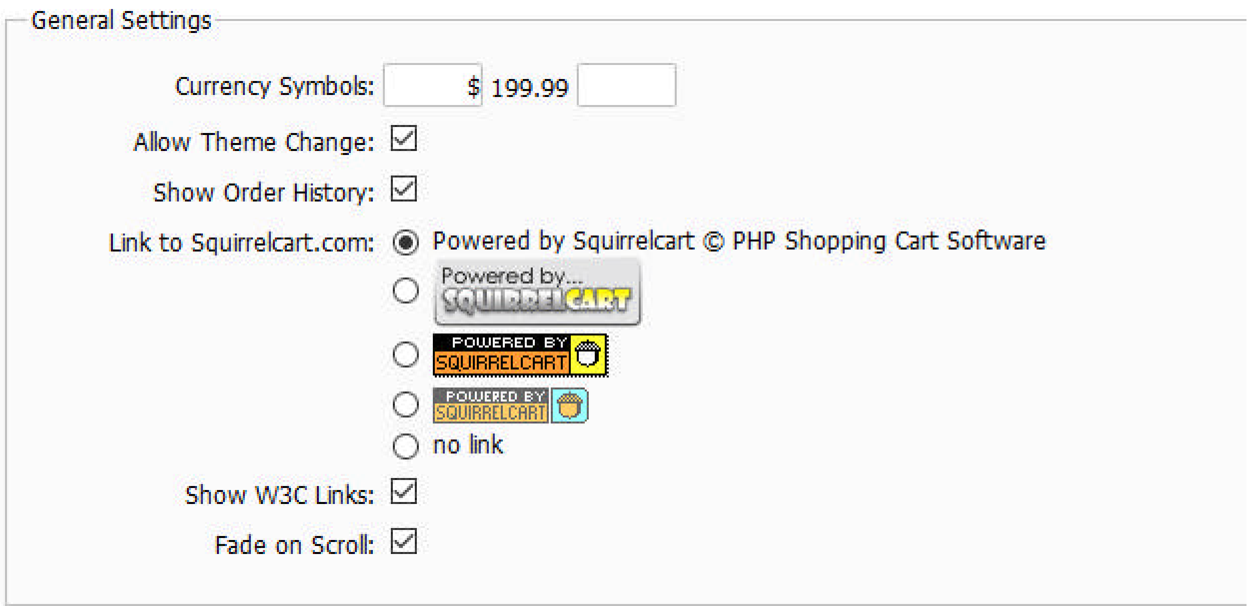
1. Open the **control panel (Section 3)**

2. Click the Visual Settings menu link



Overview

General Settings



Currency Symbols

These fields control the currency symbol shown before and/or after your prices.

Examples:
$199.99
$199.99 USD
$199.99 CAD
£199.99 GBP
€199.99

Allow Theme Change

When this field is checked, your customers can change the theme for their account only, using the theme drop down in "Account Options". If you wish to disable this functionality, uncheck this field.

Show Order History

This field controls whether or not customers will see the "Order History" link in the account options after they login. If you check this box, they will see the link. If you uncheck it, they will not.

Link to Squirrelcart.com

This field controls the appearance of the link back to Squirrelcart.com at the bottom of your cart page. You can remove that link by selecting **no link**

Show W3C Links

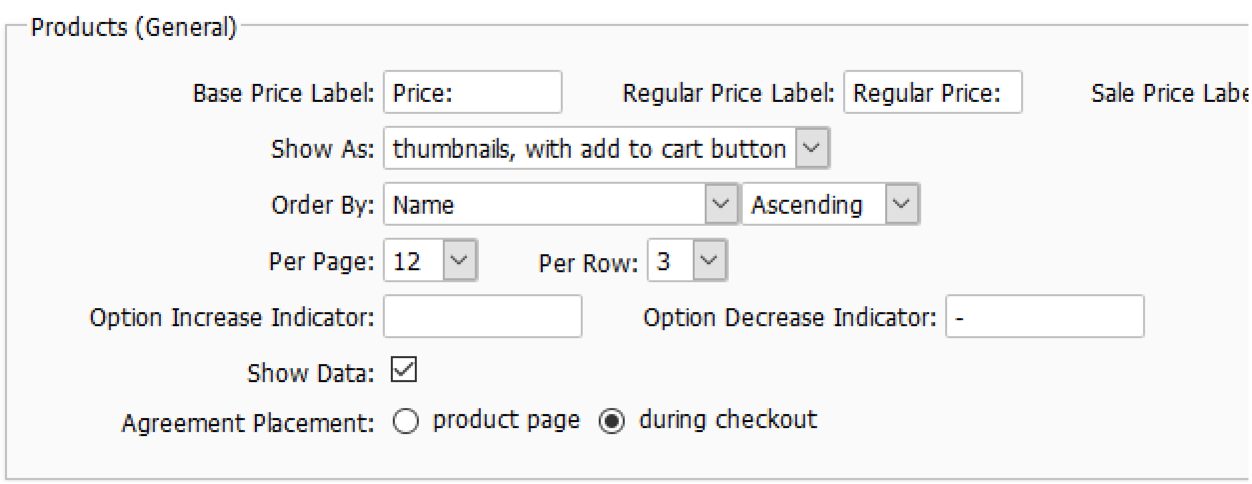
W3C links are added to the bottom of your storefront page by default:

They are used to indicate that your website complies with the XHTML 1.0 Transitional and CSS 2.1 web standards. They can be clicked to validate your XHTML and CSS. If you would like to remove these links, uncheck the **Show W3C Links** field.

Fade on Scroll

When enabled, elements in the store will fade into view as the page is scrolled down.

Products (General)



Base Price Label

This value should be text or HTML that you want to display before the base price of an item in the cart, when it is not on sale.

Regular Price Label

This value should be text or HTML that you want to display before the regular price of an item in the cart. This is usually shown crossed out, and above a product's "sale price".

Sale Price Label

This value should be text or HTML that you want to display before the price of a discounted item in the cart.

Show As

This field controls how products will appear by default when a category is clicked. The setting can be overridden at the category record level.

Order By

This is used to specify the field that will be used to sort the products for display when clicking on a category link. This can be overridden on the Category record.

Per Page

This determines the number of products that will be shown per page in the storefront. This can be overriden on the Category record.

Per Row

This determines how many products will be shown per row in the storefront. This can be overriden on the Category record.

Option Increase Indicator:

When a product option increases the base price of a product, the contents of this field precede the price shown for that option. If you wish to use this, you could enter "+" or "add" in this field.

Option Decrease Indicator:

When a product option decreases the base price of a product, the contents of this field precede the price shown for that option. If you wish to use this, you could enter "-" or "subtract" in this field.

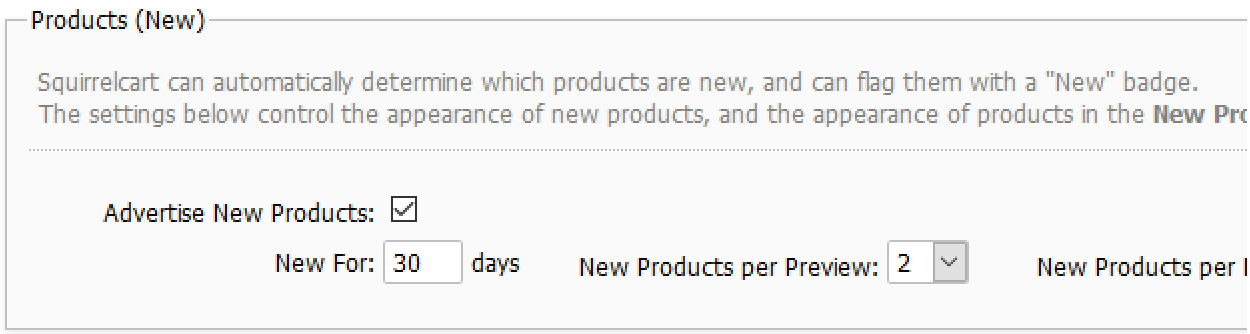
Show Data

This controls whether the **Product Data** section will appear on your product detail pages. By default, this section will appear under **Additional Information**, whenever at least one product data field is specified on a product record. Product Data includes fields like SKU, Product Code, Condition, Model No., etc....

Agreement Placement

This controls where **sales agreements** **(Section 7.10)** assigned to products will appear.

Products (New)



Advertise New Products

When checked, new products will be shown as "new" in your storefront.

New For

This field is used to specify the number of days to consider a product New.

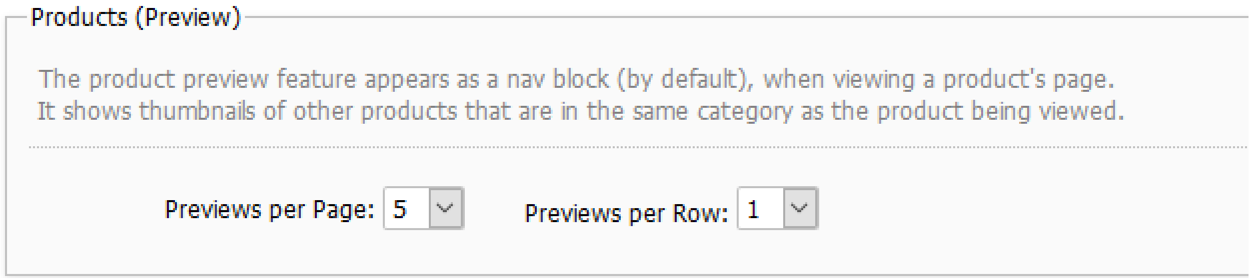
New Products per Preview

This field controls how many products will be displayed in the "New Products Preview" section of your homepage.

New Products per Row

This field controls how many products per row are displayed in the "New Products Preview" section of your homepage.

Products (Preview)



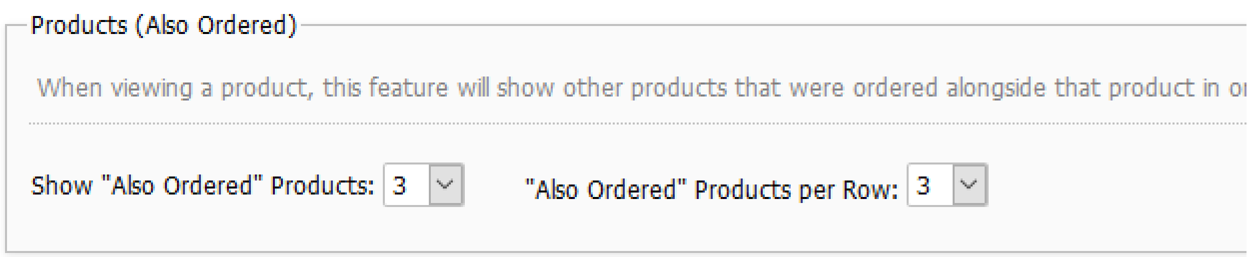
Previews per Page

If you are using the product preview feature, set this number to the number of items you would like to have displayed in the product preview. This is the navigation that is displayed by default to the right of a product's detailed description, and lists links and thumbnails for other products in the category, for easier navigation.

Previews per Row

This controls the number of products seen per row in the category preview navigation block.

Products (Also Ordered)



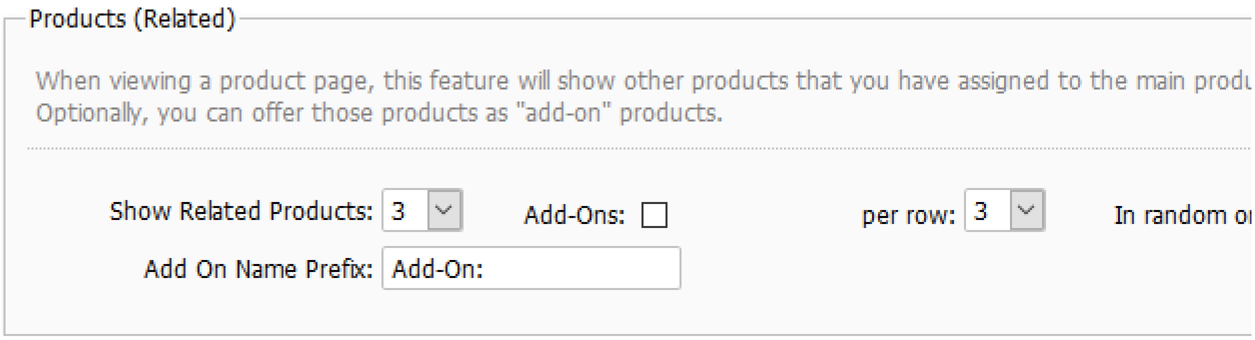
Show "Also Ordered" Products

This controls how many products will appear in the "Customers Who Ordered This Item Also Ordered" section of your product pages.

"Also Ordered" Products per Row

This controls how many products appear per row in the same section.

Products (Related)



Show Related Products

This controls how many products will appear in the "Related Products" section of your product pages.

Add-Ons

When checked, the related products will appear as add-on products, with options to add them to the cart.

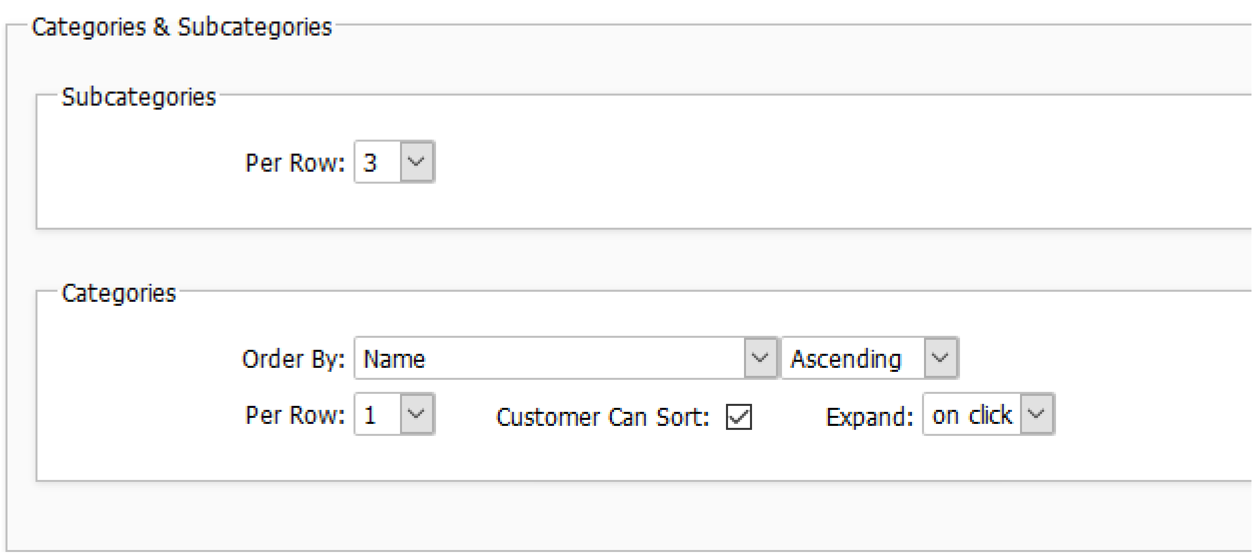
Per row

This controls how many products appear per row in the same section.

In random order

When checked the products will appear in order.

Categories & Subcategories



Subcategories

Per Row

This controls how many subcategories appear per row when viewing the parent category.

Categories

Order By

This is used to specify the field that will be used to sort the categories for display.

Per Row

This field controls how many top level categories will be shown per row in the Product Catalog content area of your storefront page.

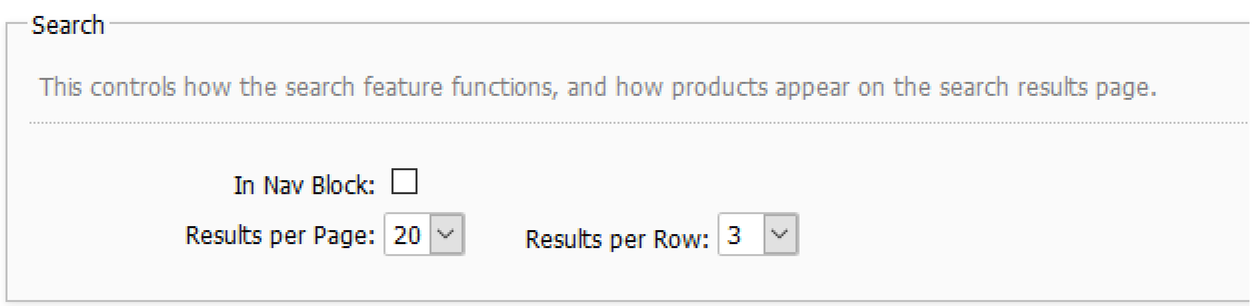
Customers Can Sort

Checking this field allows customers to sort products when viewing a category that has 3 or more products.

Expand

This field controls when (or if) parent categories in the Product Catalog navigation are expanded to show the subcategories beneath them. This section appears to the left of the page by default.
The default setting for this field is 'on click'.

Search



In Nav Block

By default the search feature appears in your header. On small screens it appears at the top of the mobile navigation. Checking this field will make the search field also appear inside the **Product Catalog** nav block.

Results per Page

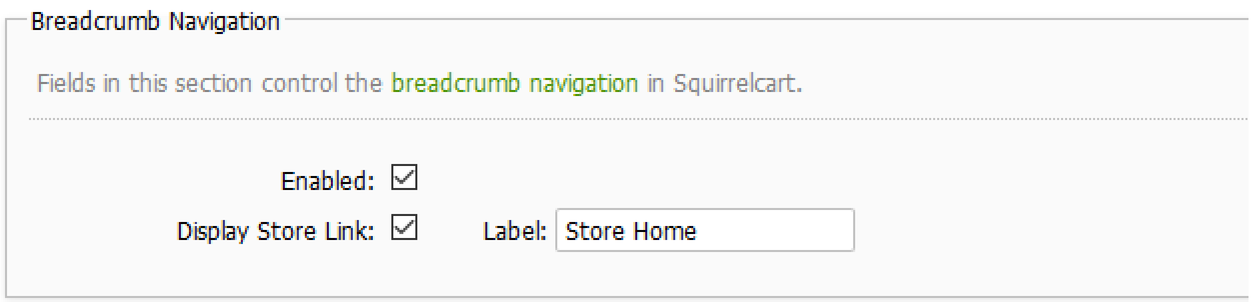
This is the default value for number of products to show on a single page of search results.

Results per Row

This controls the number of products seen per row in search results.

Breadcrumb Navigation

Breadcrumb navigation gives you a way to follow your path back through previous pages.



Enabled

This enables/disables breadcrumb navigation.

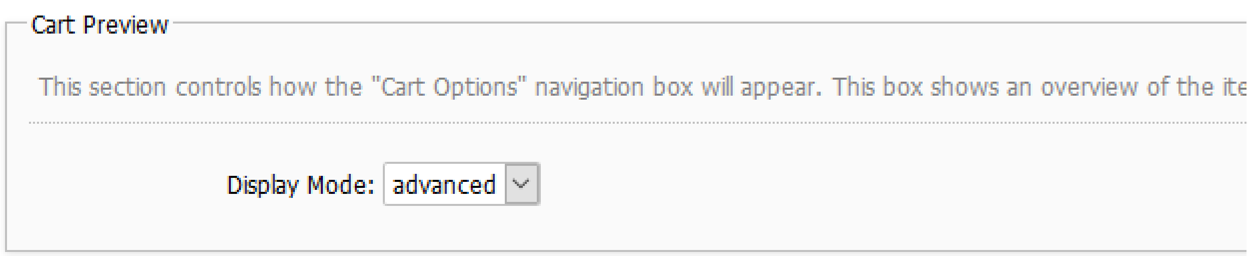
Display Store Link

When checked, the first link in your breadcrumb navigtion will be to your store's home page.

Label

When **Display Store Link** is checked, this controls what label will be used for the link to your store's home page.

Cart Preview



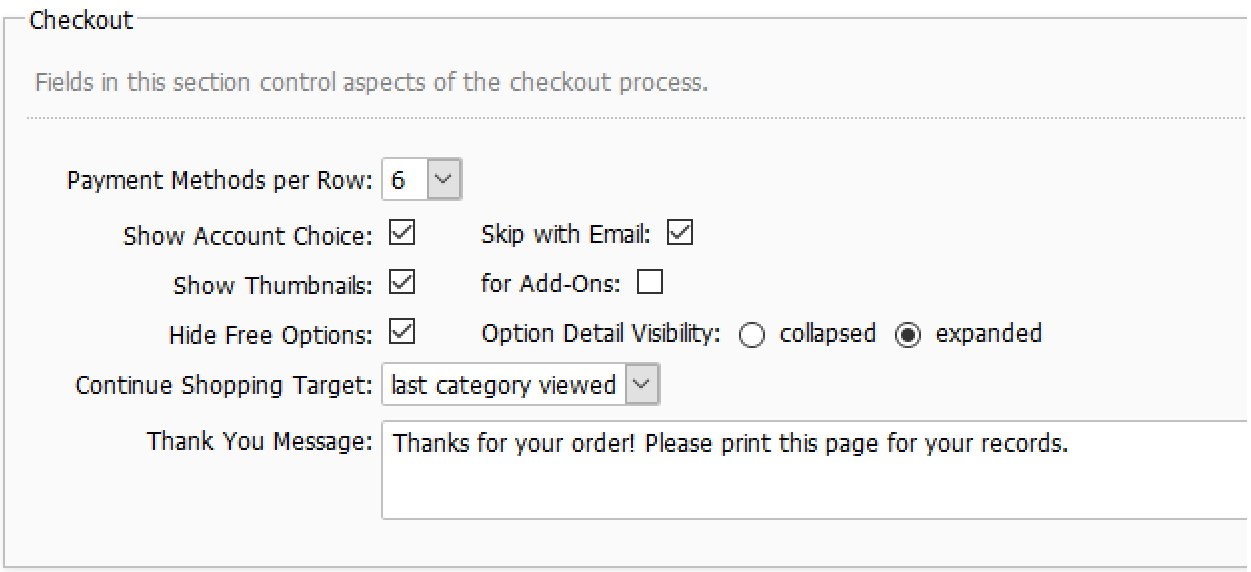
Display Mode

This field controls what will appear in the "Cart Options" navigation box.

If set to "simple", a message will appear to indicate how many items are in the cart, and the total.

If set to "advanced", a breakdown of the items in the cart will appear, with links to change the items.

Checkout



Payment Methods per Row

This field controls how many payment method icons will appear in each row.

Show Account Choice

This field controls whether or not the account choice page is shown during checkout. This page offers the customer 3 choices:

- New Account
- Existing Account
- Skip Account (not shown when "Force User Creation" is on)

Skip with Email

When enabled, the "Skip Account" option on the account choice page will include an email field for the customer to enter their email address. This gathers the email address sooner in the checkout process. This is useful if the user decides to not complete their order as you will have a better chance of being able to contact them.

Show Thumbnails

When enabled, product thumbnails will appear in the cart table.

Hide Free Options

Checking this field causes options that have no cost to not show up in the price breakdown during checkout.

Option Detail Visibility

This controls the default visibility for the option detail section on line items in the checkout, order detail, and HTML order emails.

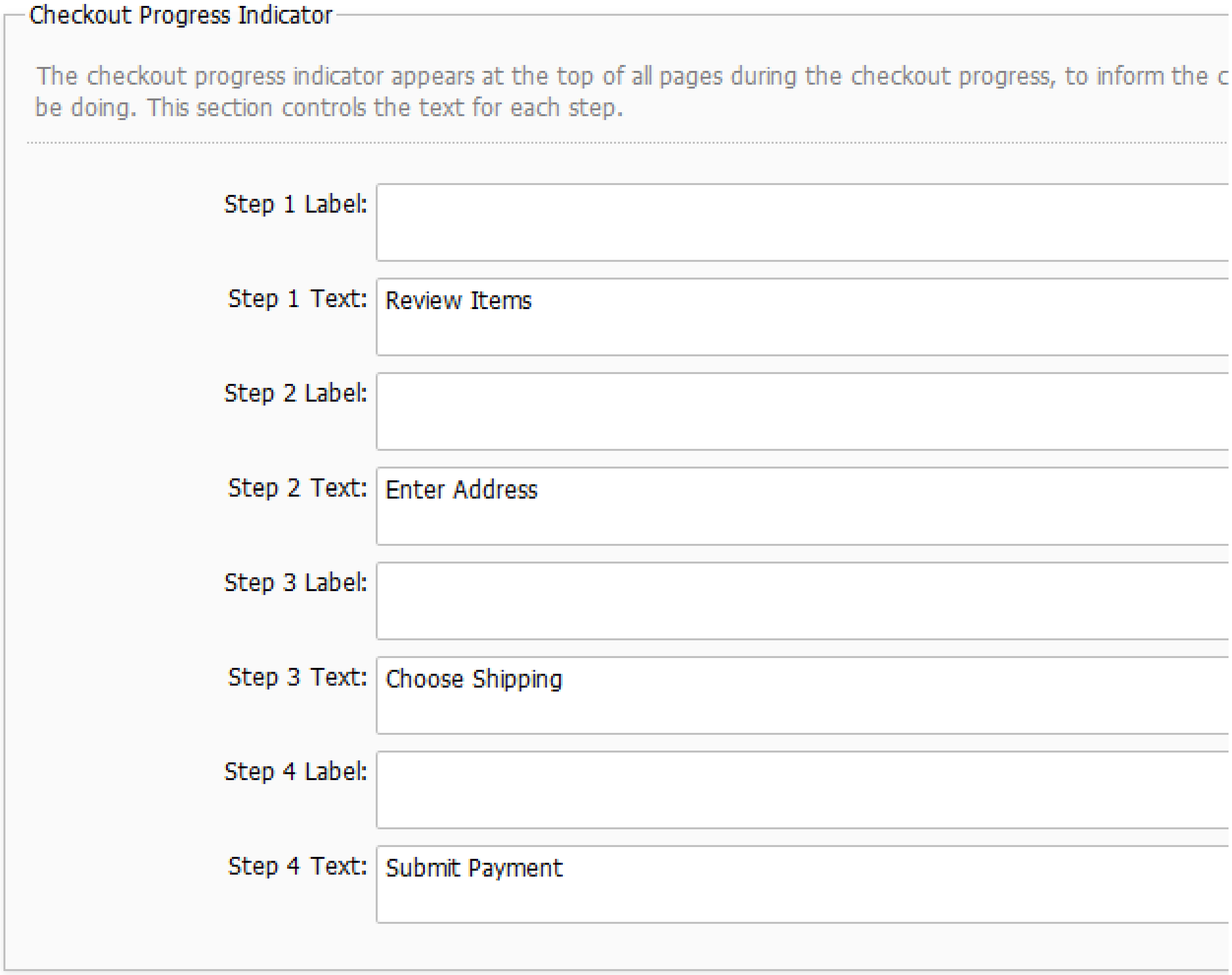
Continue Shopping Target

This field controls what happens when the **Continue Shopping** button is clicked.

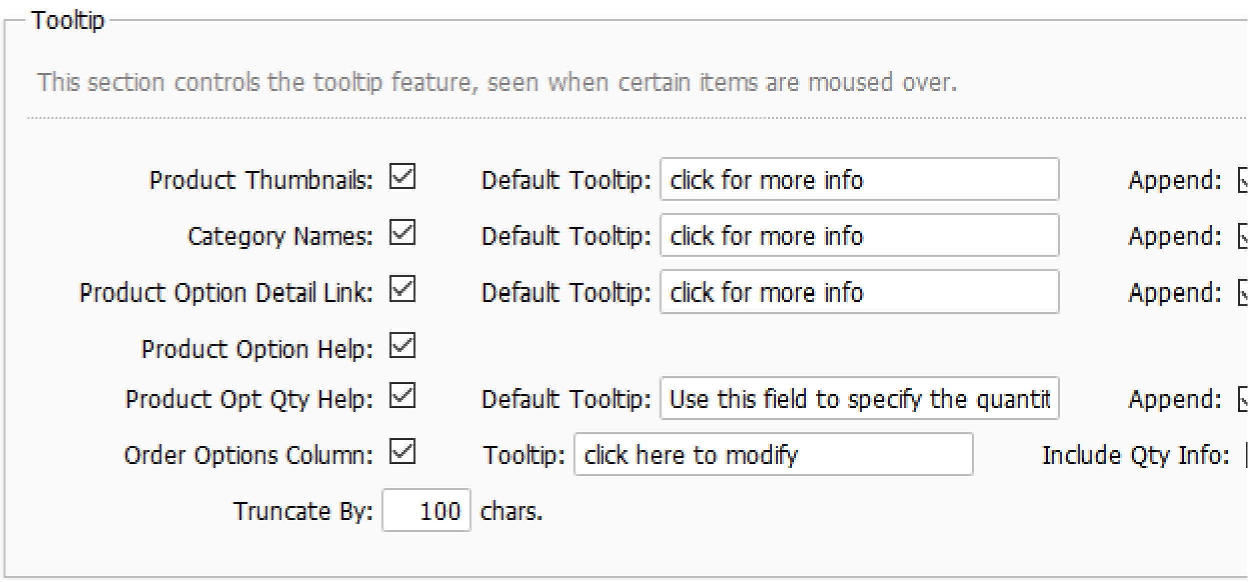
Thank You Message

This message appears on the thank you page after a customer places an order

Checkout Progress Indicator



Tooltip

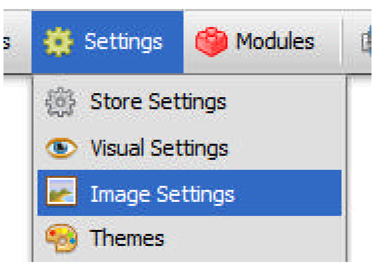


These settings control how the tooltip feature works. For help, most over each field name in the control panel.

6.3 Image Settings

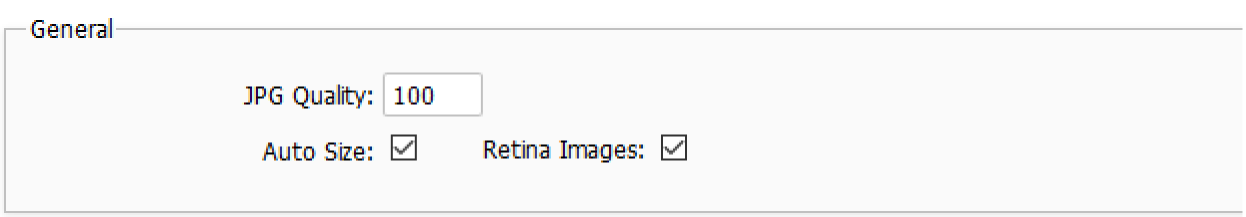
Overview

Settings controlling your images can be found in your control panel under **Settings > Image Settings**



The settings are explained below.

General



JPG Quality

This controls the quality of images generated using the *GD* library. Lower numbers result in smaller files. The recommended setting for this is 100.

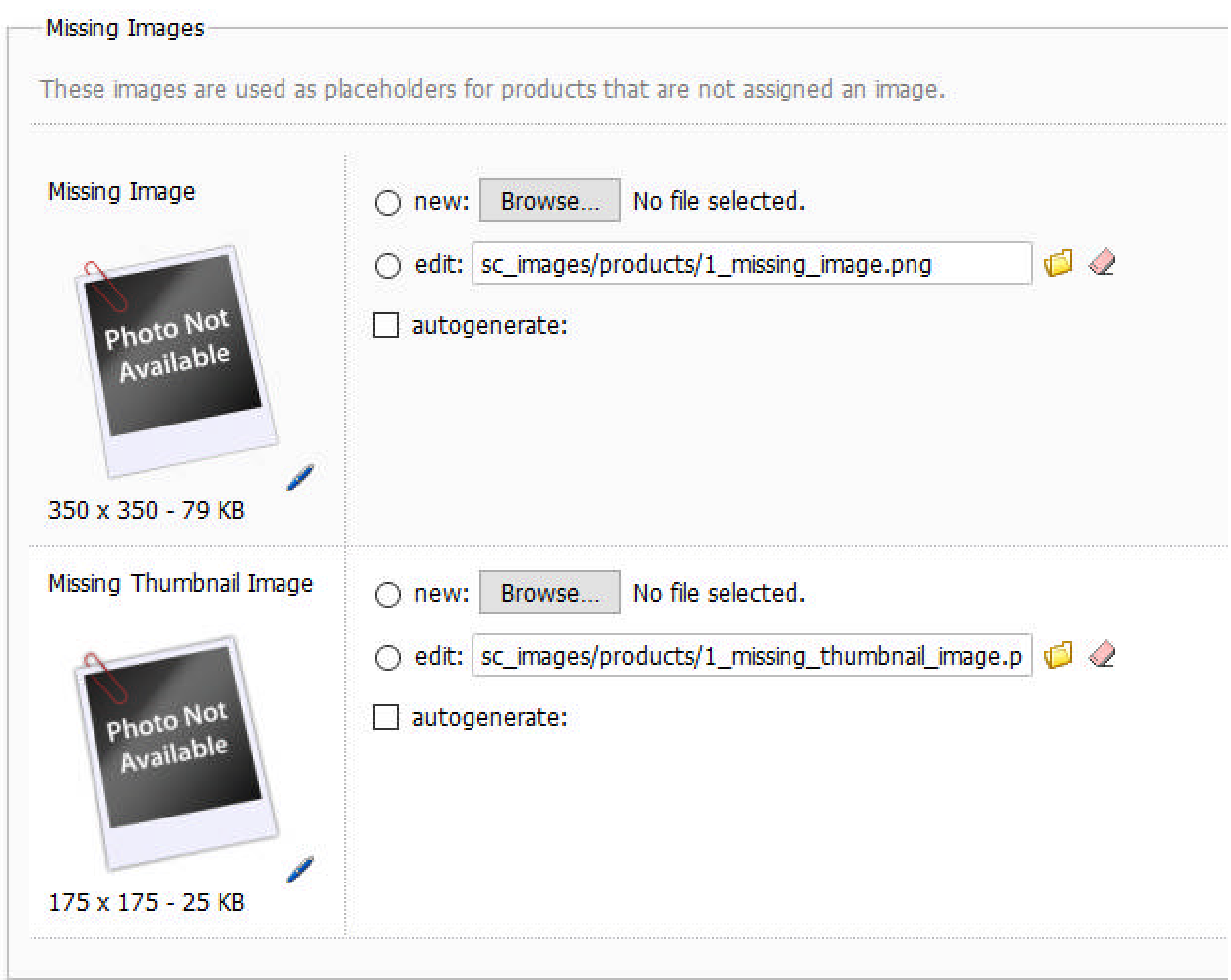
Auto Size

This turns on the Auto Size feature which will automatically create your thumbnail and other images using the largest image available. This feature is discussed in detail in the **Auto Size topic (Section 5.5)** in this section. When this field is checked, additional fieldsets will appear on the Image Settings page. These are all discussed in the **Auto Size topic (Section 5.5)**.

Retina Images

This feature is used to automatically generate images for screens that have high pixel density displays such as smart phones and tablets. This feature is discussed in **its own topic (Section 5.6)**.

Missing Images



The 2 image fields in this section are used when showing products and other elements that should have an image assigned but the image is missing.

6.4 Address Settings

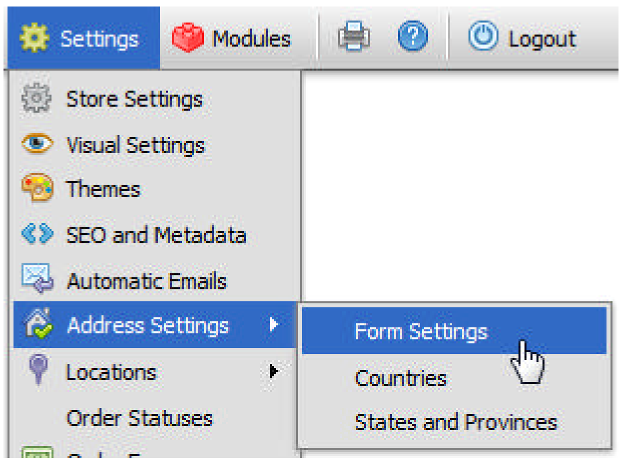
6.4.1 Address Form Settings

The Address Form Settings page controls which fields will be shown on account and address forms, and which of those fields will be required.

Opening the Address Form Settings Page

1. Open the **control panel (Section 3)**

2. Click the **Address Form Settings** menu link



Countries and States/Provinces

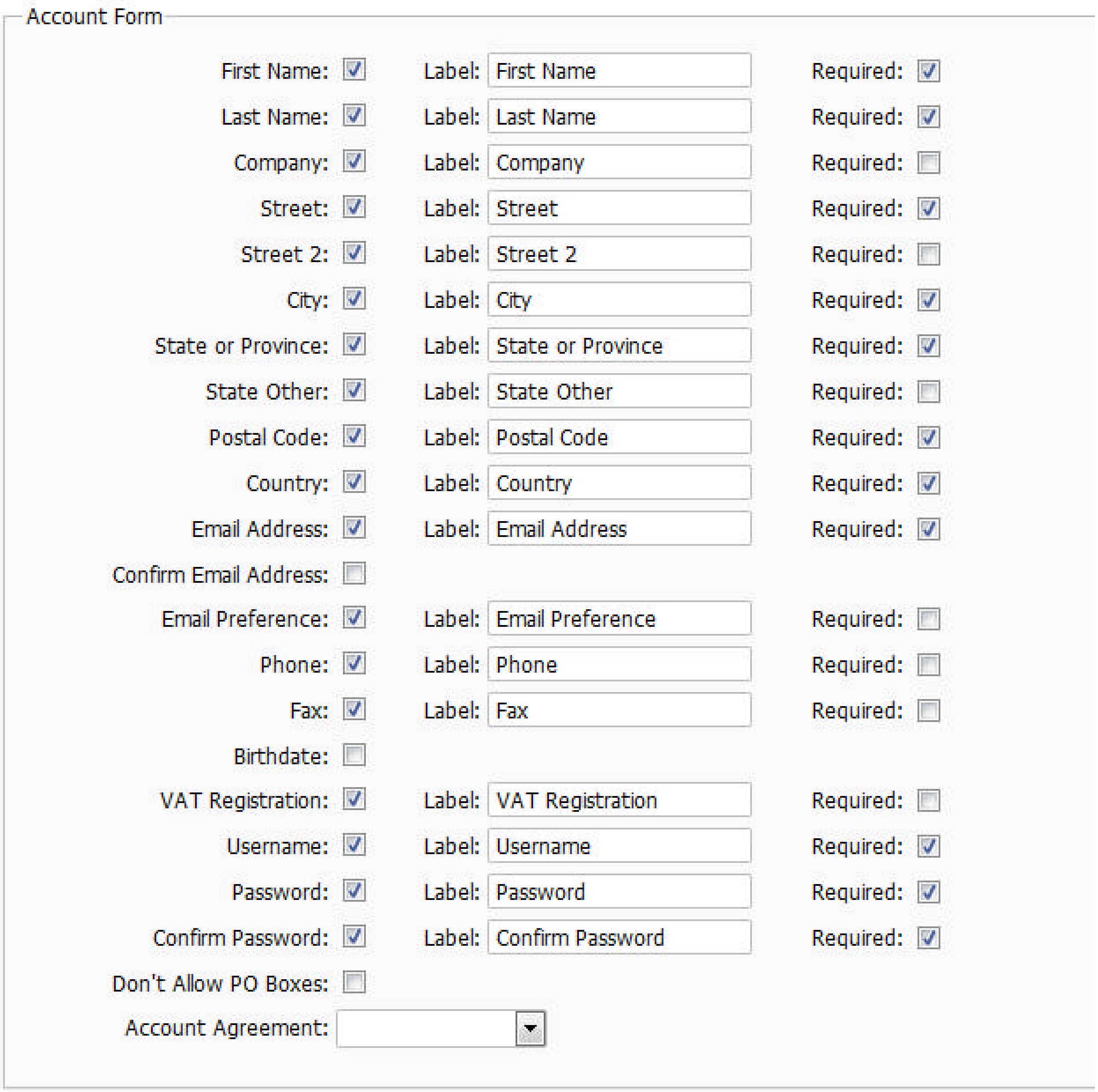
This section gives you access to country and state/province settings. To manage countries, click the Countries table link. To manage states/provinces, click the States table link.

Default Country - this is the default selected value for the Country field.

Move Default to Top - when checked, the default country appears at the top of the list in all country fields.

Account Form

This section controls the account form, used to create and modify a user account in your storefront.



Check the box next to a field name to have it appear on this form. You can then change the label for that field using the **Label** field that appears to the right of the field. Checking **Required** makes the field a required field.

The **Account Agreement** field allows you to assign an agreement that will appear on the account form. See the **Sales Agreement topic (Section 7.10)** for more information.

Address Form

The Address Form section of this page works just like the Account Form section, and controls the address form seen during checkout.

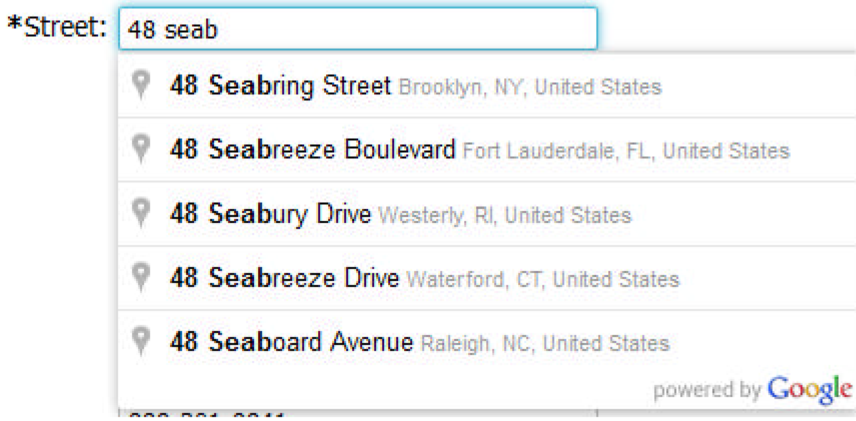
The **Address Agreement** field allows you to assign an agreement that will appear on the address form during checkout. See the **Sales Agreement topic (Section 7.10)** for more information.

Address Auto Completion With Google Maps JavaScript API

Squirrelcart has built-in support for auto completing address fields via Google Maps JavaScript API.

How it Works

When enabled, as the customer types in the street field they will see suggested addresses:



When they select an address, the address fields will automatically be populated using the selected address.

Pricing

Most users can use Google Maps JavaScript API free of charge. Usage and pricing for high volume is explained here: **https://developers.google.com/maps/documentation/javascript/usage**

To use the API, you will need to obtain an API key which can be used to track your usage and authenticate your account.

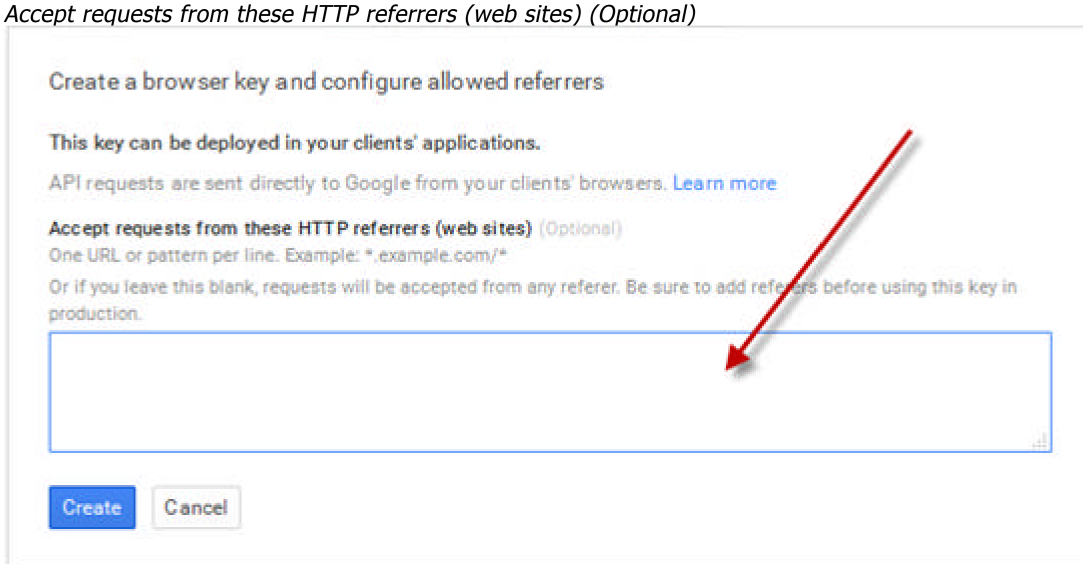
How to Enable

1. Go to **Google Developers Console (https://console.developers.google.com/)**.
2. Select a project, or create a new one.
3. In the sidebar on the left, expand **APIs & auth**.
4. Next, click **APIs**.
5. Select the **Enabled APIs** link in the API section to see a list of all your enabled APIs. Make sure that the Google Maps JavaScript API is on the list of enabled APIs. If you have not enabled it, select the API from the list of APIs, then select the **Enable API** button for the API.

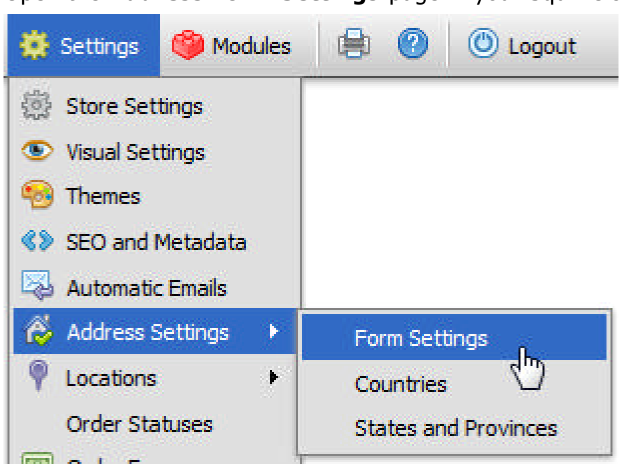
6. In the sidebar on the left, select **Credentials**. If your project doesn't already have a Key for Browser Applications, create an API key by selecting **Create new Key** and then selecting **Browser key**.

   To prevent someone from using your key, add your domain to this field:

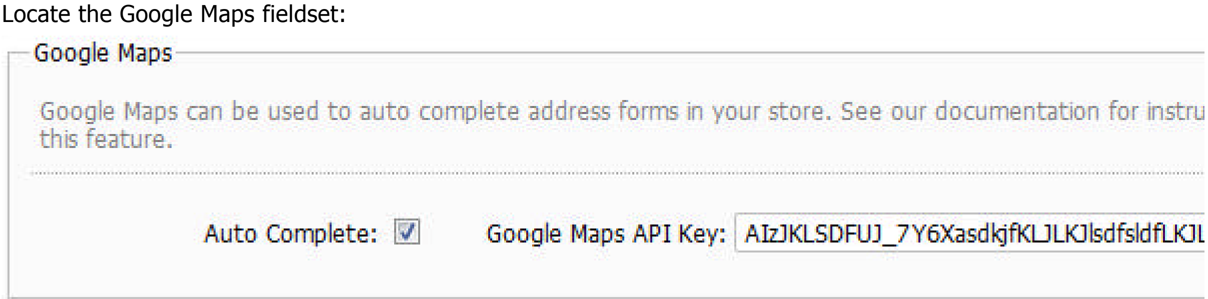
   Accept requests from these HTTP referrers (web sites) (Optional)



7. Open the **Address Form Settings** page in your Squirrelcart control panel:

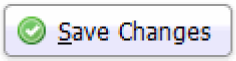


8. Locate the Google Maps fieldset:



9. Check **Auto Complete**

10. Enter your **Google Maps API Key**

11. Click 

12. Open any address form in the storefront, and type in the **Street** field to test.

6.5 Account Settings

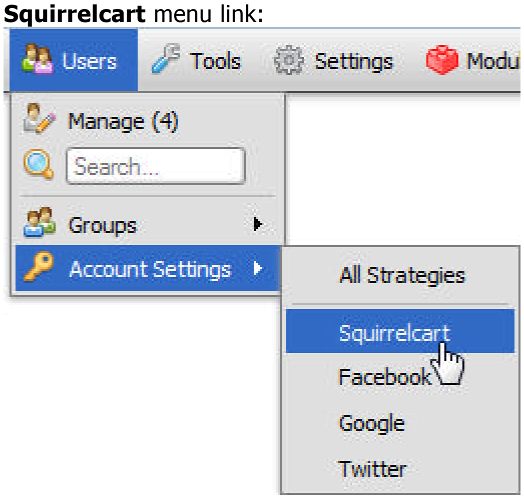
6.5.1 Squirrelcart Account Settings

Overview

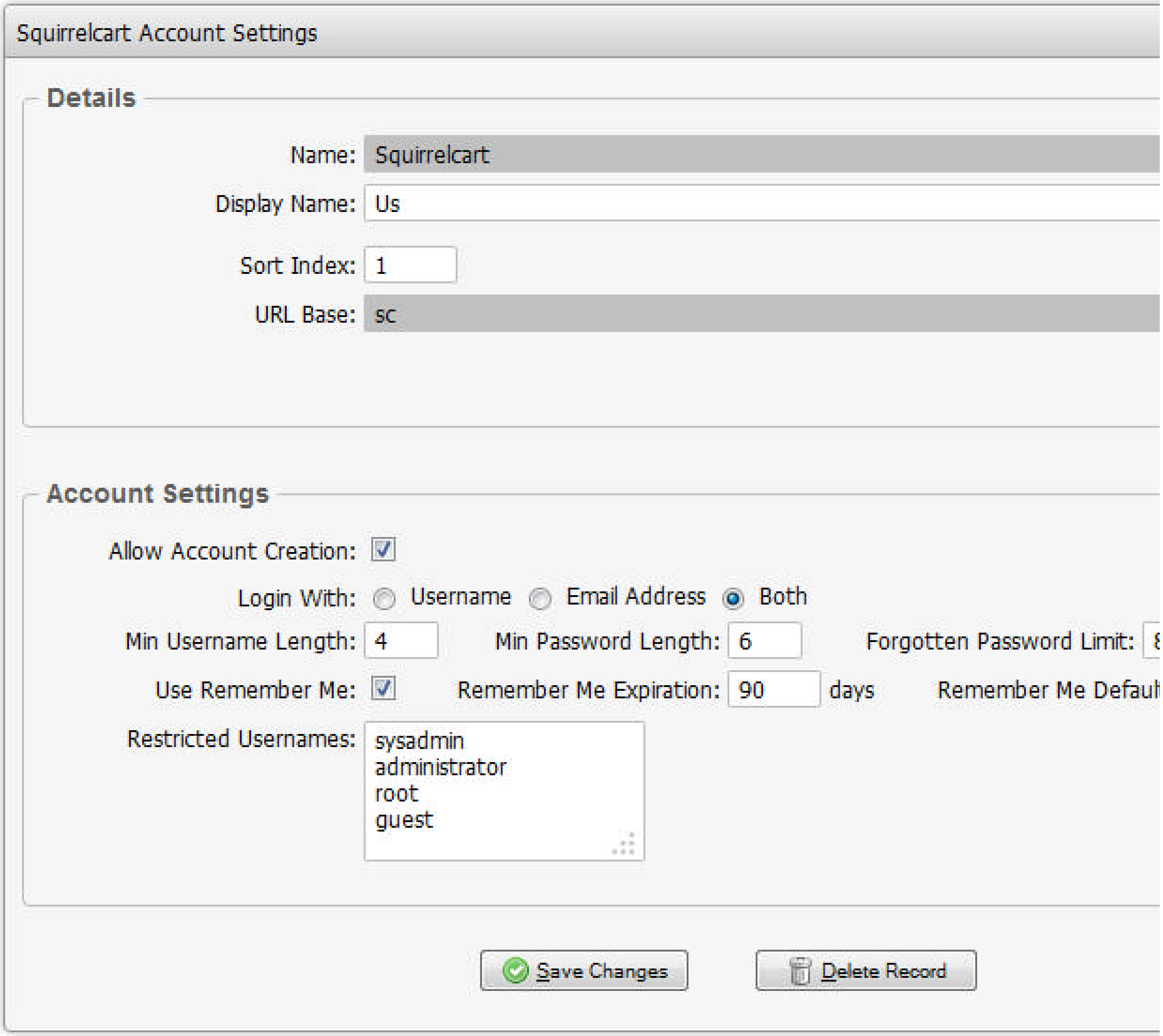
This page explains how to adjust settings specific to user accounts native to Squirrelcart.

Settings Walkthrough

Squirrelcart account settings can be viewed and modified by clicking the **Users > Account Settings > Squirrelcart** menu link:



This will open the Squirrelcart account settings page:



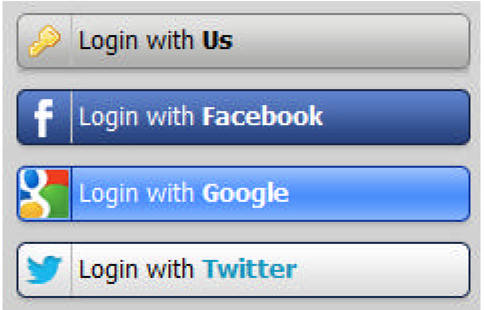
Details

Name

This field is for reference only, and cannot be changed.

Display Name

When **social sign-in ({B0C50071-B26A-447E-B894-186BF28F0E08})** is enabled, this is the label used to differentiate the native Squirrelcart login strategy from other login strategies like Facebook, Google, etc... It will appear in buttons that are used to login to your website, as shown in the first button in this example:



Sort Index

This field is only used when **social sign-in ({B0C50071-B26A-447E-B894-186BF28F0E08})** is enabled. It controls the sort order of this login strategy when it appears alongside others. The reason "Login With Us" appears first above is because this field is set to 1, Facebook is set to 2, and so on. To change the position of this button, change the value of this field.

URL Base

This field is only used when **social sign-in ({B0C50071-B26A-447E-B894-186BF28F0E08})** is enabled. It tells Squirrelcart to initiate a native Squirrelcart login when the URL is in this format:

```
http://www.example.com/auth/sc/
```

This field cannot be changed.

Account Settings

Allow Account Creation

When checked, customers will be able to create their own user accounts.

Login With

This setting controls what the user uses for a username. They can use either a username, their email address, or both.

Min Username Length

Minimum length (in characters) of usernames for accounts created by customers

Min Password Length

Minimum length (in characters) of passwords for accounts created by customers

Forgotten Password Limit

The number of times a customer can attempt to submit the Forgot Password form before being prevented from subsequent submissions

Use Remember Me

When checked, the "Remember Me" feature is enabled. This allows users to check the **Remember Me** checkbox at login, which will then automatically log them in on their subsequent visits.

For security reasons, the cookie that is set to make this feature work will be set with the **secure** attribute, if login is performed at a secure URL.

If you have the $site_secure_root variable in your config file set to a secure URL and do not have $site_www_root set to the same value, the remember me feature will not work and will automatically be disabled. For this feature to work with a secure URL, you must set $site_www_root to a secure URL, which will cause all your store's pages to use SSL.

Remember Me Expiration

The length in days that Squirrelcart should wait before expiring "remember me" information. After this number of days has past, the cookie that allows the user to be automatically logged in is no longer valid.

Remember Me Default

This field controls the default value of the "Remember Me" checkbox on the login form.

Restricted Usernames

This field is used to prevent customers from creating user accounts with certain names. List each username you want to restrict on a separate line.

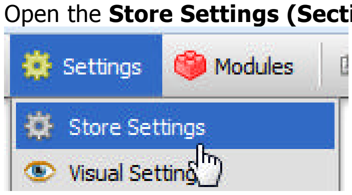
6.5.2 Enabling and Disabling Login

Overview

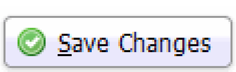
By default, customers can create accounts and login to your store, and login is optional. You can disable login for the entire store if you wish.

Enabling or Disabling Login for Entire Store

1. Open the **Store Settings (Section 6.1)** page:



2. Navigate to the **Account Settings** fieldset. You will find a field named **Allow Login**. Uncheck it to disable logins. If you previously disabled logins, you can check it to enable them again.

3. Click 

6.5.3 Account Form Settings

Settings for the account form in the storefront can be found on the Address Form Settings page. **See this topic (Section 6.4.1)** for more information.

6.5.4 Restricting Store and Product Access

See the **Managing Your Store > Access Restrictions** section of this documentation for details.

6.5.5 Social Sign-In

6.5.5.1 Social Sign-In - Overview

Overview

Social Sign-In allows your customers to login using popular social networking sites that they already have accounts for, like Facebook, Twitter, and Google.

Behind the Scenes

We use a standard protocol called Oauth 2.0 to accomplish this, and a script called **Opauth (http://www.opauth.org/)** behind the scenes, which is a PHP based implementation of the Oauth 2.0 protocol.

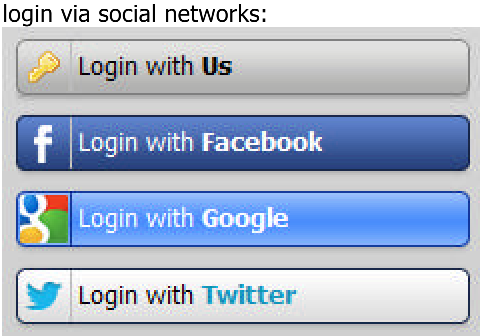
Strategies

Opauth uses the term **strategy** to refer to a network a user can login with. Squirrelcart supports the following strategies:

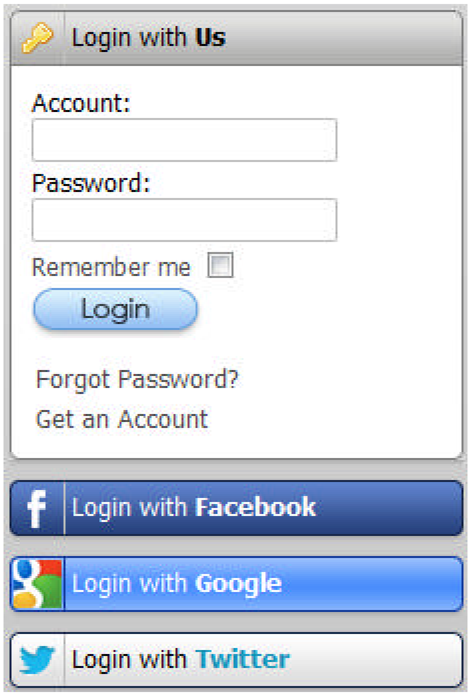
- Facebook
- Google
- Twitter

How it Works

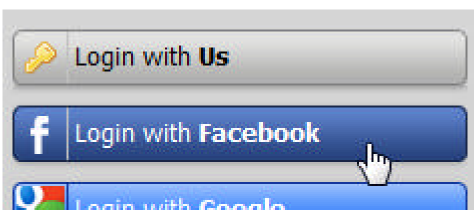
In addition to seeing a login form to login using an account native to Squirrelcart, your customers will see buttons to login via social networks:



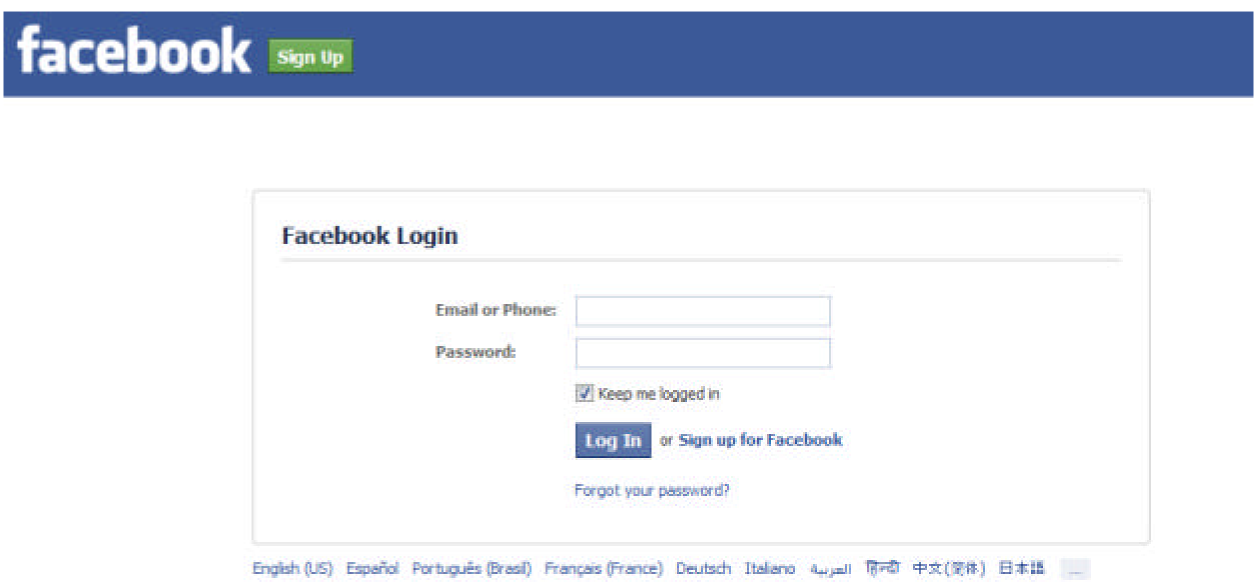
When the **Login with Us** button is clicked, it will open the standard Squirrelcart login form:



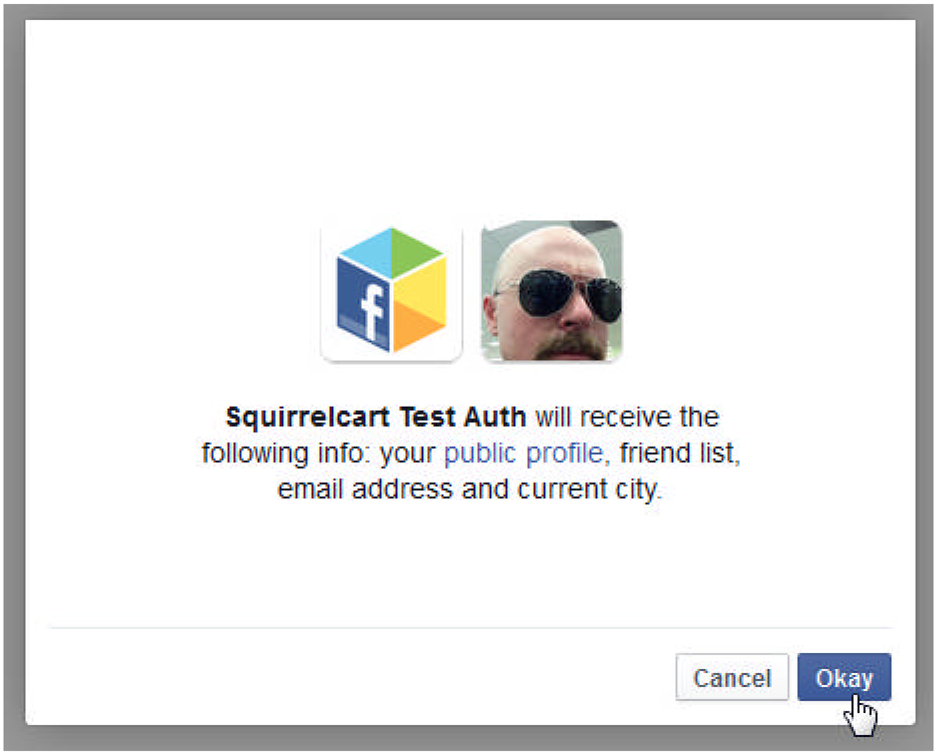
If they click any of the social network login links instead:



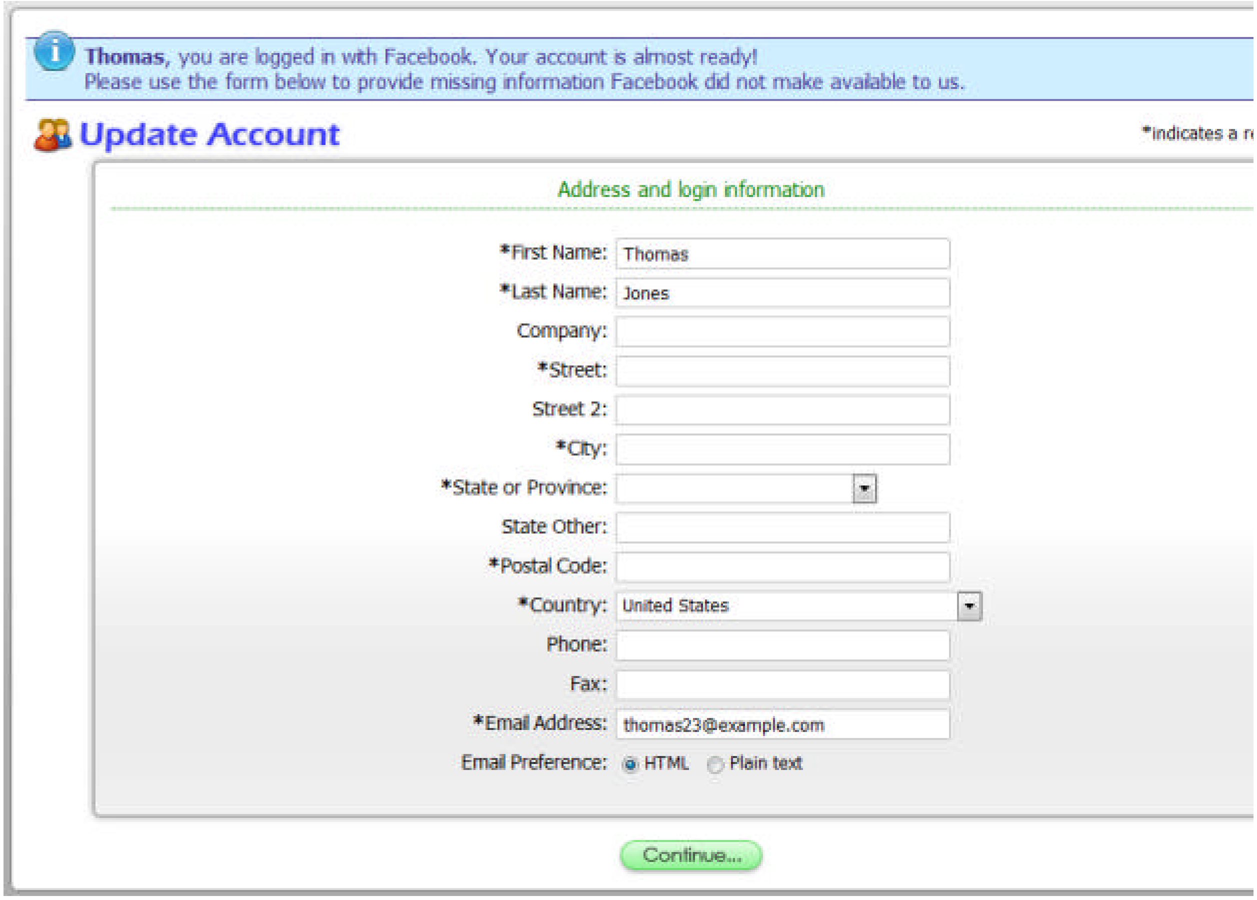
...they will be taken to the corresponding site. There, they will be asked to login if they are not already logged in:



Once logged in, the user will be asked to grant permission:



When they click Okay, they will be returned to your site. They will be logged in automatically. If any additional requried fields are not made available to Squirrelcart, they will be asked to provide the missing information using Squirrelcart's account details page:

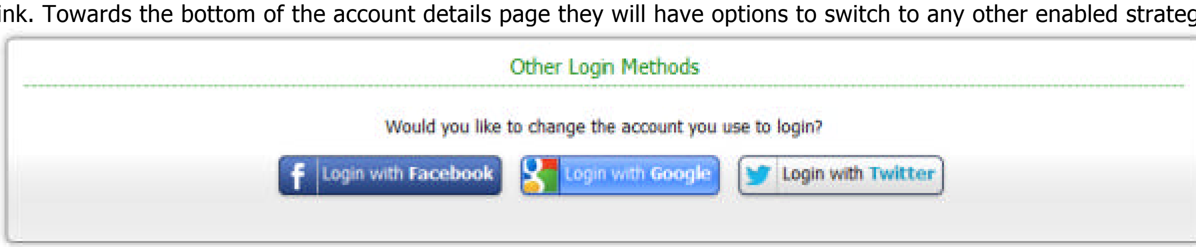


The above screen will not appear if all required fields are provided in the response from the social network. For most strategies, they will only return the email address and the person's name. If you make those the only required fields for the account form on the **address form settings** **(Section 6.4.1)** page, the users will not need to complete this step.

Once they have granted approval, on subsequent logins if they are already logged in via the social network they choose, they will be logged in immediately. If they are not logged in, they will be asked to login and will then return to your store without having to be asked for permission.

Changing Login Method

An existing user can change their login method at any time. To do so, they just need to click the **Account Details** link. Towards the bottom of the account details page they will have options to switch to any other enabled strategy:



If The Customer Forgets How They Logged In

If the customer can't remember how they logged in, as long as there is a valid email address assigned to their account they will be able to reset their account using the standard Forgot Password feature. When they do so, they will be sent an email to reset their account, which will log them in using the native Squirrelcart login strategy.

Requirements

- *PHP* 5.2 or newer
- Our **SEO URL feature** **(Section 6.12.3)** requirements must also be met.
- User account for each strategy you wish to support

Enabling Social Sign-In

1. If you have not already done so, enable our **SEO URL feature** **(Section 6.12.3)**.

2. When a strategy is enabled, the URL to login with that strategy by default will be something like this:

```
http://www.example.com/auth/facebook
```

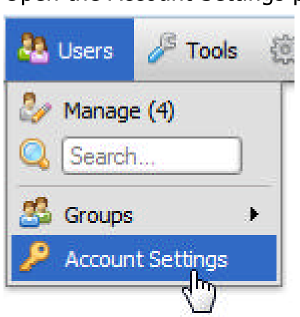
   The **auth** string let's Squirrelcart know that a login request is being made. This string can be changed if you wish, using the **SSI URL Base** field which is located in the **Account Settings** fieldset on the **Store Settings page** **(Section 6.1)**.

   We recommend leaving this field set to it's default value of **auth**. If you decide to change it and you have the **No Filename** field checked on your Store Settings page, you will need to change the "auth" string in your htaccess file to match. See the **SEO URL section of our URLs topic** **(Section 6.12.3)** for more info.

3. Enable at least one strategy. See the topics corresponding to the strategies you wish to enable in this section for instructions.

Disabling Social Sign-In

1. Open the Account Settings page:



2. Uncheck the checkbox in the **Enabled** column for all strategies except for Squirrelcart

6.5.5.2 Facebook

Overview

This page explains how to enable the Facebook login strategy for Squirrelcart's social sign-in feature. If you have not already done so, please read **the main Social Sign-In topic ({B0C50071-B26A-447E-B894-186BF28F0E08})** before reading this one. You will need to register an application with Facebook as part of the setup process.

Enabling Facebook Login

1. If you have not already done so, enable our **SEO URL feature (Section 6.12.3)**.
2. Go here: **https://developers.facebook.com/apps/**
3. If not logged in, you will be prompted to login to Facebook.
4. If you are not registered as a Facebook developer, click the **Register as a Developer** link.
5. After you have registered as a developer, click **Create a New App**
6. In the **Display Name** field, enter the name of your website.
7. Leave the **Namespace** field blank
8. Set the **Category** field to **shopping**
9. Click the **Create App ID** button
10. Click the **Settings** link on the left side of the page.
11. At the top of the page, you'll see an **App ID** and **App Secret**. Copy both of these to a text file so you have them for later use. You will have to click the **Show** button in order to view the **App Secret.**
12. Enter your domain name in the **App Domains** field.
13. Enter your email address in the **Contact Email** field.
14. Click the **Add Platform** link
15. Choose **Website** for the platform type.
16. Enter the URL to your Squirrelcart storefront page in the **Site URL** field. If you have an *SSL* certificate, use your secure URL.

17. Click **Save Changes**

18. Click **Status & Review**

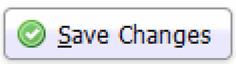
19. Change "Do you want to make this app and all its live features available to the general public?" to **YES**, then click **confirm.**

20. Open your Squirrelcart control panel

21. Click **Users > Account Settings > Facebook**

22. Enter your **App ID** and **App Secret** in the corresponding fields

23. Check the **Enabled** field

24. Click 

6.5.5.3 Google

Overview

This page explains how to enable the Google login strategy for Squirrelcart's social sign-in feature. If you have not already done so, please read **the main Social Sign-In topic ({B0C50071-B26A-447E-B894-186BF28F0E08})** before reading this one. You will need to register an application with Google as part of the setup process.

Enabling Google Login

1. If you have not already done so, enable our **SEO URL feature (Section 6.12.3)**.

2. Go here: **https://code.google.com/apis/console/**

3. Login to Google if you are not already logged in.

4. Click **create project,** enter a name for your project, and save

5. Click **APIs & auth > Credentials**

6. Under **OAuth**, click **CREATE NEW CLIENT ID**

7. Set **Application Type** to **Web application**

8. Set **Authorized Javascript origins** equal to your homepage URL. If you have an SSL certificate, use "https://" instead of "http://".

9. If you have the **No Filename** field checked on the Store Settings page in the control panel, enter a path like this for the **Authorized redirect URI** field:

```
https://www.example.com/auth/google/oauth2callback
```

   If the **No Filename** field is not checked on the Store Settings page in your control panel, enter a value like this instead:

```
https://www.example.com/store.php/auth/google/oauth2callback
```

   You'll need to change the URL to include your domain name. If you do not have an SSL certificate, you can use "http://" instead of "https://".

10. Click **CREATE CLIENT ID**

11. Copy the value of **CLIENT ID** to a text file

12. Copy the value of **CLIENT SECRET** to a text file

13. Click **APIs & auth > Consent screen**

14. Set **EMAIL ADDRESS** to the address you wish users to use if they need to contact you

15. Enter a value for **PRODUCT NAME**. We recommend using your domain name.

16. Enter a value for **HOMEPAGE URL**

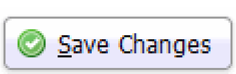
17. Click **Save**

18. Open your Squirrelcart control panel

19. Click **Users > Account Settings > Google**

20. Enter your **Client ID** and **Client secret** in the corresponding fields

21. Check the **Enabled** field

22. Click 

6.5.5.4 Twitter

Overview

This page explains how to enable the Twitter login strategy for Squirrelcart's social sign-in feature. If you have not already done so, please read **the main Social Sign-In topic ({B0C50071-B26A-447E-B894-186BF28F0E08})** before reading this one. You will need to register an application with Twitter as part of the setup process.

Enabling Twitter Login

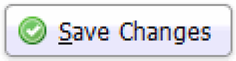
1. If you have not already done so, enable our **SEO URL feature (Section 6.12.3)**.
2. Go here: **https://dev.twitter.com/apps**
3. Login to Twitter if you are not already logged in.
4. Click **Create a new application**
5. For the **Name** field, enter the name of your company or store
6. For the **Description** field, enter a short description describing your store
7. For the **Website** field, enter the URL to your *storefront* page.

   ```
   https://www.example.com/store.php
   ```

   If you do not have an SSL certificate, you can use "http://" instead of "https://".
8. For the **Callback URL,** enter the same value you used above.
9. Submit the form
10. Upon success, click the **API Keys** tab. Copy the values of **API Key** and **API Secret** to a text file
11. Click the **Settings** tab
12. Change the **Application Icon** if you wish
13. Check **Allow this application to be used to Sign in with Twitter**
14. Click **Update settings**
15. Open your Squirrelcart control panel
16. Click **Users > Account Settings > Twitter**

17. Enter your **Consumer key** and **Consumer secret** in the corresponding fields

18. Check the **Enabled** field

19. Click 

6.6 Shipping

6.6.1 Couriers

Overview

Squirrelcart uses the term **Shipping Courier** to define the company that is handling a shipment. For example, USPS, UPS, FedEx, etc...

Squirrelcart allows you to add your own couriers in addition to the ones that are built in by default. This section explains how to work with them.

Viewing Shipping Couriers

1. Open the **Control Panel (Section 3)**

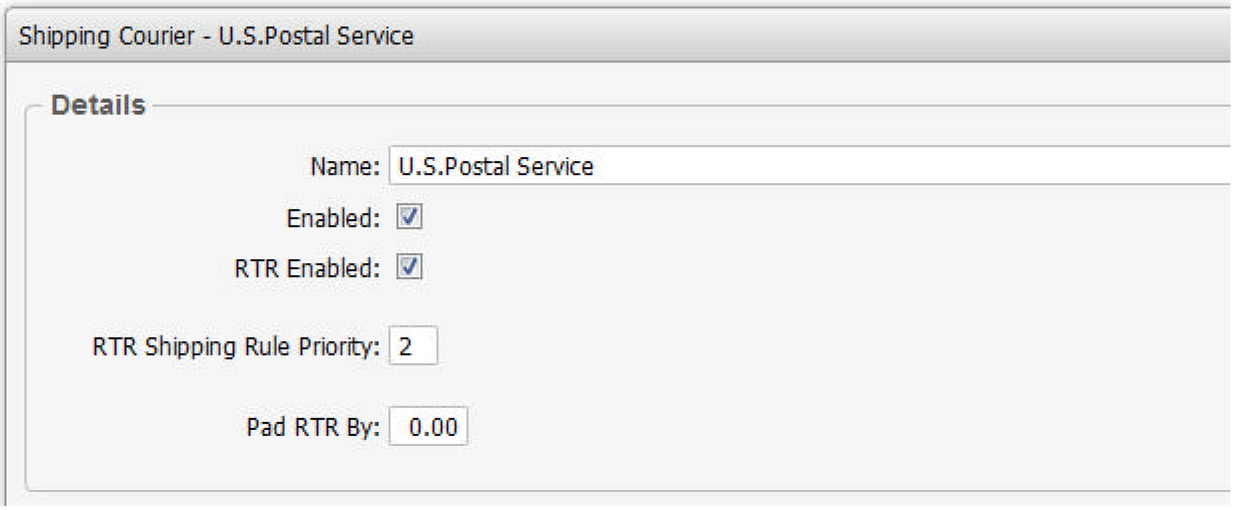
2. Click the Shipping Couriers menu link

3. Click on the Shipping Courier you wish to view

Record Overview

Some of the built in Shipping Courier records have special fields associated with **Real Time Rates** and other features offered via APIs. We will not discuss those fields here. They will be explained in the Real Time Rates section.

Details



Name
Name of courier

Enabled
This field determines whether or not Squirrelcart will attempt to use this Shipping Courier. Optionally, you can conditionally specify when this courier will be enabled using zones and rules.

RTR Enabled
For Shipping Couriers that support real time rates, this field controls whether or not real time rates are enabled.

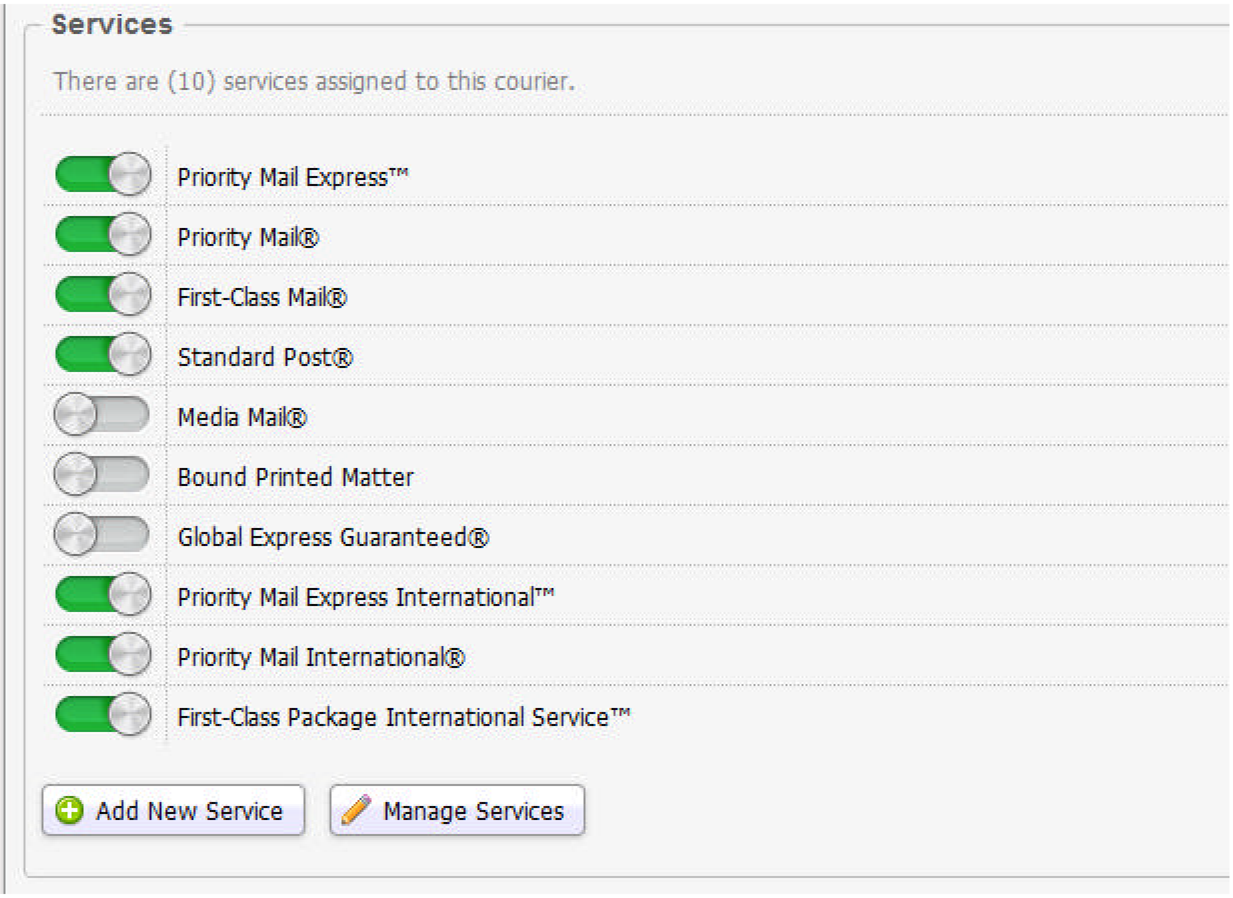
RTR Shipping Rule Priority
This controls the priority assigned to real time rates. See the **Real Time Rates topic** **(Section 6.6.3.2)** for more information.

Pad RTR By
Any amount entered here will be added to real time rates before they are presented to your customers. This can be overriden on an individual shipping method basis.

Services

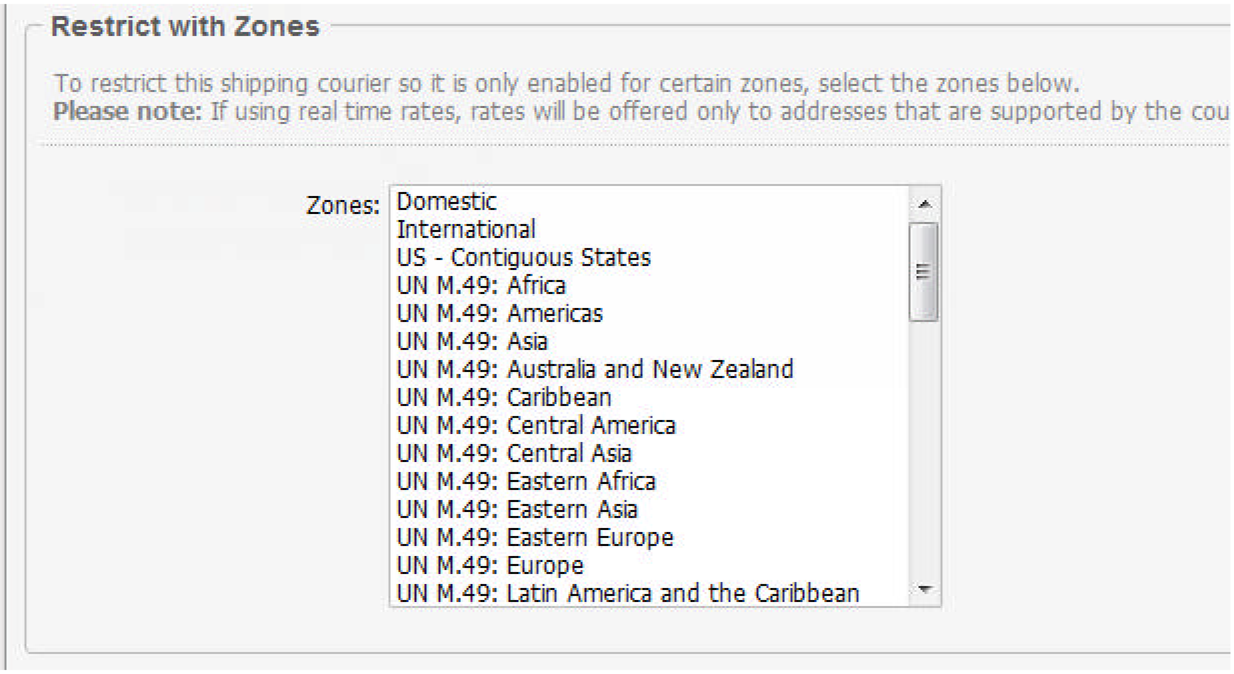
Services are individual shipping methods offered by the courier, such as Priority Mail or First-Class Mail. This section lists the services assigned to the courier, with options to enable or disable, and buttons to add or manage new services.

You can read more about services in the **Services (Section 6.6.2)** topic in this section.



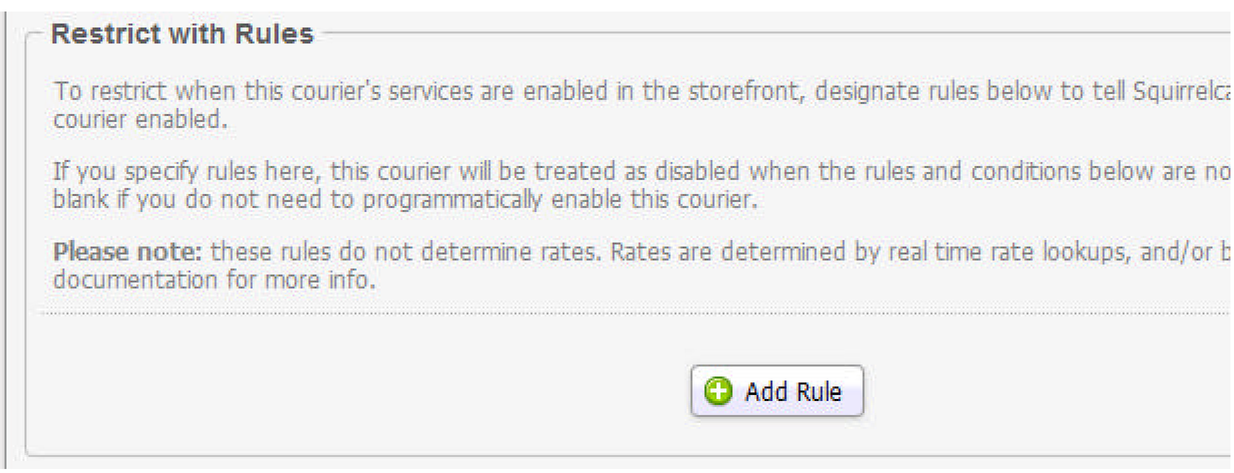
Restrict with Zones

Zones can be used to group together address locations. You can restrict a couriers so that it is only enabled for certain zones by selecting them here. Zones can also be used to restrict shipping services and shipping rules. See the **Zones topic (Section 6.6.4)** in this section for more information.



Restrict with Rules

Rules can be used to specify detailed conditions that when met will result in the courier being enabled. For example, if you only want a particular courier enabled when the order total is over $1,000, you can assign a rule to this section to accomplish that. See the **Managing Your Store > Rule System** section of this documentation for more info.



Enabling or Disabling a Courier

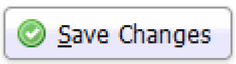
This explains how to enable a Shipping Courier so it can be used in Squirrelcart. This enables the courier only, and does not enable real time rates or other advanced shipping tools. If the courier supports additional tools such as these, refer to the topic for that particular courier nested directly below the **Shipping** section of this documentation.

1. Open the courier you want to work with (see **Viewing Shipping Couriers** above)

2. Check or uncheck the **Enabled** field

3. If you wish to restrict the courier so that it is only enabled for certain zones, select those zones in the **Restrict with Zones** fieldset. See the **Zones topic (Section 6.6.4)** for help with zones.

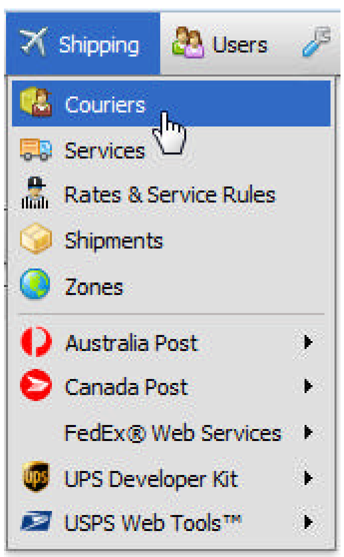
4. If you wish to restrict the courier so that it is only enabled for certain orders, customers, dates, or other situations, add one or more rules to the **Restrict with Rules** fieldset. See the **Managing Your Store > Rule System** in this documentation for help with rules.

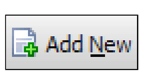
5. Click 

Creating a Custom Shipping Courier

If the courier you need is not listed, or you want to create one for something like "in store pickup":

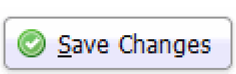
1. Open the Couriers table:



2. Click 

3. Fill out the form

4. Check **Enabled**

5. Click 

6. A courier needs at least one shipping service. After creating the courier, you can create one or more services for

this courier. See the **Services topic (Section 6.6.2)** for more info.

7. See the **Rates** section of this documentation for info on how to offer this courier to your customers during checkout.

6.6.2 Shipping Services

Overview

Services are individual shipping methods offered by a courier, such as Priority Mail or First-Class Mail.

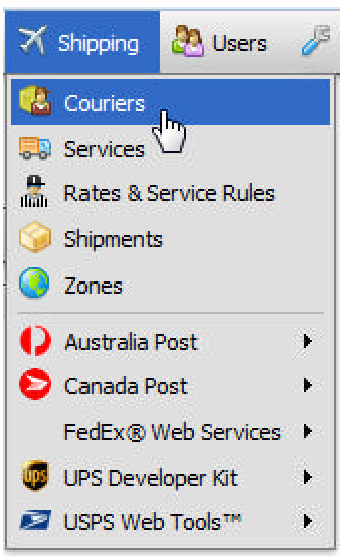
Viewing Services

There are two ways to view shipping services in your Squirrelcart control panel.

Viewing services for a specific courier, from courier's record

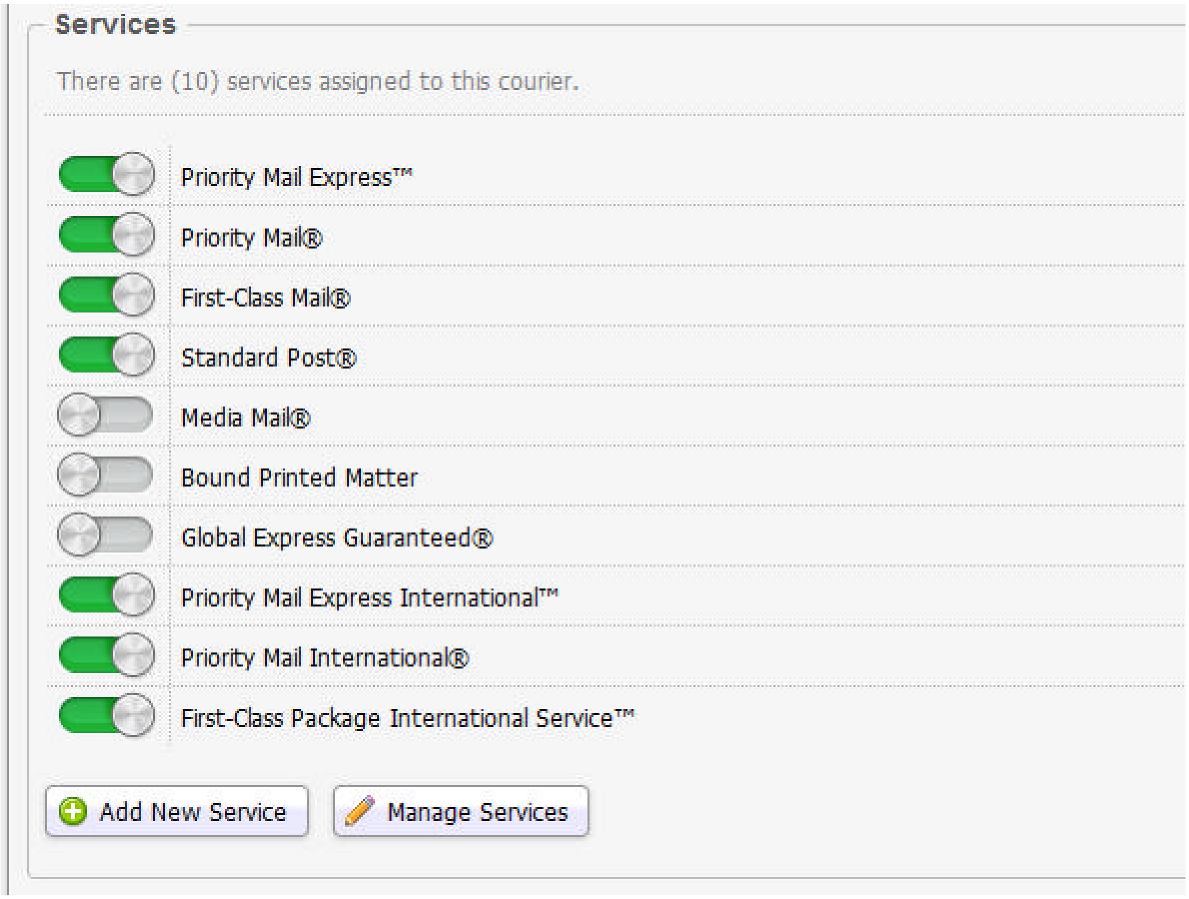
To view and manage services for a particular courier, from that courier's record:

1. View your shipping couriers



2. Click on the row corresponding to the courier you wish to work with. For this example, USPS was clicked.

3. You will find a list of services assigned to the courier in the **Services** fieldset:

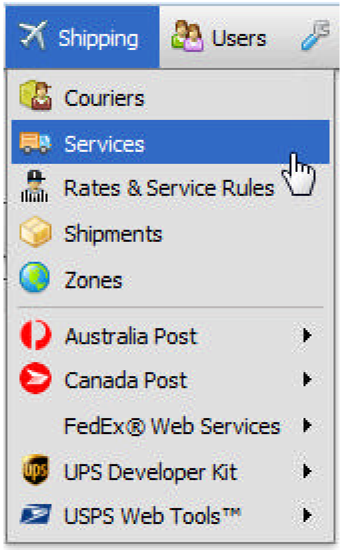


You can click the name of any service in this list to open its record, where you can find more settings.

4. Clicking the **Manage Services** button will take you to a table view showing these same services. That view is the same one mentioned in the section below.

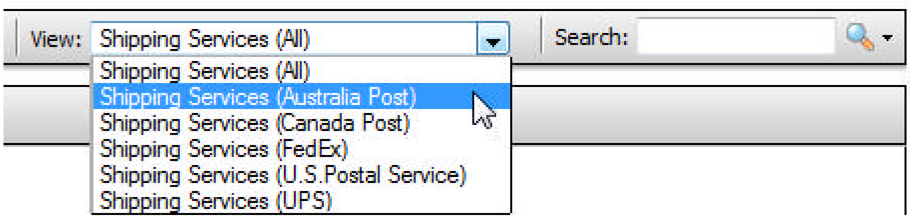
Viewing services for all couriers

Click the Services link to view all services, for all couriers:



This will open the Shipping Services table, which lists all services by default.

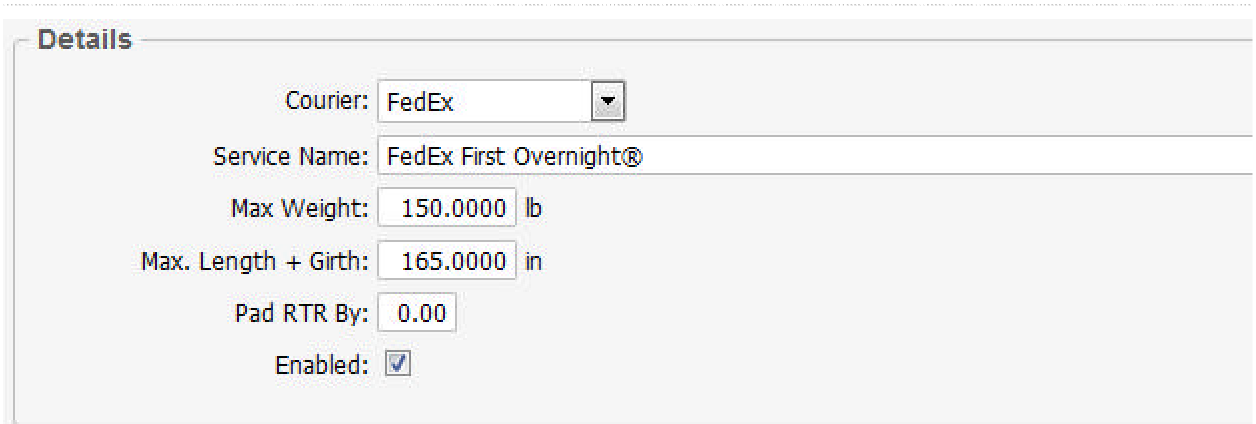
To filter the list by courier, choose one of the options in the view menu:



Clicking any row in the table will open the corresponding service's record, where you will find settings for that service.

Record Overview

Details



Courier
Courier that provides this service

Service Name
The name of the service, shown to your customers during checkout.

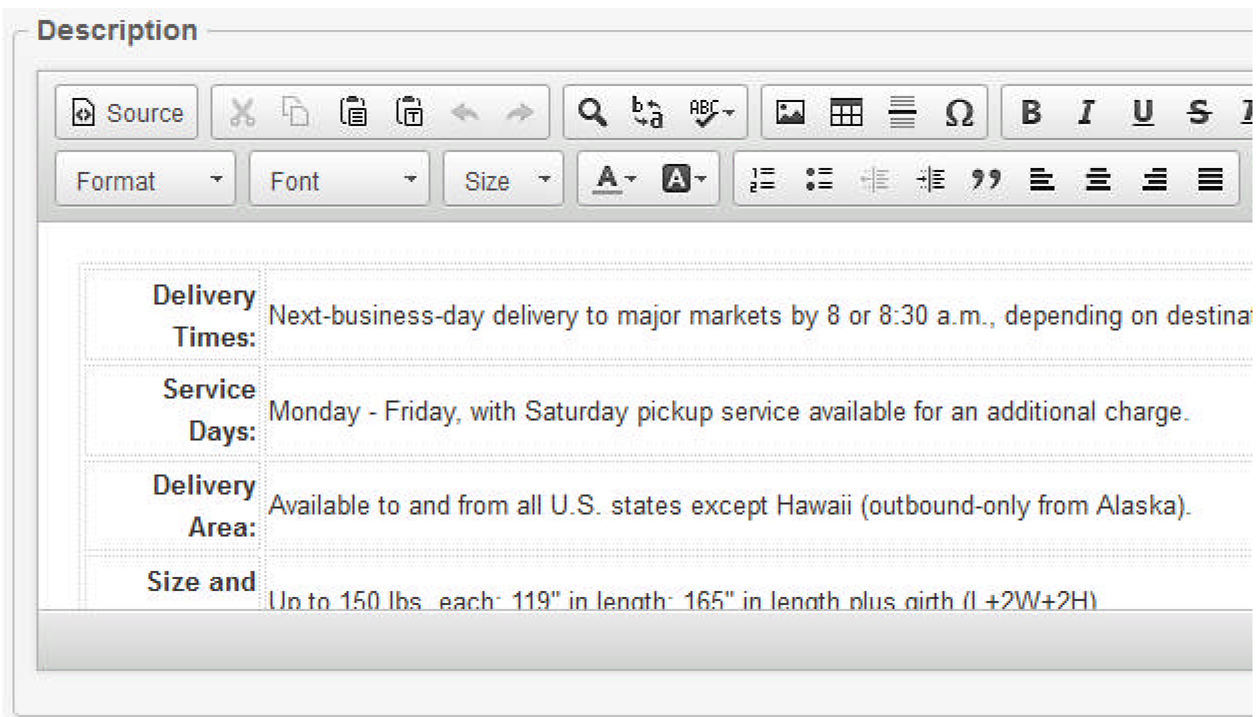
Max Weight
For Couriers that support real time rates, this controls the maximum weight limit supported by this service. For custom shipping services, this field is for reference only.

Max Length + Girth
For Couriers that support real time rates, this controls the maximum dimensions supported by this service. For custom shipping services, this field is for reference only.

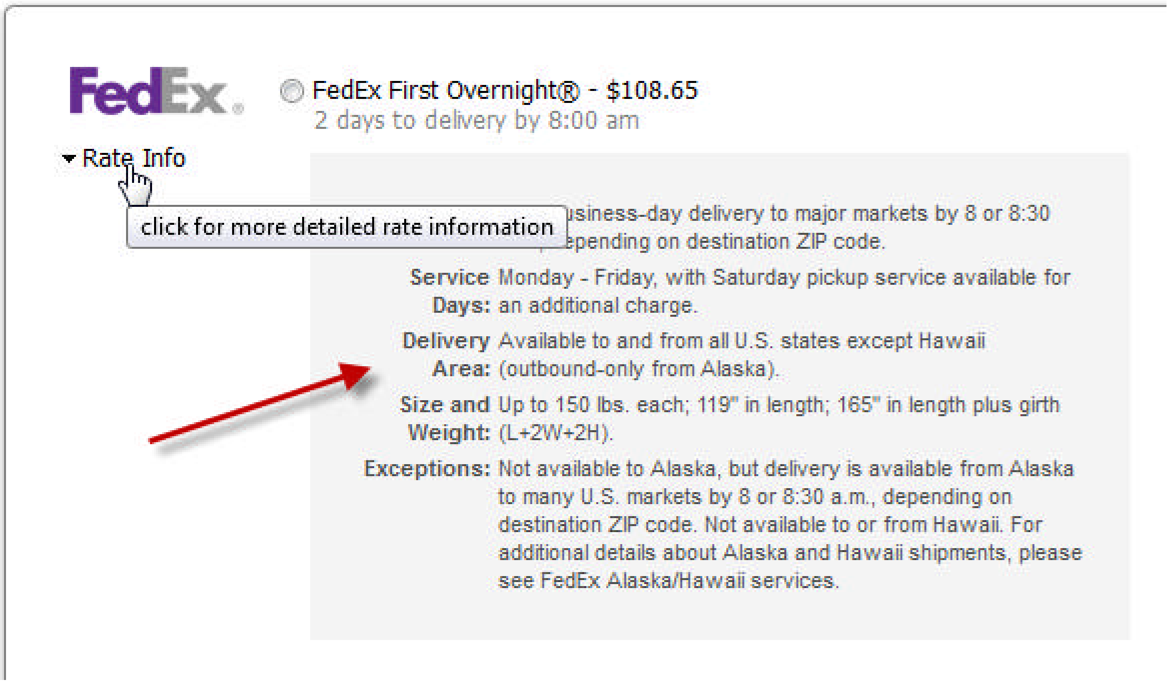
Pad RTR By
For Couriers that support real time rates, any amount entered here will be added to real time rates before they are presented to your customers.

Description

Description of the service, to help your customers understand what it includes.

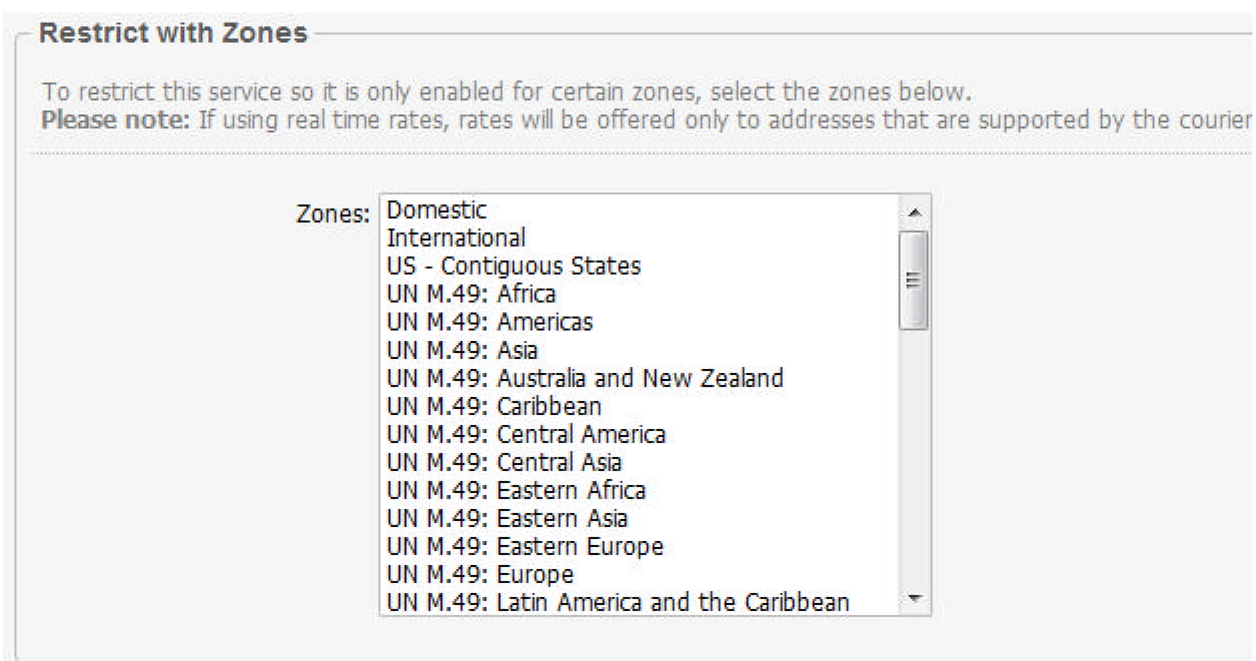


Any description entered here will be available to your customers, if they click on the **Rate Info** link during checkout:



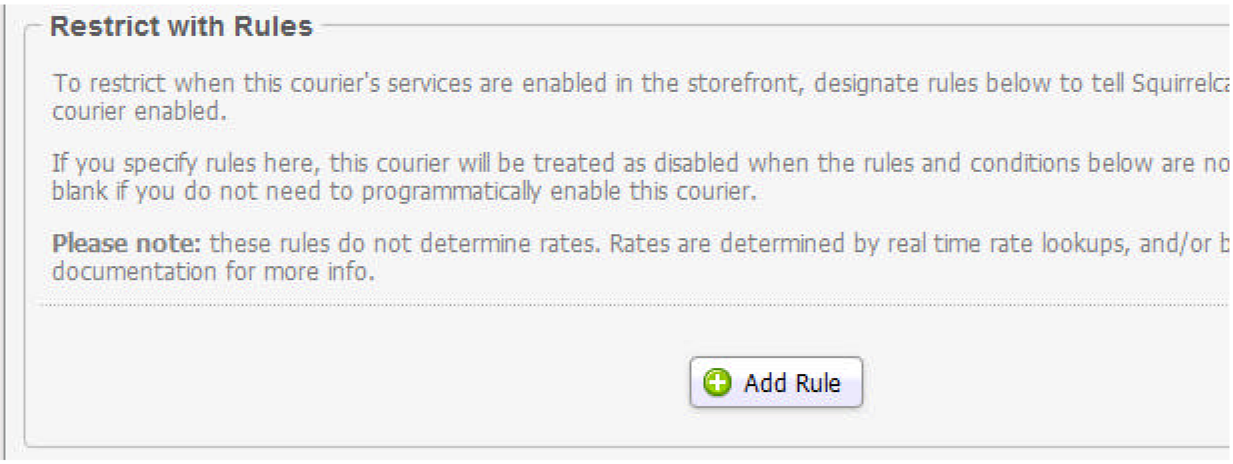
Restrict with Zones

Zones can be used to group together address locations. You can restrict a service so that it is only enabled for certain zones by selecting them here. Zones can also be used to restrict shipping couriers and shipping rules. See the **Zones topic** **(Section 6.6.4)** in this section for more information.



Restrict with Rules

Rules can be used to specify detailed conditions that when met will result in the service being enabled. For example, if you only want a particular service enabled when the order total is over $1,000, you can assign a rule to this section to accomplish that. See the **Managing Your Store > Rule System** section of this documentation for more info.



> Zone and rule restrictions can be added at the courier level as well, which will also control when that courier's services are enabled. If you want to restrict all services for a courier via zones or rules, do it on the courier's record, instead of on each of it's services.

Enabling or Disabling Services

1. View the service you wish to enable or disable, using one of the options listed above.

2. To disable or enable an individual service, click it's toggle switch. (It is green when ON).

3. If you want to enable a service, but only for certain ship to locations, open its record and select one or more zones in the **Restrict with Zones** fieldset. For help with Zones, see the **Zones topic (Section 6.6.4)**.

4. If you want to enable a service, but only for certain orders, or customers, or dates, or other conditions, add one or more rules in the **Restrict with Rules** fieldset. For help with rules, see the **Managing Your Store > Rule System** section of this documentation.

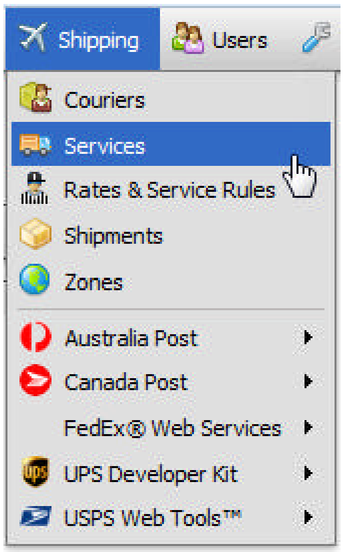
> To disable all services for a paritcular courier, you can disable the courier itself, without having to turn off each individual service belonging to that courier. See the **Shipping Couriers topic (Section 6.6.1)** for more info.

Creating a Custom Shipping Service

If the service you need is not listed, you can create it as follows:

1. Determine the courier you want the service to be offered by. If that courier does not exist, create it. See **Creating a Custom Shipping Courier here (Section 6.6.1)** for instructions.

2. Open the Shipping Services table:



3. Click

4. Fill out the form.

5. Check **Enabled**

6. Click Save Changes

7. See the **Rates** section of this documentation for info on how to offer this service to your customers during checkout.

6.6.3 Rates

6.6.3.1 Rates - Overview

Overview

When an order is shippable, Squirrelcart will attempt to offer your customers rates at checkout, based on your settings. An order is considered shippable when at least one shipping courier is enabled, and at least one product in the cart is flagged as Shippable on it's product record in the control panel.

Shipping rates are controlled in 3 ways in Squirrelcart. All 3 ways can be used in combination to offer rates to your customers.

How Rates are Determined

Real Time Rates (Section 6.6.3.2)
This is the preferred, most accurate, and least complicated way to handle your shipping rates. It works by having your server query the courier's website for rates at the time of checkout.

Rate & Service Rules (Section 6.6.3.3)

Rate & Service Rules are used to create rates manually, that will be offered based on conditions specified using Squirrelcart's **Rule System ({DAD3FB89-5C44-4804-A6E5-558CA380A78D})**.

Product Based Rates (Section 6.6.3.4)
Product based rates are manually specified for a product, on that product's record.

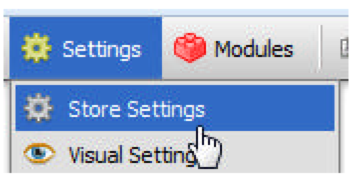
Controlling Rate Failure

In the event that an order is shippable but no rates are available for that order (due to invalid address information, misconfiguration, etc...), Squirrelcart will inform the customer that rates were not able to be determined.

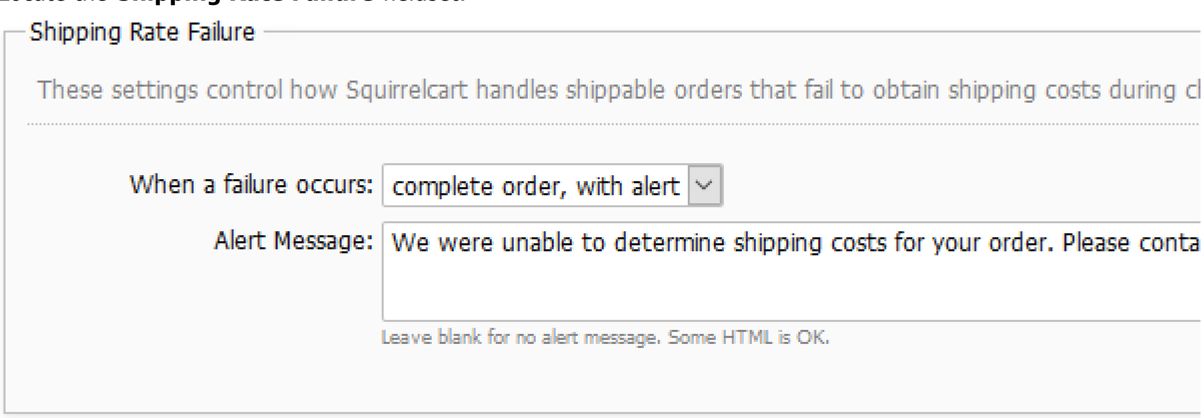
You can control what happens when a failure occurs, and can modify the message shown during rate failure.

How to Change Rate Failure Settings

1. Open the Store Settings page in the control panel



2. Locate the **Shipping Rate Failure** fieldset:



3. Use the **When a failure occurs** field to change what happens during rate failure. Options include:

   - complete order normally
   This option completes the order normally, and does not show an alert on the shipping step during checkout. Note that if rate failure occurs while using the shipping estimator on the "view cart" page, the alert will still appear within the estimator.

   - complete order, with alert
   This option completes the order normally, and shows an alert.

   - prevent order completion
   This option prevents the order from being placed, and shows an alert.

4. Use the **Alert Message** field to control the alert shown to the customer.

6.6.3.2 Real Time Rates

Overview

Squirrelcart supports obtaining real time shipping rates (RTR) for:

- USPS - Using either Endicia or USPS Web Tools.
- UPS
- FedEx
- Canada Post
- Australia Post.

This greatly reduces the time spent managing your shipping rates.

How it Works

1. Customer adds item to cart and clicks checkout
2. Customer specifies shipping address and clicks continue
3. Squirrelcart sends a request to shipping courier requesting rates
4. Shipping courier returns rates
5. Squirrelcart presents rates to customer

Steps 3 through 5 all happen behind the scenes without customer interaction.

Relation to Shipping Rules

Squirrelcart automatically treats each rate obtained via a real time rate lookup as a **Shipping Rule (Section 6.6.3.3)** with a default priority of 2. This allows you to offer your customers a combination of dynamic real time rates and manually created rates (Shipping Rules). To change the default priority, use the field **RTR Shipping Rule Priority** on the record for each **Shipping Courier ({03EF016C-7994-432E-9633-DE69DE9EA9F3})**.

Enabling Real Time Rates

In order for real time rates to work, Squirrelcart needs to know the weight of your products, your company's address, and what shipping methods you want to use.

1. Enable Real Time Rates for your courier.
   - For USPS, see the **Endicia (Section 6.6.7)** or **USPS Web Tools (Section 6.6.8)** topics
   - For FedEx, see the **FedEx Web Services (Section 6.6.9)** topic
   - For UPS, see the **UPS Developer Kit (Section 6.6.10)** topic.
   - For Australia Post, see the **Australia Post (Section 6.6.11)** topic
   - For Canada Post, see the **Canada Post Sell Online (Section 6.6.12)** topic

2. Set Product Weights

   Make sure that you have weights associated with every product record. If you do not, real time rates will fail.

3. Specify Your "Ship From" Address

   Squirrelcart uses the address specified on your **Store Settings (Section 6.1)** page as the address to ship from. If this address is blank or incorrect, real time rates will fail. If you are using the warehouse feature, the address of the warehouse is used as the ship from address.

4. Enable the **shipping services (Section 6.6.2)** you wish to use.

5. Test

   To test, add an item to the cart in your storefront. Continue through checkout, specifying a valid shipping address. If real time rates are working, you should be shown rates for the courier you enabled. If they fail, enable **diagnostics mode (Section 15.3)** to watch the data sent to your courier, and the response they return.

> Real time rate information is provided on a per package basis. To handle this, Squirrelcart has a packing function that it uses to determine a rough estimate of the number of packages that are in the order. It then requests rate information for each package, totals the amount per package, and offers the total amount to the customer for the corresponding shipping method. Squirrelcart uses the value of the Max. Weight field on the Shipping Method's record to determine how to pack the order. This method is not foolproof, but does work very well. If you wish your shipping rates to be more accurate, we recommend you check the **Ship as a separate package** option on your product records. The cart will then assume that you are shipping every item ordered in a separate package.

Padding Real Time Rates

If you need to add an amount to the real time rates returned by a courier to account for packaging, follow the steps below.

> Keep in mind that couriers frown upon presenting padded rates as the actual rate being offered by the courier.

If you do pad your real time rates, you should add a notice somewhere on your site indicating that you are adding an additional charge for packaging.

For all Rates Returned by a Courier

You can pad all the real time rates returned for a particular courier by a set amount. Just enter the amount you wish to pad by in the **Pad RTR By** field on the courier's record under **Shipping > Couriers** in your control panel.

For Individual Shipping Methods

You can pad all the real time rates returned for individual shipping methods by a set amount. If you are also padding rates at the courier level (see above), any padding done at the shipping method level takes precedence. Just enter the amount you wish to pad by in the **Pad RTR By** field on the shipping method's record under **Shipping > Methods** in your control panel.

6.6.3.3 Rate & Service Rules - Overview

Overview

Shipping Rules are records you create in the control panel. The are used to offer manually created shipping rates that will only be offered to the customer when certain conditions are met. These conditions are defined using Squirrelcart's **Rule System ({DAD3FB89-5C44-4804-A6E5-558CA380A78D})**. If more than one shipping rule applies to a given order, Squirrelcart will only offer the rates for the rules that have the largest priority number.

Here is an example scenario:

In this example, let's assume that you have 5 shipping rules created in your control panel.

These 3 rules are assigned a priority of 1:

- Offer free shipping for orders over $30 via USPS Priority when the Weight Total of the order is greater than 0
- Offer USPS OverNight for $15.00 when the Weight Total of the order is greater than 0
- Offer FedEx Ground for $8.00 when the Weight Total of the order is greater than 0

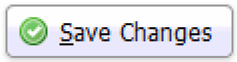
  These 2 rules are assigned a priority of 2:
- Offer USPS Global for $25.00 when the Weight Total of the order is greater than 0
- Offer FedEx International for $32.00 when the Weight Total of the order is greater than 0

  Now, if the Weight Total of the order is 20lbs, then all 5 of these rules apply to the order. Only the last 2 rules are actually used to offer rates to the customer, because they have a larger priority number (2) then the other 3 rules, and therefore take precedence.

Creating a Rate & Service Rule

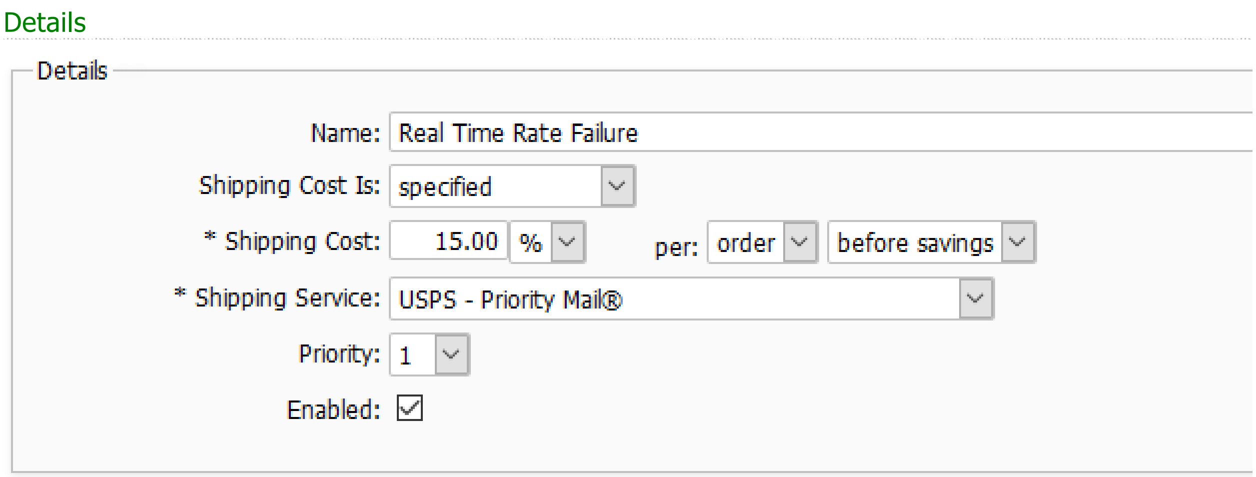
1. Open the **control panel (Section 3)**

2. Click the Shipping Rules menu link

3. Fill out the form, and Click 

. Use the Record Overview below as a guide.

Record Overview



Name
This is for your use only. The customer does not see this.

Shipping Cost Is
Possible Values:

- specified - This is the default value, used to specify a price during checkout.
- to be determined - This allows you to show shipping costs as TBD during checkout, for cases where you wish to contact the customer to handle shipping costs after their order has completed.

Shipping Cost
This is the amount to charge for shipping if the condition is met. You may enter either a decimal only in this field. If you wish the amount to be an actual currency value, set the 2nd field to your currency symbol. If you wish to charge a percentage, set it to a **%** sign. The 3rd field is described below:

per (not labeled)
This field controls how the shipping cost will be applied.
Possible Values:

- per order - if set to per order, the shipping cost will be applied once, for the entire order
- per item - if set to per item, the shipping cost will be applied once for every item in the order

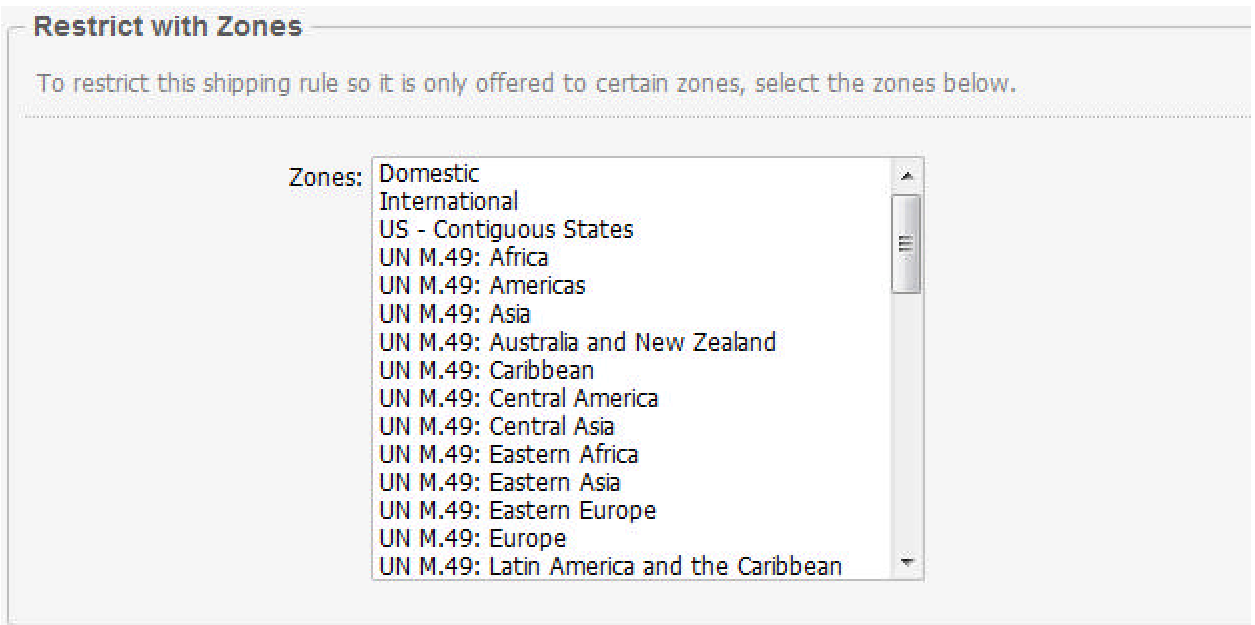
Shipping Service
This field controls the shipping method that the rate will be offered for

Priority
This field controls the priority that the shipping rule will have. The larger the number, the more priority it will have.

Enabled
This field controls whether or not the rule will be enabled, and can be unchecked to temporarily disable a shipping rule.

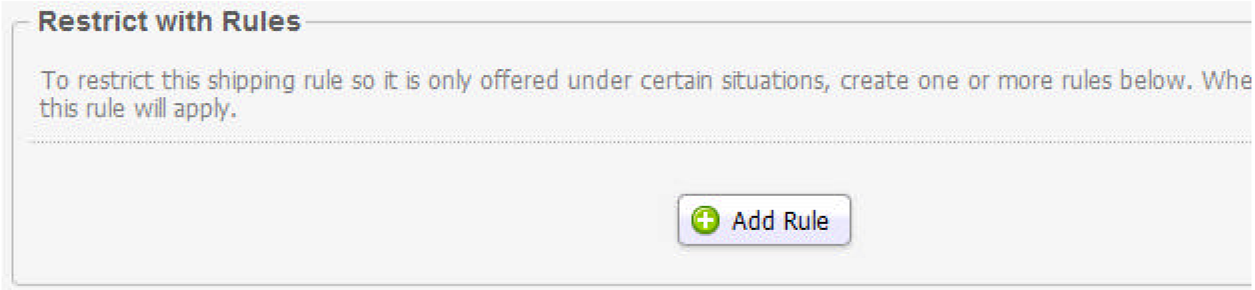
Restrict with Zones

Zones can be used to group together address locations. You can restrict a rate & service rule so that it is only enabled for certain zones by selecting them here. Zones can also be used to restrict shipping couriers and shipping rules. See the **Zones topic** **(Section 6.6.4)** in this section for more information.



Restrict with Rules

Rules can be used to specify detailed conditions that when met will result in the rate & service rule being enabled. For example, if you only want a particular rate & service rule to be offered when the order total is over $1,000, you can assign a rule to this section to accomplish that. See the **Managing Your Store > Rule System** section of this documentation for more info.



Zone and rule restrictions can be added at the courier and service level as well, which will also control when that courier's services are enabled.

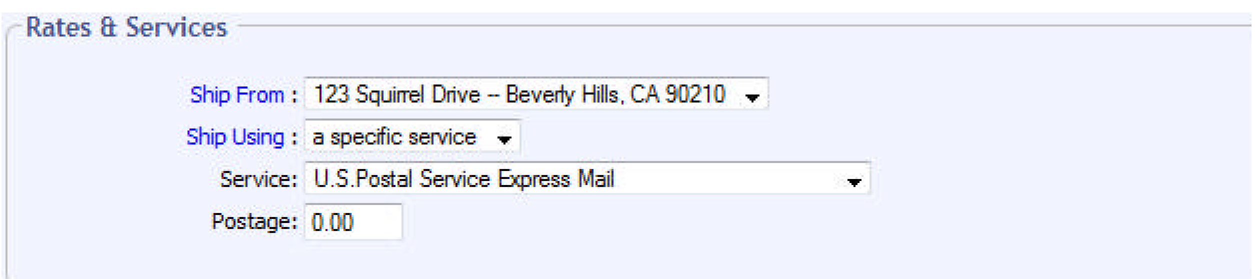
If you create rules that are based on address information, don't forget that the **Customer** rule type only applies to the information in an actual Customer account. If you want a shipping rule to apply based on address information regardless of whether or not the customer has an account, you should use the **Order (in progress)** rule type.

6.6.3.4 Product Based Rates

Overview

Shipping rates can be set on a per product basis. This is useful for altering the shipping rates offered for an item that must ship using a certain shipping method. Product based rates are controlled by the Rates & Services section on the product's record. In order to see this section, you must open a product's record in the control panel. To specify a product based rate, you need to change the **Ship Using** field in this section to anything other than **Enabled Services**.

Field Overview



Ship From (appears when Inventory Control is not enabled)

When Inventory Control is disabled, this field controls where this item will ship from.

Ship Using

This field controls whether this item will ship using a specific service that you specify, or via any services available via shipping rules.

Possible Values:

- a specific service - choosing this will make the Service, Postage is, and Postage fields appear.
- enabled services (default) - this setting will allow the rates for this item to be derived from Shipping Rules

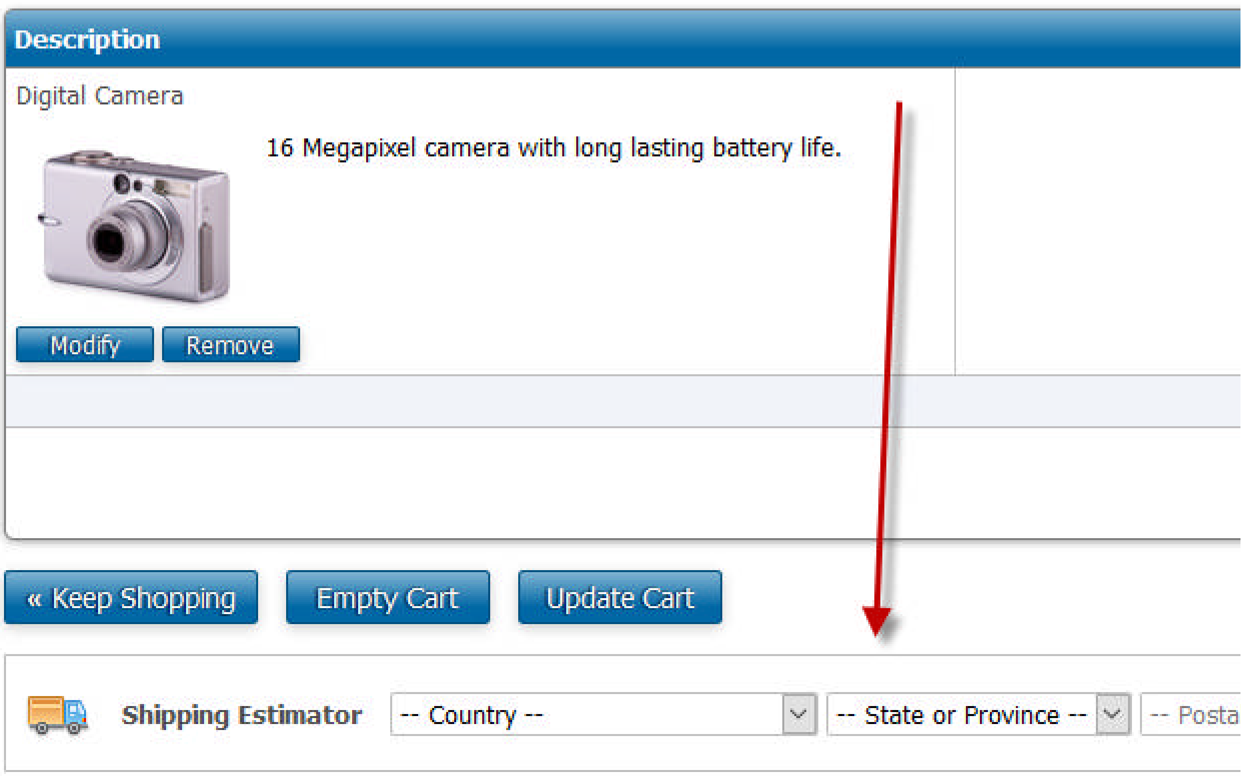
Service (appears when "Ship Using" is set to "a specific service")
This field is used to specify the service you want to use to ship the product

Postage (appears when "Ship Using" is set to "a specific service")
This field is used to specify a set postage amount. Do not enter a currency symbol ($).

6.6.3.5 Shipping Estimator

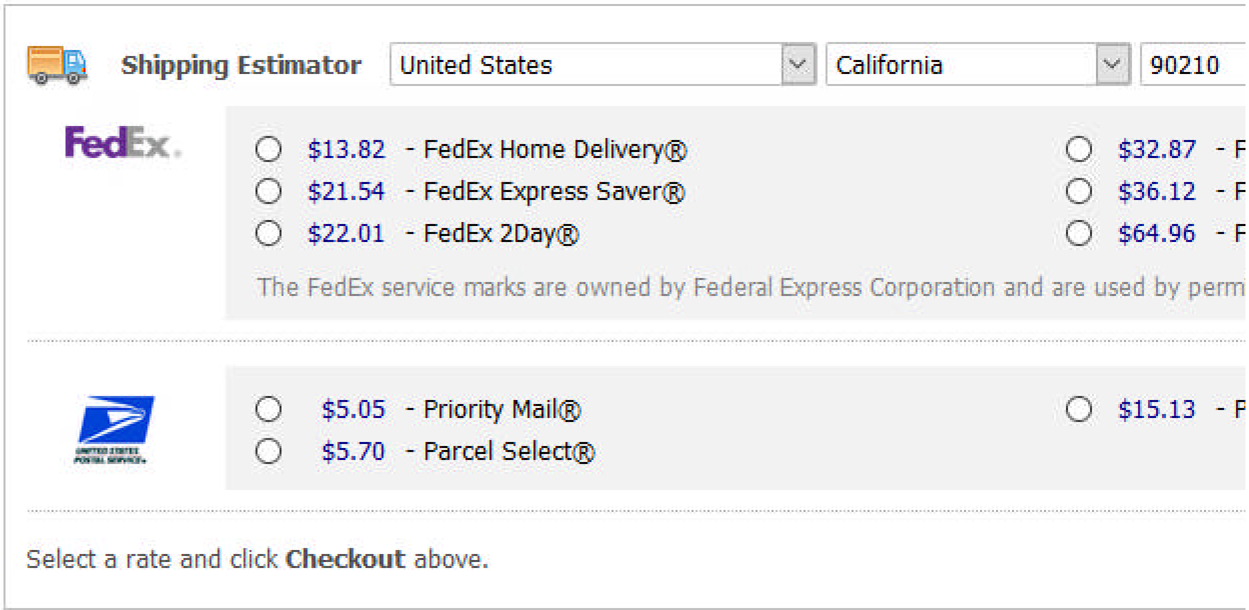
Overview

Many customers do not want to begin the checkout process unless they know what shipping is going to cost. For that reason, Squirrelcart has a shipping estimator tool that appears (by default) on the first step of the checkout process, seen when the customer clicks the **View Cart** button:



How it Works

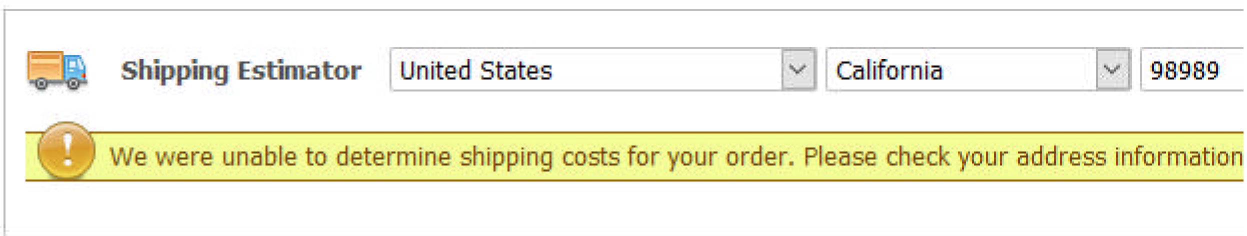
If the customer chooses to use the tool, they specify their country, state, and postal code and click **Get Estimate**. Rates will be returned within the estimator:



The customer can select a rate and click **Checkout** to complete their order.

Rate Failure

If Squirrelcart fails to determine a shipping rate, the customer will see an alert:



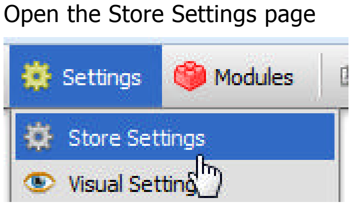
This alert can be customized. See **Controlling Rate Failure** on **this page (Section 6.6.3.1)** for more info.

Enabling or Disabling the Shipping Estimator

The shipping estimator is enabled by default and will appear for all orders that are shippable. It is automatically hidden for orders that are not shippable.

To enable or disable the estimator:

1. Open the Store Settings page



2. Locate the **Checkout Settings > General Settings** fieldset

3. Check or uncheck the **Shipping Estimator Enabled** field as needed.

4. Click **Save Changes**

Estimator Form Fields

By default, the estimator will include a country field, state field, and postal code field.

Country field

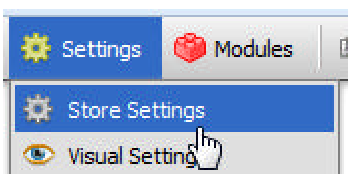
If the shipping country field is disabled on your **Address Form Settings (Section 6.4.1)** page, the country field will default to the country specified on your Store Settings page, and will be hidden.

City field

Most shipping couriers do not require a city to determine shipping rates. If you are using a courier that does (or custom rate & service rules that require knowing the city), you can add a city field to the estimator.

Note: When using the Fastway shipping courier, the city field will automatically be shown because Fastway requires it.

1. Open the Store Settings page



2. Locate the **Checkout Settings > General Settings** fieldset

3. Check **Show City** immediately following the **Shipping Estimator Enabled** field.

4. Click **Save Changes**

6.6.4 Zones

Overview

Zones

Zones can be used to group together address locations. They are given a name, such as **New England**. They contain one or more "Zone Members".

Zone Members

Zone members are assigned to a zone. They represent a location, and can be generalized, or specific. For example, a zone member can indicate:

- A country
- A state or province
- A city
- A postal code
- A range of postal codes
- Another zone (to nest zones inside a larger zone)

For example, the buit-in zone **New England** has (6) Zone Members (one for each US state in New England).

What You Can Do with Zones

Zones can be used to do the following, based on were your customer is located:

- *Limit the use of a **Shipping Courier (Section 6.6.1)**
- *Limit the use of a **Shipping Service (Section 6.6.2)**
- *Control when a **Rate & Service Rule (Section 6.6.3.3)** is offered
- Offer **discounts (Section 7.5.1)**
- Offer **downloads (Section 10.6.4)**
- **Add additional fees (Section 6.7)**
- Enable/Disable payment methods
- **Automatically add users to groups ('Adding a Customer to a Group' in the on-line documentation)**

Built-in Zones

Squirrelcart comes with many built-in zones, for common groupings of countries, areas, and US states:

Domestic

This is a built-in automatic zone. It automatically determines whether an address is domestic, based on the address of your store.

International

This is a built-in automatic zone. It automatically determines whether an address is international, based on the address of your store.

US - Contiguos States

48 contiguos states, plus Washington DC.

US Census Bureau Zones

There are several built-in zones based on the US Census Bureau designated regions and divisions: **http://en.wikipedia.org/wiki/List_of_regions_of_the_United_States#Census_Bureau-designated_regions_and_divisions**

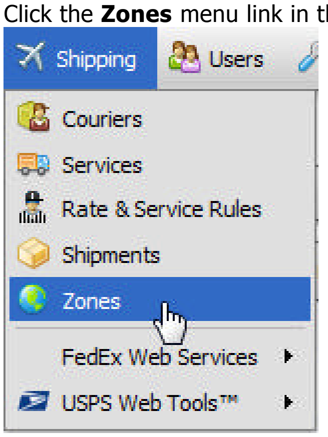
(http://en.wikipedia.org/wiki/List_of_regions_of_the_United_States#Census_Bureau-designated_regions_and_divisions)

United Nations M.49

This is the UN standard for grouping countries into regions, such as Central Asia, Eastern Europe, Northern America, etc...

Viewing Zones

Click the **Zones** menu link in the control panel

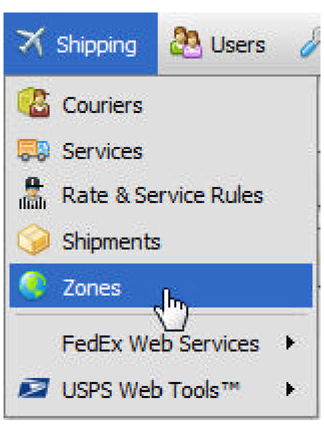


You'll see a table showing all your Zones.

Creating a Zone

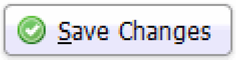
If the zone you need is not built-in, you can create a custom zone as follows:

1. Click the **Zones** menu link in the control panel



2. Click 

3. Enter a **Name,** and an optional description to help identify the purpose of the zone.

4. Click 

Once the zone is created, you'll need to add at least one Zone Member to it, for it to work. When you save the Zone record, you will see more options to add Zone Members. See the next section for instructions.

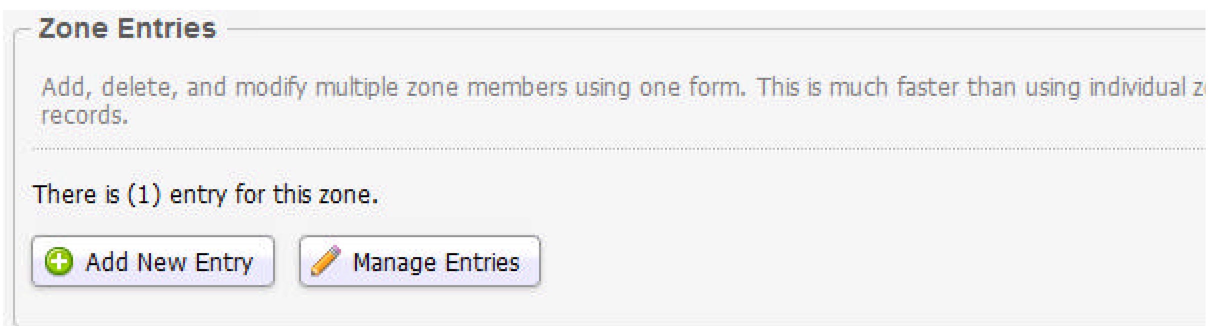
Adding Zone Members to a Zone

Open the zone record you wish to work with. From that record, there are two ways to add zone members.

Zone Entries

Each location requires a separate Zone Member. For example, to add 3 countries to a zone, you will need to create 3 Zone Members, one for each country. The fastest way to manage multiple zone members is by creating a **Zone Entry.** Zone Entries are records used to make adding and modifying multiple zone members faster and easier. To create a Zone Entry:

1. Click the **Add New Entry** button in the **Zone Entries** fieldset on the Zone record you are working with:



2. Set the **Entry Type** to one of the following:
   Countries
   States or Provinces
   Cities
   Postal Codes
   Postal Code Range
   Zones

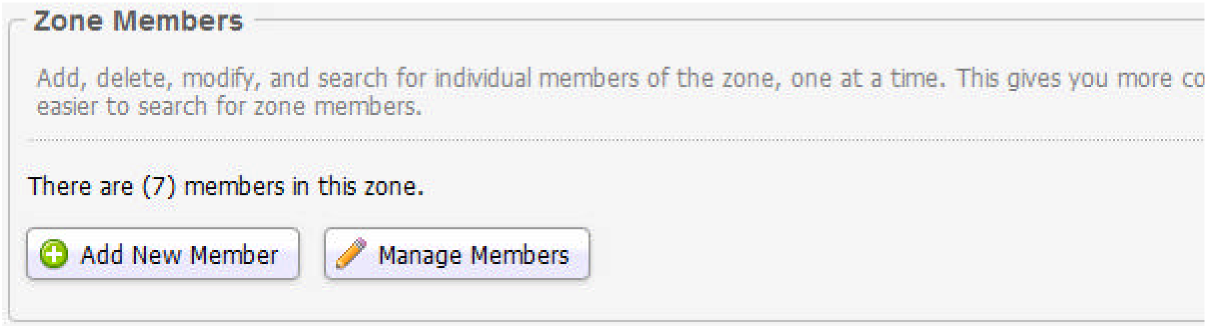
3. After setting the **Entry Type,** the **Location Info** fieldset will change based on your selection. Fill out the fields in that section.

4. Click 

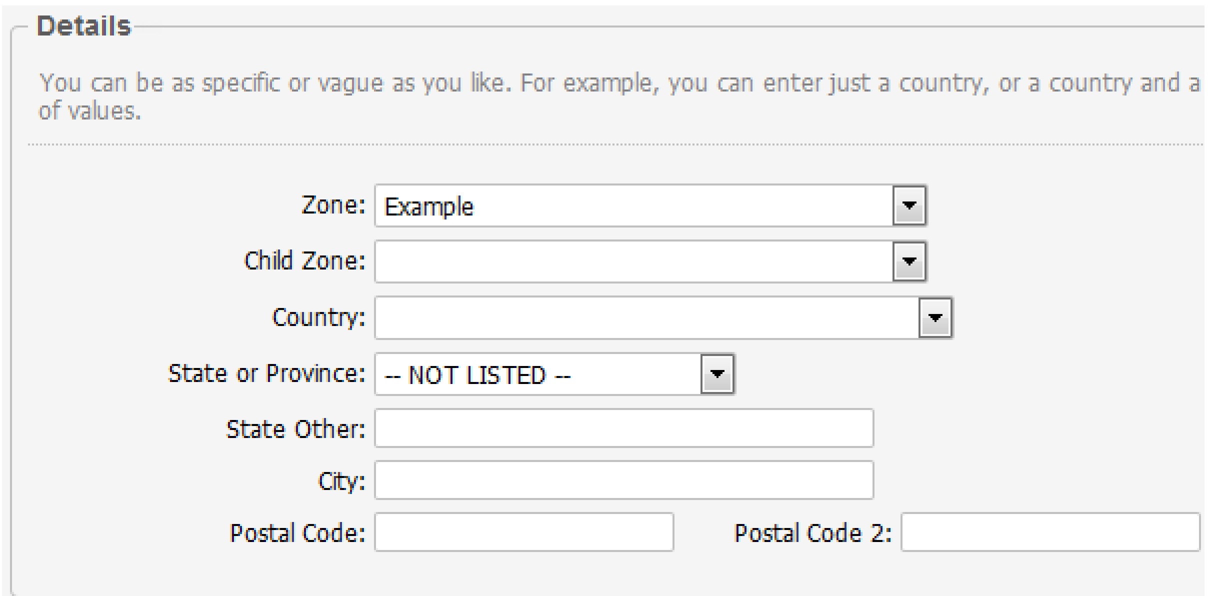
Zone Members

If you wish to add a single location to a zone, you can add a Zone Member directly, without the aid of a Zone Entry:

1. Click the **Add New Member** button, in the **Zone Members** fieldset:



2. You will see this form:



3. Fill out the fields, being as general or vague as you like.

4. Click 

Managing Zone Members (editing and deleting)

1. Open the zone record you wish to work with

2. There are two ways to manage Zone Members. See the **Adding Zone Members to a Zone** section above for more info.

   To manage Zone Members directly, click the **Manage Members** button in the **Zone Members** fieldset (see above).

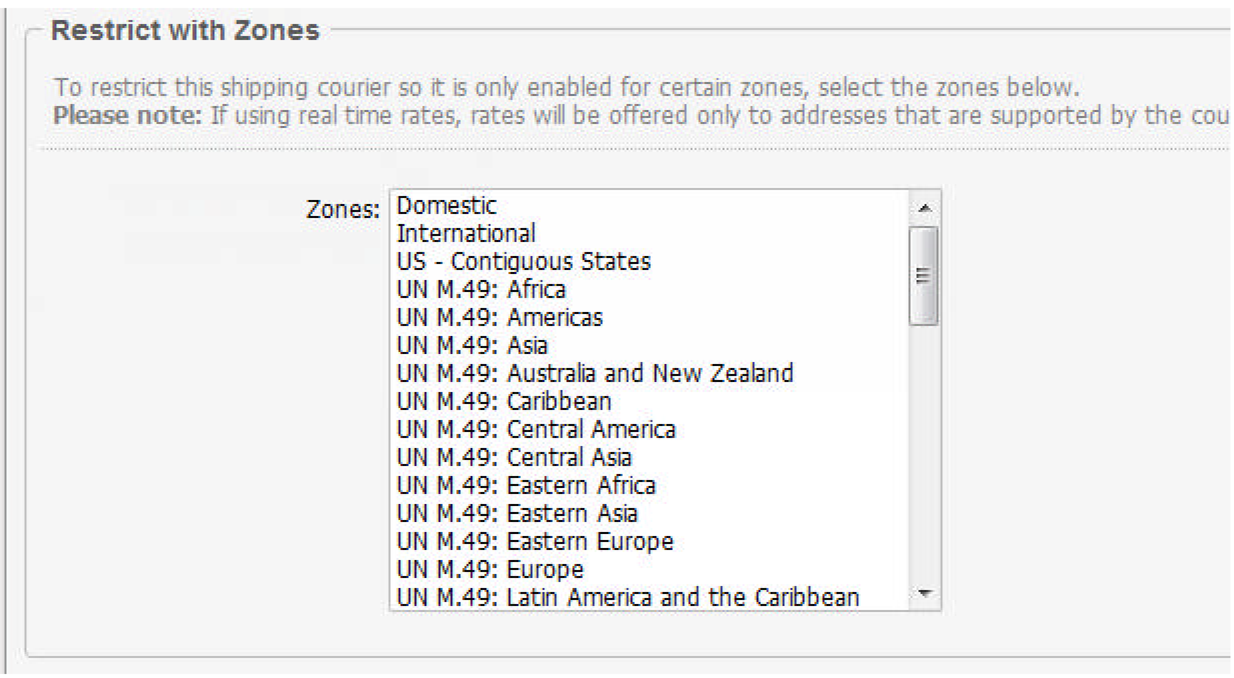
To manage Zone Members via a previously created Zone Entry, click the **Manage Entries** button in the **Zone Entries** fieldset (see above).
Note: you will not see a Manage Entries button unless the zone members were originally added via a zone entry.

3. Click 

Restricting Store Features by Zone

For Shipping

Because the first three items in the **What You Can Do with Zones** section's list above (marked with an asterisk) are related to shipping, we've made the fields to assign zones a bit more prominent. For **Shipping Couriers (Section 6.6.1)**, **Services (Section 6.6.2)**, and **Rate & Service Rules (Section 6.6.3.3)**, you will find a **Restrict with Zones** fieldset which looks like this:



To restrict shipping to certain zones:

1. Determine the zones you wish to offer a particular shipping scenario to

2. Determine where you want to assign the zone restriction.

   You can assign zones to three different shipping records. All three are related, and each has more precidence than the next. From most to least precedence in order:

   a. Shipping Courier
   USPS, UPS, FedEx, etc...

b. Services
First-Class Mail, Priority Mail, Standard Mail, etc... (these are all offered by USPS)

c. Rates & Service Rules
For each service, you may have created one or more Rate & Service Rules to control when each service is offered, and what the cost will be. For example, you might have one that offers Priority Mail at $7.50 when the weight total for an order is between 1 and 2 lbs.

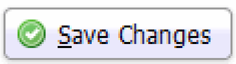
If you assign a zone restriction to a **Shipping Courier (Section 6.6.1)**, it will also restrict all its services, and all Rate & Service Rules for those services.

If you assign a zone restriction to a **service (Section 6.6.2)**, it will only restrict that service, along with any Rate & Service Rules using that service.

If you assign a zone restriction to a **Rate & Service Rule (Section 6.6.3.3)**, it will only restrict that one rule.

3. Once you have decided on either **a, b,** or **c** above, open the corresponding record.

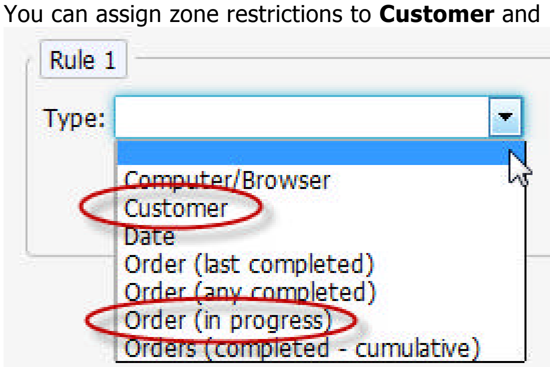
4. Select the zones you want to offer the (Courier/Service/Rate & Service Rule) to, using the **Zones** field in the **Restrict with Zones** fieldset on the record form. To select more than one value, hold down the CTRL key.

5. Click 

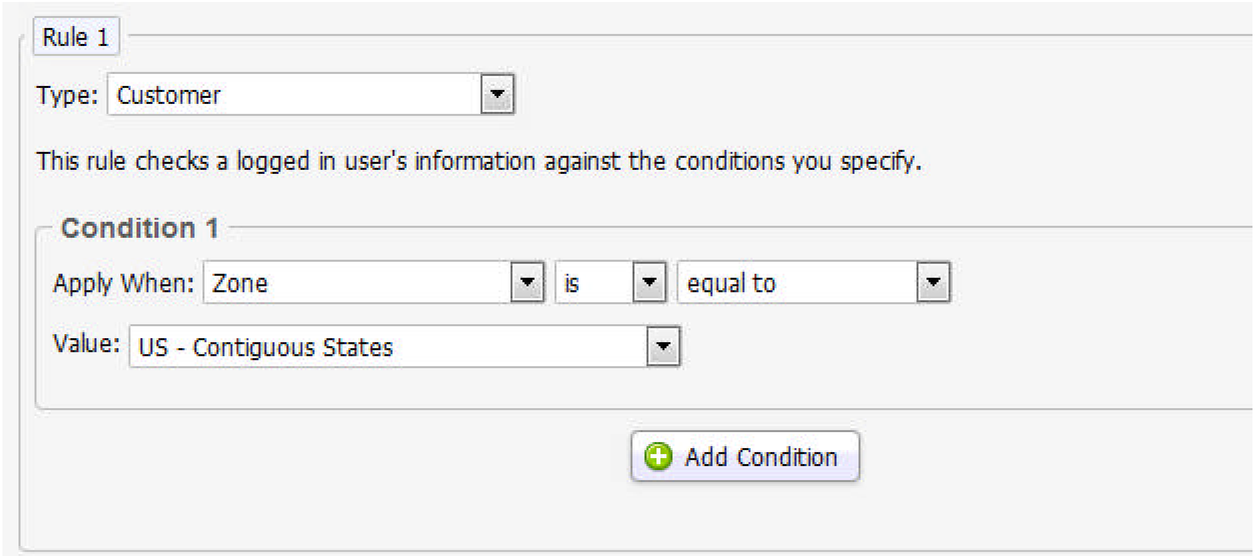
For Everything Else

Anything in the control panel that has a **Rules** fieldset on it's record form can be restricted to certain zones. For help working with rules, see the **Managing Your Store > Rule System** section of this documentation.

You can assign zone restrictions to **Customer** and **Order (in progress)** type rules:



For **Customer** rule types, add a condition like this:



For **Order (in progress)** rule types, add a condition similar to the above. For **Apply When**, you can choose either **Zone (shipping)** to match against the shipping address of the order, or **Zone (billing)** to match against the billing address.

6.6.5 Shipping - Warehouses

Overview

For general information on the Warehouse feature, see the **Warehouses topic (Section 6.9.3)** in the Configuration section. With the Warehouse feature, you can specify different originating address for your shipments. If you use drop shippers, or have multiple locations that you ship from, this feature is for you.

Assigning a Product to a Warehouse When Inventory Control is Disabled

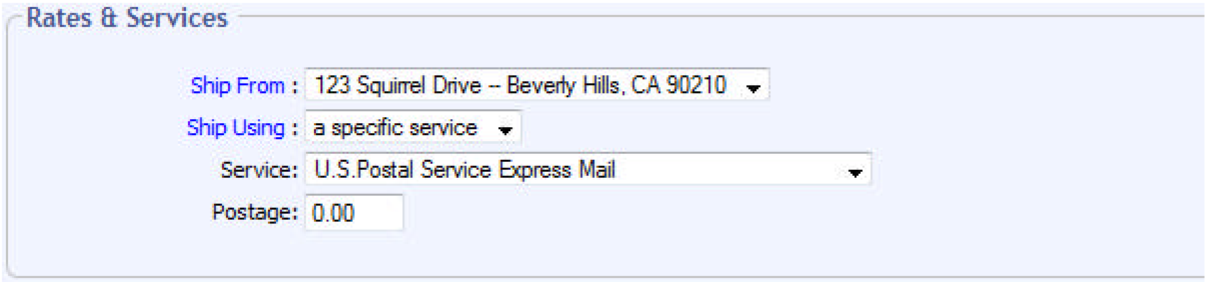
1. **Create Warehouses**

   You will need to create warehouse records for each warehouse you want to designate. By default, a built in warehouse is already created that refers to the address of your company in **Store Settings (Section 6.1)**. To add a warehouse, see the instructions in the main **Warehouse topic (Section 6.9.3)** in the Configuration section.

2. **Open product record**

3. **Specify a Warehouse**

   To specify which warehouse an item will ship from, choose the appropriate warehouse from the **Ship From** field in the Shipping Details section:



> Note: If you do not see the "Ship From" field, then Inventory Control is enabled.

Assigning a Product to a Warehouse When Inventory Control is Enabled

1. **Create Warehouses**
   You will need to create warehouse records for each warehouse you want to designate. By default, a built in warehouse is already created that refers to the address of your company in **Store Settings (Section 6.1)**. To add a warehouse, see the instructions in the main **Warehouse topic (Section 6.9.3)** in the Configuration section.

2. **Open product record**

3. **Click Add Stock**
   When **Inventory Control (Section 7.1.14)** is enabled, you need to specify the number of items you have in stock at each warehouse. This is done in the **Inventory : Stock** section of the product record.
   Find that section, and click [Add Stock] to add one stock designation.

4. **Choose Warehouse**
   Choose a Warehouse from the **Warehouse** field, and specify the number in stock. If you have stock for this item at more than one location, you can repeat this process for each warehouse.

5. **Click** [Save Changes]

> When a product is assigned to more than one warehouse, the item will ship from whichever warehouse has more stock first.

6.6.6 Shipments - Overview

Overview

Squirrelcart allows you to create records for Shipments. They are used to store information about a shipment such as:

- tracking number
- weight
- shipping method

With FedEx Web Services or UPS Developer Kit enabled

By **assigning a shipment to an order (Section 6.6.6.12.2)**, a customer can **track that shipment (Section 6.6.6.12.3)** in your *storefront*.

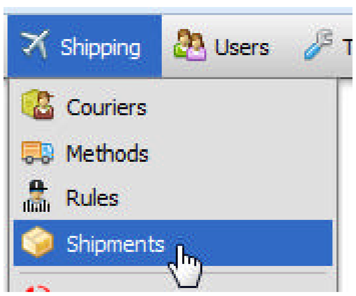
- When submitting a shipment to FedEx or UPS, it will receive a real tracking number
- Squirrelcart will generate a label for you to affix to the package.
- A ship notification email will be sent to the customer (if enabled)

6.6.6.1 Viewing Shipments

Viewing All Shipments

1. Open the **control panel (Section 3)**

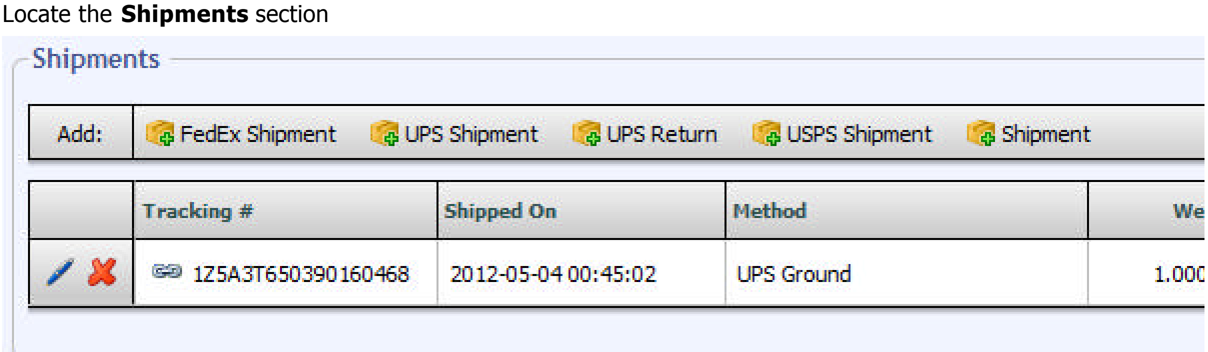
2. Click the Shipments menu link



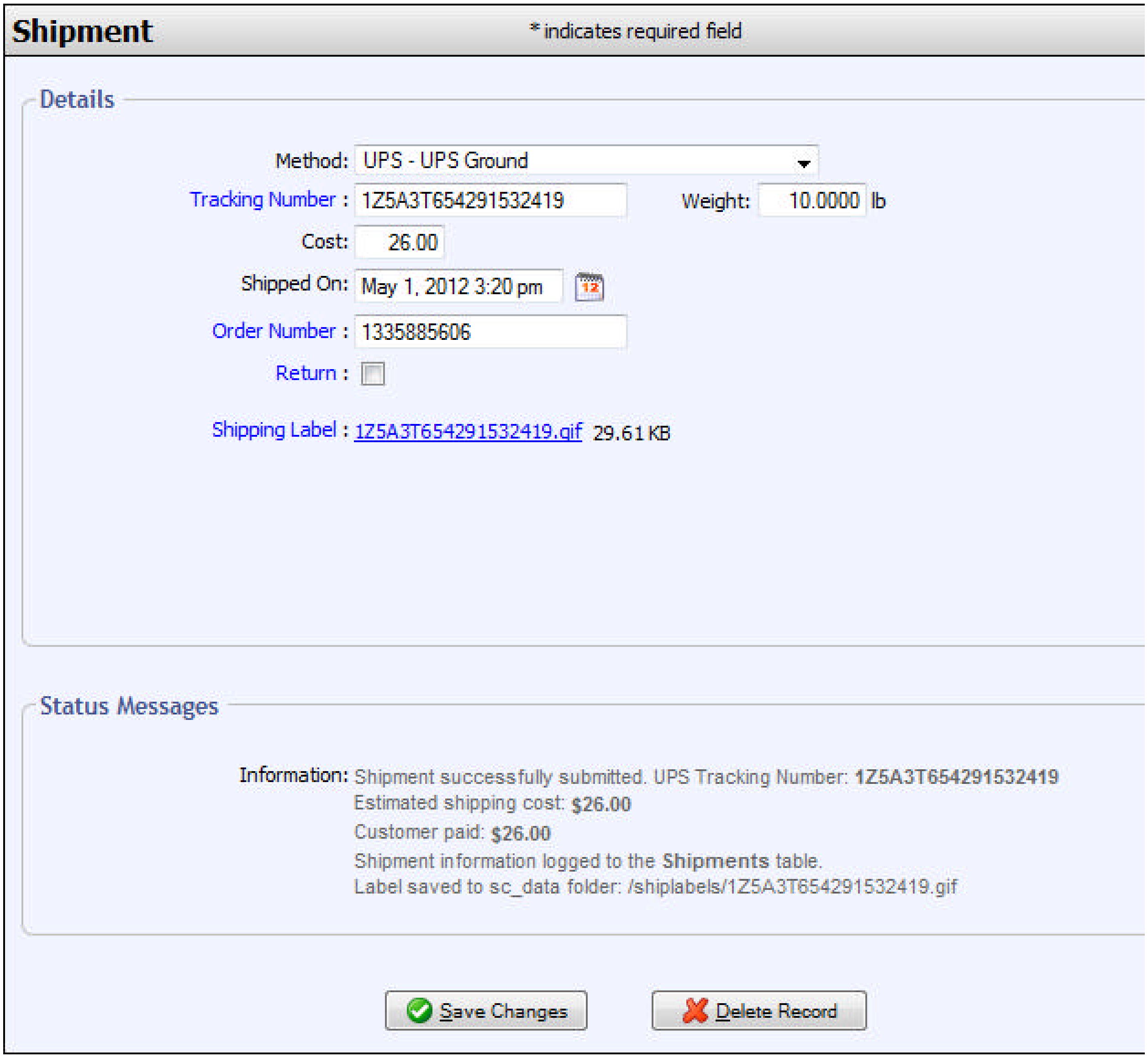
Viewing All Shipments for a Single Order

1. Open the **order record (Section 7.4.1)** you want to work with in edit mode

2. Locate the **Shipments** section



6.6.6.2 Shipments - Record Overview



Method
Shipping Method ({6F46F058-C428-4940-BBE1-89C6A5F444FA}) for this shipment.

Tracking Number
Courier specific number used to issue tracking requests.

Weight

Cost

Shipped On
Date shipment was sent out

Order Number

Squirrelcart order number associated with this shipment.

Return
This is used to signify that the shipment is a return shipment.

Shipping Label
For shipping couriers that support submitting shipments (FedEx, UPS, and USPS), this is a link to the image of the label for this shipment.

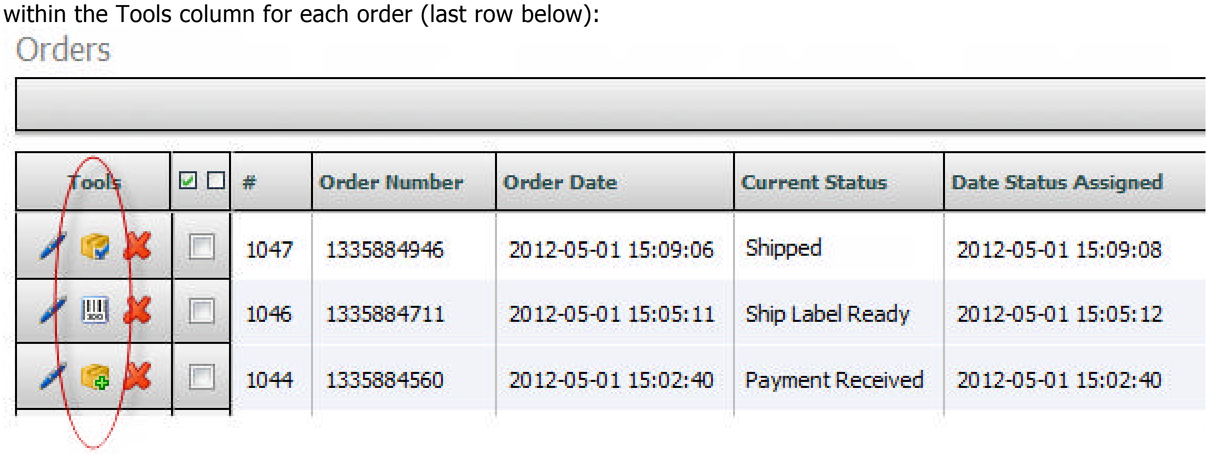
6.6.6.3 Creating a Shipment

There are 4 ways to initiate the creation of a shipment record.

Method 1 - From the Orders Table

1. Open the **Orders table (Section 7.4.1)**

2. For orders that are not "payment pending" and have not yet shipped you will see an icon to create a shipment within the Tools column for each order (last row below):



Orders

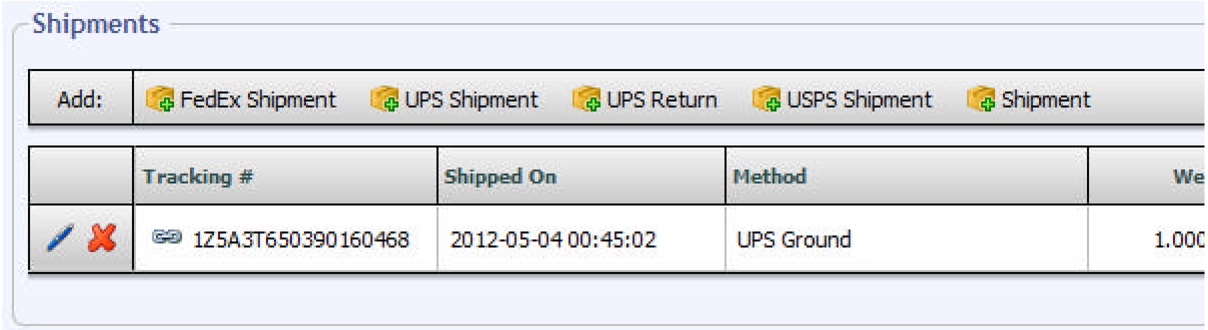
Tools		#	Order Number	Order Date	Current Status	Date Status Assigned
		1047	1335884946	2012-05-01 15:09:06	Shipped	2012-05-01 15:09:08
		1046	1335884711	2012-05-01 15:05:11	Ship Label Ready	2012-05-01 15:05:12
		1044	1335884560	2012-05-01 15:02:40	Payment Received	2012-05-01 15:02:40

3. Clicking this icon will open a new shipment form corresponding to the courier that the customer chose during checkout.

Method 2 - While Viewing an Order Record

1. Open an **order record (Section 7.4.1)** in edit mode.

2. Locate the **Shipments** section, and click the button corresponding to the type of shipment you would like to add.



FedEx Shipment
This will create a FedEx shipment via FedEx Web Services. This button will only be present when **FedEx Web Services is enabled (Section 6.6.9)**.

UPS Shipment
This will create a UPS shipment via the UPS Developer Kit. This button will only be present when **UPS Developer Kit is enabled (Section 6.6.10)**.

UPS Return
This will create a UPS return shipment via the UPS Developer Kit. This button will only be present when **UPS Developer Kit is enabled (Section 6.6.10)**.

USPS Shipment
This will create a USPS shipment via USPS Web Tools. This button will only be present when **USPS Web Tools is enabled (Section 6.6.8)**.

Shipment
This will create a shipment record, where you can assign a tracking number and details regarding the shipment.

3. Follow the instructions presented to you on the subsequent page

Method 3 - While Viewing the Shipments Table

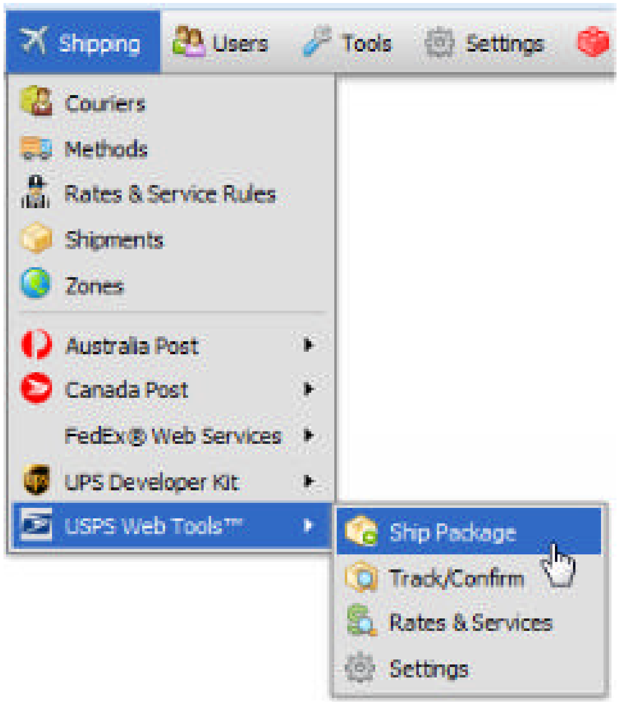
1. Open the Shipments table. See the **Viewing Shipments (Section 6.6.6.1)** topic in this section.

2. Click the button corresponding to the shipment type you wish to add (see descriptions in Method 1, #2 above).

3. Follow the instructions presented to you on the subsequent page

Method 4 - From the Shipping Menu

If you have FedEx Web Services, UPS Developer Kit, or USPS Web Tools enabled, you will find a link to create a shipment for each courier inside their respective menus under the **Shipping** control panel menu.



6.6.6.4 Creating an Endicia (USPS) shipment

Overview

Squirrelcart allows you to print labels (including postage) for USPS shipments using the label APIs provided by Endicia.

The shipments get assigned a tracking/confirmation number, you print out the label, and the customer receives a ship notification email (if enabled). You can then affix these labels to your packages, and place in a mailbox, schedule a pickup, or drop them off at your post office.

In order to use this feature, you must enable Endicia. See the **Endicia topic (Section 6.6.7)** for more information.

Submitting a Shipment (or Return Shipment)

1. **Initiate Shipment Process**

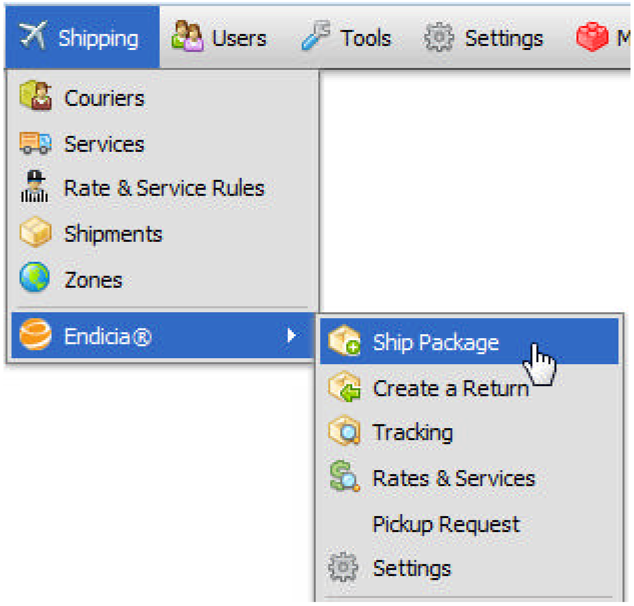
   You can start this process in 3 ways:
   Method 1: From within an open order record (in edit mode), click the **Add Endicia Shipment** button.

   OR

   Method 2: When viewing the **Shipments** **(Section 6.6.6.1)** table, click the **Add Endicia Shipment** button.

   OR

   Method 3: Click the **Ship Package** menu link for Endicia:

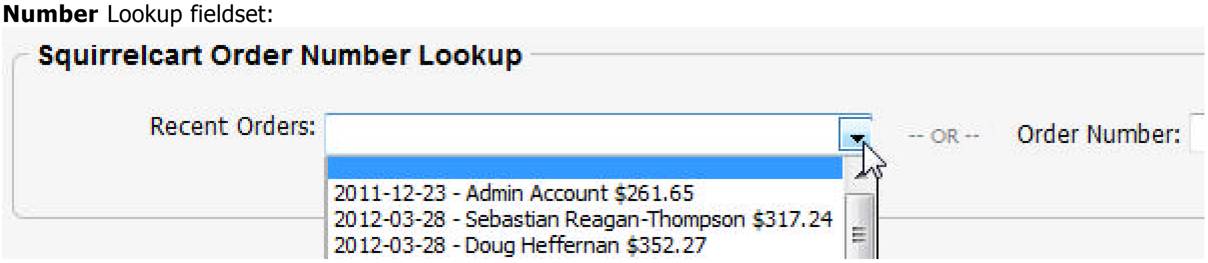


To create a return shipment instead, click the **Create a Return** link.

2. Enter Order Number (optional)

If you chose Method 1 above, information from the order will automatically be entered into the form to get you started.

If you chose method 2 or 3 above, you may assign this shipment to an order using the **Squirrelcart Order Number** Lookup fieldset:



Assigning a shipment to an order allows the customer to track the shipment in your *storefront*, and makes it easier for you to locate the shipment when viewing their order in the control panel. It also pre-populates the fields on the shipment form with the address information from the order.

3. Fill Out Form

Fill out the form and click Submit.

If you select an order when generating a shipment, if there is enough information to attempt to create the shipment it will automatically be submitted to FedEx and you will be prompted to confirm the shipment.

Fill out the form and click **Submit.**

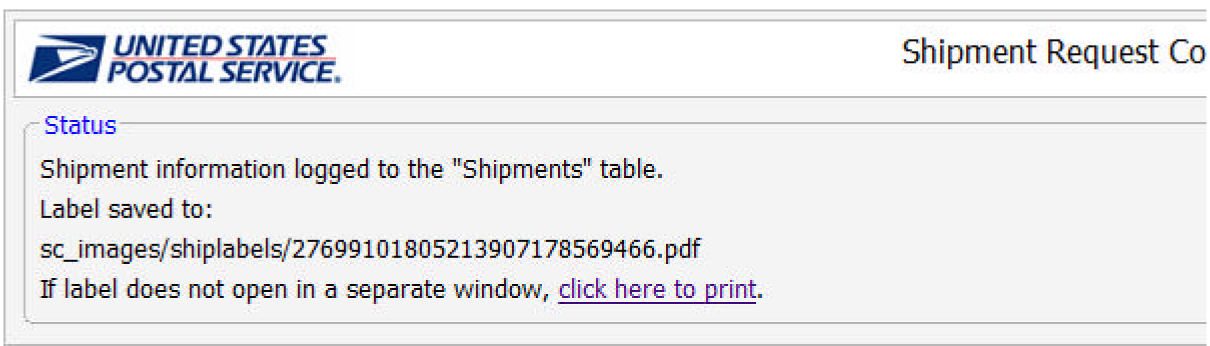
4. Print Label

A PNG file containing the label will open in a new window. Print the label and then close the window.

Thermal labels are also supported. See the **thermal label topic (Section 6.6.6.11)** for more info.

5. **Final Results**

   The status of the shipment will be shown as follows (this page may look different):



Insurance

When creating a USPS shipment via Endicia, you can optionally include insurance. When selecting insurance, you have the option of choosing USPS or Endicia as the insurance provider.

USPS does not offer insurance for international shipments. To use Endicia as an insurance provider, you must login to Endicia.com and agree to their insurance agreement.

International Shipments and Custom Forms

When creating an international shipment, Squirrelcart will prompt you for any customs information the post office may need. The resulting label will contain the appropriate custom forms built-into the label.

When generating international shipments that require use of customs form CP-72 (USPS form 2976-A), four copies of the label will print. When generating shipments that require use of customs form CN-22 (USPS form 2976), only one label will print.

Reprinting a Label

To reprint a label:

1. Click **Shipping > Shipments**
2. Locate the shipment and click on it's record row
3. Click the link(s) to open the labels you wish to print

6.6.6.5 Creating a USPS Shipment via USPS Web Tools

Overview

Squirrelcart allows you to print labels for USPS shipments using the label APIs provided by USPS.

> While USPS Web Tools® can be used to print USPS shipping labels, those labels do not include postage. Postage must be purchased at the post office when you drop off the package.
>
> If you are looking for a way to print postage paid USPS shipping labels, we recommend **enabling Endicia (http://www.ldev.ws:5318/endicia/squirrelcart/index.php?table=Shipping_Couriers&edit_records=1&selected_record_number=6)** instead of USPS Web Tools. Endicia is an approved USPS partner. With Endicia, Squirrelcart can generate postage paid labels. You can schedule pickups, get shipping discounts, and much more.

The shipments get assigned a tracking/confirmation number, you print out the label, and the customer receives a ship notification email (if enabled). You can then affix these labels to your packages, apply postage using stamps, and place in a mailbox. You can also bring the package to USPS with the label attached, and they can accept payment for the shipment.

Labels can be printed for the following:

- Delivery Confirmation
  This option allows you to confirm delivery of the package using the tracking number generated.
- Signature Confirmation
  This option allows you to confirm that a package has been delivered and signed for using the tracking number generated.
- Express Mail
  This option prints a label for Express Mail, and generates a tracking number that can be used to obtain detailed tracking information.
- Global Express Mail
  This option prints a label for Global Express Mail, and generates a tracking number that can be used to obtain detailed tracking information.

In order to use this feature, you must enable USPS WebTools. See the **USPS WebTools topic (Section 6.6.8)** for more information.

Submitting a Shipment

1. **Initiate Shipment Process**

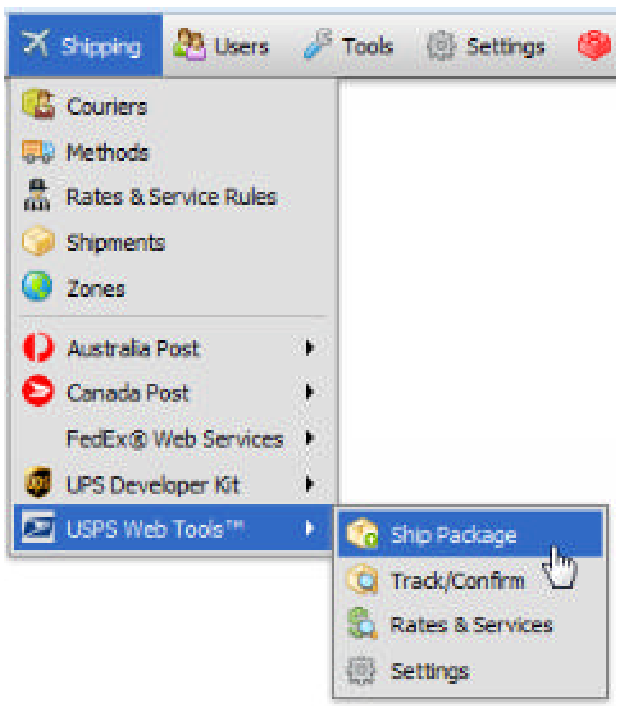
   You can start this process in 3 ways:
   Method 1: From within an open order record (in edit mode), click the **Add USPS Shipment** button.

   OR

   Method 2: When viewing the **Shipments (Section 6.6.6.1)** table, click the **Add USPS Shipment** button.

   OR

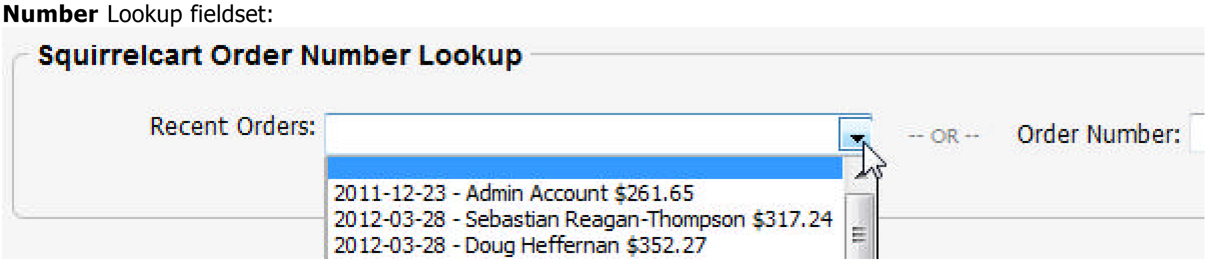
   Method 3: Click the **Ship Package** menu link for USPS:



2. **Enter Order Number (optional)**

   If you chose Method 1 above, information from the order will automatically be entered into the form to get you started.

   If you chose method 2 or 3 above, you may assign this shipment to an order using the **Squirrelcart Order Number** Lookup fieldset:

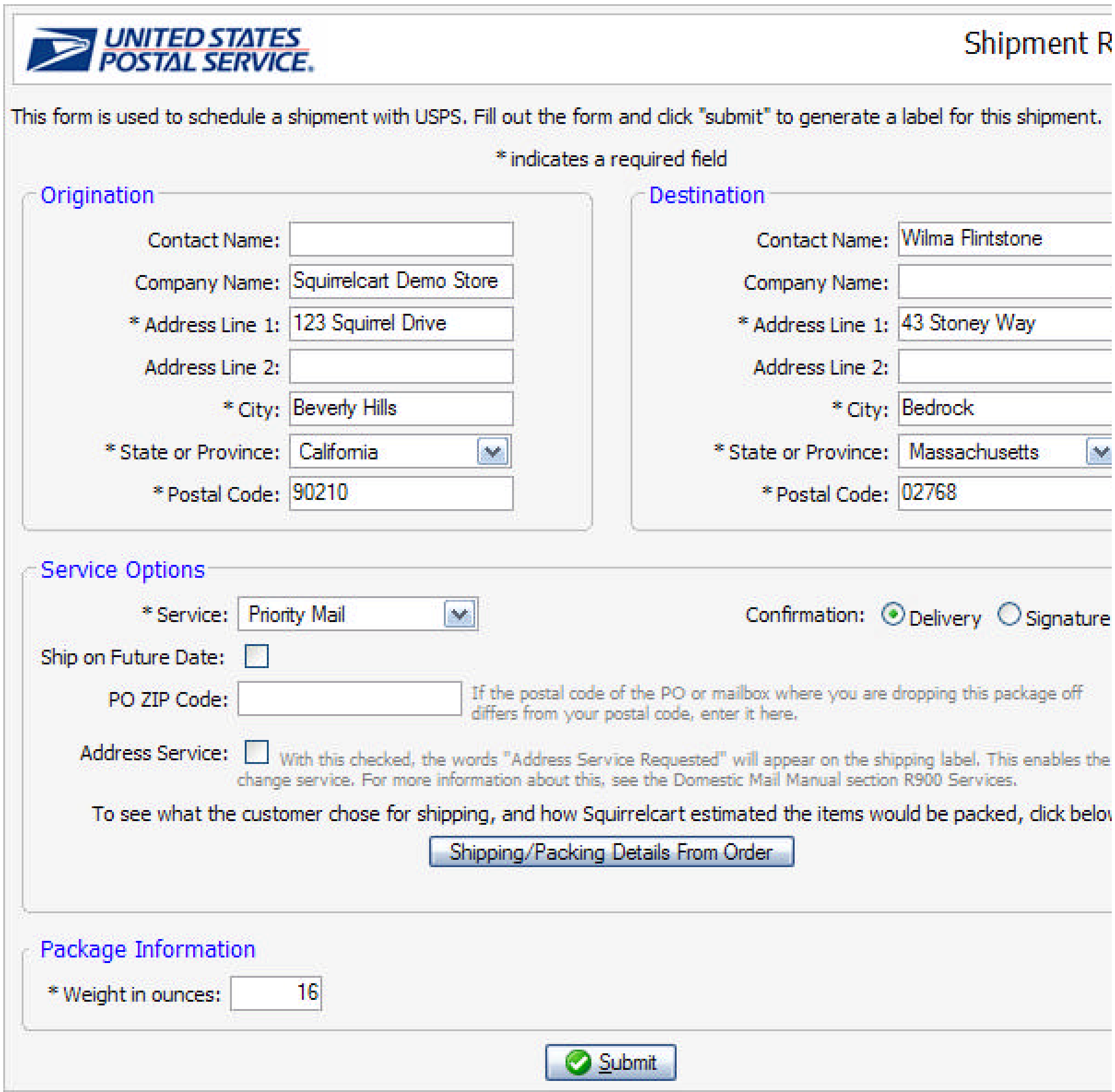


> Assigning a shipment to an order allows the customer to track the shipment in your *storefront*, and makes it easier for you to locate the shipment when viewing their order in the control panel. It also pre-populates the fields on the shipment form with the address information from the order.

3. Fill Out Form

Fill out the form and click Submit.

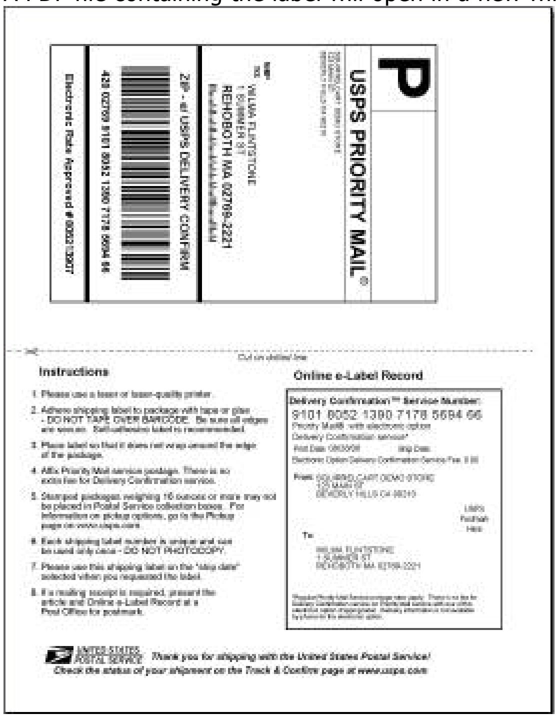
> If you select an order when generating a shipment, if there is enough information to attempt to create the shipment it will automatically be submitted to FedEx and you will be prompted to confirm the shipment.



Fill out the form and click **Submit.**

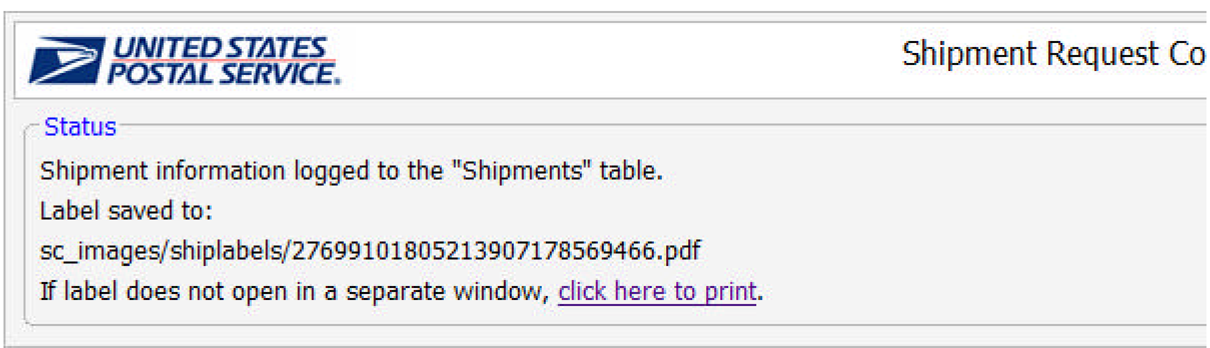
4. **Print Label**

   A PDF file containing the label will open in a new window. Print the label and then close the window.



5. **Final Results**

   The status of the shipment will be shown as follows:



6.6.6.6 Creating a FedEx Shipment

Overview

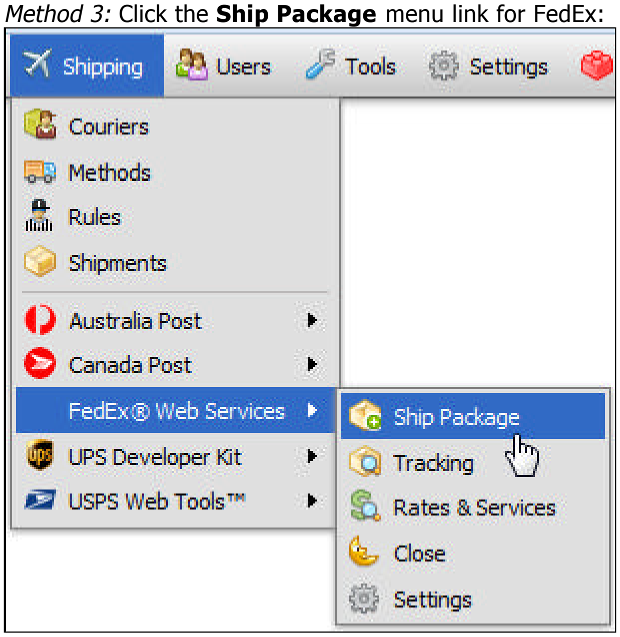
Squirrelcart allows you to submit shipments directly to FedEx over the web. The shipments get assigned a tracking number, you print out the label, and the customer receives a ship notification email (if enabled). You can then attach the label to your package and drop it off at a FedEx location, drop box, or include it in your regularly scheduled pickup.

In order to use this feature, you must enable **FedEx Web Services (Section 6.6.9)**.

Submitting a Shipment

1. **Initiate Shipment Process**

   You can start this process in 3 ways:
   Method 1: From within an open order record (in edit mode), click the **Add FedEx Shipment** button.
   OR
   Method 2: When viewing the **Shipments (Section 6.6.6.1)** table, click the **Add FedEx Shipment** button.
   OR
   Method 3: Click the **Ship Package** menu link for FedEx:

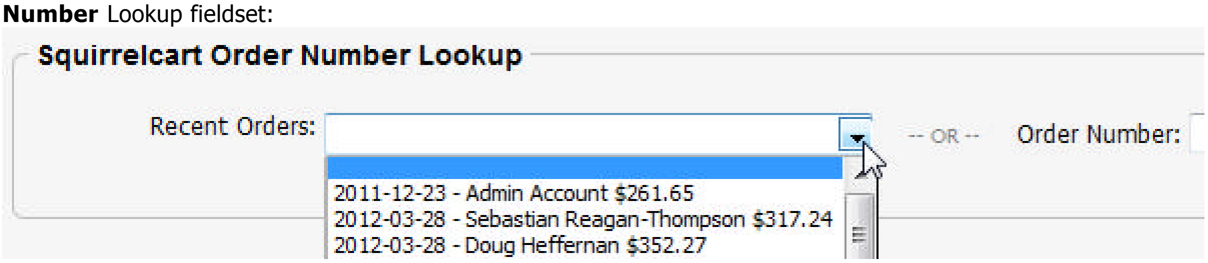


   You will be presented with a form to create your shipment.

2. **Enter Order Number (optional)**

   If you chose Method 1 above, information from the order will automatically be entered into the form to get you started.

   If you chose method 2 or 3 above, you may assign this shipment to an order using the **Squirrelcart Order Number** Lookup fieldset:

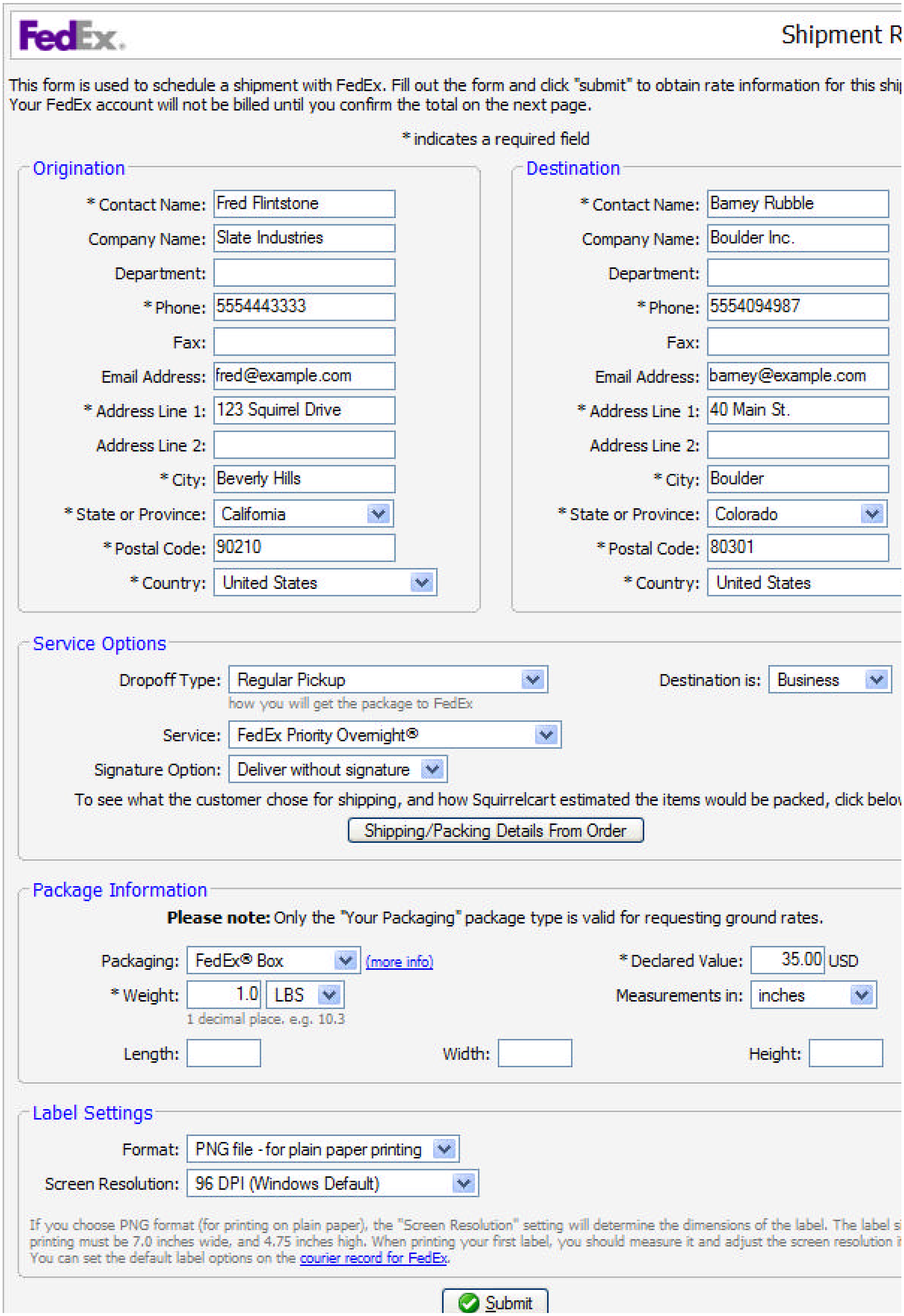


> Assigning a shipment to an order allows the customer to track the shipment in your *storefront*, and makes it easier for you to locate the shipment when viewing their order in the control panel. It also pre-populates the fields on the shipment form with the address information from the order.

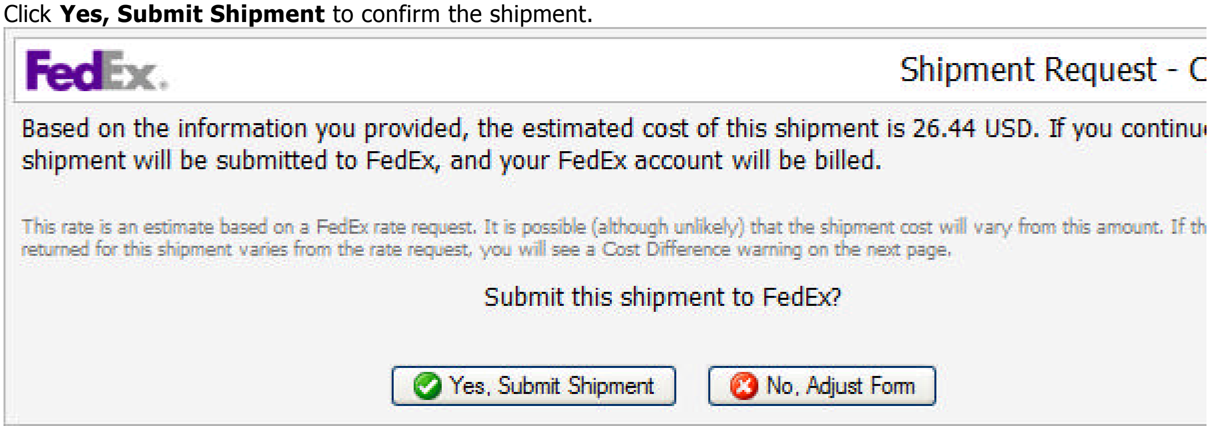
3. **Fill Out Form**

   Fill out the form and click **Submit.**

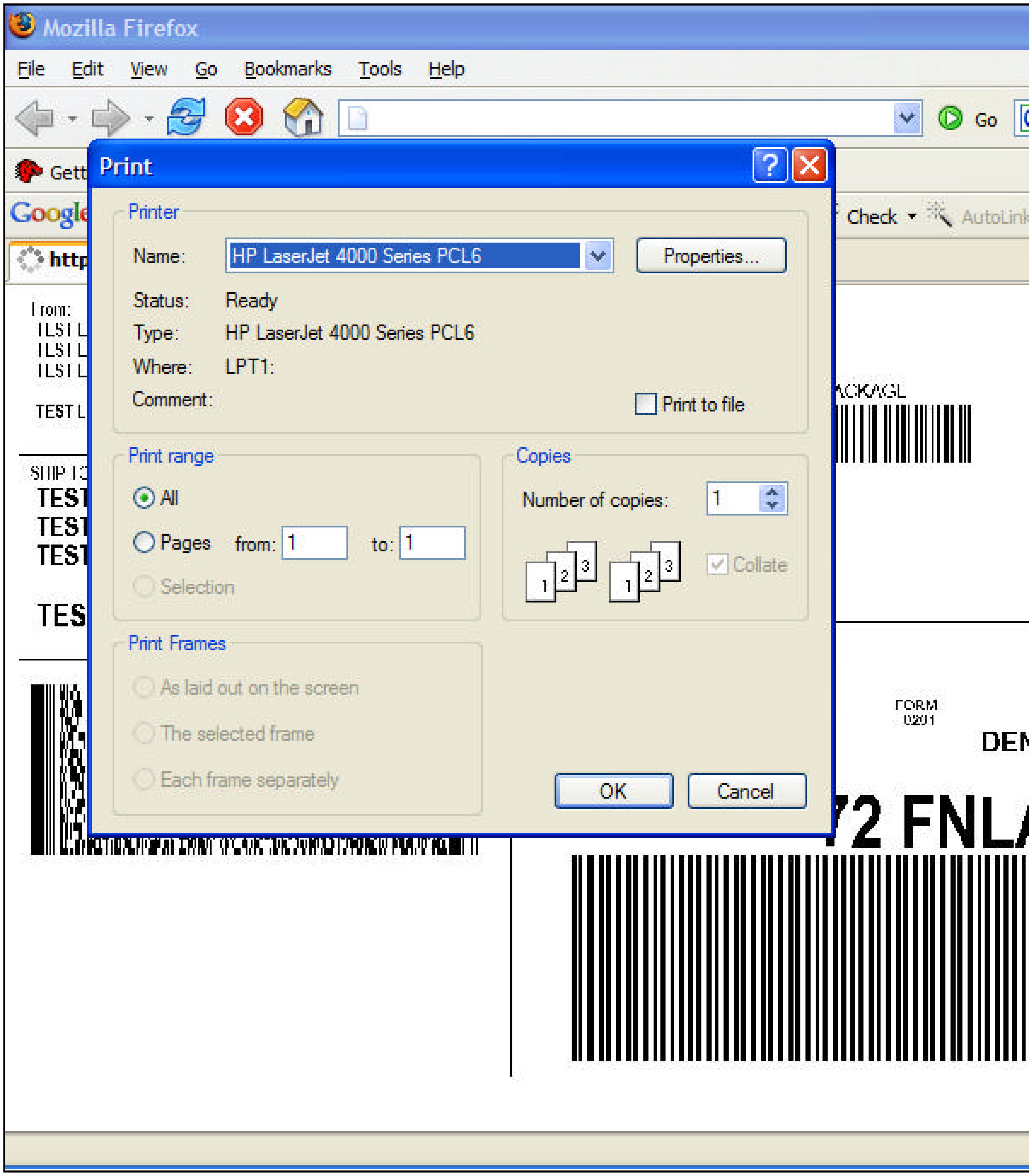
If you select an order when generating a shipment, if there is enough information to attempt to create the shipment it will automatically be submitted to FedEx and you will be prompted to confirm the shipment.


FedEx
Shipment R
This form is used to schedule a shipment with FedEx. Fill out the form and click "submit" to obtain rate information for this shi
Your FedEx account will not be billed until you confirm the total on the next page.
* indicates a required field
Origination
* Contact Name: Fred Flintstone
Company Name: Slate Industries
Department:
* Phone: 5554443333
Fax:
Email Address: fred@example.com
* Address Line 1: 123 Squirrel Drive
Address Line 2:
* City: Beverly Hills
* State or Province: California
* Postal Code: 90210
* Country: United States
Destination
* Contact Name: Barney Rubble
Company Name: Boulder Inc.
Department:
* Phone: 5554094987
Fax:
Email Address: barney@example.com
* Address Line 1: 40 Main St.
Address Line 2:
* City: Boulder
* State or Province: Colorado
* Postal Code: 80301
* Country: United States
Service Options
Dropoff Type: Regular Pickup
how you will get the package to FedEx
Destination is: Business
Service: FedEx Priority Overnight®
Signature Option: Deliver without signature
To see what the customer chose for shipping, and how Squirrelcart estimated the items would be packed, click belo
Shipping/Packing Details From Order
Package Information
Please note: Only the "Your Packaging" package type is valid for requesting ground rates.
Packaging: FedEx® Box
(more info)
* Declared Value: 35.00 USD
* Weight: 1.0 LBS
1 decimal place. e.g. 10.3
Measurements in: inches
Length:
Width:
Height:
Label Settings
Format: PNG file - for plain paper printing
Screen Resolution: 96 DPI (Windows Default)
If you choose PNG format (for printing on plain paper), the "Screen Resolution" setting will determine the dimensions of the label. The label s
printing must be 7.0 inches wide, and 4.75 inches high. When printing your first label, you should measure it and adjust the screen resolution i
You can set the default label options on the courier record for FedEx.
Submit

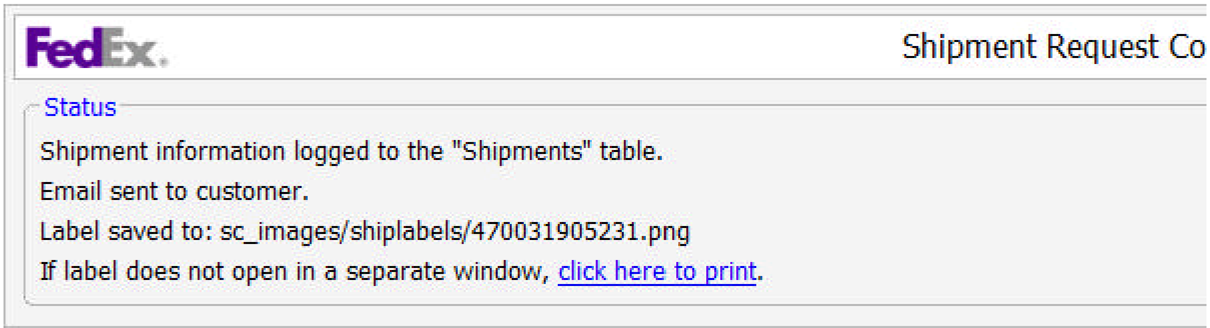
4. **Confirm Rate Estimate**
   Click **Yes, Submit Shipment** to confirm the shipment.



5. **Print Label**
   Click **OK** to print label. When done, close the window.



6. **Final Results**
   The status of the shipment will be shown as follows:



6.6.6.7 Canceling a FedEx Shipment

It is possible to cancel a shipment that was submitted to FedEx prior to the end of the business day. To cancel a shipment, just **delete it (Section 6.6.6.9)**, and watch the status messages. Squirrelcart will attempt to send a cancelation request to FedEx prior to deleting the shipment record in your database. If this fails, you can view the error returned by FedEx, and will still have the option to delete the shipment record in Squirrelcart.

6.6.6.8 Creating a UPS Shipment

Overview

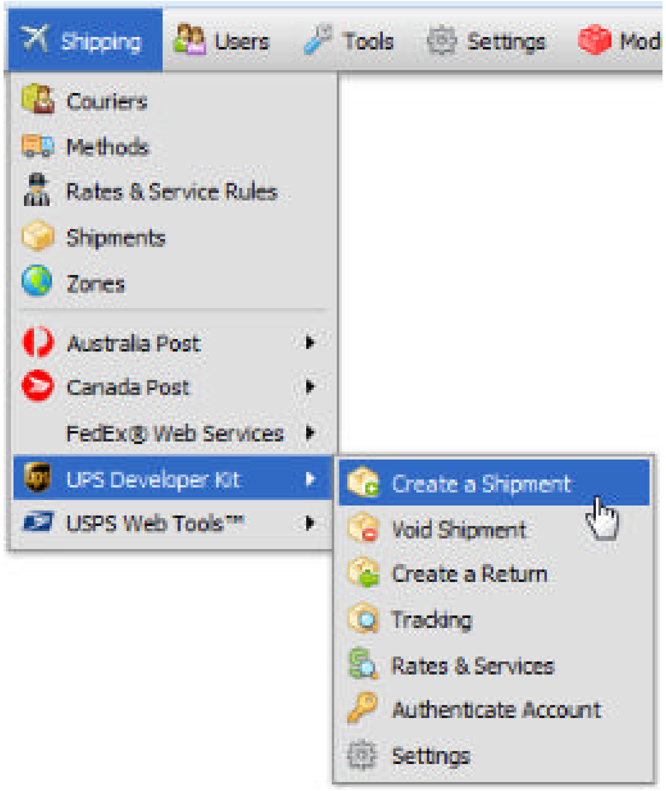
Squirrelcart allows you to submit shipments directly to UPS over the web. The shipments get assigned a tracking number, you print out the label, and the customer receives a ship notification email (if enabled). You can then attach the label to your package and drop it off at a UPS location, drop box, or include it in your regularly scheduled pickup.

In order to use this feature, you must enable **UPS Developer Kit (Section 6.6.10)**.

Submitting a Shipment

1. **Initiate Shipment Process**

   You can start this process in 3 ways:
   Method 1: From within an open order record (in edit mode), click the **Add UPS Shipment** button.
   OR
   Method 2: When viewing the **Shipments (Section 6.6.6.1)** table, click the **Add UPS Shipment** button.
   OR
   Method 3: Click the **Ship Package** menu link for UPS:

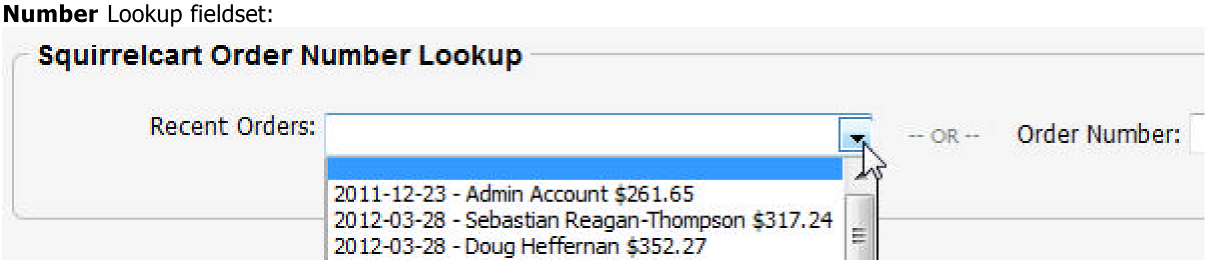


You will be presented with a form to create your shipment.

2. **Enter Order Number (optional)**

   If you chose Method 1 above, information from the order will automatically be entered into the form to get you started.

   If you chose method 2 or 3 above, you may assign this shipment to an order using the **Squirrelcart Order Number** Lookup fieldset:



> Assigning a shipment to an order allows the customer to track the shipment in your *storefront*, and makes it easier for you to locate the shipment when viewing their order in the control panel. It also pre-populates the fields on the shipment form with the address information from the order.

3. **Fill Out Form**

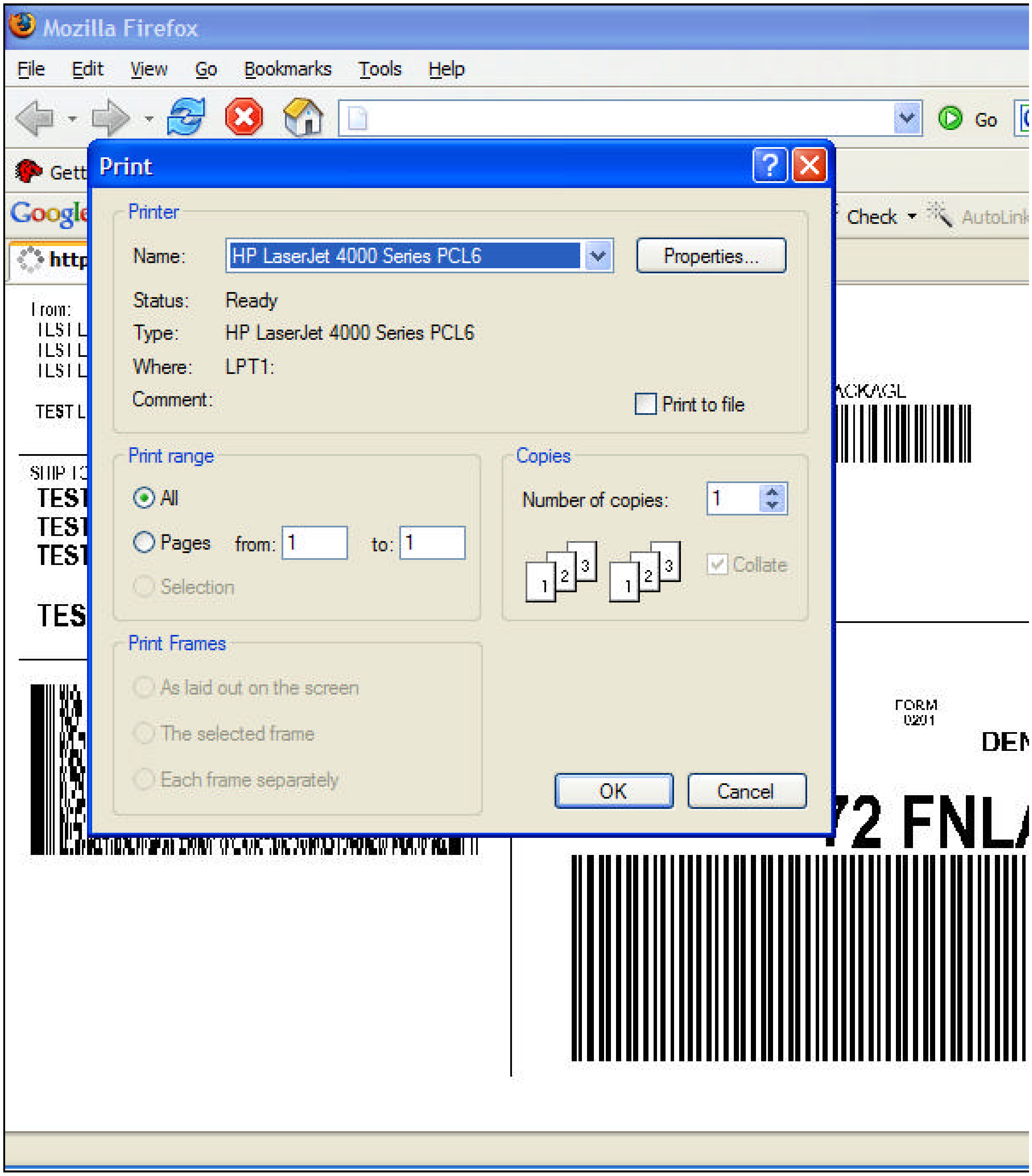
   Fill out the form and click **Submit.**

> If you select an order when generating a shipment, if there is enough information to attempt to create the shipment it will automatically be submitted to UPS and you will be prompted to confirm the shipment.

4. **Confirm Rate Estimate**

5. **Print Label**

Click **OK** to print label. When done, close the window.

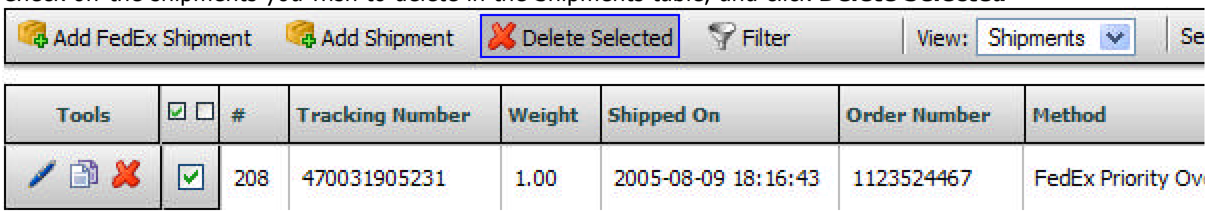


6.6.6.9 Deleting Shipments

Shipments are deleted in the same manner as other records. Before deleting the record in your database, Squirrelcart will send a cancelation request for any shipment that was submitted to a courier via the web. Not all shipments can be canceled. The status messages will alert you to any issues that may arise.

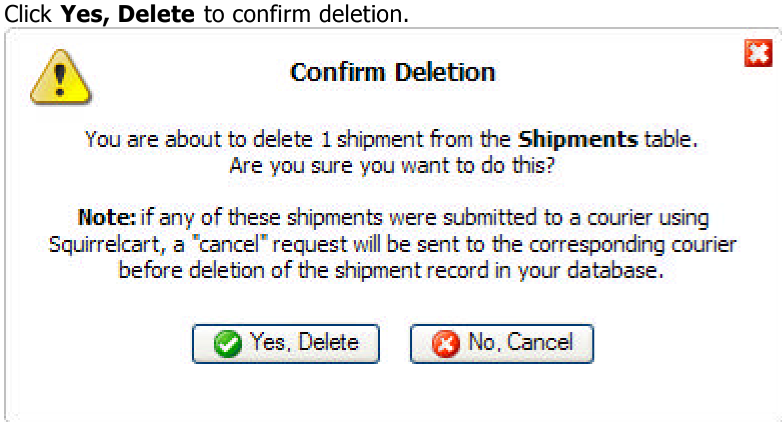
1. **Select Shipments**

   Check off the shipments you wish to delete in the Shipments table, and click **Delete Selected**



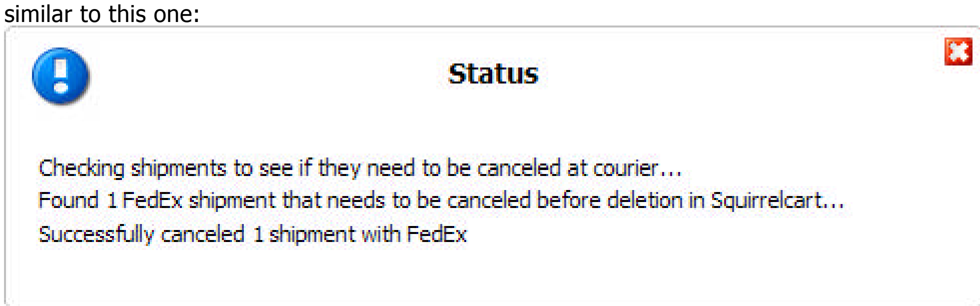
2. **Confirm Deletion**

   Click **Yes, Delete** to confirm deletion.

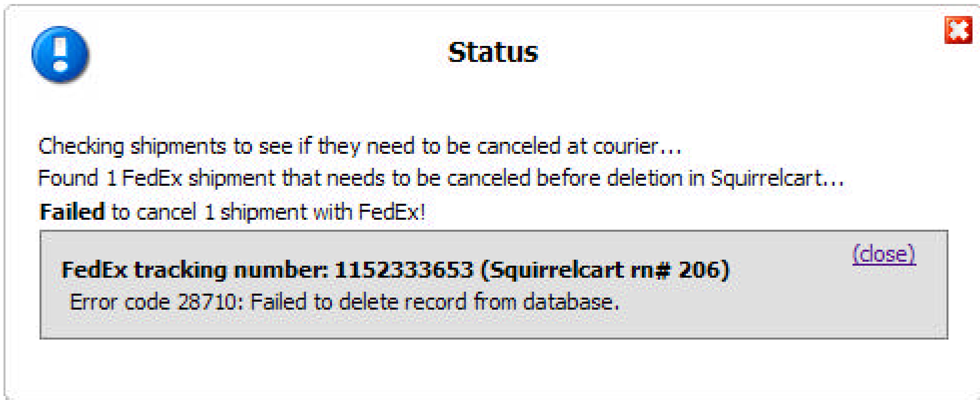


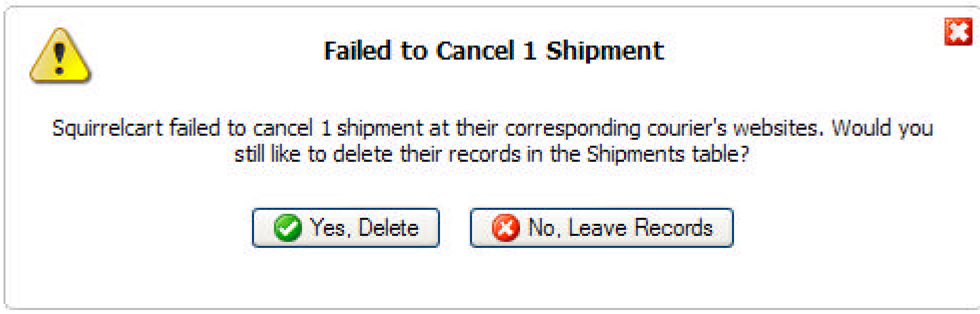
3. **Check Status**

   Squirrelcart will attempt to cancel any shipments that were submitted to a courier by sending a cancelation request to that courier via XML. If this process is successful for all shipments, you will see a status message similar to this one:



If any of the cancellation requests fail, you will see a failure warning below the status box. Inside the status box, each failure will be listed, along with a **Click for Details** link. Clicking that link will display a gray box below that line showing the error message returned by the courier. You then have the option to still delete the shipment if you wish by clicking **Yes, Delete** in the warning box.





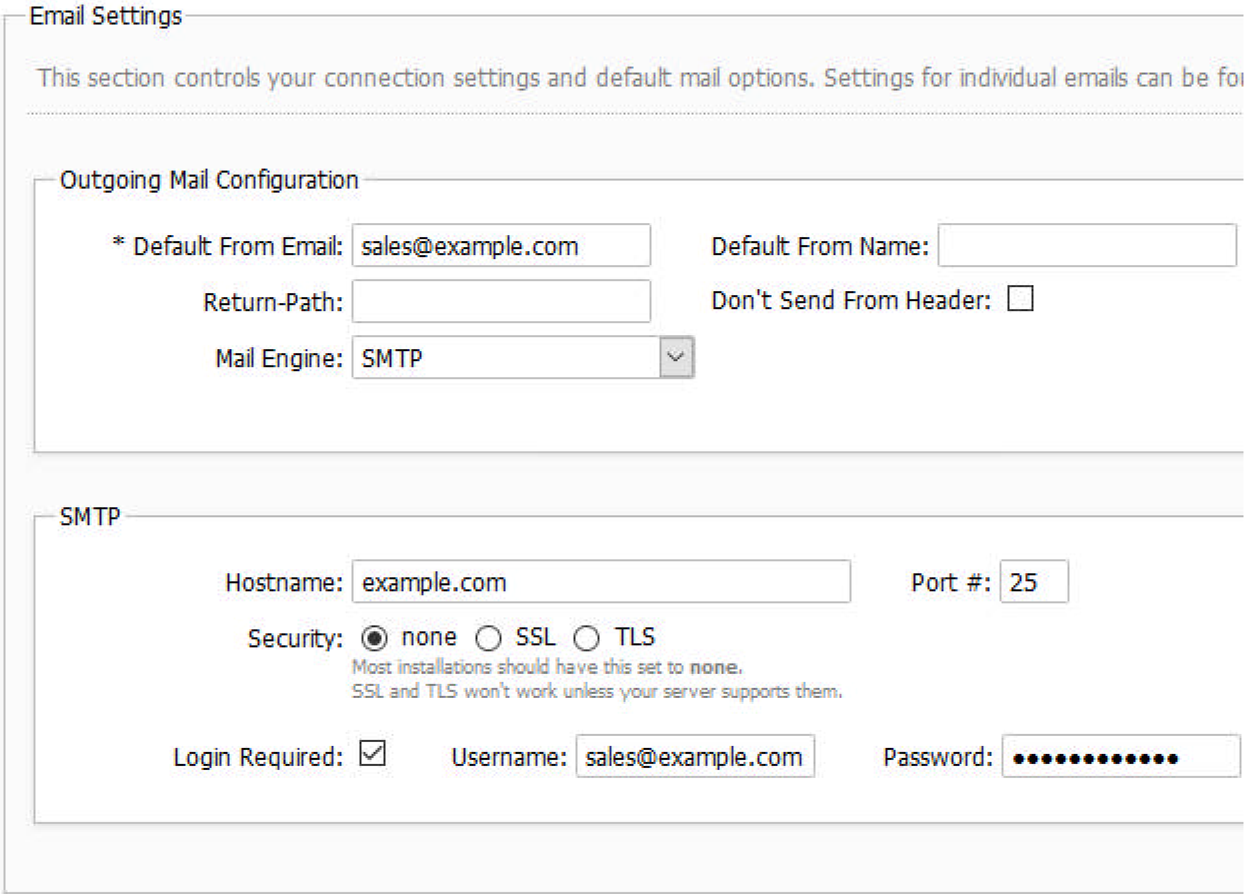
6.6.6.10 Ship Notification Email

Overview

A ship notification email will be sent to the customer when you submit a shipment and assign it to an order. This is an automatic process, and you do not need to do anything to initiate it.

Settings

There are 2 settings that apply to the Ship Notification Email on the **store settings (Section 6.1)** page.



Email Ship Notification
When checked, Squirrelcart will send the ship notification email. To disable this feature, uncheck this field.

HTML
This field controls the format of the message. When checked, the email will be in HTML format. When unchecked, it will be in plain text format.

6.6.6.11 Advanced Features

Overview

This topic explains some advanced shipment features which are available for **Endicia (Section 6.6.7)**, **FedEx Web Services (Section 6.6.9)** and **UPS Developer Kit (Section 6.6.10)**.

Thermal Label Printing

As of version 3.5.0, we support generating thermal labels for Endicia (USPS), FedEx and UPS. This is an experimental feature. Due to the complexity involved, and the wide array of different printer makes and models, we cannot guarantee you will be able to print thermal labels with this feature. We have tested thermal label printing with a Zebra LP 2844 printer which uses the EPL format, and a Zebra GM400 printer using the ZPL label format.

You will find settings to turn on thermal printing on the settings pages and shipment creation forms for Endicia, FedEx and UPS. Check with the manufacturer of your printer to determine the proper label format for your printer.

How it Works

Thermal printing is handled via a Java applet called **qz-print (http://qzindustries.com/)**, accessed via your browser. You will need to have Java installed on your computer, along with the Java browser module for your browser.

Enabling Thermal Printing

1. Enable Endicia, FedEx Web Services, and/or UPS Developer Kit.

2. You will need to have your thermal printer connected to your computer, and properly installed. Configure the driver as follows:
   Set **Spool Format** to **Raw**
   Select **Print directly to the printer**

3. Open the settings page for the courier you wish to use with thermal printing

4. Set the **Label Image Type** field to either ELTRON (for the EPL format) or Zebra (for the ZPL format), depending on your printer type.

5. Enter the name of the printer in the **Thermal Printer** field.

6. Set **Label Stock** to one of the "thermal" options that matches the stock you are using.

7. Save changes

Importing the Applet Certificate

The free version of the qz-print applet is not signed. Because of this, you will get security prompts when using it. To prevent these from appearing, you can import the CSR file provided by qz-print.

1. Connect to your website via FTP.

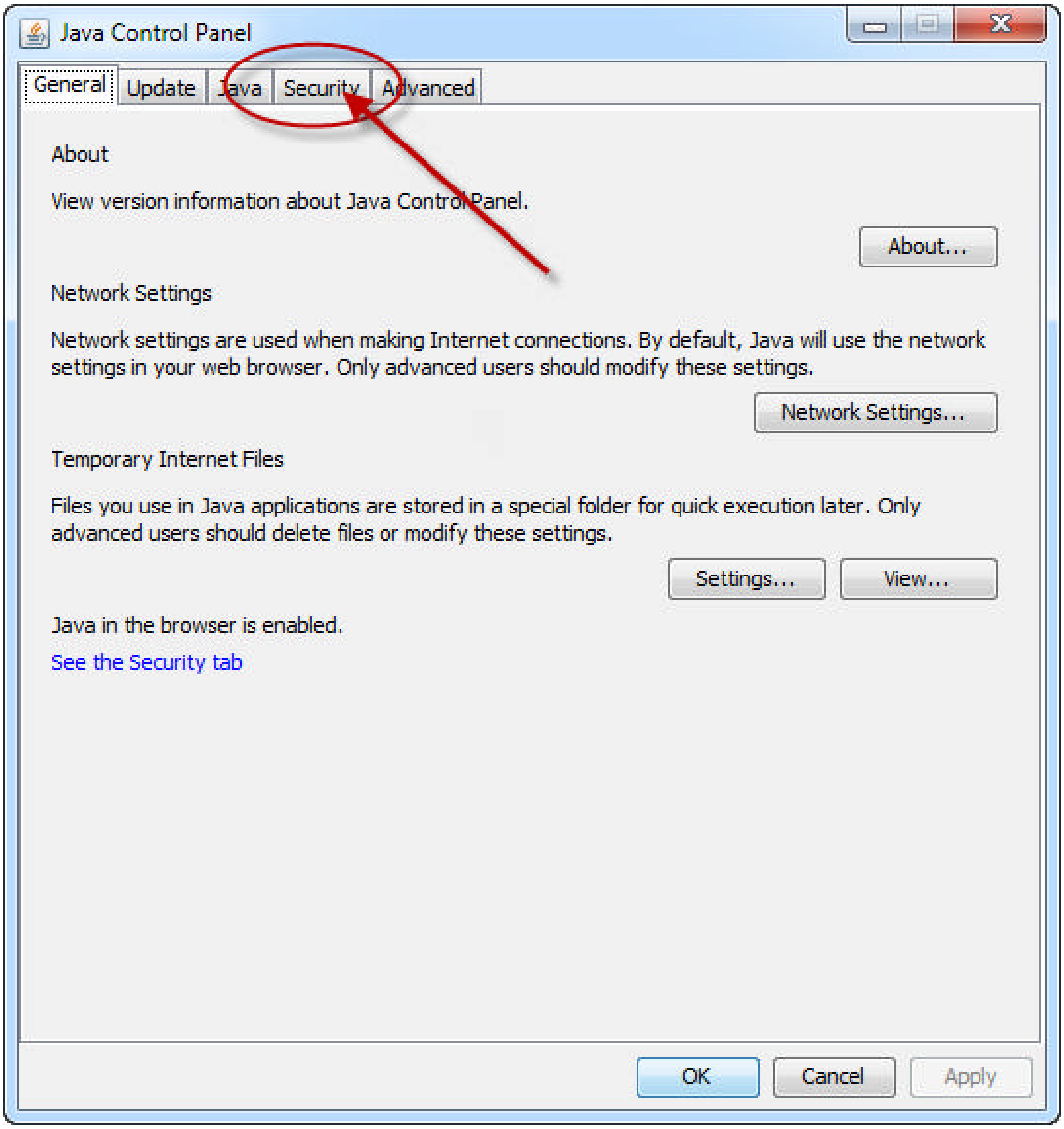
2. Navigate to this folder:

   `squirrelcart/lib/qz-print/qz-freecerts/`

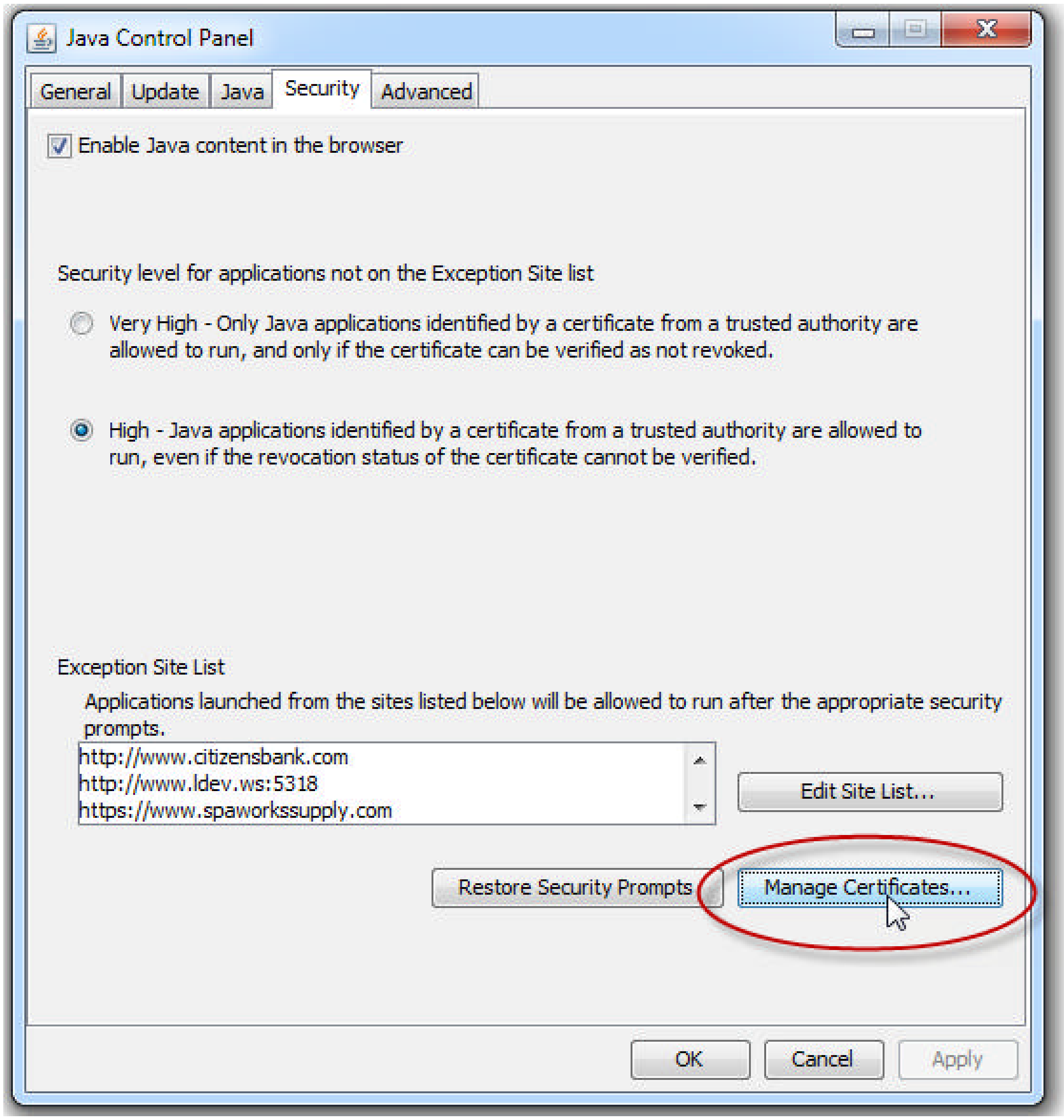
3. Download the qz-free.csr file to your computer.

4. Open the Java Control Panel on your computer.

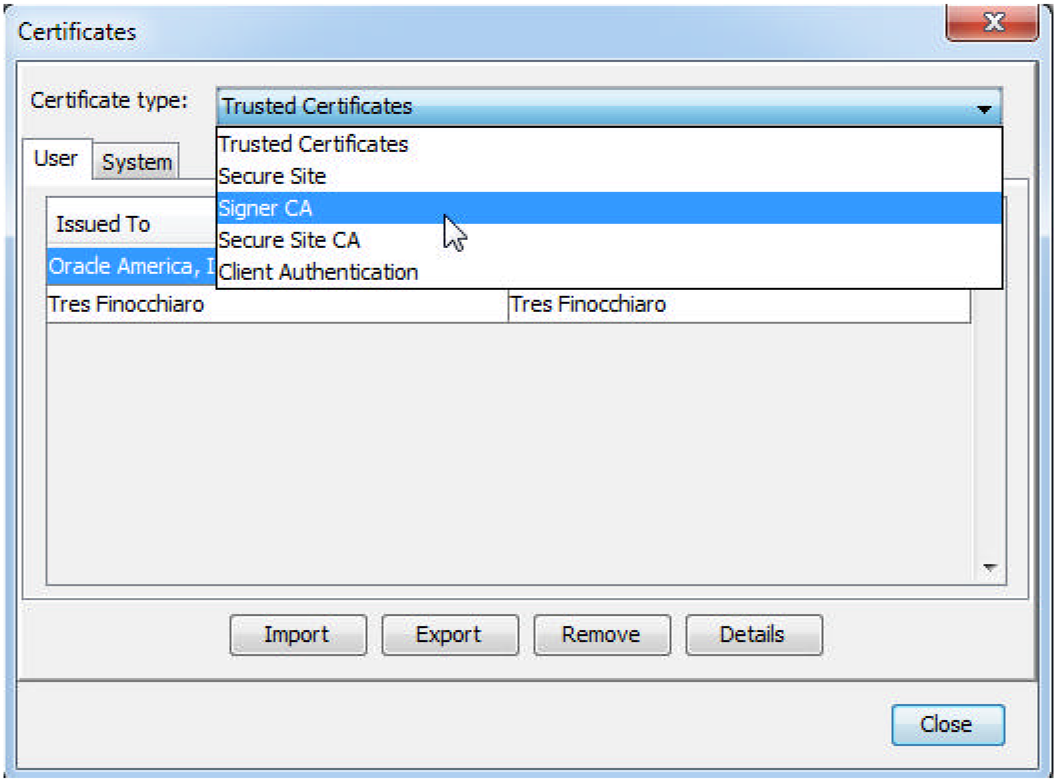
5. Click the **Security** tab:



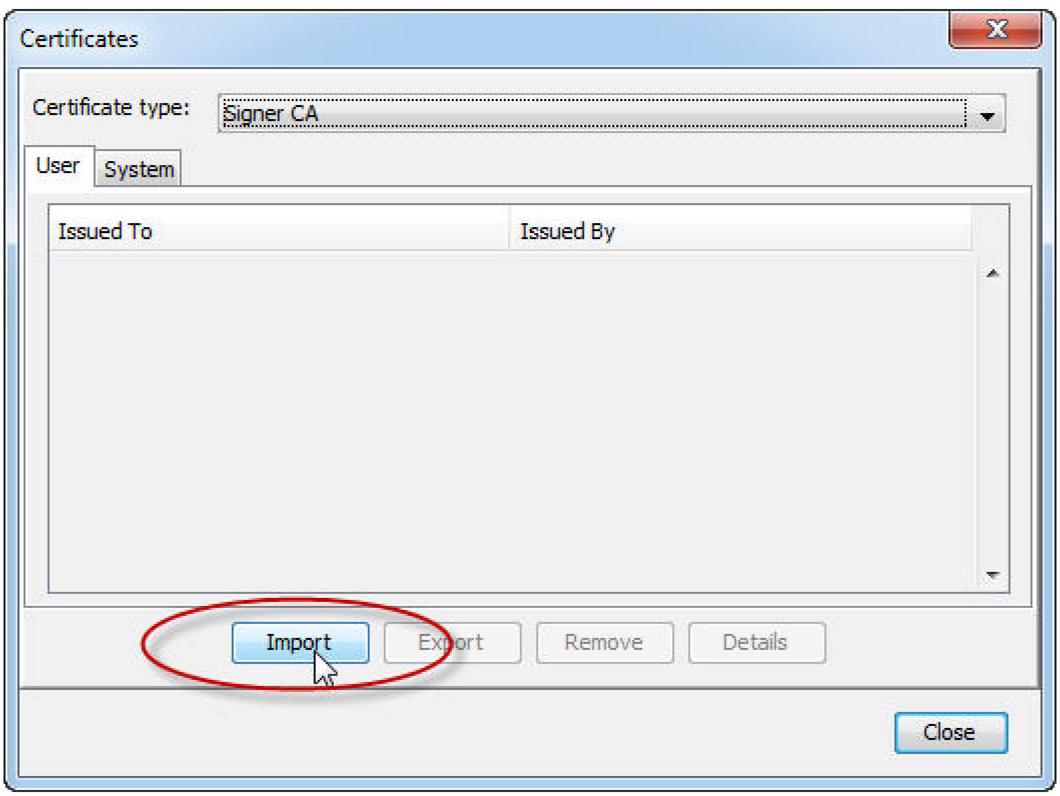
6. Click **Manage Certificates...**



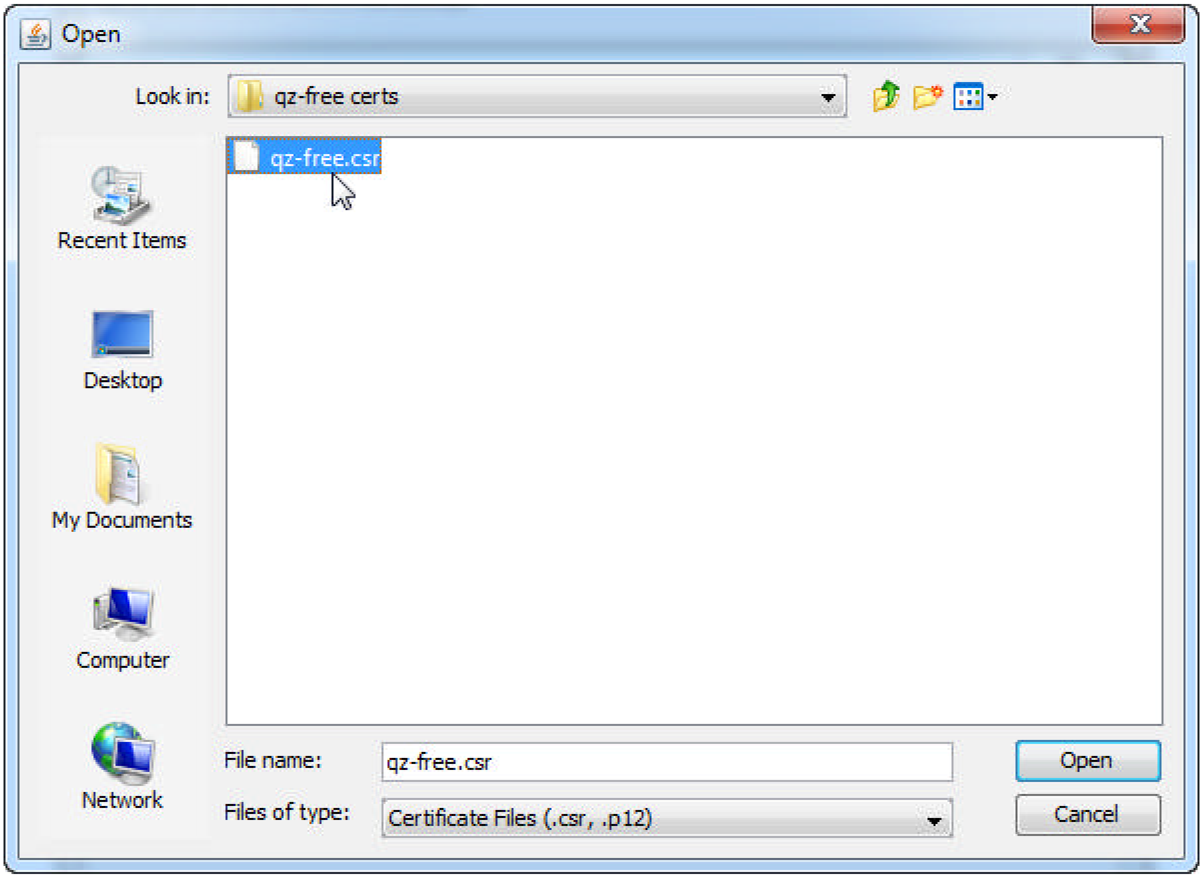
7. Set **Certificate Type** to **Signer CA**:



8. Click the **Import** button:



9. Select the qz-free.csr file you saved to your computer in step 3, click **Open,** and apply changes.



Auto Creation of Shipping Labels

Squirrelcart supports auto creation of shipping labels at the time the customer places their order.

⚠ You should always confirm the details of a shipment before passing it off to a courier. You can view the details of any auto created shipment by opening the corresponding shipment record in the control panel.

Enabling Auto Creation

1. Open the Settings page for the courier you wish to enable this for (currently only Endicia, FedEx and UPS are supported)

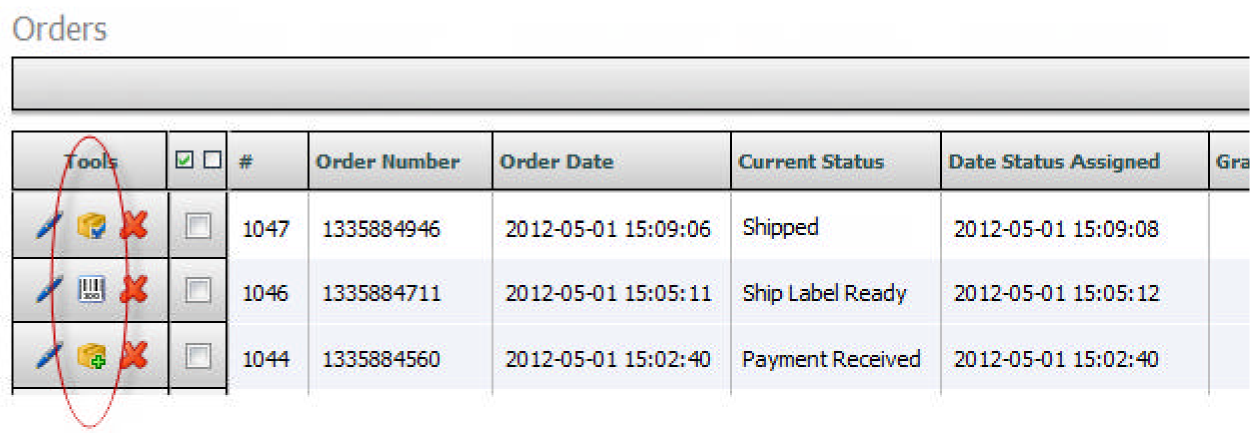
2. Check the **Auto Create Shipments** checkbox field to turn on this feature

3. Specify the value for the **Acceptable Rate Difference** field. While for most shipments the amount the customer pays should match your cost, it is possible for rate differences to occur. The Acceptable Rate Difference setting is used to specify a difference (as a percentage) which will be acceptable to you. When Squirrelcart attempts to auto create a shipment, if your cost is higher than what the customer paid but within the acceptable rate difference, the shipment will still be created. If your cost is higher, the shipment will not be created.

4. Optionally, you can set a max cost using the **Max Cost** field, and disable international shipment auto creation by checking **Domestic Only**

Printing Labels

Shipments that were auto created will automatically be assigned an order status of **Ship Label Ready**. To print a label for an auto created shipment, click the label icon for that order in the orders table:



You will be able to view the details regarding the shipment (weight, cost, etc...) on the subsequent page.

6.6.6.12 Tracking - Overview

Overview

Tracking allows you and your customers to see the status of a shipment from start to finish. Tracking is a feature currently supported for **UPS (Section 6.6.10)**, **USPS (Section 6.6.8)**, and **FedEx (Section 6.6.9)**.

6.6.6.12.1 Tracking - Enabling

Enabling Real Time Rates will also enable tracking for UPS, USPS, and FedEx. See the **Real Time Rates topic (Section 6.6.3.2)** for more information.

6.6.6.12.2 Assigning a Tracking Number

In order for a customer to track a shipment, you must first create a record for that shipment in the Shipments table. This is discussed in the **Shipments section (Section 6.6.6)** of the documentation.

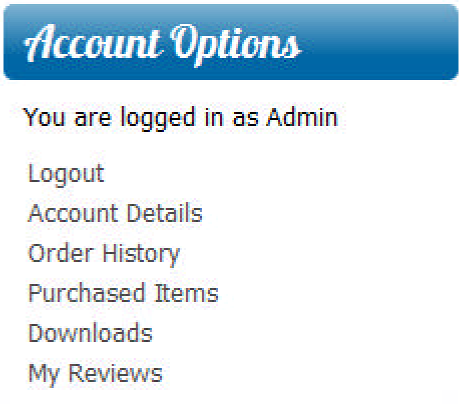
6.6.6.12.3 Tracking a Shipment

Tracking in the Storefront

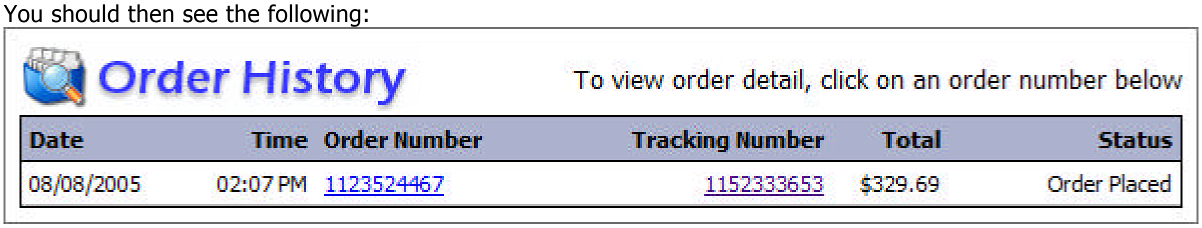
To track a package as a customer would, you must have a user account.

1. Login on *storefront* page

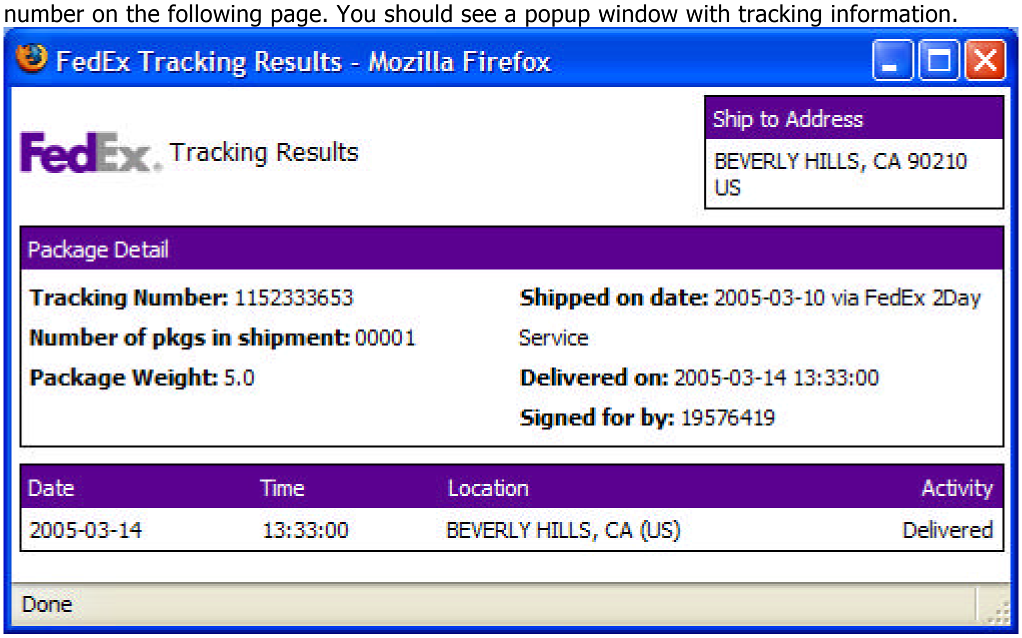
2. Click the **Order History** link in the Account Options nav box



You should then see the following:



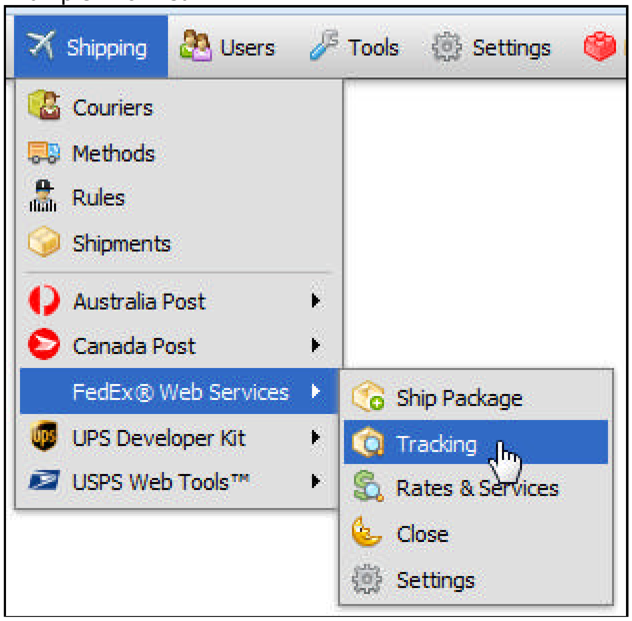
3. Click the tracking number you wish to check. You may also click the Order Number, and then click the tracking number on the following page. You should see a popup window with tracking information.



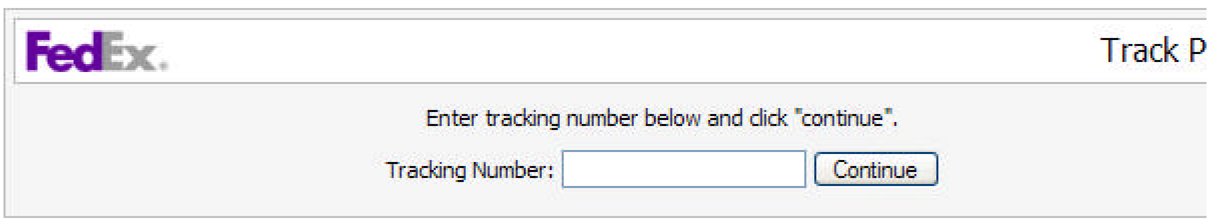
Tracking in the Control Panel

1. Open the **control panel (Section 3)**

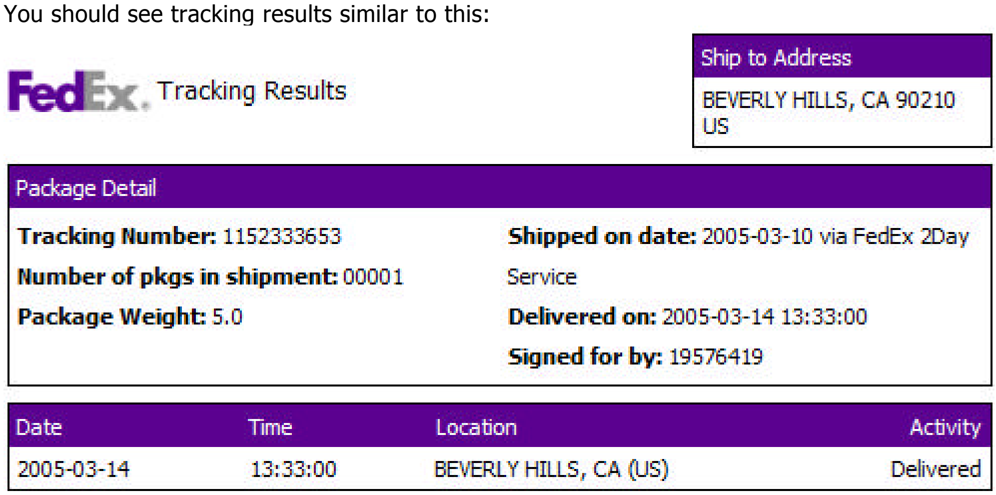
2. Click the tracking menu link for the courier of the shipment you wish to track.
   Example - for FedEx:



3. Enter the tracking number in the tracking number field and click **Continue**



You should see tracking results similar to this:



6.6.7 Endicia

Overview

Endicia® is an online shipping service provider and approved partner of the U.S. Postal Service. With Endicia, you can print USPS shipping labels which include postage. You can also obtain USPS rate information, track shipments, schedule pickups, and much more. **Learn more about Endicia on their website. (http://www.endicia.com/)**

What you can do with Endicia

Storefront features for your customers

- Obtain live USPS rate info during checkout
- Track shipments from order history page
- Validate and correct addresses

Control panel features for you

- Buy postage
- Print plain paper and thermal shipping labels that include postage
- Create return shipping labels
- Schedule pickups (requires Endicia Advanced plan)
- Check available rates and services
- Track packages
- Signup for an Endicia account
- Check your Endicia account status
- Generate a USPS SCAN form (requires Endicia Advanced plan)

Requirements

Our Endicia integration requires *SOAP*, *CURL* OR *fsockopen* support, and *OpenSSL*.

Enabling Endicia

To use Endicia, you must have an Endicia account. Endicia has two environments, which use separate accounts specific to each environment:

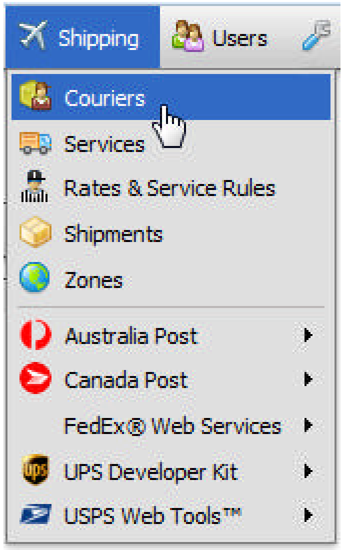
Live environment - this is on by default, and is used for generating live labels, live rates, etc...

Sandbox environment - this is a test environment. It is used solely for testing. Operations performed using this environment are for testing only and do not have associated charges.

If you do not have an account, sign up using Squirrelcart

1. Open your Squirrelcart control panel

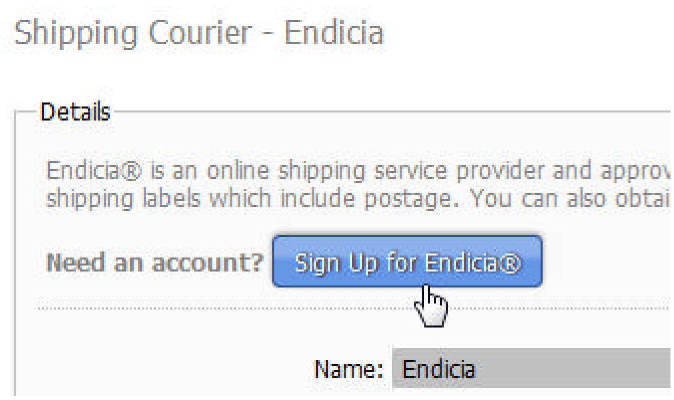
2. Click **Shipping > Couriers**



3. Click the record row labeled **Endicia**

4. Determine which environment you wish to use. If you would like to test using a test sandbox account, the sandbox must be turned on. To do so, click the **Enable Sandbox** button.
   Note: if this button reads **Disable Sandbox**, you already have the sandbox environment turned on.

5. Click the **Sign Up for Endicia** button:



   Note: in the Sandbox environment this button will read **Sign Up for Endicia Sandbox**

6. Follow the instructions on the form to create your Endicia account.
   If you have an SSL certificate for your website, Squirrelcart will ask you for a credit card number for payment of your Endicia monthly fees. That payment information is sent to Endicia.

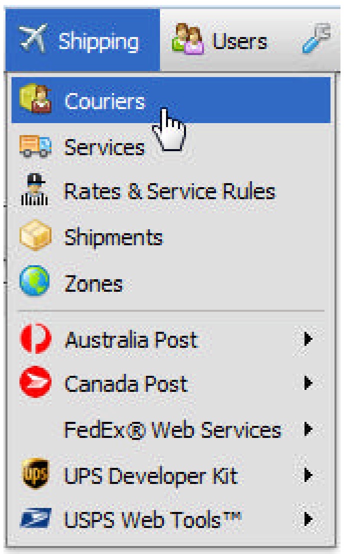
   If you do not have an SSL certificate for your website, Squirrelcart will not ask you for a credit card number. After you create your account, you can login at Endicia.com and add your payment method.

7. After successfully creating your account, you will be prompted to change your passphrase via a second form. Submit that form to change your passphrase, and your account is ready to use.

If you already have an Endicia account:

1. Open your Squirrelcart control panel

2. Click **Shipping > Couriers**



3. Click the record row labeled **Endicia**

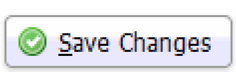
4. Determine which environment you wish to use. If you would like to test using a test sandbox account, the sandbox must be turned on. To do so, click the **Enable Sandbox** button.
   Note: if this button reads **Disable Sandbox**, you already have the sandbox environment turned on.

5. Enter your Endicia account number in the **Endicia Account #** field.

6. Enter your Endicia pass phrase in the **Endicia Pass Phrase** field.

7. If you have a Dial-A-ZIP account, enter its password in the field of the same name (for more info, see the **Address Validation topic (Section 6.6.14)**).

8. Check the **Enabled** field.

9. Click 

How Postage Works

Before you can create labels, you'll need to buy postage. When you purchase postage, the payment method you have on file at Endicia.com is used. The amount purchased is added to your available postage balance, which is tracked by Endicia. When you create a USPS shipping label in Squirrelcart using your Endicia account, the cost of that shipment is immediately deducted from your postage balance, regardless of whether or not that label is actually scanned.

How to Buy Postage

You can add postage to your Endicia.com account from your Squirrelcart control panel:

1. Click **Shipping > Endicia > Buy Postage**
2. Enter the amount you wish to purchase
3. Check the box to confirm the purchase, and click **Buy Postage.** The payment method you have on flie with Endicia will be charged.

How to Check Your Postage Balance

You can check your Endicia account postage balance from your Squirrelcart control panel:

1. Click **Shipping > Endicia > Account Status**
2. You will find your postage balance towards the top of this page, after **Available Postage Balance**

How to Request a Postage Refund

If you make a mistake when creating a label or if a customer cancels their order, you can request a refund from your Squirrelcart control panel.

If you know the tracking number:

1. Click **Shipping > Endicia > Request Refund**
2. Enter one or more tracking numbers in the Tracking Numbers field. Each one should be on a separate line.
3. Click the **Request Refund** button.

If you don't know the tracking number:

1. Click **Shipping > Shipments** to view your shipment records
2. Locate the row corresponding to the shipment you would like a refund for and click on the record to open it.
3. To the right of the **Tracking Number** field, you'll see a **Request Refund** button. Click that button to request the refund.

Automatic Refunds

Endicia offers an automatic refund feature which detects unused labels and automatically issues refunds for them. To turn this feature on, login to Endicia.com. You'll find a link to enable this feature in their control panel.

Changing your Payment Method

To change the payment method used for your Endicia.com account, login at Endicia.com. You'll find a link to update your payment info in their control panel.

Creating Shipments (and Return Shipments)

See the **Creating an Endicia (USPS) Shipment topic (Section 6.6.6.4)** for instructions.

Rate Lookups

Rate Lookups During Checkout

With Endicia enabled, your customers will get live rate information (real time rates) as they checkout. This is discussed in the **Real Time Rates topic (Section 6.6.3.2)**.

Rate Accuracy

In order to make the rates presented to your customers as accurate as possible, we recommend that you enable the "Ship as a Separate Package" field on products that are shipping in separate boxes. You can then specify package dimensions below the field. Those dimensions will be sent to Endicia during rate requests.

Rate Lookups in the Control Panel

For info on this feature, see **this topic (Section 6.6.15.1.3)**.

Tracking Shipments

For info on tracking shipments via Endicia, see **this topic (Section 6.6.15.1.2)**.

Pickup Requests

For instructions on submitting pickup requests, see the separate **pickup request topic (Section 6.6.15.1.4)**.

Address Validation

We support address validation via Endicia's Dial-A-ZIP API, which can be used to correct address during checkout and when creating shipping labels. For more info on this, see the **Address Validation topic (Section 6.6.14)**.

6.6.8 USPS Web Tools

Overview

USPS Web Tools® is a free service offered by the U.S.Postal Service. You can learn more about it here: **https://www.usps.com/business/web-tools-apis/welcome.htm**

> While USPS Web Tools® can be used to print USPS shipping labels, those labels do not include postage. Postage must be purchased at the post office when you drop off the package.
>
> If you are looking for a way to print postage paid USPS shipping labels, we recommend **enabling Endicia (http://www.ldev.ws:5318/endicia/squirrelcart/index.php?table=Shipping_Couriers&edit_records=1&selected_record_number=6)** instead of USPS Web Tools. Endicia is an approved USPS partner. With Endicia, Squirrelcart can generate postage paid labels. You can schedule pickups, get shipping discounts, and much more.

Squirrelcart supports **Real Time Rates (Section 6.6.3.2)**, **Shipments (Section 6.6.6.5)**, and **Track/Confirm (Section 6.6.6.12)** for USPS, for shipments shipping from the US to all addresses that are serviced by USPS.

APIs Supported

USPS supplies information via APIs. The following APIs are used by Squirrelcart:

- Track & Confirm
  Used to perform tracking and confirmation of delivery/signature
- Domestic Mail Service Standards
  Used to obtain estimated delivery times to display along with rate requests
- Delivery Confirmation
  Used with shipment feature to generate Delivery Confirmation label
- Signature Confirmation
  Used with shipment feature to generate Signature Confirmation label
- Express Mail
  Used with shipment feature to generate Express Mail label
- Global Express Mail
  Used with shipment feature to generate Global Express Mail label
- Domestic & International Rates
  Used to obtain rate information for storefront and control panel rate tool
- Address Information (Verify)
  This API is used to validate and correct address information.

Requirements

USPS Web Tools requires *CURL* OR *fsockopen* support, and *OpenSSL*.

Enabling USPS Web Tools

1. Register

   Register online to use USPS Web Tools at the following URL:
   https://secure.shippingapis.com/registration/

2. Wait for Email

   Once your registration is complete, you will receive a username and password to access USPS Web Tools via email.

3. Call USPS to get access to production

   The email will tell you to test, and then call a toll free number to get access to their production servers. There is no need to test, as we have done plenty of testing with their APIs. Reply to the email or call their support phone number, and ask to have your account given access to their production servers. You will need access to all of the APIs listed above, so you may want to cut and paste them into the email.

4. Open the USPS **Shipping Courier (Section 6.6.1)** record in Squirrelcart's control panel

5. Check the **Enabled** field

6. Check the **RTR Enabled** field

7. Enter Username

   Enter your username provided by USPS in the **RTR Username** field.

8. Enable Services

   Check the boxes next to the shipping methods you want to offer.

Rate Accuracy

In order to make the rates presented to your customers as accurate as possible, we recommend that you enable the "Ship as a Separate Package" field on products that are shipping in separate boxes. You then need to specify dimensions below the field. While this will increase the accuracy of the rates presented, it is still possible for the rates to differ from what your actual costs are. This is due to the fact that USPS does not allow you to pass width, length, or height to them to determine which services are valid. Because of this, Squirrelcart will make it's best attempt to eliminate rates returned that do not meet your product's dimensions.

6.6.9 FedEx Web Services

Overview

Lighthouse Development is a FedEx Certified Solutions Provider. For more information about our implementation of FedEx Web Services, see this page: **http://www.squirrelcart.com/fedex.php**

Squirrelcart supports **Real Time Rates (Section 6.6.3.2)**, **Shipments (Section 6.6.6)**, and **Tracking (Section 6.6.6.12)** via FedEx.

Requirements

- PHP 5 or newer
- *SOAP* support
- *CURL* OR *fsockopen* support
- *OpenSSL*

Enabling FedEx Web Services

1. Open the FedEx **Shipping Courier (Section 6.6.1)** record

2. Check the **RTR Enabled** field in the **Details** field set

3. Click the link to subscribe to FedEx Web Services in the **FedEx Web Services Settings** field set:

4. Register
   Follow the prompts to register.

FedEx One Rate®

FedEx One Rate® is flat rate shipping that does not require you to weigh or measure shipments under 50 lbs. With FedEx One Rate you can add to the box without adding to the price.

Creating a FedEx One Rate® shipment

Follow the normal proceduers for **creating a FedEx shipment (Section 6.6.6.6)**. While specifying your package information, check the FedEx One Rate® field in the **Service Options** fieldset, and choose a package type that is supported by FedEx One Rate®.

Getting FedEx One Rate® shipping rates during checkout

If you have real time rates enabled for FedEx, you can offer FedEx One Rate® for individual products. To do so:

1. Open a product record

2. Check **Ship as a separate pkg** in the **Shipping Details > Packaging** fieldset

3. In the **Shipping Details > FedEx Specifics** fieldset, check the box next to FedEx One Rate®.

4. Set the **Packaging** field in the same section to a package type that is supported by FedEx One Rate®.

5. Save changes

6.6.10 UPS Developer Kit

Overview

UPS Developer Kit is a set of APIs used to communicate with UPS, to automate rate lookups, shipment and label creation, tracking, and more.

Squirrelcart has been certified by UPS via their UPS Ready program. For more information regarding our implementation of the UPS Developer Kit, see this URL:
http://www.squirrelcart.com/ups_developer_kit.php

Squirrelcart supports **Real Time Rates (Section 6.6.3.2)**, **Shipments (Section 6.6.6)**, Returns, and **Tracking (Section 6.6.6.12)** via UPS.

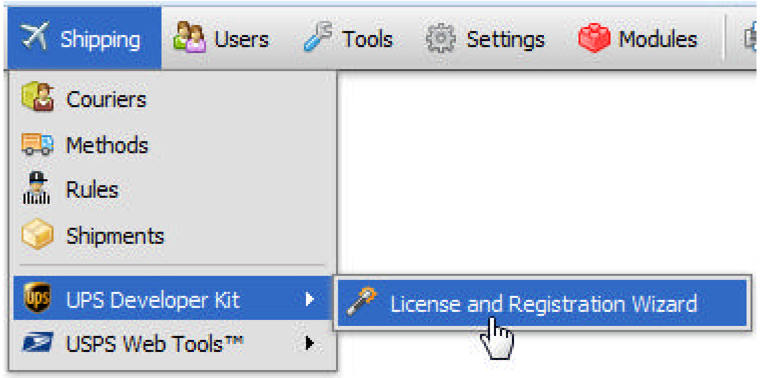
Requirements

- PHP 5 or newer
- *SOAP* support
- *CURL* OR *fsockopen* support
- *OpenSSL*

Enabling UPS Developer Kit

During the registration process, you will have an opportunity to enter a UPS Shipper Number (your account number). While this is optional, it is recommend. To receive negotiated rates (rates specific to your account), you will need to authenticate your account. To do so, you will need a copy of a recent UPS invoice handy. If you do not yet have one, you can still register and authenticate your account at a later date using the **Shipping > UPS Developer Kit > Authenticate Account** menu option.

1. Open the control panel
2. Mouse over the **Shipping** menu link. If you see a **UPS Developer Kit** option, skip to step 5.
3. Click **Shipping > Couriers**
4. Check the checkbox in the **Enabled** column for the UPS shipping courier record
5. Click **Save Changes**
6. Refresh your browser to update the toolbar menu, which will now contain a new Shipping > UPS Developer Kit menu option
7. Click the **Shipping > UPS Developer Kit > License and Registration Wizard** menu link:



8. Follow the prompts to register.

Settings

There are 2 settings that can cause the rates returned by UPS to vary.

UPS Account Type

You can set the manner in which your packages are picked up using the **UPS Account Type** field on the UPS shipping courier record, or by clicking **Shipping > UPS Developer Kit > Settings**.

Destination Address Type

Rates vary depending on whether the destination address is residential or commercial. The customer has the option to indicate this on the shipping address form using the **Address Is** field. You can enable this field on the **Address Form Settings (Section 6.4.1)** page.

6.6.11 Australia Post

Overview

For more information about Australia Post, see their website:

http://www.auspost.com.au (http://www.auspost.com.au/)

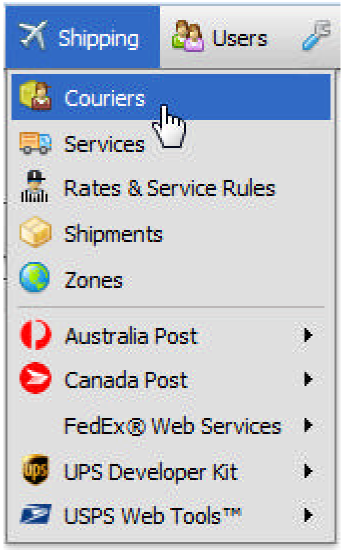
Squirrelcart supports **Real Time Rates (Section 6.6.3.2)** via Australia Post.

Requirements

CURL OR *fsockopen* support

Enabling Real time Rates for Australia Post

1. Cilck the Shipping Couriers menu link

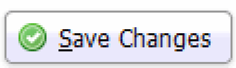


2. Click on the record row labeled **Australia Post**

3. Check the **RTR Enabled** field to enable real time rates

4. Check the **Enabled** field to enable the courier itself

5. Make sure you have at least one shipping service selected

6. Click 

Tips

Package Origination

Australia Post can only provide rates for packages shipping from Australia. For this reason, your packages in Squirrelcart must have an Australian originating address. The originating address for packages is controlled in 2 ways.

Method 1: With **inventory control (Section 7.1.14)** disabled (or with it enabled with only a single **warehouse (Section 6.9.3)** record)

With this method, the address specified in your store settings controls where packages are shipped from. You should ensure that you have your Postal Code set to a valid Australian postal code, and the Country field set to **Australia**.

Method 2: With **inventory control (Section 7.1.14)** enabled and with more than one **warehouse (Section 6.9.3)** record

With this method, the address on your Store Settings page controls the originating address for all packages shipping from the default warehouse. For packages shipping from other warehouses, the address on the warehouse record is used and must be an Australian address for Australian Post rates to be returned.

Weights and Measurements
While it's not required, you will probably want to change the **Weight Units** field on your **Store Settings (Section 6.1)** page to **kg**, and the **Dimension Units** field to **cm**.

6.6.12 Canada Post Sell Online

Overview

Squirrelcart supports **Real Time Rates (Section 6.6.3.2)**, for Canada Post, via their Sell Online API.

Requirements

CURL OR *fsockopen* support
Port 30000 must be open on your web server

Enabling Canada Post Sell Online

1. You'll need a Canada Post Venture One account. If you do not have one, signup free at this URL:
   http://canadapost.ca/cpo/mc/business/solutions/ventureone.jsf

2. Request a CPC ID
   To use Canada Post Sell Online, you'll need a CPC account. To obtain one, send an email to **sellonline@canadapost.ca (mailto:sellonline@canadapost.caRegister%20online%20to%20use%20USPS%20Web%20Tools%20at%20the%20following%20URL:%20http://www.)** requesting a CPC ID. Include the following information in the email:
   - Company Name
   - 10 digit Venture One ID number
   - Address
   - Contact name
   - Phone number

3. Wait for Email Reply
   Once your registration is complete, you will receive a CPC ID to access Sell Online.

4. Open the Canada Post **Shipping Courier (Section 6.6.1)** record.

5. Check the **Enabled** field to enable Canada Post as a courier in Squirrelcart

6. Check the **RTR Enabled** to enable real time rate lookups for Canada Post

7. Enter your CPC ID in the **CPC ID** field

8. If you wish to send the total cost of products in a shipment for insurance purposes, check the **RTR**

Insurance field.

9. Enable the shipping services you wish to offer in the **Enabled Services** fieldset

10. Click Save Changes

Rate Accuracy

Canada Post has its own system for determining how items will be packed in order to obtain shipping rates. For this reason, their system requires that we send a list of items that are in the order, along with their quantities, weights, and dimensions. Canada Post then uses that information to determine shipping rates.

There are many settings in your Sell Online shipping profile that you can adjust to control how rates are returned. To access your Sell Online shipping profile, see the information in the email you received from Canada Post that contained your CPC ID.

6.6.13 Fastway

Overview

Fastway is a courier that offers shipping via franchises in Australia, New Zealand, Ireland, Northern Ireland, and South Africa.

⚠ Squirrelcart supports using Fastway for shipping within Australia only.

Fastway handles their shipping using pre-paid labels that you must buy in advance.

Using Fastway's API, you can obtain rate information for shipments to Australia. **Learn more about Fastway (http://www.fastway.com.au/)**.

What you can do with Endicia

Storefront features for your customers

- Obtain rate info during checkout
- Auto complete state/city/postal code fields on address forms
- Validate addresses

Control panel features for you

- Check available rates and services

Requirements

Our Fastway integration requires *CURL* OR *fsockopen* support.

Enabling Fastway

To use Fastway, you must have an API key. You must also enter your store's Australian address information on the Store Settings page.

Obtaining an API key

1. Visit the API webpage: **http://au.api.fastway.org/v3/docs/index.html**

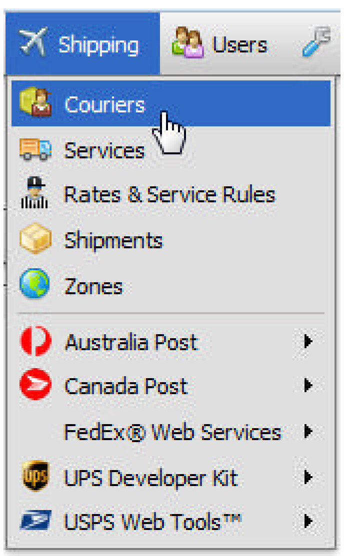
2. Click **Get API Key**

3. Fill out the form to obtain your API Key

Enabling Fastway

1. Open your Squirrelcart control panel

2. Click **Shipping > Couriers**



3. Click the record row labeled **Fastway**

4. Check the **Enabled** field

5. Check the **RTR Enabled** field

6. Enter your **API Key** in the field of the same name

7. If you wish to use the autocomplete address feature, check the **Autocomplete Addresses** field. This feature is explained further down on this page.

8. Enable at least one service in the **Services** fieldset.

9. Click Save Changes

10. Specify which labels you have purchased from Fastway, and their price. See **Configuring Label Pricing** below.

Configuring Label Pricing

Fastway shipping is done via pre-purchased labels and satchels (envelopes). Labels are sold by regional franchises that handle shipping from specific origins. They come in different colors corresponding to different destination areas.

Each label handles up to 5kg. For shipments over 5kg, excess shipping labels must be used, up to a maximum of 25kg.

For each **warehouse (Section 6.9.3)** you ship from, you must specify which labels you have already purchased and the price you paid for them. This is how Squirrelcart determines rates during checkout.

How to Configure Label Pricing

1. Open the control panel

2. Open a warehouse record corresponding to a location that you use Fastway to ship from, using the **Settings > Locations > Warehouses** link:

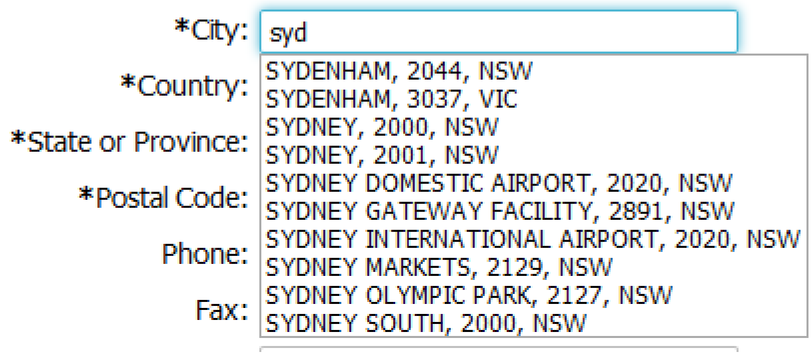
3. Use the fields in the Fastway Labels & Satchels fieldset to specify the price you paid for each label for that location. For labels you do not own, leave the field blank.

4. Click Save Changes

> If you have more than one warehouse location that uses the same Fastway regional franchise, only enter your label info for one of those locations.

Address Autocompletion

With Fastway enabled, your customers can auto complete their state, city, and postal code using values they type in either the city field or postal code field. Example:



When a value is selected, the city, state, and postal code fields are automatically populated.

Enabling Address Autocompletion

Open the Fastway courier record in the control panel and check the **Autocomplete Addresses** field.

Rate Lookups

Rate Lookups During Checkout

With Endicia enabled, your customers will get live rate information (real time rates) as they checkout. This is discussed in the **Real Time Rates topic** **(Section 6.6.3.2)**.

Rate Accuracy

In order to make the rates presented to your customers as accurate as possible, we recommend that you enable the "Ship as a Separate Package" field on products that are shipping in separate boxes. You can then specify package dimensions below the field. Those dimensions will be sent to Endicia during rate requests.

Rate Lookups in the Control Panel

For info on this feature, see **this topic** **(Section 6.6.15.1.3)**.

Tracking Shipments

For info on tracking shipments via Endicia, see **this topic** **(Section 6.6.15.1.2)**.

Pickup Requests

For instructions on submitting pickup requests, see the separate **pickup request topic** **(Section 6.6.15.1.4)**.

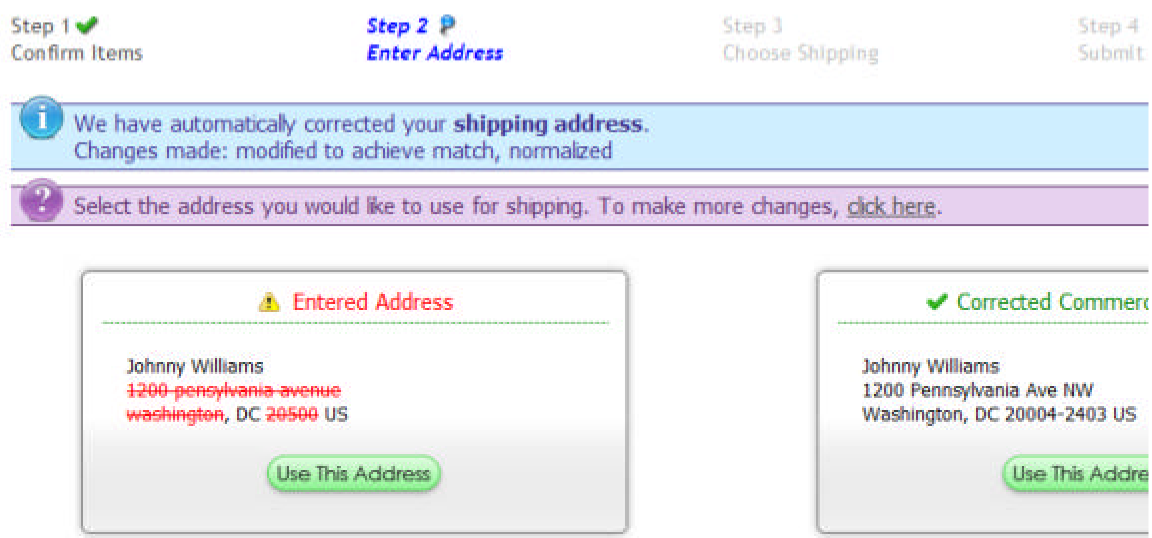
Address Validation

We support address validation via Endicia's Dial-A-ZIP API, which can be used to correct address during checkout and when creating shipping labels. For more info on this, see the **Address Validation topic (Section 6.6.14)**.

6.6.14 Address Validation

Overview

Address validation can be enabled using **Endicia (Section 6.6.7)**, **USPS Web Tools (Section 6.6.8)**, **FedEx Web Services (Section 6.6.9)**, or **Fastway (Section 6.6.13)**. It is used to ensure shipping addresses are accurate. When enabled, shipping addresses entered in the storefront and in the control panel will be checked using an address validation service. If a correction is found, the customer will be given the opportunity to correct their address automatically. In the storefront, it looks like this:



This same feature is used when creating shipping labels in the control panel.

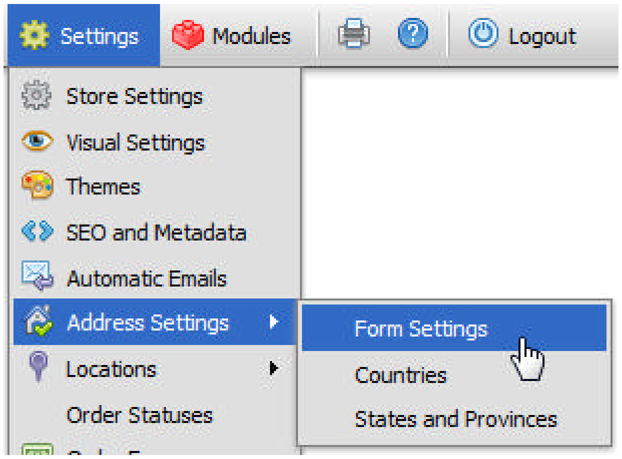
Note: When using Fastway for address validation, it will validate whether the address is recognized but will not offer corrections as shown above. If an address is not valid, the customer will be instructed to correct it themselves.

Enabling Address Validation

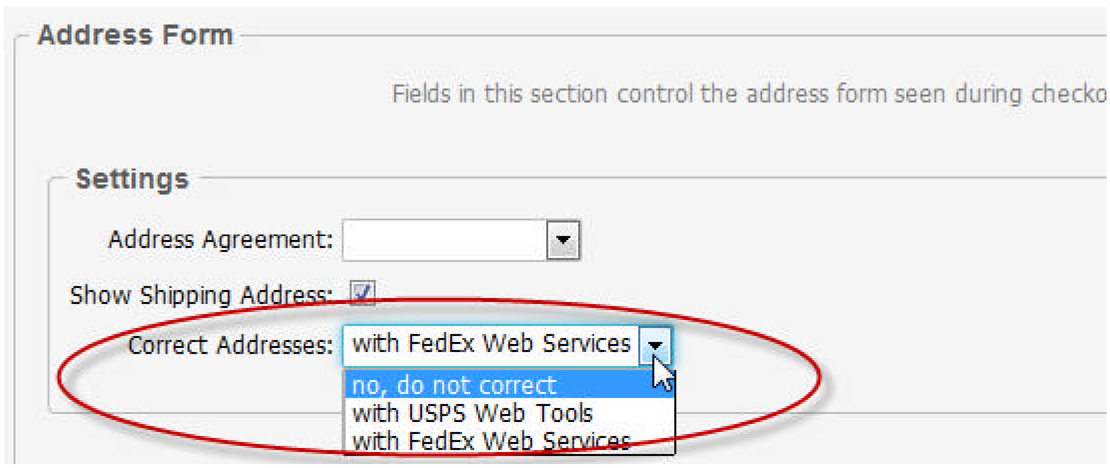
1. If you have not already done so, enable a courier that supports address validation:

   Endicia (Section 6.6.7), **USPS Web Tools (Section 6.6.8)**, **FedEx Web Services (Section 6.6.9)**, or **Fastway (Section 6.6.13)**

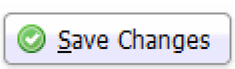
2. In the control panel, open the Address Form Settings page:



3. Change the **Correct Addresses** field to whichever service you wish to use:



4. If you chose "Endicia", see the **Additional Steps for Endicia** section below.

5. Click 

Additional Steps for Endicia

Endicia uses an API called Dial-A-ZIP for address validation. To get access to his API, you must contact Endicia support (**labelserver@endicia.com**). Once they have set this up for your account, after you've folllowed the steps above to turn on address validation do the following:

1. Open the control panel

2. Click **Shipping > Endicia > Settings**

3. Enter your Dial-A-ZIP password in the field of the same name

4. Click **Save Changes**

5. To test, try checking out with the wrong zip code.

> Your Dial-A-ZIP account number must be the same as your Endicia account number. If you are unsure as to what your Dial-A-ZIP account number is, contact Endicia support for assistance.

6.6.15 Shipping Tools - Overview

This section covers the shipping tools available in the Control Panel. Each tool requires that you enable the corresponding courier's web tools before you can use them.

6.6.15.1 Endicia (USPS)

6.6.15.1.1 Endicia - Ship Package

This tool is discussed in the **Creating an Endicia Shipment topic (Section 6.6.6.4)**.

6.6.15.1.2 Endicia - Tracking

This tool is discussed under **Configuration > Shipping > Shipments > Tracking** to the left.

6.6.15.1.3 Endicia - Rates & Services

Overview

This control panel tool can be used to obtain USPS rate and service info via Endicia, within Squirrelcart's control panel.

How to Lookup Rates & Services

1. Click **Shipping > Endicia > Rates & Services**

2. Fill out the form

3. Click the **Submit** button. If rates are available they will be shown above the request form.

6.6.15.1.4 Endicia - Pickup Request

Overview

This tool can be used to request a USPS pickup, check for USPS pickup availability. It can also be used to change or cancel a previously scheduled pickup.

This feature requres an Endicia Advanced Plan.

Scheduling a USPS Pickup via Endicia

1. Click **Shipping > Endicia > Pickup Request**
2. Under **Request Type**, Check Availability will be selected by default. Leave this selected.
3. Under **Pickup Address**, specify the address you want the postal carrier to obtain the package from.
4. Click the **Check Availability** button
5. The next available pickup date will be shown at the top of the page. The **Schedule Pickup** field in the **Request Type** fieldset will be selected.
6. Fill out the **Package Information** fieldset, and click the **Request Pickup** button to schedule your pickup.
7. You will receive a confirmation #. Save this number, as it will be needed to cancel or change the pickup.

Changing a Previously Scheduled Pickup

1. Click **Shipping > Endicia > Pickup Request**
2. Under **Request Type**, select **Change Pickup**
3. Enter your confirmation # (the one you received when you scheduled the pickup)
4. Under **Pickup Address**, specify the address you want the postal carrier to obtain the package from.
5. Fill out the **Package Information** fieldset, and click the **Change Pickup** button to schedule your pickup.

Canceling a Previously Scheduled Pickup

1. Click **Shipping > Endicia > Pickup Request**
2. Under **Request Type**, select **Cancel Pickup**
3. Enter your confirmation # (the one you received when you scheduled the pickup)
4. Click the **Cancel Pickup** button.

6.6.15.2 USPS Webtools

6.6.15.2.1 USPS - Ship Package

This tool is explained in detail in the **Creating a USPS Shipment via USPS Web Tools (Section 6.6.6.5)** topic.

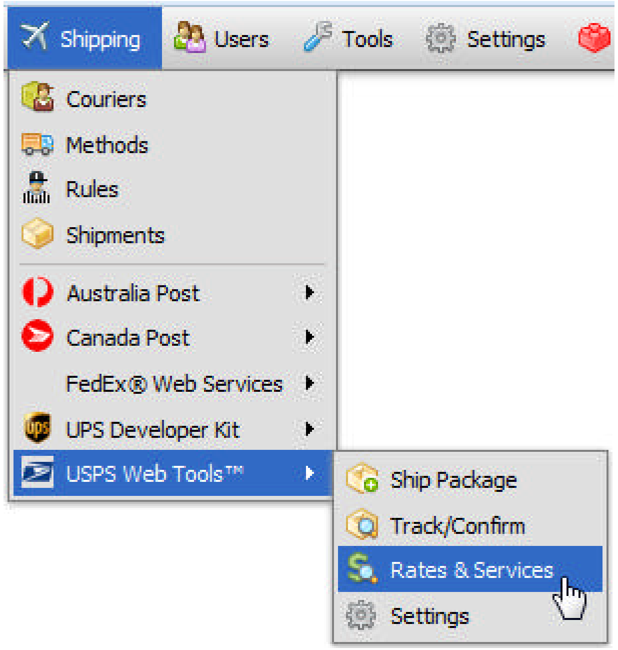
6.6.15.2.2 USPS Track/Confirm

This tool is explained in the **Tracking a Shipment (Section 6.6.6.12.3)** topic.

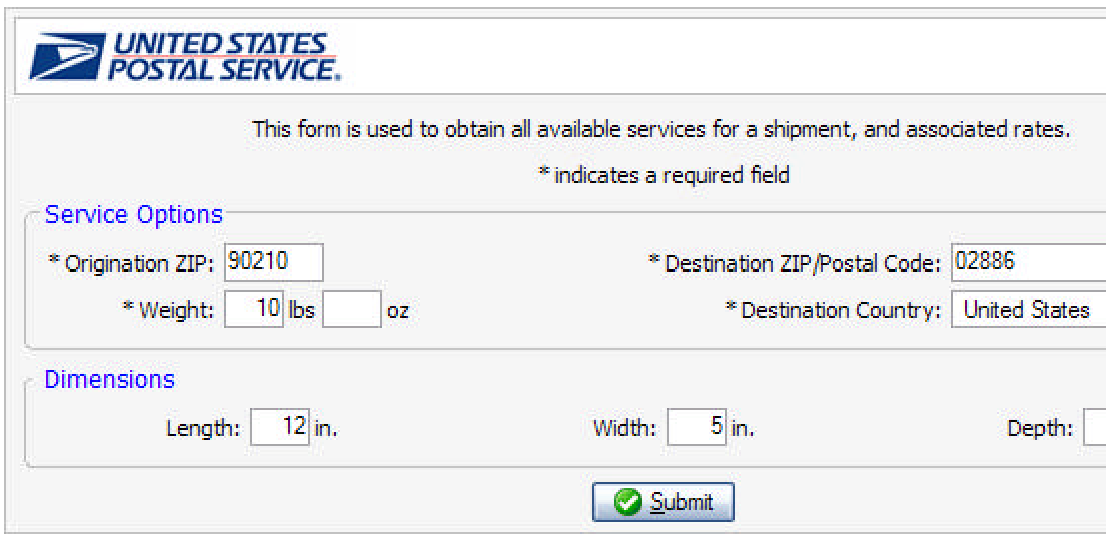
6.6.15.2.3 USPS - Rates and Services

This tool allows you to check rate information in the control panel.

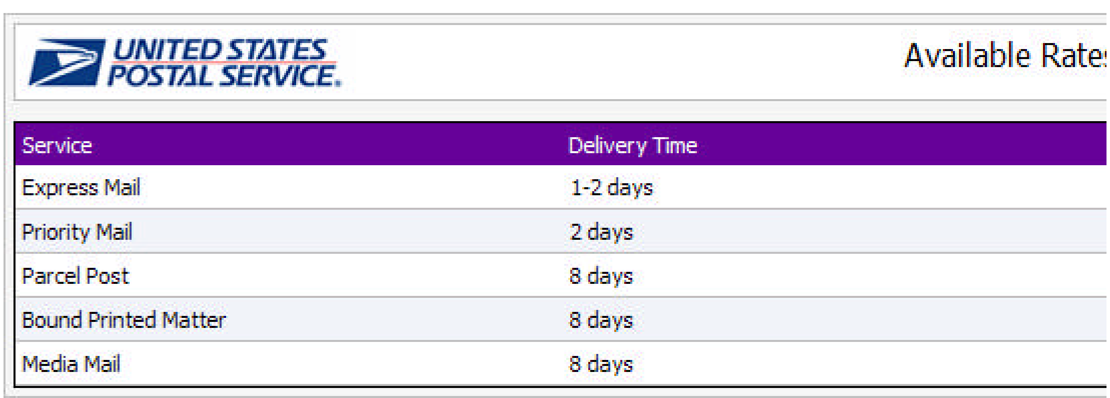
1. Click the USPS Rates and Services menu link



2. Fill out form



3. Click **Submit**



Service	Delivery Time
Express Mail	1-2 days
Priority Mail	2 days
Parcel Post	8 days
Bound Printed Matter	8 days
Media Mail	8 days

6.6.15.3 FedEx Web Services

6.6.15.3.1 FedEx - Ship Package Tool

This tool is explained in detail in the **Creating a FedEx Shipment (Section 6.6.6.6)** topic.

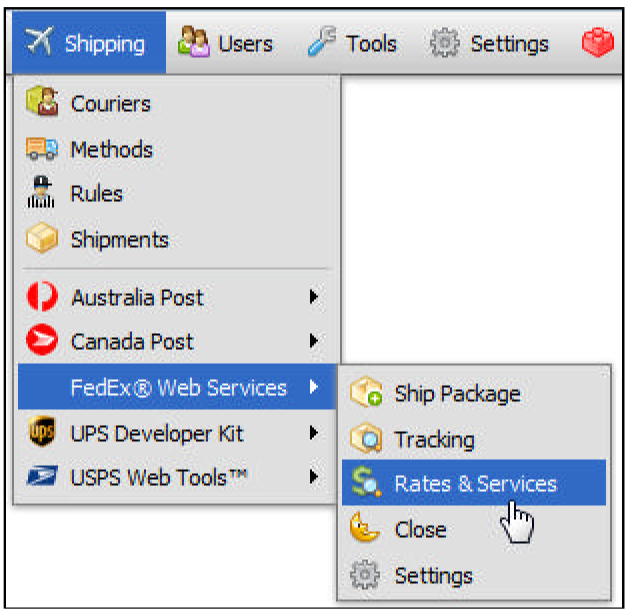
6.6.15.3.2 FedEx Tracking

This tool is explained in the **Tracking a Shipment (Section 6.6.6.12.3)** topic.

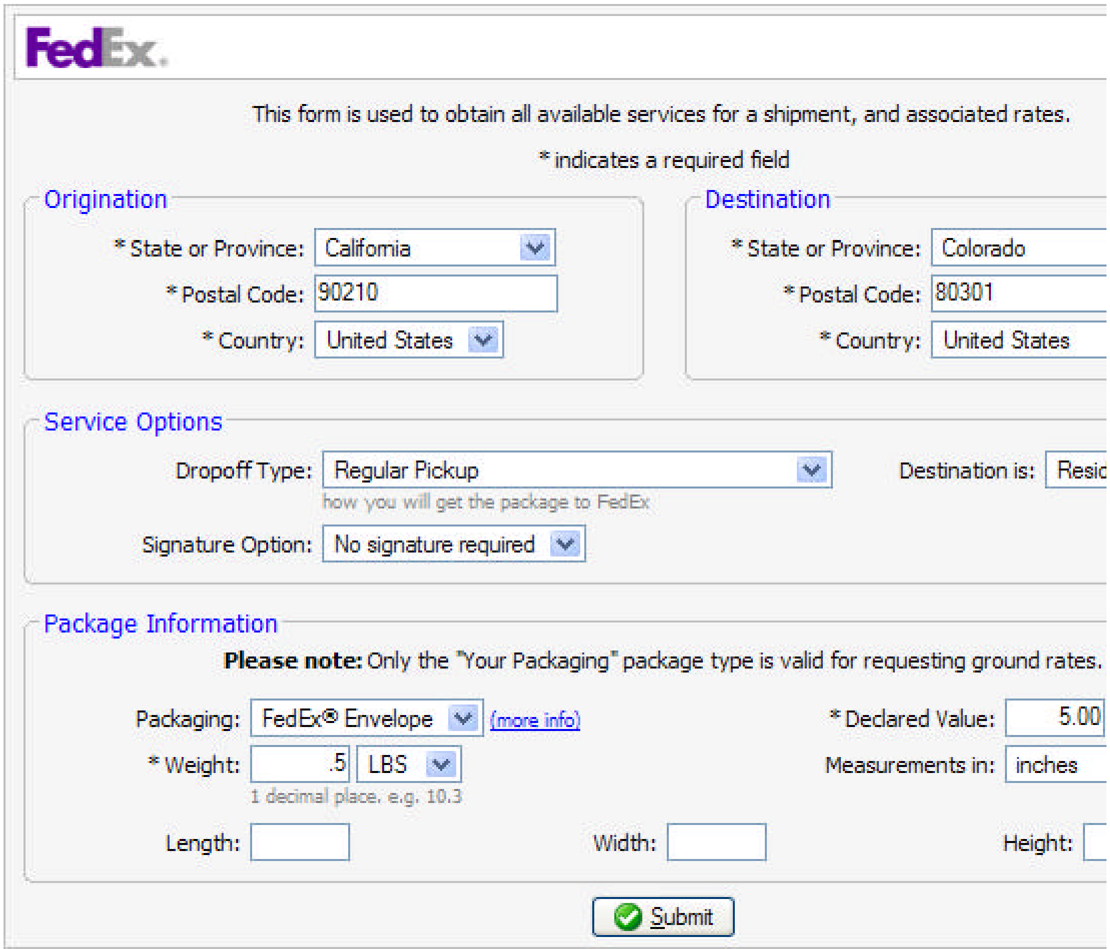
6.6.15.3.3 FedEx - Rates and Services Tool

This tool allows you to check rate information in the control panel.

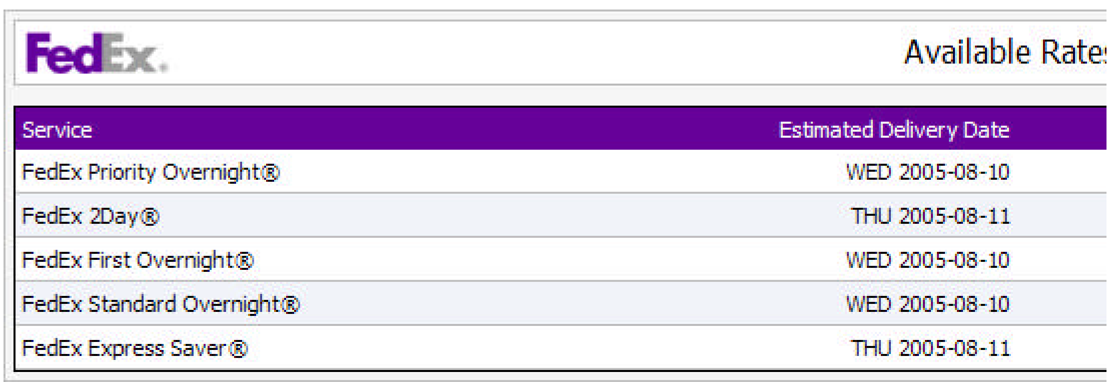
1. Click the FedEx Rates and Services menu link



2. Fill out form



3. Click **Submit**



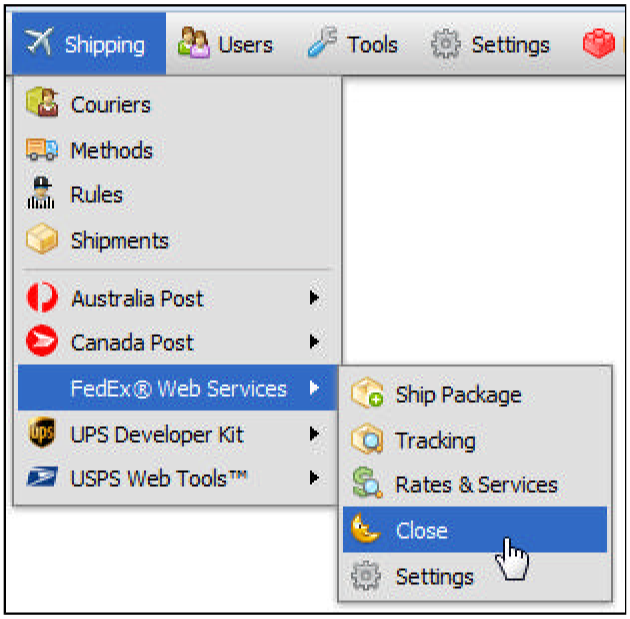
6.6.15.3.4 FedEx - Close Request Tool

Overview

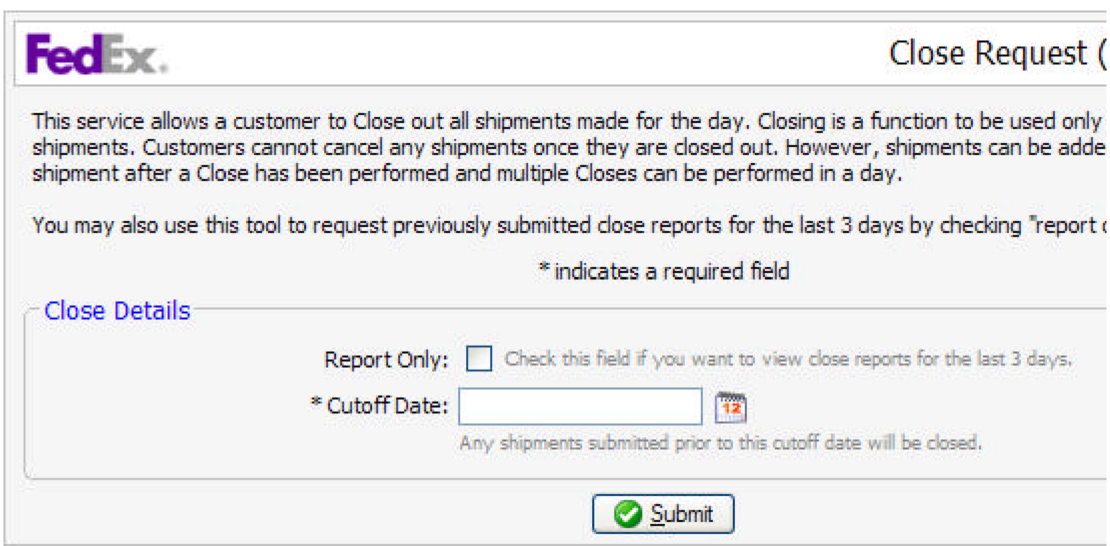
This service allows a customer to Close out all shipments made for the day. Closing is a function to be used only for FedEx Ground shipments. Customers cannot cancel any shipments once they are closed out. However, shipments can be added to a day's shipment after a Close has been performed and multiple Closes can be performed in a day.

Submitting a Close Request

1. Click the FedEx Close Request menu link



2. Select a Cutoff Date



3. Click **Submit**

   You should see a report similar to this:

```
                                             FEDEX GROUND PICK-UI

                                FedEx Ground Shipper #: 6000505
123 Main St.                    FedEx Account #: 123456789
```

```
 Beverly Hills, CA 90210

-----------------------------------------------------------------------------
                   | COD        | Decl. Val. | Oversize  | Oversize  | Oversiz
 Tracking #        | Amount     | (if>$100)  |     I     |    II     |    III
 ----------------------------------------------------------------------------

 ----------------------------------------------------------------------------
    Total Packages:    0             0           0          0            0

-----------------------------------------------------------------------------
1.   THE LIABILITY OF FEDEX GROUND IS LIMITED TO THE SUM OF $100 PER PACKAGE,
     SHIPPER AND AN ADDITIONAL CHARGE IS PAID AT THE RATE SET FORTH IN THE CUR
     TARIFF PER EACH $100.00 OF ADDITIONAL VALUE, OR FRACTION THEREOF. CLAIMS
     MONTHS OF THE SCHEDULED DELIVERY DATE ARE WAIVED.

2.   THE ENTRY OF A C.O.D. AMOUNT IS NOT A DECLARATION OF VALUE.

3.   IN NO EVENT SHALL FEDEX GROUND BE LIABLE FOR ANY SPECIAL, INCIDENTIAL OR
     WITHOUT LIMITATION, LOSS OF PROFITS OR INCOME, WHETHER OR NOT FEDEX GROUN
     MIGHT BE INCURRED.
 |--------------------------------------------------|
 | This section to be completed by Driver           |
 |--------------------------------------------------|          |-------------
 | Total Packages:         | Core Zone:             |          | Ttl Domestic
 |                         |                        |          |
 |--------------------------------------------------|          |-------------
 | Pickup Time:                                     |          | Ttl Internat
 |--------------------------------------------------|          |-------------
 | Driver Number:                                   |          | Ttl FedEx Ho
 |--------------------------------------------------|          |-------------
 | Driver Signature:                                |          | Total Packag
 |                                                  |          |
 |--------------------------------------------------|          |-------------


 |--------------------------------------------------|
 | This section to be completed for spotted trailers|
 |--------------------------------------------------|          |-------------
 | Shipper Load?           | Trailer #:             |          | Pickup Recor
 |--------------------------------------------------|          |-------------
```

Report Only

If you wish to generate a report, you can do so by repeating the above process, and checking the **Report Only** field.

6.6.15.4 UPS OnLine Tools

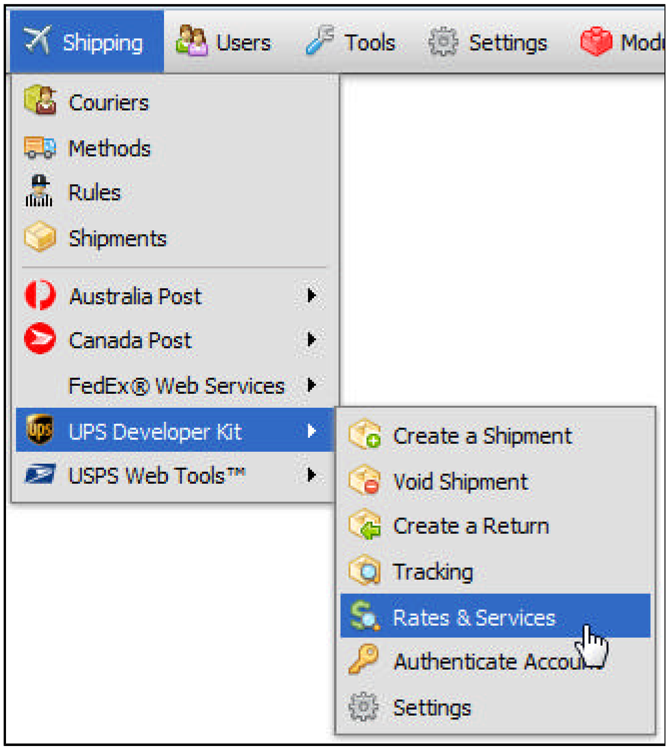
6.6.15.4.1 UPS - Tracking

This tool is explained in the **Tracking a Shipment (Section 6.6.6.12.3)** topic.

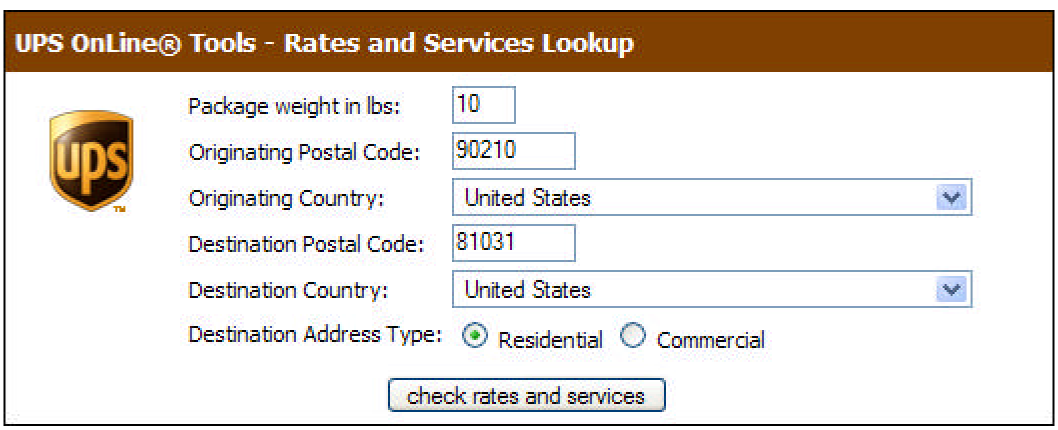
6.6.15.4.2 UPS - Rates and Services

This tool allows you to check rate information in the control panel.

1. Click the UPS Rates and Services menu link



2. Fill out form



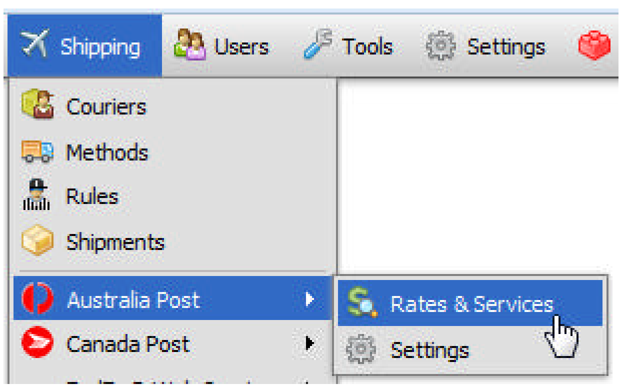
3. Click **check rates and services** button

6.6.15.5 Australia Post

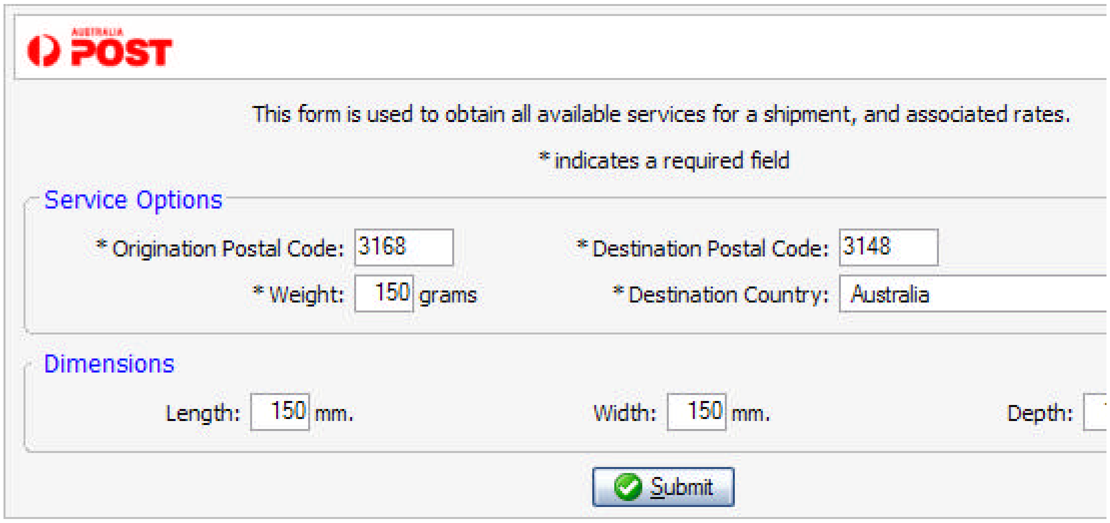
6.6.15.5.1 Australia Post - Rates and Services

This tool allows you to check rate information in the control panel.

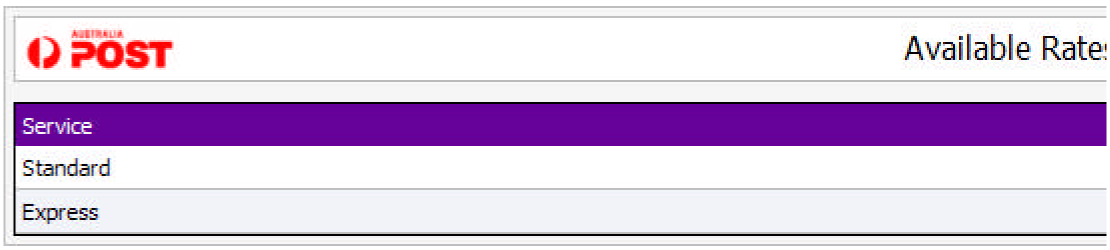
1. Click the Australia Post Rates and Services menu link



2. Fill out form



3. Click **Submit**



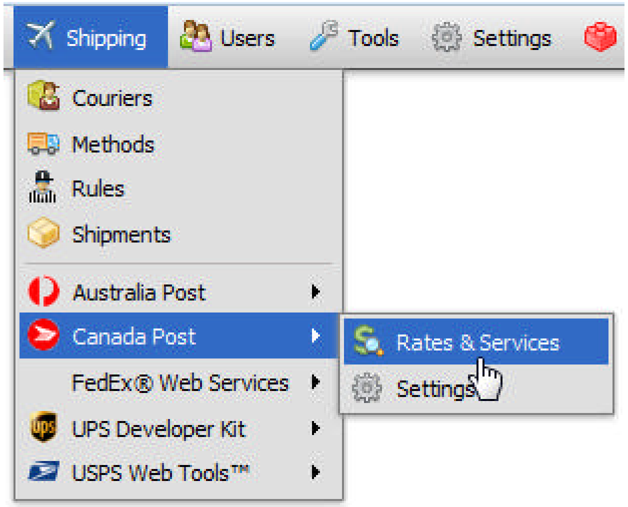
6.6.15.6 Canada Post Sell Online

6.6.15.6.1 Rates and Services

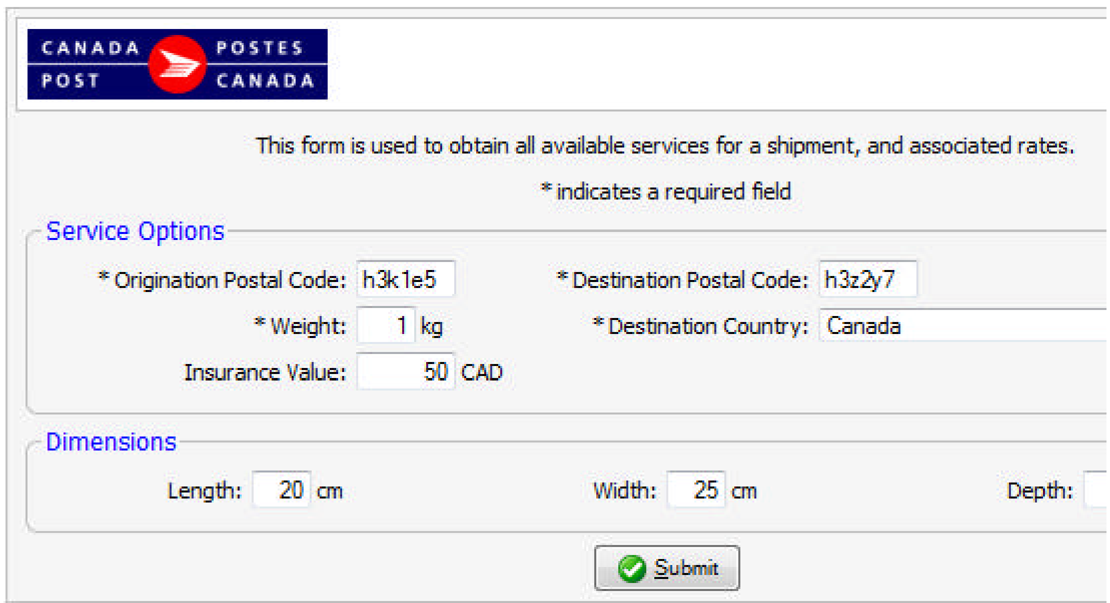
Instructions

This tool allows you to check rate information in the control panel.

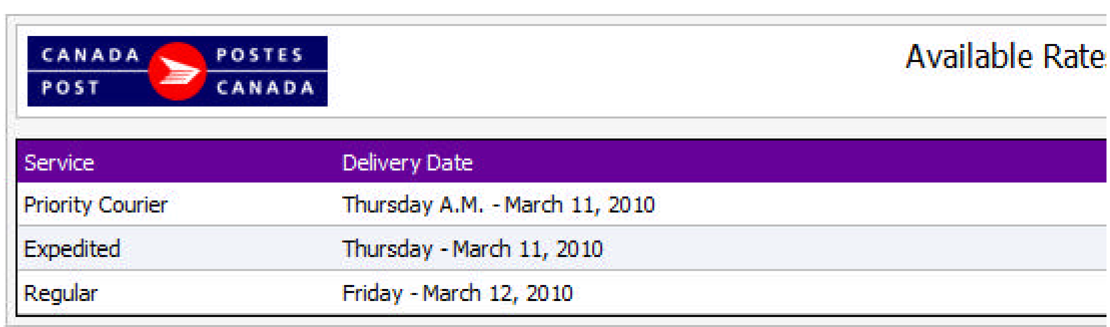
1. Click the Canada Post Rates and Services menu link



2. Fill out form



3. Click **Submit**



6.7 Handling and Order Fees

Overview

Squirrelcart provides a few methods for adding handling and other fees to your customer's orders.

Handling - for every order

If you wish to add a handling fee to all orders:

1. Open the **store settings page (Section 6.1)**
2. Locate the **Checkout Settings** fieldset
3. Enter an amount in the **Per Order Handling Fee** field
4. Click **Save Changes**

Handling - for individual products

If you wish to add a handling fee for individual products:

1. Open the **product record (Section 7.1.2)** you want to assign handling to
2. Enter an amount in the **Handling Fee** field
3. Click **Save Changes**

Order fees - for adding additional fees to orders via rules

The order fees feature allows you to assign an unlimited number of additional fees to your orders. You can specify your own label for the fee, along with rules that control when the fee will be charged.

Viewing Order Fees

To view order fees already created in your control panel, click the **Settings > Order Fees** link in your control panel

Adding and modifying Order Fee records

1. Click the **Settings > Order Fees** link in your control panel
2. To add a new record, click **Add New**. To modify an existing record, click anywhere on it's record row

3. Enter a name in the **Name** field, for your reference

4. Enter a cost using the **Cost** field. The cost can be per order or per item, and can be a dollar amount or a percentage.

5. Check the **Enabled** field to enable the order fee

6. Set the **Type** field. When set to **handling**, this fee will be combined with other handling fees and listed as "Handling" during checkout. When set to **other**, it will be listed separately with whatever label you designate using the **Label for Customer** field.

7. Enter a description in the **Description** field (optional)

8. If you would like your customer to have access to the description, check the **Description Visible** field

9. If you want to control when the order fee is offered, add one or more rules to the order fee record using the **Rules** fieldset. For more information on using the ruleset feature, see the **Managing Your Store > Rule System** section of this documentation.

10. Click **Save Changes**

6.8 Payment

6.8.1 Payment - Overview

Payment Methods define what type of payment you will accept from your customers.

Payment Gateways are used to send payment data to your payment processor. They are the online equivalent of a credit card swipe terminal.

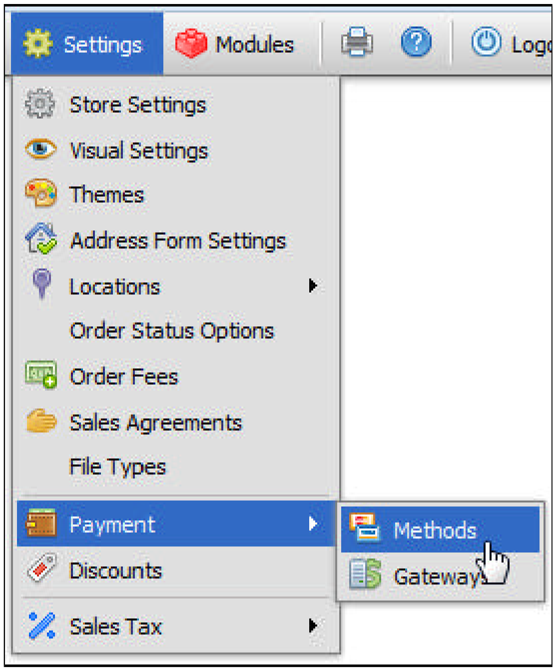
> ⚠ You should never fulfill an order without confirming that you have actually received payment by your payment gateway / processor.

6.8.2 Payment Methods

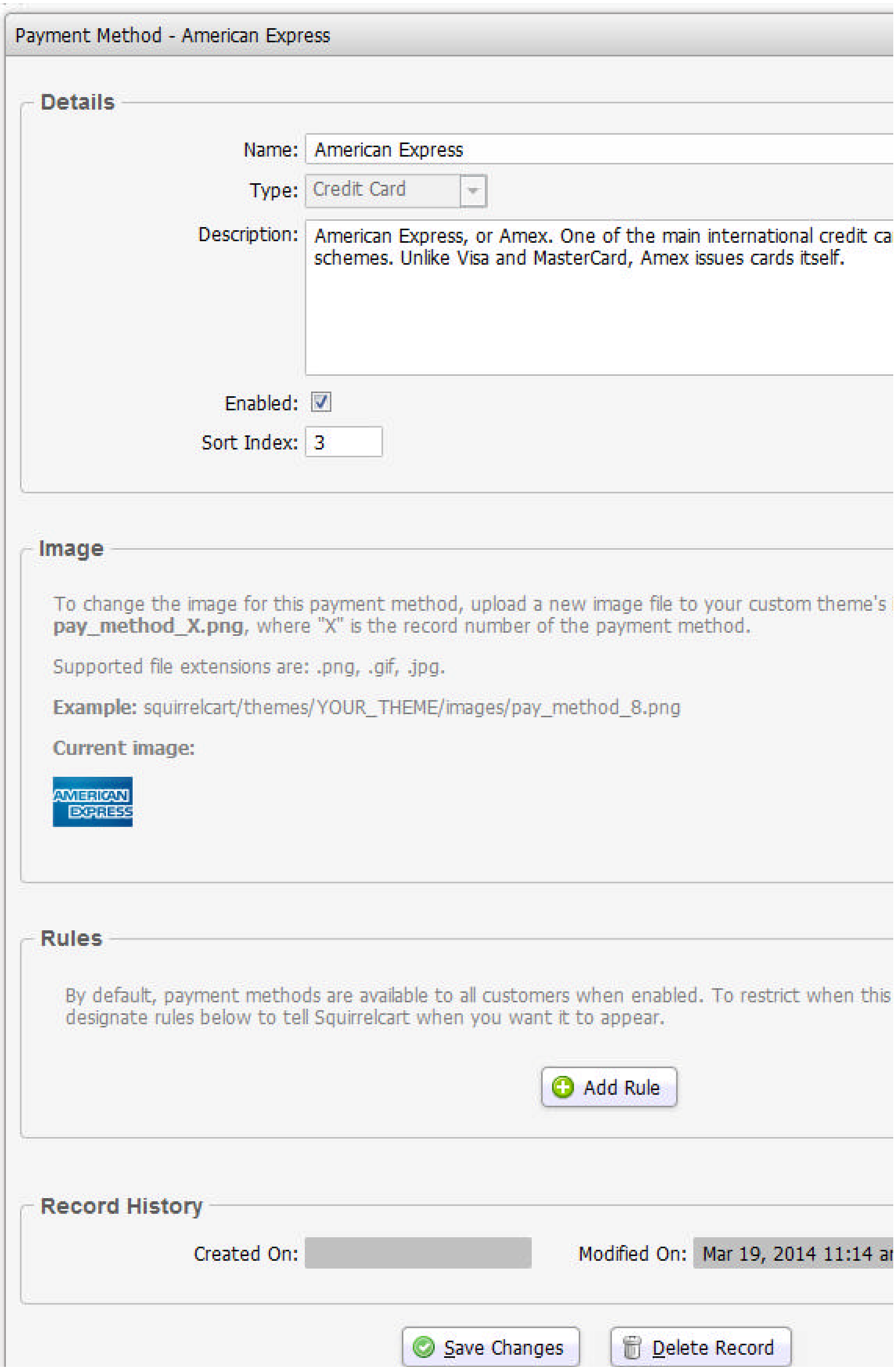
6.8.2.1 Record Overview

Viewing Payment Methods

To view payment methods, click this menu link:



Field Overview


Payment Method - American Express
Details
Name: American Express
Type: Credit Card
Description: American Express, or Amex. One of the main international credit ca
schemes. Unlike Visa and MasterCard, Amex issues cards itself.
Enabled:
Sort Index: 3
Image
To change the image for this payment method, upload a new image file to your custom theme's
pay_method_X.png, where "X" is the record number of the payment method.
Supported file extensions are: .png, .gif, .jpg.
Example: squirrelcart/themes/YOUR_THEME/images/pay_method_8.png
Current image:
AMERICAN EXPRESS
Rules
By default, payment methods are available to all customers when enabled. To restrict when this
designate rules below to tell Squirrelcart when you want it to appear.
Add Rule
Record History
Created On:
Modified On: Mar 19, 2014 11:14 ar
Save Changes
Delete Record

Name

This is the name that appears during checkout

Type

This field tells Squirrelcart how to handle this payment method. The field is read only for built in payment methods.
Possible Values:

- Credit Card
- Custom
- Electronic Check
- Other

Description

A description of the Payment Method. This is for your reference only.

Enabled

This field determines whether the method will be offered to the customer at checkout.

Sort Index

This controls the sort order. Payment methods will be displayed sorted by this field.

Image

This shows the current image for the payment method, based on your current theme. See the fieldset for instructions on changing the payment method image.

Rules

This can be used to restrict when this payment method is offered.

6.8.2.2 Credit Cards

6.8.2.2.1 Enabling Credit Card Payments

Overview

In order to accept credit cards directly, you will need a *merchant account*, and access to 1 of our supported payment gateways. You will then need to enable each credit card that you want to accept in the Payment Methods table, and enable your Payment Gateway. There are alternatives to having a merchant account that allow your customers to pay you via another company's website - PayPal Website Payments Pro, PayPal Website Payments Standard, Amazon Simple Pay, Checkout by Amazon, and Google Checkout are among these.

1. **Secure your website**

   Before you can accept credit card payments, you need to make sure your website is secure. Access to an *SSL* certificate is needed in order to encrypt data that is sent to and from your web site. This will prevent thieves from intercepting credit card information in transit. See the *SSL* topic in the glossary for more information.

2. Enable Payment Method Record

Open the Payment Methods table, and check the Enabled field on each payment method you wish to support. For a full explanation of the fields on a Payment Method record, see the **Payment Methods > Record Overview (Section 6.8.2.1)** topic in this section.

3. Enable a Payment Gateway

In order for you to receive payment, you will need to enable a payment gateway.

Instructions for enabling a Payment Gateway are in the Payment Gateway section of this documentation.

6.8.2.2.2 Supported Credit Cards

Squirrelcart supports the following credit cards:

- Visa
- MasterCArd
- American Express
- Discover

6.8.2.2.3 Security Code

Overview

Security Code is a generic term we use to refer to the CVV2 and CVC security codes found on credit cards. The security code is a three or four digit code imprinted on credit cards to help merchants verify that the customer has a legitimate card in hand at the time of the order.

Squirrelcart can prompt the customer for the security code at checkout. It then sends it to the card issuer as part of the authorization request. The card issuer checks the security code to determine its validity, then sends a result back to the merchant along with the authorization.

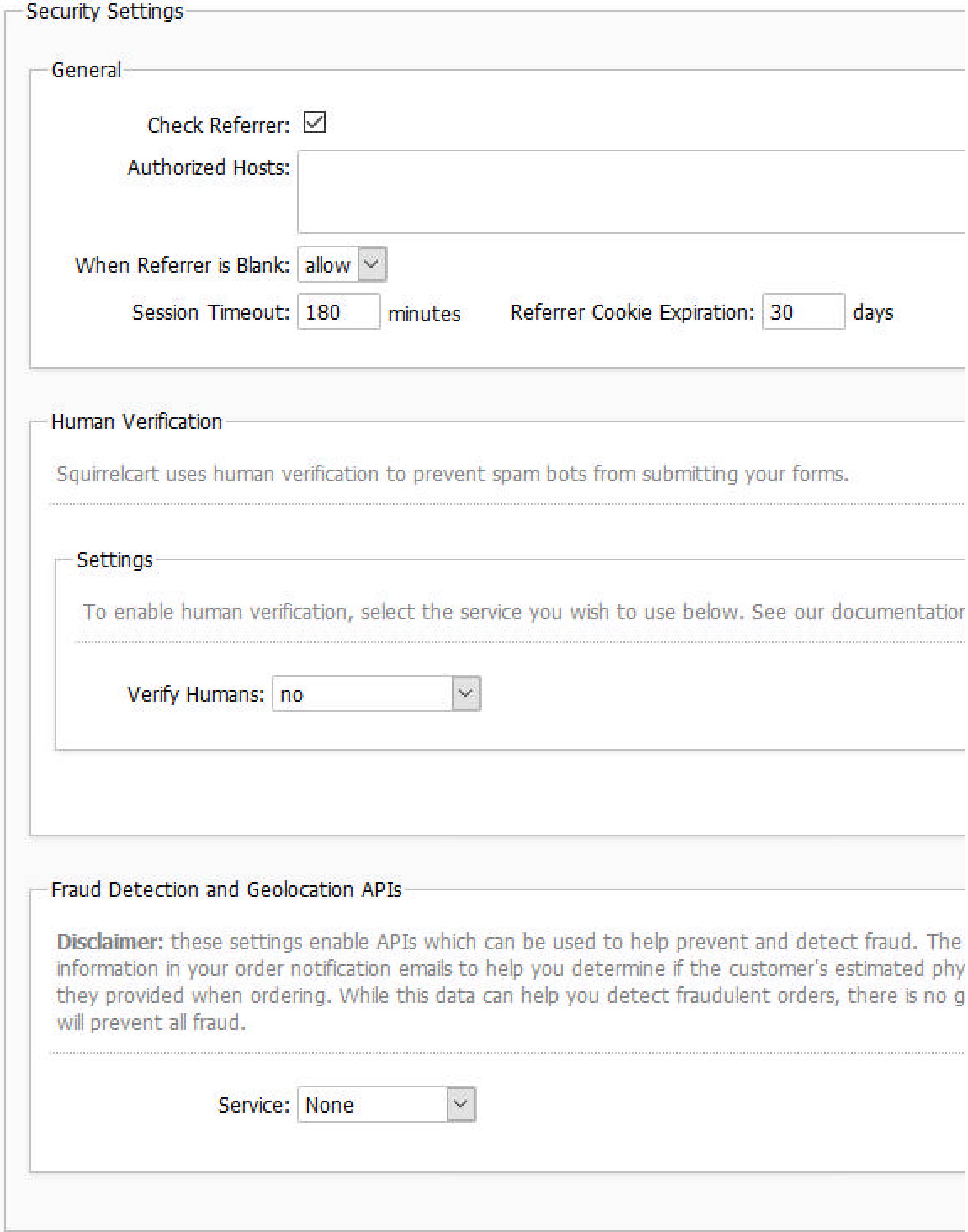
Please see the images below for examples of security codes:

Security Code for Visa, MasterCard and Discover

Security Code for American Express

Settings

There are 2 fields that control your security code settings on the **Store Settings (Section 6.1)** page. They are within the **Security Settings** section, and are labeled **Collect CVV2/CVC** and **CVV2/CVC is Required**.



Collect CVV2/CVC
If checked, the cart will prompt the customer for their CVV2/CVC code.

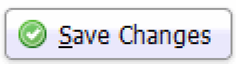
CVV2/CVC is Required
This forces the customer to enter their CVV2/CVC code in order to submit an order.

6.8.2.3 Check or Money Order

Overview

This payment method allows you to accept payment via traditional checks or money orders. When enabled, the customer is presented with your mailing address, and asked to mail payment. The address they are given is taken from your Company Information on your **Store Settings (Section 6.1)** page.

Enabling Check or Money Order Payments

1. Open the **Check or Money Order Payment Method (Section 6.8.2.1)** record
2. Check the **Enabled** field
3. Click 

Customizing Payment Instructions

If you wish to customize the instructions the customer sees after completing their order, modify the file **squirrelcart/payment_gateways/check.php**.

6.8.2.4 Electronic Check

Overview

Electronic Check is also known as ACH or Direct Debit. It is a payment method that allows the customer to pay using their checking account. They enter their account number, routing number, and other information on the payment page, and Squirrelcart submits it to a payment gateway for processing.

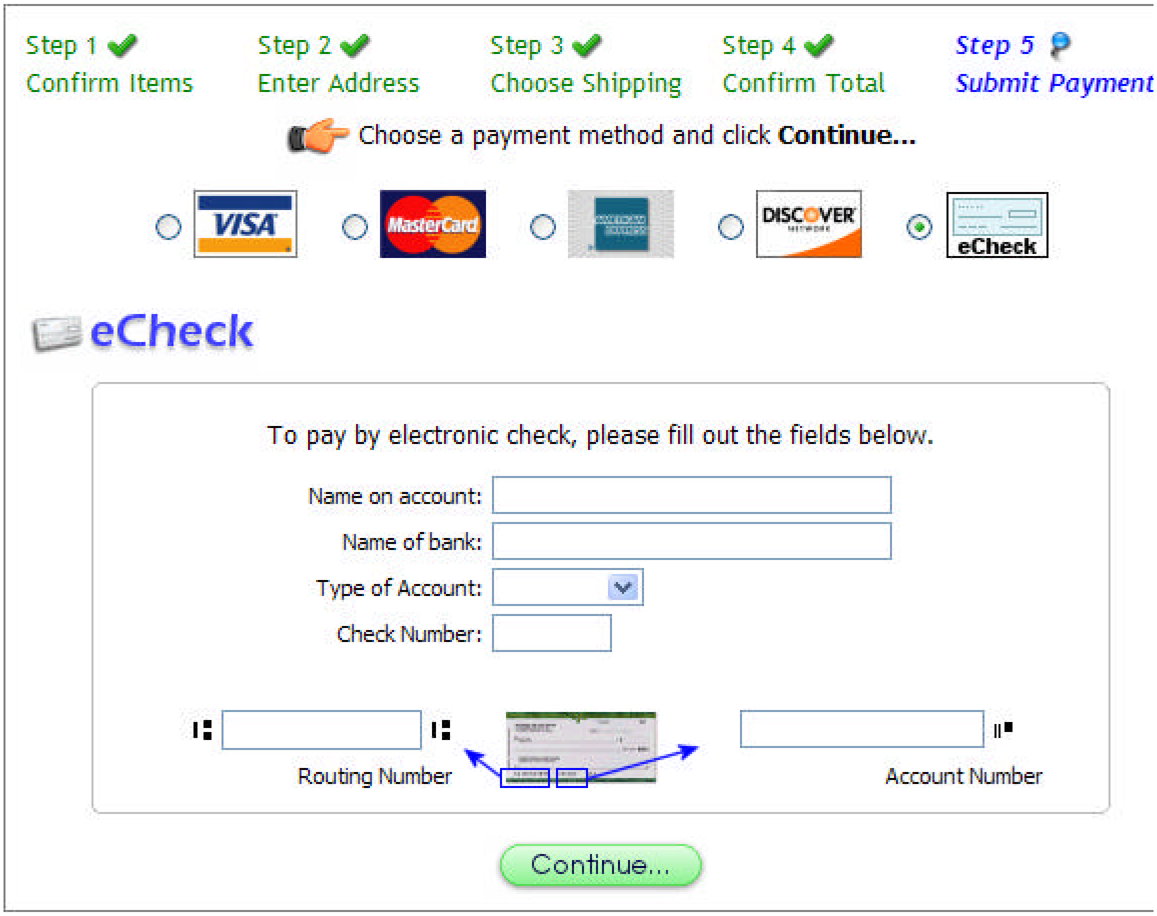
Squirrelcart supports Electronic Check for the following payment gateways:

- Authorize.net
- CyberSource
- ECHO (Electronic Clearing House, Inc.)
- FastCharge
- First Data Global Gateway
- Merchant Partners
- Pay-Me-Now
- PayFuse
- PayPointUSA
- PayQuake
- QuickCommerce Pro (ecx.com)

- Star Processing
- TrustCommerce
- VeriSign Payflow
- WonderPay

What the Customer Sees

The fields for gathering checking account information at checkout are below:



Enabling Electronic Check Payments

1. Open the **Electronic Check Payment Method (Section 6.8.2.1)** record

2. Check the **Enabled** field

3. Click Save Changes

If you do not see the Echeck fields after following these steps, it is most likely due to a Payment Gateway being enabled that does not support Electronic Checks.

6.8.2.5 Purchase Order

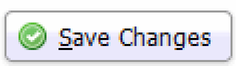
Overview

This payment method allows you to accept payment via purchase order. When enabled, the customer sees a "Purchase Order" payment method during the checkout process. If they choose to pay with this method, they are presented with a Purchase Order # field to enter their own purchase order number.

When the purchase order number is entered, the order is automatically completed and marked with an order status of "Payment Pending". The customer is presented with your mailing address, and asked to mail payment. The address they are given is taken from your Company Information on your Store Settings page.

You can find the purchase order when viewing an order immediately following the "Payment Method: Purchase Order" text in the lower left hand corner of the order.

Enabling Purchase Order Payments

1. Open the **Purchase Order Payment Method (Section 6.8.2.1)** record
2. Check the **Enabled** field
3. Click 

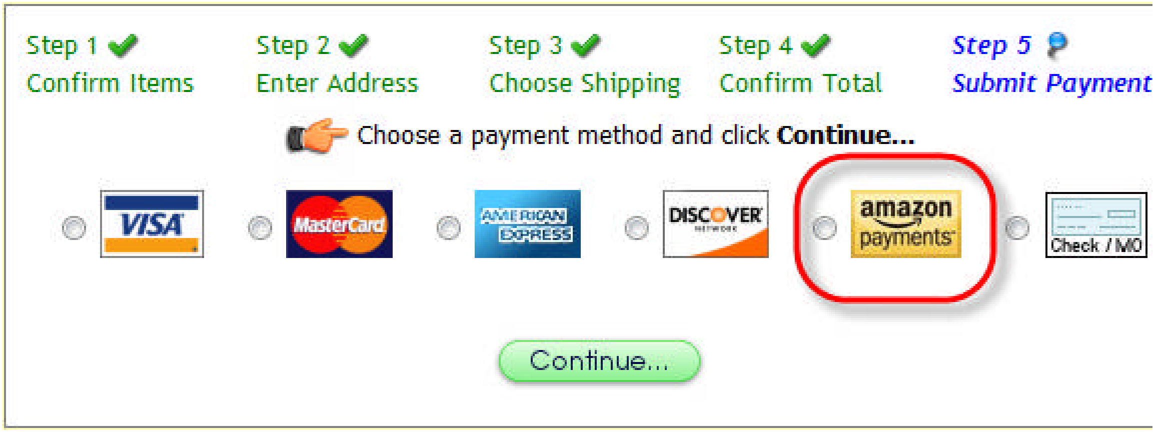
Customizing Payment Instructions

If you wish to customize the instructions the customer sees after completing their order, modify the file **squirrelcart/payment_gateways/purchase_order.php**.

6.8.2.6 Amazon Payments - Amazon Simple Pay

Overview

Amazon Simple Pay allows your customers to pay for their orders using their Amazon.com account - the same account they use to purchase products on Amazon.com. When enabled, customers will see an **Amazon Payments** payment method during the checkout process:



You can read more about Amazon Payments on their website: **http://payments.amazon.com (http://payments.amazon.com/)**

Requirements

PHP 5 or newer

CURL and *OpenSSL*

How it Works

1. Customer selects **Amazon Payments** as a payment method during checkout

2. Customer is sent to Amazon.com to submit payment, where they can login with their Amazon account or create one

3. Customer selects a payment source from those listed on their Amazon.com account, and confirms payment

4. Customer is returned to your website, and sees a thank you page and the order is stored in Squirrelcart's database

5. At this point, the payment can have a status of successful, initiated, or reserved (meaning you then have to click "settle" in your Amazon Payments control panel upon shipment.

⚠ Squirrelcart will complete the order as long as the status is either **successful, initiated,** or **reserved.** Payments with a status of **initiated** have not yet passed Amazon's internal fraud check and should not be shipped until Amazon updated the payment to a **successful** or **reserved** status.

IPN Feature

Amazon Simple Pay has an IPN feature, which stands for Instant Payment Notification. This feature is automatically enabled when you enable Amazon Simple Pay. When you make any change to a payment in Amazon Payment's control panel, Amazon will notify Squirrelcart on your website of the change. Squirrelcart will update the IPN Log field on the corresponding order and add additional order status fields as needed.

Setup Instructions

1. If you don't have an Amazon Payments business account, sign up for one here:

   https://payments.amazon.com/sdui/sdui/premiumaccount

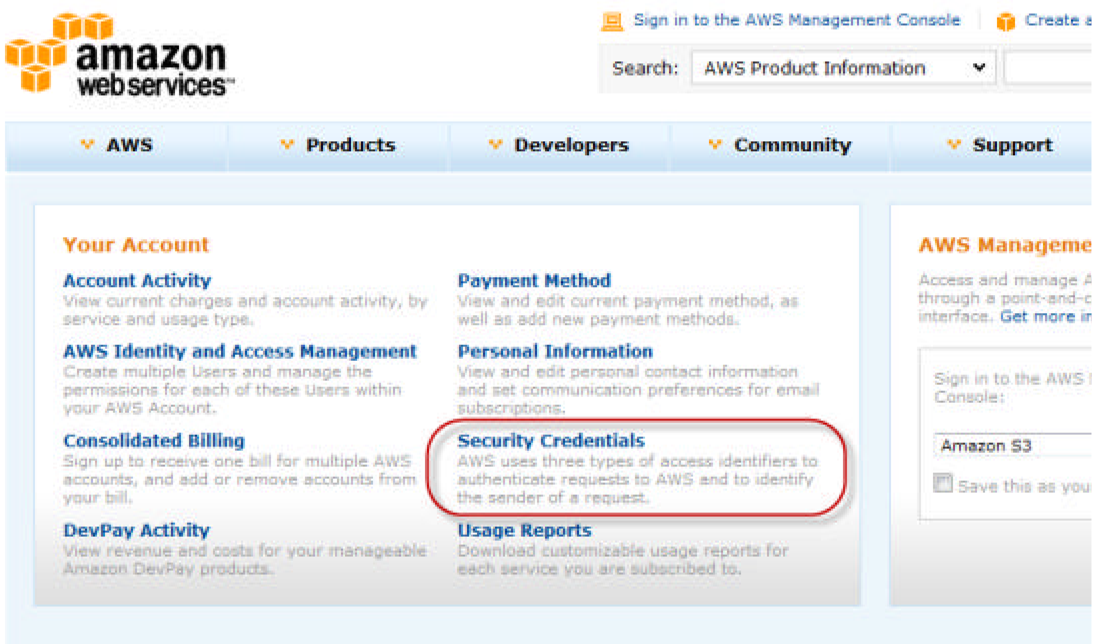
   Follow the instructions they provide, including confirming your email address, and adding a bank account.

2. Go to the Amazon Web Services website:

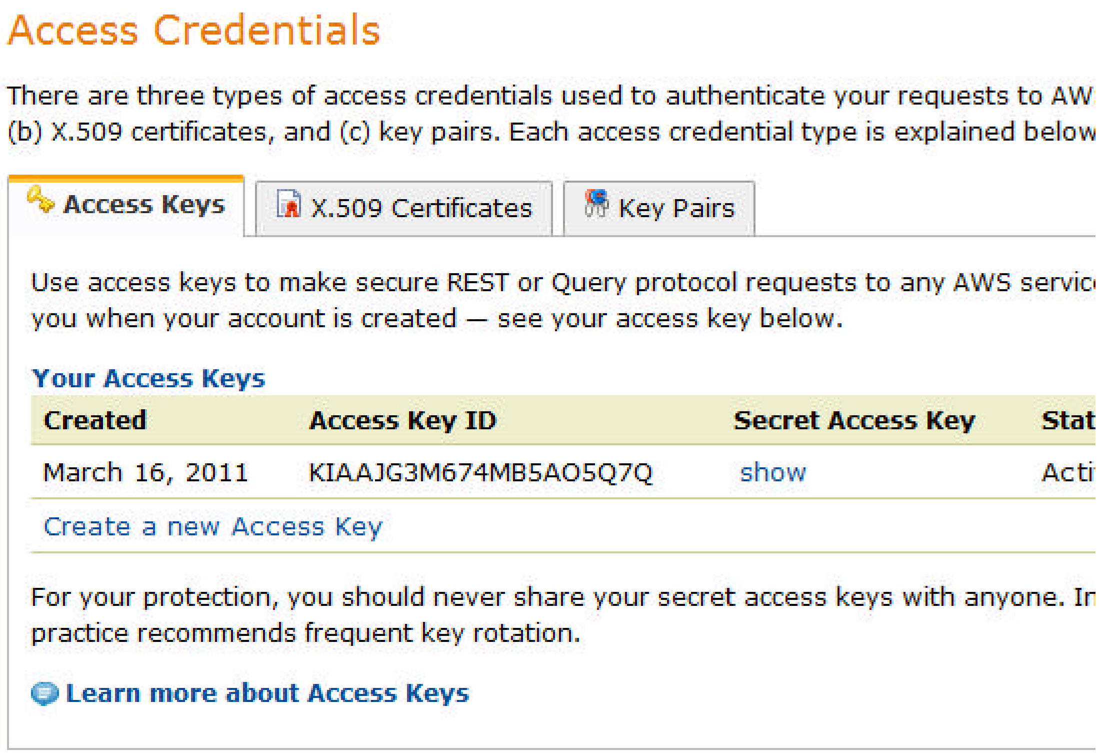
   http://www.amazon.com/webservices

3. Login. If it is your first time using AWS, you will be prompted to create a new account.

4. Click the **Account** tab, and then click the **Security Credentials** link:



5. You should see something like this:

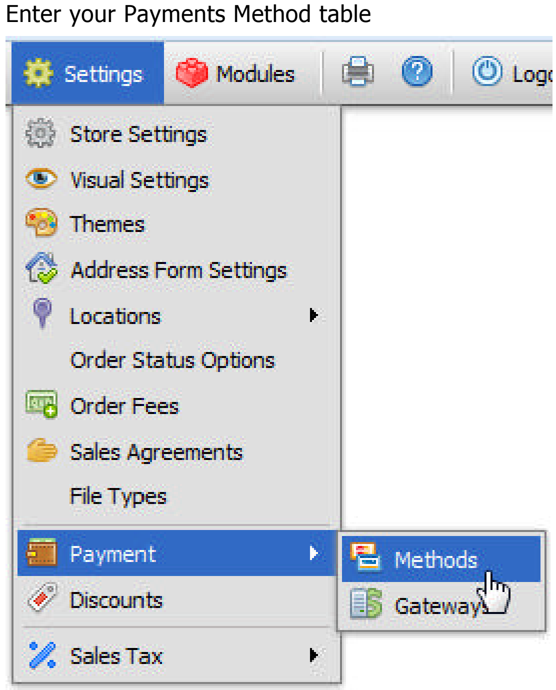


6. Click the **Show** link under **Secret Access Key** so it will appear

7. Copy the **Access Key ID** and the **Secret Access Key** (or write them down very carefully!)

8. Login to Squirrelcart as store admin, and enter your **control panel (Section 3)**

9. Enter your Payments Method table



10. Click the record row labeled **Amazon Payments - Amazon Simple Pay**

11. Paste your Access Key ID in the **Access Key ID** field

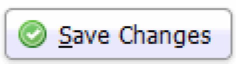
12. Paste your **Secret Access Key** in the **Secret Access Key** field

13. Make sure the **Amazon Mode** field is set to **Live**

14. Set the **Transaction Type** field. For help, click the field label

15. **IPN** (Instant Payment Notification) will notify Squirrelcart whenever a change is made to a payment (refund, settle, etc...). To receive an email to the email address on your Amazon account every time an IPN occurs, check the **Test IPN** checkbox. This is for testing purposes and is optional.

16. Check the **Enabled** field

17. Click 

Additional Steps

If your are using a new Amazon Payments account, no additional changes are needed. If you are using an account that you may have changed settings on previously, you should follow these additional steps to ensure your settings match the default for a new account.

1. Login to your Amazon Payments business account here:
   http://payments.amazon.com (http://payments.amazon.com/)

2. Click **Your Account**

3. Click **Edit My Account Settings**

4. Click **Manage Developer and Seller Preferences**

5. Confirm that **Sign the buttons?** is checked. If not, check it.

6. Make sure all of the following fields are blank:
   Return URL
   User Abandon URL
   URL for Instant Payment Notification

7. If you made any changes, click **Confirm** to save them.

Testing

Easy Way

The easiest way to test to see if your Amazon Payments setup is working is to create a product that costs $1.00 and set the shipping for that product to $0.00. You can then add that item to the cart and checkout using Amazon Payments. You'll need to submit payment using a different Amazon account then the one you are using for receiving payments.

Sandbox - not recommended for most users

Testing with Amazon's sandbox will take more time. Amazon's sandbox is geared towards developers and allows you to test payments on a test environment using different user accounts than their regular system. We don't recommend testing this way as it is more complicated and should not be needed for the average user. We don't provide support for using their sandbox, but here is the general idea of how to do this:

1. Sign up for a sandbox business account here:
   https://payments-sandbox.amazon.com/sdui/sdui/premiumaccount
2. Follow the setup instructions above, but when logging into the AWS website (steps 2 - 10) use the same account info you used when creating your sandbox account
3. When modifying the Amazon Payments (PBA) payment method in Squirrelcart, set the **Amazon Mode** field to **Test (Sandbox)**
4. Sign up for a sandbox personal account here, which you can use for sending test payments:
   https://payments-sandbox.amazon.com/sdui/sdui/basicaccount
5. When done testing, you'll need to follow the setup instructions again using your regular Amazon Payments and AWS accounts.

Troubleshooting

The following information should help when troubleshooting problems submitting payments via Amazon Payments.

Signatures do not match

If you receive this error during checkout, it indicates that your **Access Key ID** and/or **Secret Access Key** entered in Squirrelcart are incorrect

payment failed

When a status of PF is returned from Amazon, Squirrelcart generates this error. This can be due to just about anything, and unfortunately Amazon does not provide more information as to why payment failed.

This could be due to insufficient funds, fraud check failure, or other issues. If you are receiving this error and feel that you should not be, you'll need to contact Amazon Payments support for assistance.

During testing with a live account, we received a payment failed status when the order total was $0.01. Changing the order total to $1.00 resolved this.

6.8.2.7 Amazon Payments - Checkout by Amazon

Overview

Checkout by Amazon allows your customers to checkout on Amazon.com, using their Amazon.com user account. When a customer clicks the **View Cart** button in Squirrelcart, your customer will see the following:

If they click the **Checkout with Amazon** button, they are taken to Amazon.com to complete the entire checkout process.

If you have no other payment methods enabled, they will only see the **Checkout with Amazon** button.

Important Considerations

Checkout by Amazon is not just a payment processor. They handle the entire checkout experience, including:

- Obtaining shipping and billing address information
- Totaling items in cart
- Adding shipping charges
- Adding tax
- Obtaining payment
- Storing order

Because Amazon is taking over the entire checkout process, the following features/settings in Squirrelcart have no impact on an order placed via **Checkout by Amazon:**

- Inventory Control
- Taxes
- Shipping rates
- Order storage

> When an order is placed using **Checkout by Amazon**, Squirrelcart will not store the order in your database, and will not email the customer or you to indicate an order has been submitted.

If you prefer to allow Squirrelcart to handle the checkout process, along with inventory control, taxes, shipping, and order storage - **Amazon Simple Pay (Section 6.8.2.6)** is a better alternative.

Requirements

Checkout by Amazon user account. If you haven't already done so, **use this link to signup for your Checkout By Amazon account (https://sellercentral.amazon.com/gp/on-board/workflow/Registration/login.html/902-0586098-4611057?passthrough%2Fsource=AmazonCheckout&passthrough%2FId=Squirrelcart&passthrough%2Faccount=cba&passthrough%2FsuperSource=OAR&passthrough%2FmarketplaceID=AZ4B0ZS3LGLX)**.

PHP 5

Setup Instructions

1. Login to Seller Central using your Checkout by Amazon user account (see above requirements for account signup link):
   https://sellercentral.amazon.com (https://sellercentral.amazon.com/)

2. Make sure **Web Site** is set to **Your Checkout Website** and NOT **Your Checkout Website (Sandbox):**

3. Click the **Settings** link

4. Click **Checkout Pipeline Settings**

5. Your **Merchant ID** appears at the bottom. Write it down.

6. Click the **Edit** button

7. In the **Successful Payment Return URL** field, enter the full URL to your storefront page with **?pm_return=23** following it:

```
http://www.example.com/store.php?pm_return=23
```

8. In the **Cancel Payment Return URL** field, enter the full URL to your storefront page with **?show_cart=1** following it:

```
http://www.example.com/store.php?show_cart=1
```

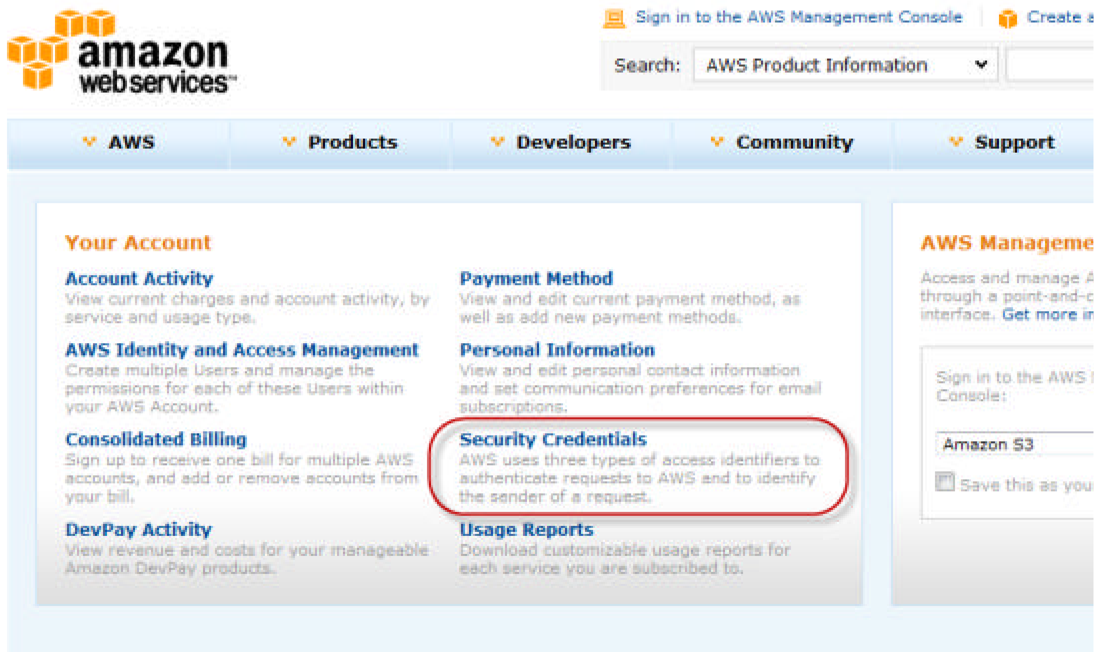
9. Ensure that the field after **Shopping Cart Security** is checked that reads "Accept only digitally signed XML shopping carts"

10. Click the **Update** button

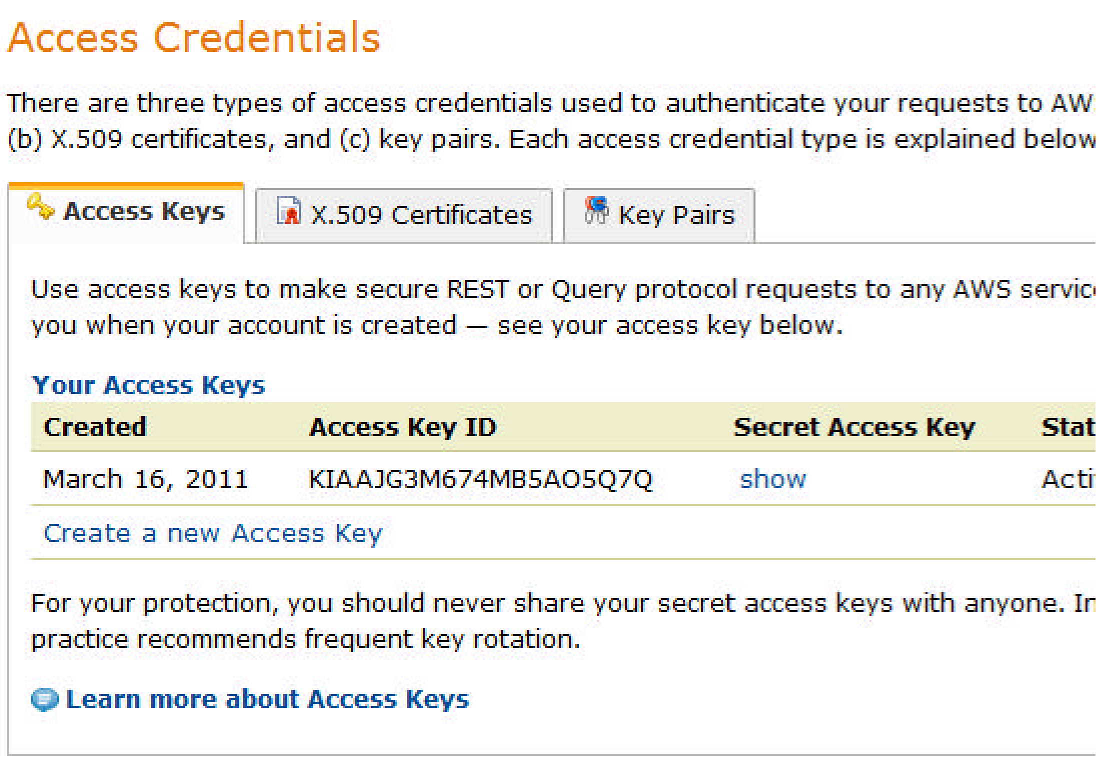
11. Go to the Amazon Web Services website: **http://www.amazon.com/webservices**

12. Login. If this is your first time using AWS you will be prompted to create an account.

13. Click the **Account** tab, and then click the **Security Credentials** link:



14. You should see something like this:

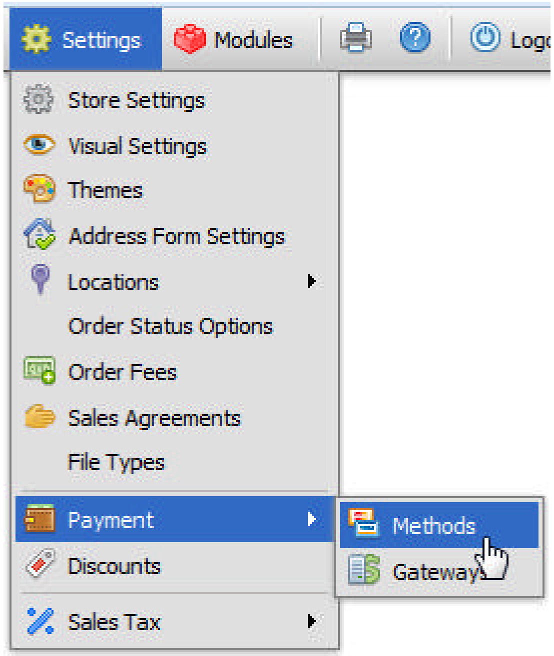


15. Click the **Show** link under **Secret Access Key** so it will appear

16. Copy the **Access Key ID** and the **Secret Access Key** (or write them down very carefully!)

17. Login to Squirrelcart's control panel

18. Click the Payment Methods menu link:



19. Click the record row labeled **Amazon Payments - Checkout by Amazon**

20. Enter your Merchant ID in the **Merchant ID** field

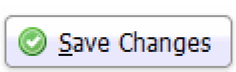
21. Enter your Access Key ID in the **Access Key ID** field

22. Enter your Secret Access Key in the **Secret Access Key** field

23. Set the **Amazon Mode** field to **Live**

24. Alter the **Checkout Button *** fields if you wish

25. Check the **Enabled** field

26. Click 

27. Shipping and tax rates need to be configured in your Seller Central control panel. Refer to the documentation for Checkout by Amazon for instructions.

6.8.2.8 Moneybookers

Overview

Moneybookers.com allows customers to pay via a Moneybookers account, using their account balance or a credit card. You can learn more about Moneybookers here:

http://www.moneybookers.com (http://www.moneybookers.com/)

Customers will see a Moneybookers payment method image during checkout.

Requirements

A Moneybookers **Company** account. Personal accounts cannot be used.

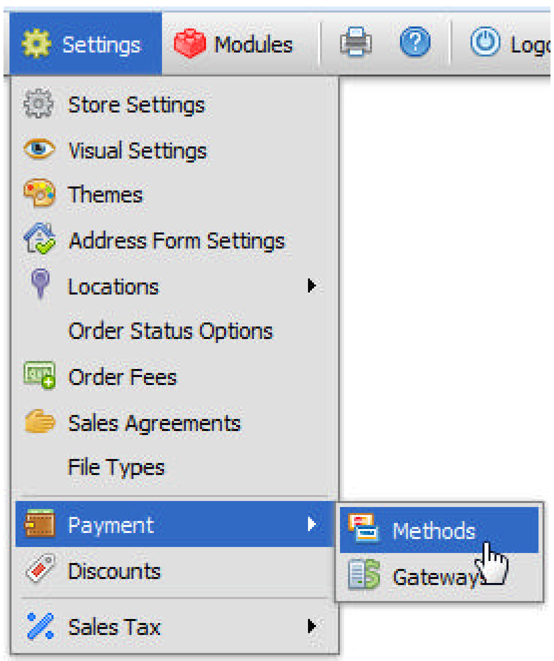
Setup Instructions

1. Login to your Moneybookers account at Moneybookers.com
2. Write down your **Customer** ID number, which should appear in the upper left hand corner of the page:

3. Click the **Merchant Tools** link
4. For security purposes, enter a word in the **Secret Word** field, using lowercase letters. Enter the same word again in the **Confirm Secret Word** field. You'll need to remember or write this word down for later.

5. Click the **confirm** button to save your changes

6. In Squirrelcart's control panel, click the **Settings > Payment > Methods** menu link



7. Click the record row labeled **Moneybookers**

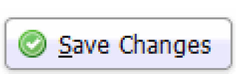
8. Enter your Moneybookers payment email address in the **Payment Email Address** field

9. Enter your **Secret Word** in the **Secret Word** field

10. Enter your **Customer ID** in the **Customer ID** field

11. Set the **Currency Code** field

12. Check the **Enabled** field

13. Click 

Tips and Precautions

Moneybookers may return a payment status of "payment pending", if the transaction has not yet completely processed. When that occurs, Squirrelcart will mark the order with an order status of **Payment Pending.** If Moneybookers indicates that a payment is complete, the status is set to **Payment Received.** We recommend you always confirm receipt of funds before shipping orders.

6.8.2.9 NOCHEX

Overview

NOCHEX is a UK 3rd party payment processor similar to PayPal. You can find out more about them here: **http://www.nochex.com (http://www.nochex.com/)**.

Squirrelcart supports the optional APC feature, described here: **http://help.nochex.com/?Action=Q&ID=121**

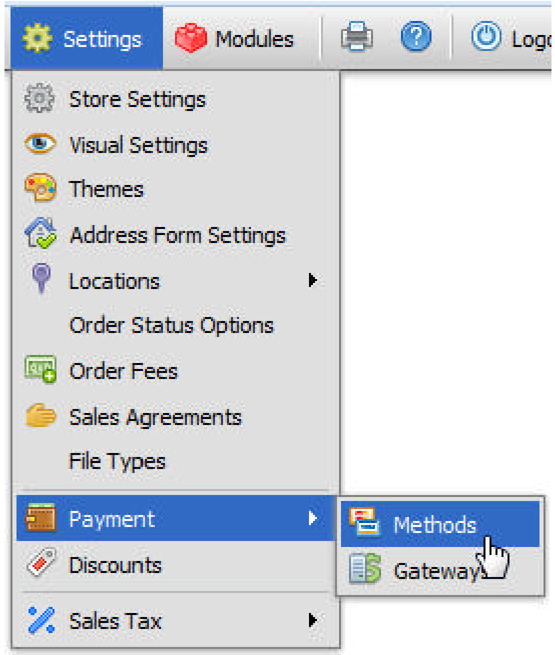
APC Requirements

The optional APC feature has the following requirements:

- *CURL* or *fsockopen* support
- *OpenSSL*

Setup Instructions

1. Open the Payment Methods table in the control panel



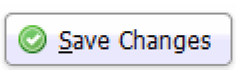
2. Click the record row labeled **NOCHEX**

3. Enter the email address that you use to accept NOCHEX payments in the **Payment Email Address** field

4. Choose the **Transaction Mode**

5. If you would like to use the APC feature (recommended), check the **APC** field. There are no other steps required to setup APC, and you do not need to contact NOCHEX to have them turn it on for you.

6. Check the **Enabled** field

7. Click 

6.8.2.10 PayFast

Overview

PayFast is a South African based payment system. It provides an alternative way to allow your customers to pay using credit cards and other forms of payment without you having to incur the expenses of a merchant account. PayFast performs the transaction on their website, and adds the money to your PayFast account. For more information about PayFast, see their official site at **https://www.payfast.co.za (https://www.payfast.co.za/)**.

Before you can accept payments via PayFast, you will need to sign up for a business account on their website.

Requirements

- PayFast business account and associated credentials
- *CURL* or *fsockopen* PHP extensions
- *OpenSSL* PHP extension

Supported Features

Auto Return

Auto Return returns the customer to your website after they submit payment at PayFast. Squirrelcart automatically makes use of this feature, you do not have to enable it.

Payment Data Transfer (PDT)

When PayFast returns the customer to your website after they submit payment, they do not provide any data to indicate the status of that payment. PDT is used to make a behind the scenes query to PayFast to obtain information about the transaction. This allows us to determine if the transaction was approved or not. PDT requires *CURL* and *OpenSSL*.

PDT is used when the customer is returned to your website. If the transaction was successful, the order is completed in Squirrelcart.

Instant Transaction Notification (ITN)

The combination of AutoReturn and PDT is enough for most orders to complete in Squirrelcart. However, AutoReturn relies on the customer's browser. Should the customer close their browser window before returning, AutoReturn and PDT won't be able to complete the order. In these instances, ITN is used to complete the order via a silent post.

ITN provides immediate notification of PayFast payments you receive. ITN requires *CURL* and *OpenSSL*.

Enabling PayFast

> While PDT and ITN are not required by PayFast, Squirrelcart's integration does require them. You must enable both PDT and ITN for PayFast to function properly. Instructions for both are included below.

1. If you do not have a PayFast account, visit PayFast.co.za and signup.

2. Login to your PayFast.co.za account at: **https://www.payfast.co.za (https://www.payfast.co.za/)**

3. Click **SETTINGS**

4. Under the heading **MERCHANT IDENTIFIERS,** you'll see a Merchant ID and a Merchant Key. Write

these down very carefully, or copy them for later use.

5. Click the **EDIT** button to the right of **PAYMENT DATA TRANSFER.**

6. Change the **PDT Status** field to **Enabled**

7. Click **Update**

8. You should now see a **PDT Key** listed in the **PAYMENT DATA TRANSFER** section. Write this down or copy it for later use.

9. Click the **EDIT** button to the right of **INSTANT TRANSACTION NOTIFICATION**

10. Change the **ITN Status** field to **Enabled**

11. For the **Notify URL** field, enter the URL as follows:

    `http://www.EXAMPLE.COM/squirrelcart/payfast_itn.php`

    Change the domain name to match your site. If you have installed Squirrelcart in a subdirectory, be sure to add that to the URL. For example, if your *storefront* page is http://www.example.com/store/store.php, then your ITN URL would be http://www.example.com/store/squirrelcart/payfast_itn.php.

12. Click **Update**

13. Login to Squirrelcart as admin and open the control panel.

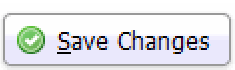
14. Click **Settings > Payment > Methods** from the admin menu system.

15. Click on the record labeled **PayFast**

16. Enter your **PayFast Username, Merchant ID, Merchant Key**, and **PDT Key** in the corresponding fields. **Username** is the same username you logged in with at PayFast.co.za and should also be your email address. The other three settings were obtained in the steps above this one.

17. Make sure the **Payment Mode** field is set to **Live**

18. Check the **Enabled** field

19. Click 

Testing

The best way to test is with **Payment Mode** set to **Live.** Create a product that has a low price, and place an order for it.

PayFast offers a sandbox environment for testing. If you wish to test with that environment, set the

Payment Mode field to **Test** and change all your credentials in Squirrelcart to match the ones they provide for their sandbox environment:

https://www.payfast.co.za/s/std/integration-guide

6.8.2.11 PayPal Payments Standard

Overview

PayPal is an alternative way to allow your customers to pay using credit cards and electronic checks without you having to incur the expenses of a merchant account. PayPal performs the transaction on their website, and adds the money to your PayPal account. For more information about PayPal, see their official site at **http://www.paypal.com (http://www.paypal.com/)**.

This section describes how to configure Squirrelcart with PayPal's traditional payment method, which is called "PayPal Website Payments Standard". This does not cover PayPal's new service called "PayPal Website Payments Pro", which acts more like a traditional payment gateway. Instructions on setting up PayPal Website Payments Pro can be found in **the topic with the same name (Section 6.8.3.4.42)** in the **Configuration > Payment > Payment Gateways > Supported Gateways** section of this documentation.

Before you can accept payments via PayPal, you will need to sign up for an account. You can do so by clicking the "sign up" link at **http://www.paypal.com (http://www.paypal.com/)**. When you complete the registration, you will have specified an email address to receive payments to. You will need this email address to configure Squirrelcart to work with PayPal.

> ⚠ You should never fulfill an order without confirming that you have actually received payment by your payment gateway / processor.

Supported Features

Auto Return

Auto Return for Website Payments allows merchants to eliminate the Payment Receipt page in the Website Payments flow and automatically return buyers to their website upon payment completion.

> ⚠ PayPal now allows customers to pay using a credit card without having to have a PayPal account. As of this writing (10/31/2006) the Auto Return feature only works when the customer pays using their credit card. For this reason, you should also enable IPN which will be able to complete the order in Squirrelcart when a customer pays without a PayPal account. If your server does not meet the requirements for IPN you should disable Auto Return.

Payment Data Transfer (PDT)

Payment Data Transfer provides merchants with the ability to add additional security to a transaction by having your web server send a behind-the-scenes query to PayPal to ensure that the data received from an "Auto Return" did indeed come from PayPal. PDT requires *CURL* and *OpenSSL*.

If you do not enable PDT, use caution when fulfilling orders. Without PDT it is impossible to determine if the payment notification actually came from PayPal and matched the order in question.

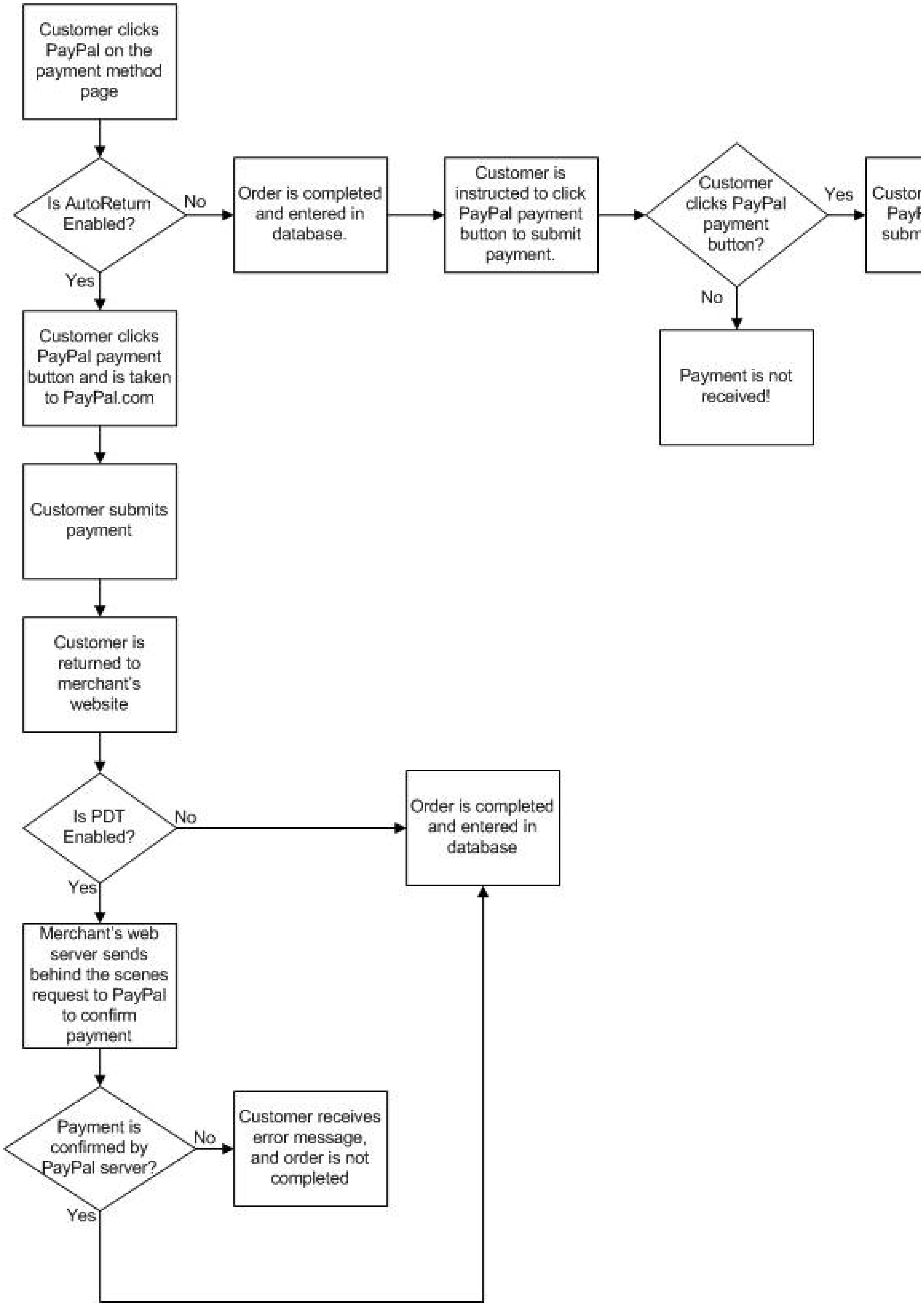
PDT works in conjunction with Auto Return to transmit payment details back to your website. You must enable Auto Return to use Payment Data Transfer.

Instant Payment Notification (IPN)

PayPal's Instant Payment Notification allows you to integrate PayPal payments with Squirrelcart's order management feature. IPN provides immediate notification and confirmation of PayPal payments you receive, and allows Squirrelcart to update the payment status on orders in your database. If you activate IPN, you will receive an IPN when a payment is first received, which will display the status of the payment (Completed or Pending). If the payment status was Pending, you will receive another IPN when the payment clears, fails, or is denied. IPN requires *CURL* and *OpenSSL*.

Payment Flow

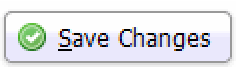
The payment process flow will vary depending on which (if any) of the supported features you enable. The illustration below demonstrates the payment process flow based on your configuration.


Customer clicks PayPal on the payment method page
Is AutoReturn Enabled?
No
Order is completed and entered in database.
Customer is instructed to click PayPal payment button to submit payment.
Customer clicks PayPal payment button?
Yes
No
Payment is not received!
Yes
Customer clicks PayPal payment button and is taken to PayPal.com
Customer submits payment
Customer is returned to merchant's website
Is PDT Enabled?
No
Order is completed and entered in database
Yes
Merchant's web server sends behind the scenes request to PayPal to confirm payment
Payment is confirmed by PayPal server?
No
Customer receives error message, and order is not completed
Yes

Enabling PayPal Payments

Auto Return, PDT, and IPN are optional but strongly recommend. The above section explains what these features do, and what to expect if you do not have them turned on. First, we will explain how to setup Squirrelcart to accept PayPal payments without using these additional components. Then we will explain how to enable the additional features. Please read this section in its entirety before following the steps.

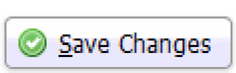
Basic Setup

1. If you do not have a PayPal account, visit PayPal.com and signup.
2. Login to Squirrelcart as admin and open the control panel.
3. Click **Settings > Payment > Methods** from the admin menu system.
4. Click on the record labeled **PayPal**
5. Enter your PayPal payment email address in the **Payment Email Address** field. If you have multiple payment addresses configured for your PayPal account, use the primary address.
6. Make sure the **Payment Mode** field is set to **Live**
7. Choose your currency using the **Currency Code** field.
8. Check the **Enabled** field
9. Click 

10. Continue to the Auto Return and PDT setup sections below.

Auto Return Setup

There are no additional requirements for Auto Return. We recommend that you enable it, as it will allow Squirrelcart to complete the order AFTER the customer has submitted payment. With Auto Return off, the order is completed before the customer is sent to PayPal.

1. Open PayPal's record in Squirrelcart (see **Basic Setup** above)
2. Check the **Auto Return** checkbox
3. Click 

4. Login to your account at PayPal.com

5. Click **Profile**

6. Click **Update** to the right of **Website preferences**

7. Click "On" in the "Auto Return for Website Payments" section.

8. For the **Return URL** field, enter your storefront URL. If you have an SSL certificate, use the secure URL to your storefront page:
   `https://www.example.com/store.php`

   If you do not have an SSL certificate, enter the regular non-secure URL to your storefront page:
   `http://www.example.com/store.php`

9. Scroll to the bottom of the page and click "Save"

Payment Data Transfer Setup

PDT requires *CURL* or *fsockopen* support, and *OpenSSL*. Do not enable PDT unless CURL and OpenSSL are available.

1. Auto Return must be enabled. Follow the instructions in **Auto Return Setup** above.

2. Login to PayPal.com

3. Click the **Profile** tab

4. Click **Update** to the right of **Website preferences**

5. In the **Payment Data Transfer** section, click **on**

6. Scroll to the bottom of the page and click **Save**

7. When you click **Save** a message will appear at the top of the page indicating that you have successfully saved your preferences. Your identity token will also appear in the context of this message. You will need this information in the next step. Select the entire line of text after "Identity Token:" and copy it to your clipboard. This token will always be available should you need it on the **Website Payment Preferences** page.

8. Open PayPal's record in Squirrelcart (see **Basic Setup** above)

9. Check the **PDT** field. The **Identity Token** field will appear to the right.

10. Paste your Identity Token in the **Identity Token** field

11. Click Save Changes

> Your business PayPal email address must be confirmed in your PayPal control panel for PDT to work. If you do not have a confirmed email address, you will receive the following error message:
>
> Error: No data received from PayPal. Merchant PayPal Business account email address may need to be confirmed in PayPal control panel.

> When using PDT, your Payment Email Address in Squirrelcart must match your primary payment address in PayPal. If it does not, PDT will fail.

Instant Payment Notification Setup

IPN requires *CURL* and *OpenSSL*. Do not enable IPN unless CURL and OpenSSL are available.

1. Auto Return must be enabled. Follow the instructions in **Auto Return Setup** above.

2. Open PayPal's record in Squirrelcart (see **Basic Setup** above)

3. Check the **IPN** field

4. Click Save Changes

Testing IPN

To ensure that IPN is working, we've added a testing feature. It is designed to send an email to your PayPal email address whenever your website receives an IPN from PayPal. The email will contain all the data that was sent to your site. To enable this test feature, follow these instructions.

1. Make sure IPN is enabled per the instructions above.

2. Open the PayPal record in Squirrelcart

3. Check the **Test IPN** checkbox

4. Click Save Changes

6.8.2.12 Paymate (Australia)

Overview

Paymate is a 3rd party Australian payment processor similar to PayPal. You can find out more about them here: **http://www.paymate.com.au (http://www.paymate.com.au/)**

Checkout Process

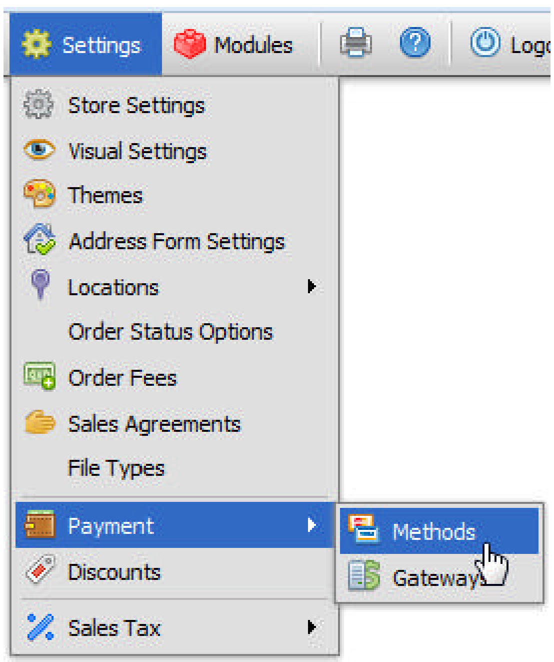
During the checkout process, if your customer chooses to pay using Paymate, Squirrelcart will complete the order and mark it as "Payment Pending". Your customer will see a prominent notice on the thank you page with instructions for submitting payment through Paymate by clicking a Paymate button. That button will send the payment information to Paymate and your customer can submit payment on their site. You should not ship products when you receive an order from Squirrelcart via Paymate until you have confirmed that payment has been sent via Paymate.

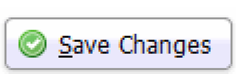
Requirements

There are no special requirements for Paymate.

Setup Instructions

1. Open the Payment Methods table in the control panel



2. Click the record row labeled **Paymate (Australia)**
3. Enter your Paymate account name in the **Account Name** field
4. Check the **Enabled** field
5. Click 

> You do not need to enable any credit card payment methods for Paymate to work. The payment method on your orders will appear as Paymate.

6.8.2.13 StrataPay

Overview

StrataPay is a 3rd party payment processor. You can find out more about them here: **http://www.stratapay.com.au (http://www.stratapay.com.au/)**.

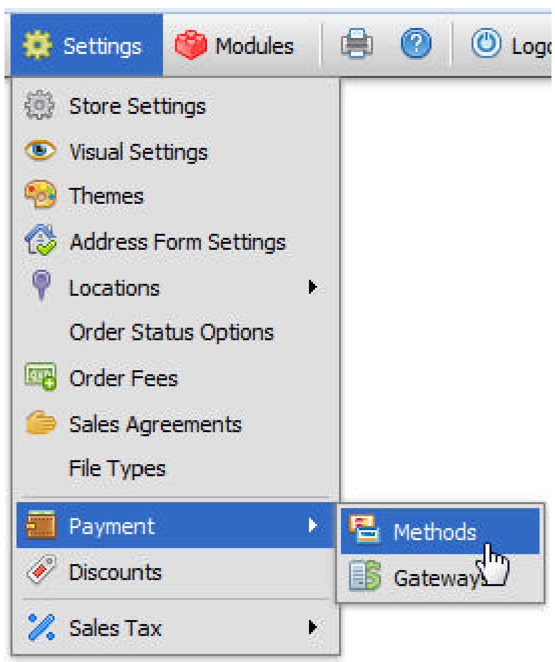
StrataPay allows your customers to "pay now" using a credit card, or "pay later" using an invoice that can be paid in 8 different ways. If you have Pay Later enabled, your customer will see a page with "Pay Now" and "Pay Later" buttons. If they choose **Pay Now**, the order will appear in your database with an order status of **Payment Received.** If they choose **Pay Later**, the order status will appear as **Payment Pending**.

Requirements

There are no special requirements for StrataPay.

Setup Instructions

1. Open the Payment Methods table in the control panel

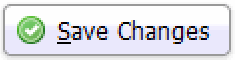


2. Click the record row labeled **StrataPay**

3. Enter your StrataPay account number in the **Account Number** field

4. If you would like your customers to use the Pay Later feature, check the **Pay Later** field.

5. Check the **Enabled** field

6. Click 

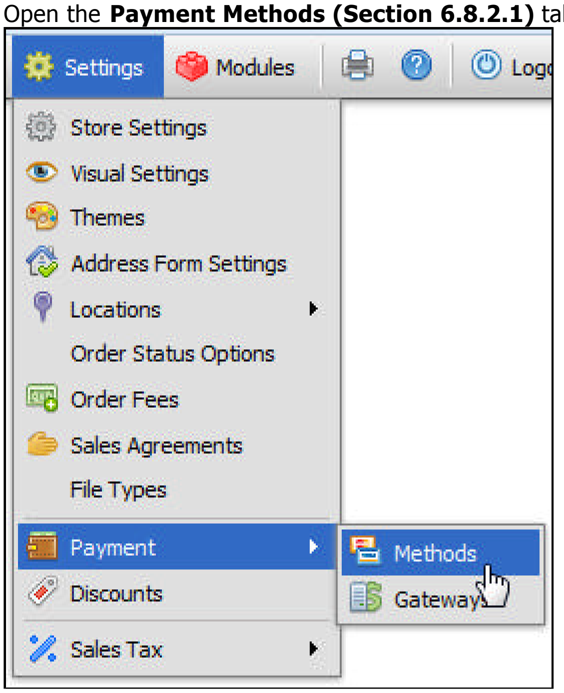
> You do not need to enable any credit card payment methods for StrataPay to work. The payment method on your orders will appear as StrataPay.

6.8.2.14 Adding a Custom Payment Method

We have had several people ask whether they could add a custom payment method, such as "call to order" and similar to the "check or money order" method. This topic explains how. This is considered an advanced topic, and should only be attempted by someone with good knowledge of HTML and an understanding of PHP.

> Please do not confuse payment methods with payment gateways. A payment method should not be used to simulate payment gateway functionality.

1. Open the **Payment Methods (Section 6.8.2.1)** table



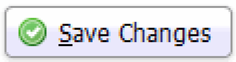
2. Click 

3. Enter a name that best explains the method in the **Name** field

4. Set the **Type** field to **Other**

5. Enter a file name in the **Module Name** field. You can choose any valid PHP filename you like. For example, if you want people to phone in order, choose something like **phone.php**. We recommend you make the filename lowercase, and with no spaces. It also must end in **.php**

6. Check the **Enabled** field

7. Click 

8. Make a new file in the **squirrelcart/payment_gateways** folder and name it the same as what you entered in step 5 above.

9. Paste the contents of **squirrelcart/payment_gateways/check.php** into your new file.
   This new file will be included when the person checks out and chooses the new payment method you are setting up. You may want to change the wording in the file according to the method you are creating.

10. If you want the cart to complete the order when the customer get's to this page, then add this to the very top of your new file:
```
<?php $SC['complete_order'] = 1; ?>
```

6.8.3 Payment Gateways - Overview

Payment Gateways are used to send the transaction to the customer's bank, and to your *merchant account* for processing. They serve the same purpose online as a credit card terminal does offline. To use a payment gateway, you will need to purchase access to it through a merchant account provider. You will also need a merchant account in order to use it.

Squirrelcart supports many popular payment gateways. All supported gateways are listed in the Supported Gateways section.

6.8.3.1 Connection Methods

Overview

Payment gateways offer different ways to connect to them to submit a transaction. The names for these connection methods are not standard. They are often branded, and are different for each payment gateway.

Squirrelcart classifies these connection methods into 5 different types. In Squirrelcart, there is a "Connection Method" field on each payment gateway record that can be set to control how your store will submit transactions to the gateway you've enabled. Some payment gateways support 1, 2, or 3 of these methods.

Our connection method names have either one or two parts (separated by a forward slash). They start with a term used to indicate where the payment form is hosted.
Store Hosted indicates that the payment form is hosted on your store's web server.
Gateway Hosted indicates that the payment form is hosted on the payment gateway's web server.

The optional second part of the connection method name indicates how the data is sent to the gateway.
Server represents your web server.
Gateway represents the payment gateway's web server.
Browser represents your customer's computer.

The five connection methods are as follows:

- Store Hosted / Server to Gateway
- Store Hosted / Browser to Gateway*
- Store Hosted / Browser to Gateway (Relay)
- Gateway Hosted*
- Gateway Hosted (Iframe)*

PCI compliance

PCI compliance is a standard created by the credit card industry to verify that a business is able to securely handle credit card data. If your website handles credit card data, your merchant account provider may require that your website and your business both be PCI compliant. That requirement is only needed if your website is actually handling the credit card data. If you wish to avoid this requirement, you can easily do so by choosing a connection method that does not result in your web site handling credit card data directly.

*The connection methods marked with an asterisk above do not cause your web server to handle credit card data, and as a result exempt you from having to be PCI compliant. If you want to avoid PCI compliance, use one of these connection methods.

Each connection method is explained in detail below.

Store Hosted / Server to Gateway

Website Requirements

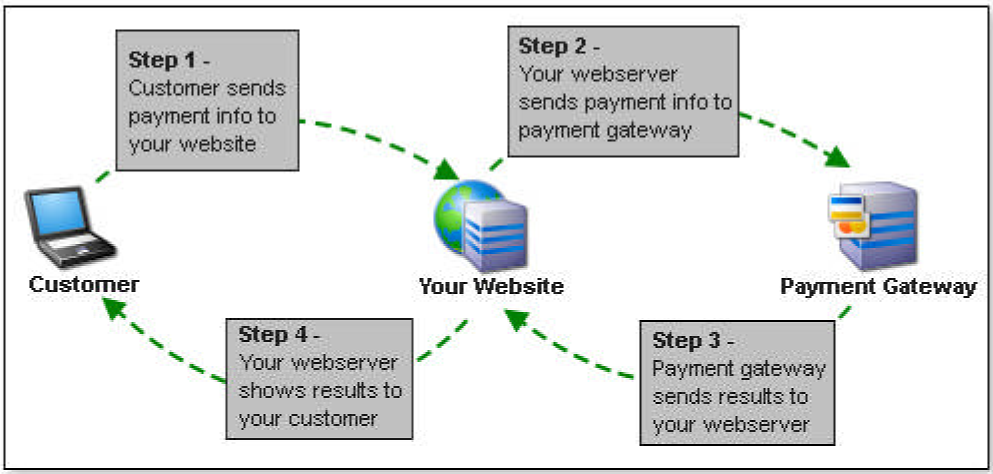
This method requires at a minimum that you have an *SSL* certificate for your website. It also requires *CURL* OR *fsockopen* support, and *OpenSSL*, unless specified otherwise for your particular gateway in "Supported Gateways".

Benefits

- Your customer never leaves your website.
- Added security in that your server sends the transaction directly to the gateway using SSL encryption.
- Better performance

How it Works

Your customer enters payment information on your secure web page, and submits it to your web server. While the customer is waiting for the next page to load, your web server sends payment information to the payment gateway in the background via *SSL* (Secure Socket Layer). The payment gateway sends the result back to your web server indicating the transaction status. Your web server then uses that information to determine what message to issue to the customer. In this method, the customer never sees the URL for the Payment Gateway in their browser. The customer never leaves your website.



Store Hosted / Browser to Gateway

Benefits

- Customer can stay on your website to enter payment information
- In most cases, customer has the impression that they never leave your website

How it Works

Your customer enters their payment information while on your website. When they submit the form, it is submitted directly by their browser to the payment gateway. It is never sent to your server.

Store Hosted / Browser to Gateway (Relay)

Website Requirements

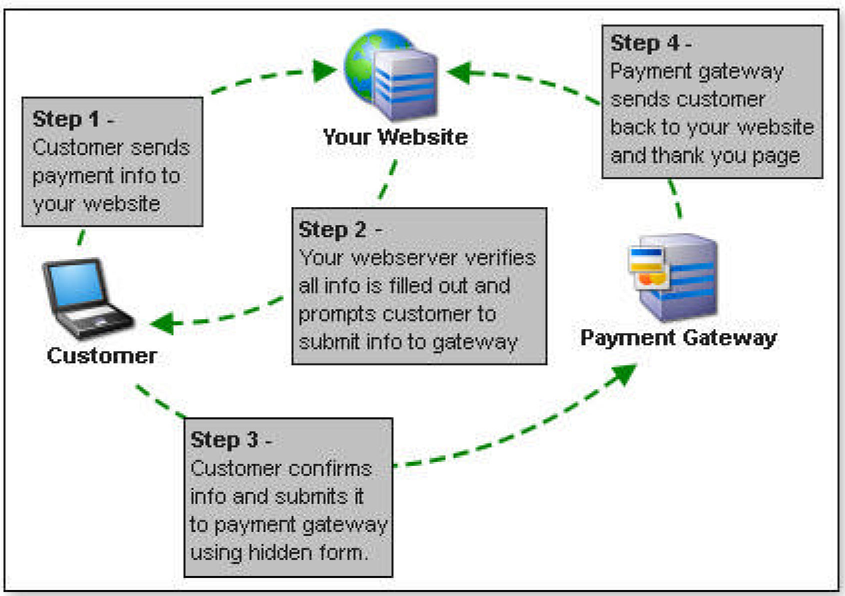
SSL Certificate

Benefits

- Customer can stay on your website to enter payment information
- In most cases, customer has the impression that they never leave your website

How it Works

Your customer enters their payment information using a secure form on your website. Your web server verifies all information is filled out, and then prompts your customer to continue to the payment gateway to submit the information. The customer then clicks the continue button and sends their payment information to the payment gateway for processing. The payment gateway then sends the customer back to your website to view the result of the transaction, and the thank you page if the transaction was approved. Depending on the payment gateway, the customer may never see the page on payment gateway web site. Most gateways will instantly redirect the customer to your site. Some will also alternatively load the entire thank you page from your website, and show it to the customer. When this happens, the only indication that the customer is not on your website is the URL in the address bar, as it will show the URL for the payment gateway.



Gateway Hosted

Website Requirements

No special requirements.

Benefits

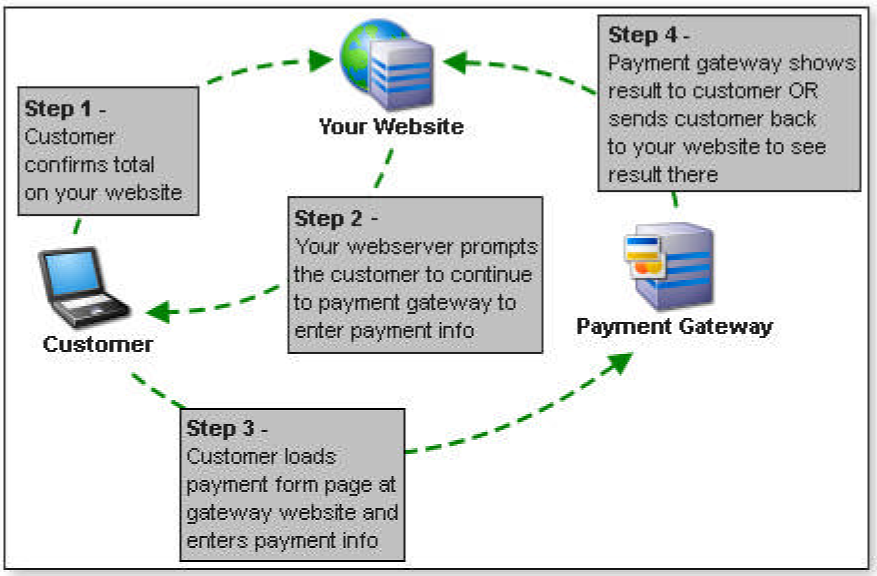
Does not require an *SSL* certificate, *CURL*, *fsockopen*, or *OpenSSL*

Disadvantage

Your customer does not remain on your website. While most customers do not mind this, it is better in general to keep the customer on your site if possible. It gives them the sense that the transaction is being handled completely by your company and not a third party.

How it Works

This method is used when your website does not have *SSL* installed. Because of lack of *SSL*, there is no secure way for your site to gather payment information. The order total is sent via a form POST to a secure URL at the Payment Gateway website. The customer is then presented with a form in which they enter their payment information, and complete the order. Upon completion, most gateways will redirect the customer back to your website. Some may not return the customer, and will leave them at a thank you page at the gateway website.



Gateway Hosted (Iframe)

Website Requirements

No special requirements.

Benefits

Does not require an *SSL* certificate, *CURL*, *fsockopen*, or *OpenSSL*.
Customer remains on your website during the transaction.

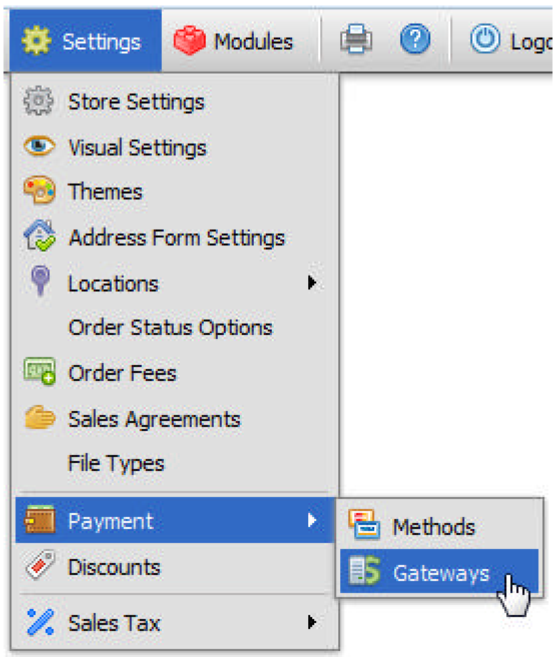
How it Works

During checkout, while still on your website a payment form hosted by your payment gateway is displayed in an iframe. While the payment form resides on the payment gateway's website, the customer never leaves your website. This removes any liability of accepting card data on your website, as your website never receives the card data. It has the benefit of keeping the customer on your site during the transaction.

6.8.3.2 Opening a Payment Gateway Record

To open a payment gateway:

1. Click the Payment Gateways menu link



2. Click on the payment gateway you wish to work with

6.8.3.3 Enabling a Payment Gateway

Overview

The process for setting up a gateway varies depending on the gateway you are using. The instructions for each gateway are located in the Supported Gateways section of the documentation.

> ⚠ You should never fulfill an order without confirming that you have actually received payment by your payment gateway / processor.

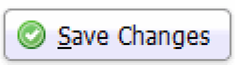
Before you can use a payment gateway, you must sign up for it. Contact your merchant account provider for more information. Before attempting to setup a gateway, you should read the **Configuration > Payment > Payment Methods > Credit Cards > Enabling Credit Card Payments (Section 6.8.2.2.1)** topic.

6.8.3.4 Supported Gateways

6.8.3.4.1 2Checkout

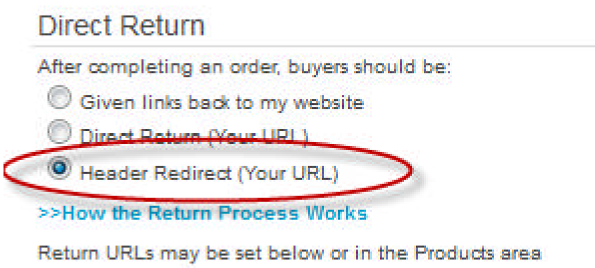
Information about 2Checkout can be found here: **http://www.2Checkout.com (http://www.2checkout.com/)**

Setup Instructions

1. Open the payment gateway record labeled 2Checkout in the control panel of Squirrelcart
2. Enter your Seller ID number for 2Checkout in the **Seller ID** field.
3. Enter a unique phrase up to 16 characters in the **Secret Word** field. This will be entered in 2CO as your "secret word", so you should write it down.
4. Check **Enabled**
5. Set **Connection Method** to **Gateway Hosted**
6. Click 

7. Log into your 2Checkout.com control panel
8. Click the **Account** tab, then click the **Site Management** link below it:

9. In the **Demo Setting** section, set the field to **ON** to enable test mode. When you are done testing, you'll need to go back and set this to **OFF**
10. In the **Direct Return** section, choose the option **Header Redirect:**



11. In the **secret word** field, enter the same phrase you entered in the **Secret Word** field in Squirrelcart.

12. In the **URLs** section, enter the URL to your store page for the **Approved URL** field. You can enter either your secure URL if you have one, or the regular http:// URL, as follows:

13.

```
http://www.example.com/store.php
```

In the **Pending URL** field, enter the URL to your store page. You can enter either your secure URL if you have one, or the regular http:// URL, as follows:

```
http://www.example.com/store.php
```

> ⚠ The domain name in the URLs you enter must match the domain name on file with 2Checkout, or 2Checkout will not return the customer to your website.

14. Click the **Save Changes** button

15. In order to use 2Checkout, you have to have one product created in their system, with the product ID set to **1.** Click the **Products** tab, and then click the **Create** button below it:

16. This product is going to be used to represent a typical order from your site. Enter something in the **Name** field that is generic enough to describe the items you sell, but be as specific as possible. For example, "Web Design Services" is better than "Web Services".

17. Enter **1** for the **Your Product Id** field

18. Enter the average price of an order on your site in the **Price** field

19. Fill out the other fields as you see fit, but leave **Pending URL** and **Approved URL** blank.

20. Click the **Save Changes** button

> 2Checkout can return a status of "pending", which means that they could not immediately verify the card. When this happens, Squirrelcart will consider the order approved. You will get an email from 2CO when they have determined the correct status. Because of this, you should always check your 2CO control panel to ensure that the payment was received before shipping an order.

Testing Information

You can test using your account as follows:

1. Login to your 2Checkout control panel
2. Click **Account**
3. Click **Site Management**
4. In the **Demo Setting** section, set the field to **ON** to enable demo mode
5. Checkout on your website. When you choose a payment method, you will be taken to 2Checkout which will now be in test mode. Enter test Visa #4111111111111111 when prompted for a card number.

6.8.3.4.2 ANZ eGate

Overview

ANZ eGate is an Australian payment gateway. You can find more information about them here:

As of this writing, the control panel URL for ANZ eGate is:
https://migs.mastercard.com.au/ma/ANZAU

ANZ eGate offers 2 modes that map to Squirrelcart's connection methods: **http://www.anz.com/small-business/products-services/merchant-services/internet-payment-solutions/egate/**

- Merchant-Hosted - This corresponds to Squirrelcart's "Store Hosted / Server to Gateway" **connection method (Section 6.8.3.1)**.
- Server-Hosted - This corresponds to Squirrelcart's "Gateway Hosted" **connection method (Section 6.8.3.1)**.

> Merchant-Hosted is the recommended way to connect to ANZ eGate, assuming your web server meets the requirements for it.

When you first have an account setup with ANZ eGate, they provide that account with access to their test servers only. In order to gain access to their production servers, you will need to contact their support department.

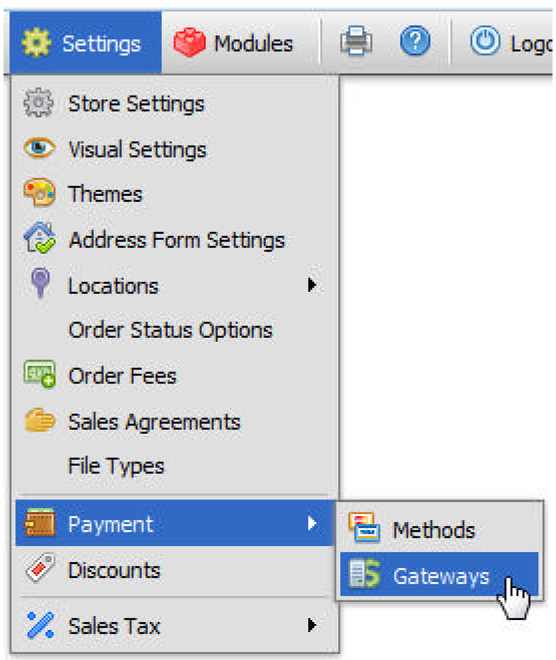
Merchant-Hosted

Requirements

- *CURL* OR *fsockopen* support
- *OpenSSL*
- *SSL* Certificate
- VPC Merchant ID - provided by ANZ eGate
- VPC Access Code- found in ANZ eGate Merchant Administration control panel

Setup Instructions

1. Click the Payment Gateways link in your control panel



2. Click the record row labeled **ANZ eGate**

3. Enter your Merchant ID in the **Merchant ID** field. If ANZ eGate provided you with a test account name that begins with **TEST,** enter your real merchant ID without **TEST** at the beginning.

   Example: If ANZ eGate provided you with the merchant ID "TESTYOURCOMPANYNAME", you would enter YOURCOMPANYNAME

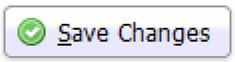
4. Enter your Access Code in the **Access Code** field

5. Leave the **Secure Hash Secret** field blank

6. Set the **Connection Method** field to **Store Hosted / Server to Gateway**

7. Check the **Enabled** field

8. If you haven't tested ANZ eGate before, check the **Test Mode** field

9. Click 

10. Place a test transaction. See the "Testing" section at the bottom of this page for more information.

11. When finished testing, contact ANZ eGate and request production system access. When they give you that access, open the ANZ eGate record again in Squirrelcart and uncheck **Test Mode.**

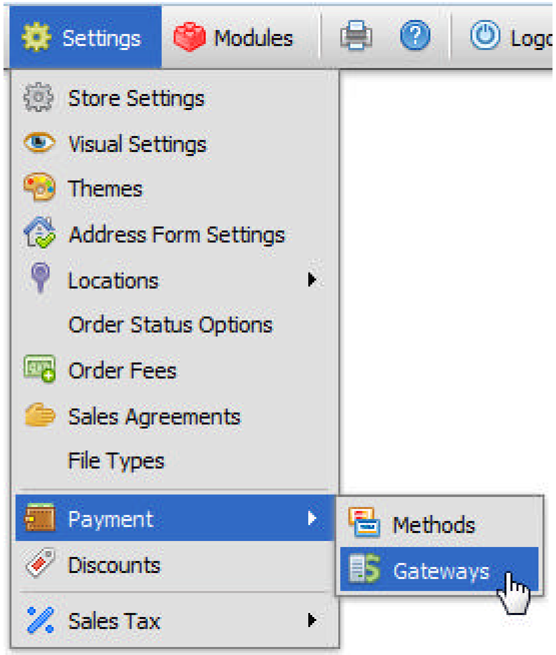
Server-Hosted

Requirements

- No special server requirements
- VPC Merchant ID - provided by ANZ eGate
- VPC Access Code - found in ANZ eGate Merchant Administration control panel
- VPC Secure Hash Secret - found in ANZ eGate's Merchant Administration control panel

Setup Instructions

1. Click the Payment Gateways link in your control panel



2. Click the record row labeled **ANZ eGate**

3. Enter your Merchant ID in the **Merchant ID** field. If ANZ eGate provided you with a test account name that begins with **TEST,** enter your real merchant ID without **TEST** at the beginning.

   Example: If ANZ eGate provided you with the merchant ID "TESTYOURCOMPANYNAME", you would enter YOURCOMPANYNAME

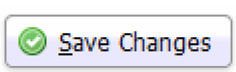
4. Enter your Access Code in the **Access Code** field

5. Enter your **Secure Hash Secret** in the **Secure Hash Secret** field

6. Set the **Connection Method** field to **Gateway Hosted**

7. Check the **Enabled** field

8. If you haven't tested CommWeb before, check the **Test Mode** field

9. Click 

10. Place a test transaction. See the "Testing" section at the bottom of this page for more information.

11. When finished testing, contact ANZ eGate and request production system access. When they give you that access, open the ANZ eGate record again in Squirrelcart and uncheck **Test Mode.**

Testing

ANZ eGate offers a testing environment that is very similar to their production environment. To test ANZ eGate , check the **Test Mode** field on the ANZ eGate record in Squirrelcart's control panel.

The ANZ eGate test environment will provide different payment responses depending on the total amount of the order. You also must use their test card numbers and expiration dates to get these responses.

Test Cards

Card Type	**Card Number**	**Expiration Date**
MasterCard	5123456789012346	05/2017
MasterCard	5313581000123430	05/2017
Visa	4005550000000001	05/2017
Visa	4557012345678902	05/2017
Amex	345678901234564	05/2017
Diners Club	30123456789019	05/2017

Response Codes

Resp Code	**Name**	**Amount**
0	Transaction approved	xxx.00
1	Transaction could not be processed	xxx.10
2	Transaction declined	xxx.05
3	No reply from processing host	xxx.68
4	Card has expired	xxx.33
5	Insufficient credit	xxx.51

6.8.3.4.3 Authorize.net

Overview

Information about Authorize.net can be found here: **http://www.authorizenet.com (http://www.authorizenet.com/)**

Squirrelcart supports accepting payments via credit card or electronic check through Authorize.net. Authorize.net offers two methods of connecting to their gateway, AIM (Advanced Integration Method) and SIM (Simple Integration Method). Squirrelcart implements AIM when you set "**Connection Method (Section 6.8.3.1)**" to "Store Hosted / Server to Gateway", and SIM when you set it to "Gateway Hosted" or "Store Hosted / Browser to Gateway (Relay)".

If you meet the requirements for AIM, it is the best method to use.

Advanced Integration Method (AIM)

AIM requirements

- *CURL* OR *fsockopen* support
- *OpenSSL*
- *SSL* Certificate

AIM Setup Instructions

Squirrelcart uses your API Login ID and Transaction Key to authenticate with Authorize.net. To obtain that information, follow the steps below.

1. Log into your Authorize.net control panel

2. Click **settings**

3. Click **API Login ID and Transaction Key** in the section labeled **Security Settings**

4. *To create an API Login ID or Transaction Key for the first time:*

   Step 1: Type in your Secret Answer. You should have configured a Secret Question and Secret Answer during account activation.

   Step 2: Click Submit to continue or click Cancel to cancel the action. The API Login ID and Transaction Key generated for your payment gateway account appear.

   Once you have initially created your API Login ID, you may not change it in the Merchant Interface. To change your API Login ID, you will need to contact Authorize.net Customer Support.

   IMPORTANT: The API Login ID is different than your user login ID. Your user login ID allows you to log into your Merchant Interface user account. The API Login ID grants a merchant access to submit transactions to the payment gateway.

   You may obtain a new, unique Transaction Key on this page as often as needed.

   To obtain a new transaction key:

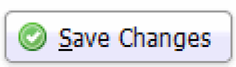
   Step 1: Enter your Secret Answer (the answer to your Secret Question configured at account setup).

   Step 2: To disable the old transaction key, click the check box labeled Disable Old Transaction Key.
   Note: If the Disable Old Transaction Key check box is not selected, the old transaction key will

automatically expire in 24 hours.

Step 3: Click Submit to continue or click Cancel to cancel the action. Your new transaction key is displayed.

Now that you have your API Login ID and Transaction Key, you will need to give Squirrelcart that information so it can communicate with Authorize.net. To do that, follow the steps below.

1. Open the payment gateway record labeled **Authorize.net** in the control panel of Squirrelcart
2. Enter your Authorize.net API Login ID in the **API Login ID** field.
3. Leave the **Account Password** field blank
4. Enter your Transaction Key in the **Transaction Key** field.
5. Set the **Authenticate With** field to **Account Transaction Key.** The **Account Password** is their for backwards compatibility with older versions of Authorize.net and should not be used.
6. Choose your *Transaction Type*
7. Set the **Connection Method** field to **Store Hosted / Server to Gateway**
8. Check **Enabled**
9. Click 

> By default, Authorize.net returns data to Squirrelcart using a comma to separate fields. There is a setting to change the separator in the Authorize.net control panel. If you think you may have changed the setting from it's default, you should verify that it is set to a comma. The setting can be found by clicking **Settings**, and then clicking **Direct Response**. It should be set to "**, (comma)**".

Simple Integration Method (SIM)

SIM requirements

SSL Certificate

SIM setup instructions

1. Login to Authorize.net's control panel

2. Click **settings**

3. Click **Relay Response**

4. In the URL field, below **Default Relay URL** enter the secure URL to your cart page as in:

   ```
   https://www.example.com/store.php
   ```

5. Click **Settings**

6. Click **API Login ID and Transaction Key** in the section labeled **Security Settings**

7. You will need to obtain your API Login ID and Transaction Key.

   To create an API Login ID or Transaction Key for the first time:

   Step 1: Type in your Secret Answer. You should have configured a Secret Question and Secret Answer during account activation.

   Step 2: Click Submit to continue or click Cancel to cancel the action. The API Login ID and Transaction Key generated for your payment gateway account appear.

   Once you have initially created your API Login ID, you may not change it in the Merchant Interface. To change your API Login ID, you will need to contact Authorize.net Customer Support.

   IMPORTANT: The API Login ID is different than your user login ID. Your user login ID allows you to log into your Merchant Interface user account. The API Login ID grants a merchant access to submit transactions to the payment gateway.

   You may obtain a new, unique Transaction Key on this page as often as needed.

   To obtain a new transaction key:

   Step 1: Enter your Secret Answer (the answer to your Secret Question configured at account setup).

   Step 2: To disable the old transaction key, click the check box labeled Disable Old Transaction Key.

   Note: If the Disable Old Transaction Key check box is not selected, the old transaction key will automatically expire in 24 hours.

   Step 3: Click Submit to continue or click Cancel to cancel the action. Your new transaction key is displayed.

8. Open the payment gateway record labeled **Authorize.net** in the control panel of Squirrelcart

9. Enter your Authorize.net API Login ID in the **API Login ID** field.

10. Leave the **Account Password** field blank.

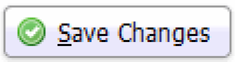
11. Enter your transaction key into the **Transaction Key** field.

12. Set **Authenticate Wit**h to **Account Transaction Key** (the **Account Password** setting should not be used...it is for backwards compatibility with older versions of Authorize.net.

13. Choose your *Transaction Type*

14. If you have *SSL* capabilities on your site, set connection method to **Store Hosted / Browser to Gateway (Relay)**, otherwise, set it to **Gateway Hosted**.

15. Check **Enabled**

16. Click 

6.8.3.4.4 Beanstream

Overview

Beanstream is a Canadian based payment gateway. You can find out more about it on their website: **http://www.beanstream.com (http://www.beanstream.com/)**

Requirements

Beanstream supports the **Store Hosted / Server to Gateway, Store Hosted / Browser to Gateway (Relay)**, and **Gateway Hosted** connection methods offered by Squirrelcart. Requirements vary based on the **connection method (Section 6.8.3.1)** you choose in Squirrelcart.

Setup Instructions

1. Determine which **connection method (Section 6.8.3.1)** you are going to use.

2. Login to your Beanstream control panel

3. Click **adminstration > account settings > order settings**

4. Uncheck the **Restrict Internet Transaction Processing Types** field

5. Make sure the following fields are unchecked:
   Require PGP signing of all transactions
   Validate referring host address
   Validate orders against inventory
   Use username/password validation against transaction

6. Check the field labeled **Use hash validation against transaction**

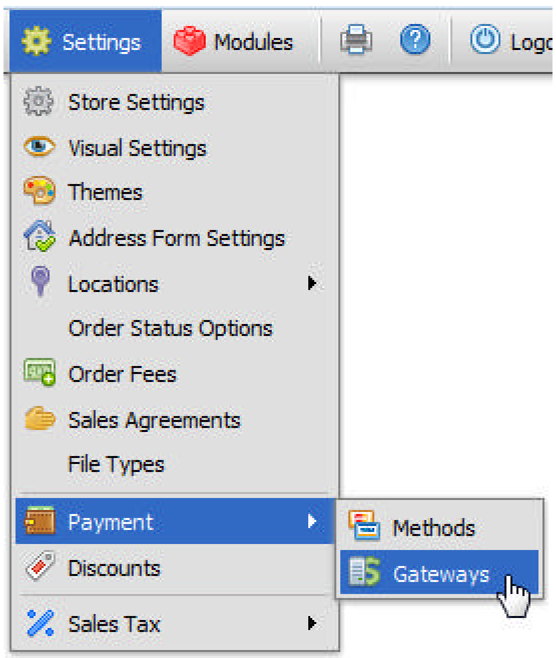
7. Below that field, enter a unique string in the **Hash Key** field. This string is used to ensure only your website is permitted to submit transactions. Write this value down.

8. Set the **Hash Algorithm** field to **MD5.**

9. Click **Update**

10. Open Squirrelcart's control panel

11. Open the Payment Gateways table



12. Click on the record row labeled **Beanstream**

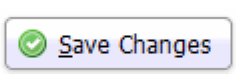
13. Enter your 9 digit Merchant ID in the **Merchant ID #** field

14. Enter the hash key you created in step 7 in the **Hash Key** field

15. Choose your transaction type using the **Transaction Type** field (click the field name for help)

16. Set the **Connection Method** field to the choice you made in step 1

17. Check the **Enabled** field

18. Click 

6.8.3.4.5 BluePay

Overview

More information about BluePay can be found here: **http://www.bluepay.com (http://www.bluepay.com/)**

Requirements

- *SSL* certificate
- *CURL* OR *fsockopen* support, and *OpenSSL* (for the Store Hosted / Server to Gateway **connection method (Section 6.8.3.1)**)
- BluePay Account ID and Secret Key (see next section)

Locating BluePay Account ID and Secret Key

You will need what BluePay refers to as your **Account ID**, and **Secret Key** to configure Squirrelcart for use with BluePay. You can obtain both of these as follows:

1. Go to **http://www.bluepay.com (http://www.bluepay.com/)**

2. Click the link that reads "BluePay Manager Login" (**https://secure.bluepay.com/login**)

3. Login with the information provided by BluePay

4. Click "Administration > Accounts > List"

5. Click the **View** link  under **Options**

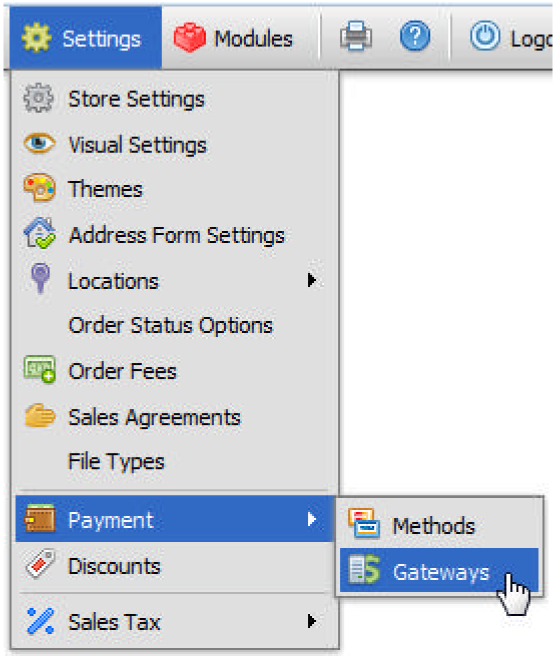
6. Your Account ID is listed in the **Account Information** section. Write this down.

7. Your Secret Key should be listed in the **Website Integration** section. Write this down.

Setup Instructions

1. Open the control panel in Squirrelcart

2. Open the Payment Gateways table



3. Click on the record labeled **BluePay**

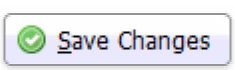
4. Enter your Account ID in the **Account ID** field

5. Enter your Secret Key in the **Secret Key** field

6. Choose your transaction type

7. Choose your **connection method (Section 6.8.3.1)**

8. Check the **Enabled** field

9. Click 

6.8.3.4.6 Braintree

Overview

Information about Braintree can be found here: **https://www.braintreepayments.com (https://www.braintreepayments.com/)**.

Squirrelcart supports accepting payments via credit card or PayPal through Braintree, using their Drop-In UI:
https://developers.braintreepayments.com/javascript+php/sdk/client/drop-in

Requirements

- PHP 5.2.1 or newer
- *CURL* PHP extension
- DOM PHP extension
- SimpleXML PHP extension
- XMLWriter PHP extension
- *SSL* Certificate

Setup Instructions

1. Login to your Braintree Payments account:
   https://www.braintreepayments.com (https://www.braintreepayments.com/)

2. Click **Account > My user**

3. Click **API Keys** under **Authorization**

4. On this page, you will find the following info:

   Merchant ID
   Public Key
   Private Key

   Copy all of these to Notepad or a similar program.

5. If you wish to accept PayPal through Braintree (as opposed to accepting **directly through PayPal (Section 6.8.2.11)**), follow these instructions to link your PayPal and Braintree accounts: **https://articles.braintreepayments.com/guides/paypal/setup-guide**

6. Open your Squirrelcart control panel

7. Click **Settings > Payment > Methods**

8. Enable each credit card payment method your Braintree account accepts (usually Visa, MasterCard, Amex, and Discover).

9. If you'd like to accept PayPal through Braintree, enable the **PayPal (via 3rd Party)** payment method (#26).

10. Click **Settings > Payment > Gateways**

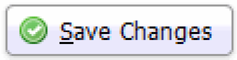
11. Click the record labeled **Braintree**

12. Enter your credentials from step 4 in the corresponding fields.

13. Set the **Transaction Type** field. Mouse over the field name for help if needed.

14. If you are using a Sandbox account, check the **Test Mode** field. For a live account, make sure that field is unchecked.

15. Check the **Enabled** field

16. Click 

6.8.3.4.7 CCBill

Overview

You can get more information about CCBill here:

http://www.ccbill.com (http://www.ccbill.com/)

Important Note!

CCBill supports recurring payments. At this time, our integration with CCBill does NOT handle recurring payments. If you use CCBill with Squirrelcart, you can accept single one time payments using their Dynamic Pricing feature.

Requirements

CCBill uses Squirrelcart's **Gateway Hosted connection method (Section 6.8.3.1)**, which has no special server requirements. The information needed to enable CCBill is as follows:

- 6 digit CCBill account number
- 4 digit CCBill subaccount number
- Form Name
- Salt Key

  CCBill support should be able to provide you with all of the information above.

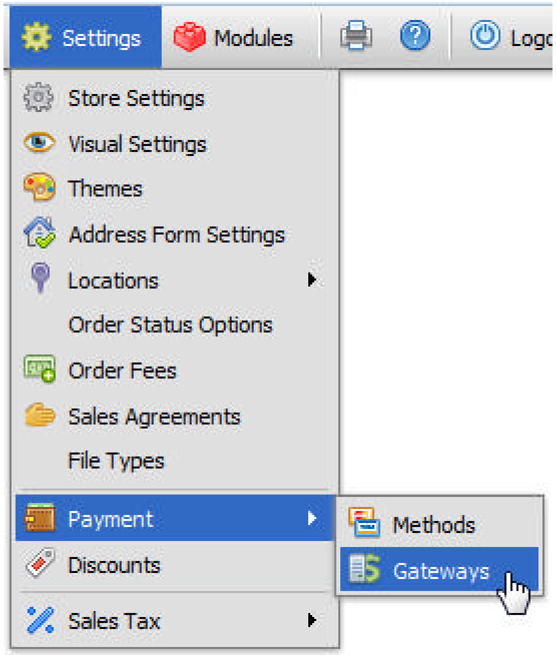
Setup Instructions

1. To use CCBill with Squirrelcart, you must have their Dynamic Pricing feature enabled for your account.

   Contact their support department and have them turn this on for you. Do not continue until you have confirmation that your account is setup for Dynamic Pricing.

2. You will need the 4 pieces of information listed above under Requirements. If you do not have this information, contact CCBill support for it.

3. Login to Squirrlecart's control panel, and click the Payment Gateways menu link:



4. Click on the row for the record labeled **CCBill**

5. Enter your 6 Digit Account Number

6. Enter your 4 Digit Subaccount Number

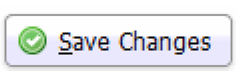
7. Enter your Form Name (example: **12cc**)

8. Enter your Salt Key. Make sure there is no space at the beginning or end of the field.

9. Set the **Connection Method** field is set to **Gateway Hosted**

10. Choose your currency code using the **Currency Code** field

11. Check the **Enabled** field

12. Click 

13. Login to your CCBill control panel at **http://www.ccbill.com (http://www.ccbill.com/)**

14. In the **Account Admin** section on the left, click **-Basic**. This link should be under the heading **Modify Subaccount.**

15. In the **Approval URL** field, enter the full URL to your storefront page with added parameters as follows:
`http://www.example.com/store.php?subscription_id=%%subscription_id%%&`

Be careful typing this URL. If it is not exactly as above (but with your storefront page URL before the ?) it will not work.

16. Enter the exact same URL you entered for step 5 in the **Denial URL** field

17. Click **Update** to save your changes

18. In the **Account Admin** section on the left, click **-Advanced.** This link should be under the heading **Modify Subaccount**

19. In the **Approval Post URL** field, enter the same URL you used in step 5 and 6.

20. Click **Update** to save your changes

Testing Information

Use the following steps to create a transaction test account for the purpose of testing your CCBill setup and sign-up form.

1. Log into the CCBill Admin Portal and go to Account Info-->Transaction Test Settings.
2. Select "Create New User" and provide a valid IP range and e-mail address that will be used during testing. To find your IP address, try this link:
http://www.whatismyip.com/
3. Go to your Squirrelcart storefront page and add an item to the cart.
4. When you get to the payment page, choose a credit card payment method and click **Continue.** You will be sent to CCBill's payment form.
5. Make sure the email address on the payment form matches the one you used when creating your test account
6. Submit the form using one of the test credit card numbers below. Different card numbers can be used to get different responses.

Card Number: 5555555555557777
Result: approved (MC)

Card Number: 4444444444446666
Result: approved (Visa)

Card Number: 5555555555559922
Result: decline (MC)

Card Number: 4444444444444422
Result: decline (Visa)

CCBill has default settings on your account that limit the amount you can charge. By default, amounts must be between 2.95 and 100.00. If you try to submit an order with an amount that is not in that range you will get a **Invalid Intial Price** error when you are sent to their payment form. If you need to change those price settings, contact their support department.

6.8.3.4.8 CommWeb VPC

Overview

CommWeb is an Australian payment gateway. You can find more information about them here: **http://business.commbank.com.au/business_display/0,1928,CH2617%255FTS8337,00.html**

CommWeb offers 2 modes that map to Squirrelcart's connection methods:

- Merchant-Hosted - This corresponds to Squirrelcart's "Store Hosted / Server to Gateway" **connection method (Section 6.8.3.1)**.
- Server-Hosted - This corresponds to Squirrelcart's "Gateway Hosted" **connection method (Section 6.8.3.1)**.

Merchant-Hosted is the recommended way to connect to CommWeb, assuming your web server meets the requirements for it.

When you first have an account setup with CommWeb, they provide that account with access to their test servers only. In order to gain access to their production servers, you will need to contact their support department.

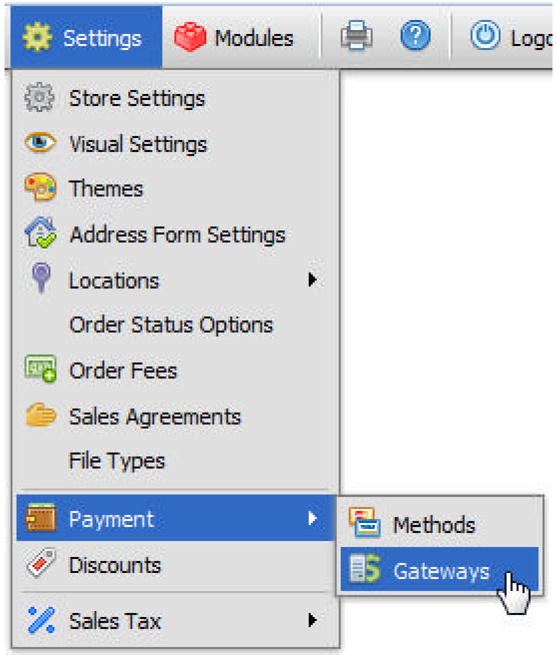
Merchant-Hosted

Requirements

- *CURL* OR *fsockopen* support
- *OpenSSL*
- *SSL* Certificate
- VPC Merchant ID - provided by CommWeb
- VPC Access Code- found in CommWeb's Merchant Administration control panel

Setup Instructions

1. Click the Payment Gateways link in your control panel



2. Click the record row labeled **CommWeb VPC**

3. Enter your Merchant ID in the **Merchant ID** field. If CommWeb provided you with a test account name that begins with **TEST,** enter your real merchant ID without **TEST** at the beginning.

   Example: If CommWeb provided you with the merchant ID "TESTYOURCOMPANYNAME", you would enter YOURCOMPANYNAME

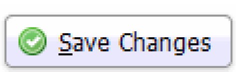
4. Enter your Access Code in the **Access Code** field

5. Leave the **Secure Hash Secret** field blank

6. Set the **Connection Method** field to **Store Hosted / Server to Gateway**

7. Check the **Enabled** field

8. If you haven't tested CommWeb before, check the **Test Mode** field

9. Click 

10. Place a test transaction. See the "Testing" section at the bottom of this page for more information.

11. When finished testing, contact CommWeb and request production system access. When they give you that access, open the CommWeb record again in Squirrelcart and uncheck **Test Mode.**

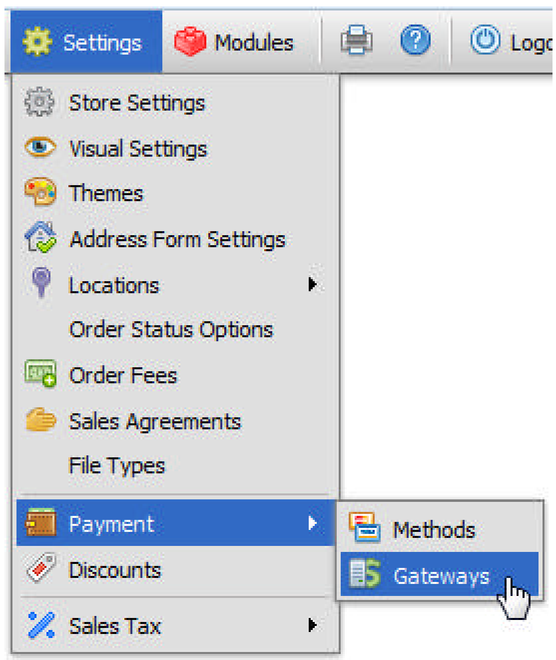
Server-Hosted

Requirements

- No special server requirements
- VPC Merchant ID - provided by CommWeb
- VPC Access Code - found in CommWeb's Merchant Administration control panel
- VPC Secure Hash Secret - found in CommWeb's Merchant Administration control panel

Setup Instructions

1. Click the Payment Gateways link in your control panel



2. Click the record row labeled **CommWeb VPC**

3. Enter your Merchant ID in the **Merchant ID** field. If CommWeb provided you with a test account name that begins with **TEST,** enter your real merchant ID without **TEST** at the beginning.

   Example: If CommWeb provided you with the merchant ID "TESTYOURCOMPANYNAME", you would enter YOURCOMPANYNAME

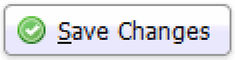
4. Enter your Access Code in the **Access Code** field

5. Enter your **Secure Hash Secret** in the **Secure Hash Secret** field

6. Set the **Connection Method** field to **Gateway Hosted**

7. Check the **Enabled** field

8. If you haven't tested CommWeb before, check the **Test Mode** field

9. Click 

10. Place a test transaction. See the "Testing" section at the bottom of this page for more information.

11. When finished testing, contact CommWeb and request production system access. When they give you that access, open the CommWeb record again in Squirrelcart and uncheck **Test Mode.**

Testing

CommWeb offers a testing environment that is very similar to their production environment. To test CommWeb, check the **Test Mode** field on the CommWeb record in Squirrelcart's control panel.

CommWeb's test environment will provide different payment responses depending on the total amount of the order. You also must use their test card numbers and expiration dates to get these responses.

Test Cards

Card Type	Card Number	Expiration Date
MasterCard	5123456789012346	05/2017
MasterCard	5313581000123430	05/2017
Visa	4005550000000001	05/2017
Visa	4557012345678902	05/2017
Amex	345678901234564	05/2017
Diners Club	30123456789019	05/2017

Response Codes

Resp Code	Name	Amount
0	Transaction approved	xxx.00
1	Transaction could not be processed	xxx.10
2	Transaction declined	xxx.05
3	No reply from processing host	xxx.68
4	Card has expired	xxx.33
5	Insufficient credit	xxx.51

6.8.3.4.9 CyberSource Secure Acceptance SOP

Overview

Information on CyberSource Secure Acceptance Silent Order POST can be found here:
https://www.cybersource.com/developers/learn/integration_methods/secure_acceptance_so

CyberSource Secure Acceptance SOP uses Squirrelcart's "Store Hosted / Browser to Gateway" **connection method (Section 6.8.3.1)**.

With this service, the customer submits their card information directly to the gateway using their browser. CyberSource handles the request and instantly transfers your customer back to your site. The customer will have the impression that they have never left your website.

> Please note: CyberSource may return a status of REVIEW for a transaction. This status means that you must review the transaction in CyberSource's control panel for it to be accepted. In order for transactions with this status to not impact receiving an order, Squirrelcart will complete an order that has this status, and flag it with a **Payment Pending** order status. You should always check the information in CyberSource before shipping goods.

Requirements

- *SSL* certificate
- CyberSource account, with Secure Acceptance enabled
- JavaScript must be working properly in your store

Setup Instructions

1. Open Notepad, Wordpad, MS Word, or any other text editor. This will be used to paste some of the credentials created in the steps below.

2. Login to the CyberSource Business Center using your "Merchant Admin Account":
   https://ebc.cybersource.com (https://ebc.cybersource.com/)

   If you wish to use a test account, use this URL instead:
   https://ebctest.cybersource.com (https://ebctest.cybersource.com/)

3. In the left navigation panel, click **Tools & Settings > Secure Acceptance > Profiles**

   > If you don't see this option in your CyberSource control panel, it may be because you are not logged in with the primary "Merchant Admin Account". If you are certain that you are using the correct account and do not see this menu option, you'll need to contact CyberSource support to get Secure Acceptance added to your account before continuing.

4. The new profile form should open automatically. Enter a name in the **Name** field.

5. Enter a value in the **Profile ID.** Save this value for reference later, using the editor you opened in #1

above.

6. Set **Integration Method** to **Silent Order Post**

7. Enter your **Company Name**

8. Click **Create** to save your changes

9. Click **Payment Settings**

10. Click **Add/Edit Card Types**

11. Check the cards that your merchant account is configured to accept.

12. Click **Update**

13. For each card type in the table:
    a. click the pencil icon
    b. Select your currency code in the left "Disabled" box
    c. Click the right arrow to move it to "Enabled"
    d. click **Update**

14. When done repeating step 13 above for each card, click the **Save** button

15. Click **Security**

16. Click **Create New Key**

17. Enter a value in the **Key Name** field

18. Set **Signature Version** to **Version 1**

19. Set **Signature Method** to **HMAC-SHA256**

20. Click **Generate Key**

21. You will have 30 seconds to copy the Access Key and Secret Key. Paste both values into your editor, opened in step #1 above.

22. Click **Return to Profile Home**

23. Click **Notifications**

24. Check the checkbox to the left of **Merchant POST URL**

25. To the right of **Merchant POST URL**, enter the full secure URL to your Squirrelcart storefront page:

```
https://example.com/store.php
```

26. Under **Select the card number digits that you want displayed**, choose **Return last 4 digits of card number**

27. Click **Save**

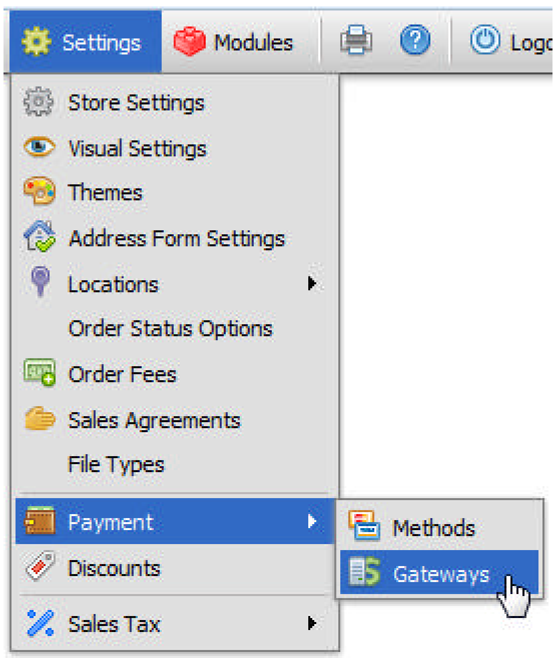
28. Click **Customer Response Pages**

29. Enter the same URL you used for step 25

30. Click **Save**

31. Click **Promote to Active**

32. Open the **Payment Gateways** table in your Squirrelcart control panel



33. Click the record labeled **Cybersoure Secure Acceptance SOP** to open it

34. Enter your Profile ID, Access Key, and Secret Key in the fields of the same name.

35. Enter a value in the **Locale** field. If you are in the US, enter:
en-us

If you are in another country, use this table for reference:

Language	**Locale Code**
Arabic	ar-xn
Cambodia	km-kh
Chinese - Hong Kong	zh-hk

Chinese - Maco	zh-mo
Chinese - Mainland	zh-cn
Chinese - Singapore	zh-sg
Chinese - Taiwan	zh-tw
Czech	cz-cz
Dutch	nl-nl
English - American	en-us
English - Australia	en-au
English - Britain	en-gb
English - Canada	en-ca
English - Ireland	en-ie
English - New Zealand	en-nz
French	fr-fr
French - Canada	fr-ca
German	de-de
German - Austria	de-at
Hungary	hu-hu
Indonesian	id-id
Italian	it-it
Japanese	ja-jp
Korean	ko-kr
Lao People's Democratic Republic	lo-la
Malaysian Bahasa	ms-my
Philippines Tagalog	tl-ph
Polish	pl-pl
Portuguese - Brazil	pt-br
Russian	ru-ru
Slovakian	sk-sk
Spanish	es-es
Spanish - Argentina	es-ar
Spanish - Chile	es-cl
Spanish - Colombia	es-co
Spanish - Mexico	es-mx
Spanish - Peru	es-pe
Spanish - American	es-us
Tamil	tam
Thai	th-th
Turkish	tr-tr
Vietnamese	vi-vn

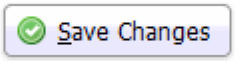
36. Set the **Transaction Type** field. Click the field name for help.

37. Set **Connection Method** to **Store Hosted / Browser to Gateway**

38. Set the **Currency Code** field to the currency used by your merchant account

39. Check the **Enabled** field

40. If you are using a test account, check the **Test Mode** field

41. Click 

42. Follow the testing instructions below.

43. When done testing, to use Cybersource Secure Acceptance in their live environment you must request that your account be made live. They call that process **Go-Live**. Contact their support department to submit that **Go-Live** request.

Testing

Testing with a test account

1. The setup instructions above must have been followed while logged into the test Business Center (**https://ebctest.cybersource.com (https://ebctest.cybersource.com/)**), using a test account

2. Open the Cybersource Secure Acceptance SOP payment gateway record in Squirrelcart, and check **Test Mode**

3. Add an item to the cart

4. Checkout up to the payment form

5. Choose Visa as the payment method

6. Enter card number 4111111111111111

7. Enter any future expiration date

8. Enter any 3 digit value for the card security code

9. Click **Place Order**

10. If you have CyberSource configured properly, the order will complete and you will see a thank you page. After testing, repeat the setup instructions using the live Business Center, and uncheck **Test Mode** in Squirrelcart.

Testing with a real account account

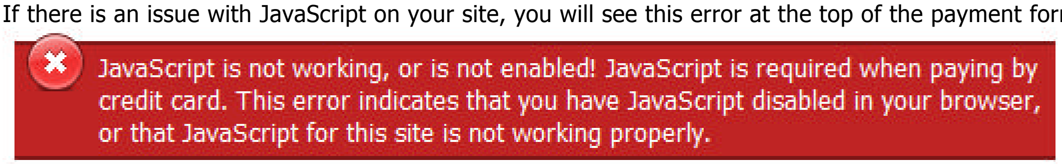
1. The setup instructions above must have been followed while logged into the real Business Center (**https://ebc.cybersource.com (https://ebc.cybersource.com/)**), using a real account
2. Open the Cybersource Secure Acceptance SOP payment gateway record in Squirrelcart, and make sure **Test Mode** is unchecked.
3. Add an item to the cart
4. Choose Visa as the payment method
5. Enter card number 4111111111111111
6. Enter any future expiration date
7. Enter any 3 digit value for the card security code
8. Click **Place Order**
9. You should receive a decline if everything is working properly. The only way to test order completion with a live account is to submit a real order using a real credit card.

Troubleshooting

JavaScript

After submitting the payment form in Squirrelcart, JavaScript is used to validate the form and submit it directly to CyberSource. For this to work, JavaScript must be working properly in your store. If you added any custom JavaScript to your store, it must not be generating any errors behind the scenes. If you have existing custom JavaScript that contains syntax or other errors, it will prevent our JavaScript from running.

If there is an issue with JavaScript on your site, you will see this error at the top of the payment form:



If you see this error, it is an indication that you have a problem with your custom JavaScript.

403 - Unauthorized Error

If you have an issue with any of the credentials you entered during the setup process, after submiting the payment form you may see a page at CyberSource.com with the following error:

You are not authorized to view this page. The transaction has not been processed.

If this occurs, you should double check your credentials. You can see more information about the error and what caused it in the Business Center as follows:

1. Login to the CyberSource Business Center
2. In the left navigation, click **Transaction Search > Secure Acceptance Search**
3. Click the search button to search recent transactions
4. Find the transaction corresponding to the one you submitted. You'll see the error listed in the **Decision** column. You can click the magnifying glass in the **Log** column to view a log of the transaction, with much more detailed information.

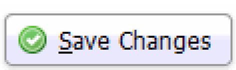
6.8.3.4.10 ECHO

Overview

Information on ECHO can be found here: **http://www.echo-inc.com (http://www.echo-inc.com/)**

To setup ECHO, you must first determine how you want to connect. Please see the **Connection Methods (Section 6.8.3.1)** topic for more information. Once you have decided, continue below.

Setup Instructions for Store Hosted / Server to Gateway method

1. Open the payment gateway record labeled **ECHO** in the control panel of Squirrelcart
2. Enter your ECHO account number in the **Account Number / Website Name** field
3. Enter your ECHO PIN number in the **PIN** field
4. Choose your *Transaction Type*
5. Set **Connection Method** to **Store Hosted / Server to Gateway**
6. Check the **Enabled** field
7. Click 

Setup Instructions for Gateway Hosted and Store Hosted / Browser to Gateway (Relay) methods

1. Go to **http://www.merchantamerica.com (http://www.merchantamerica.com/)**, and login

2. Click the **Edit my Setup** link at the bottom of the page

3. Click the **Edit my Store Info** link, below the **My Store** heading on the left

4. Enter a unique name to identify your store in the **Website Name** field. Write this name down.

5. Click **Submit**. If you get an error saying the name is not available, choose another one.

6. Click **Edit Form Options** under the heading on the left titled **My Payment Form**.

7. Set **Enable Payment Form** to **Yes**

8. Set **Allow Passed-in Values** to **Yes**

9. Set **Allow Post to Redirect URL**s to **Yes**

10. Check **Use Alternate Success and Failure Links**

11. For both **Success Page Link** and **Failure Page Link**, enter the URL to your *storefront*. If you have *SSL*, use the secure URL, otherwise use the regular http:// URL:
    - The secure URL to your cart page as in:
      `https://www.example.com/store.php`

    OR

    - If you do not have a secure URL, enter your regular cart page URL as in:
      `http://www.example.com/store.php`

12. Click **Submit**

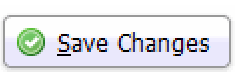
13. Open the payment gateway record labeled **ECHO** in the control panel of Squirrelcart

14. Enter the value you chose for **Website Name** in the **Account Number / Website Name** field. You do not need to enter a password.

15. Leave the **PIN** field blank

16. Set **Connection Method** to either of the Gateway Hosted form post methods.

17. Check the **Enabled** field

18. Click 

Test VISA card for approval from ECHO:

4005550000000019

6.8.3.4.11 e-Path

Ovewrview

e-Path is a payment gateway based in Australia. It is not a true payment gateway in that they do not charge credit cards. They store the card numbers securely, for you to access and charge however you wish - via a card terminal, a virtual terminal, etc...

You can find more information about e-Path on their website:

http://www.e-Path.com.au (http://www.e-path.com.au/)

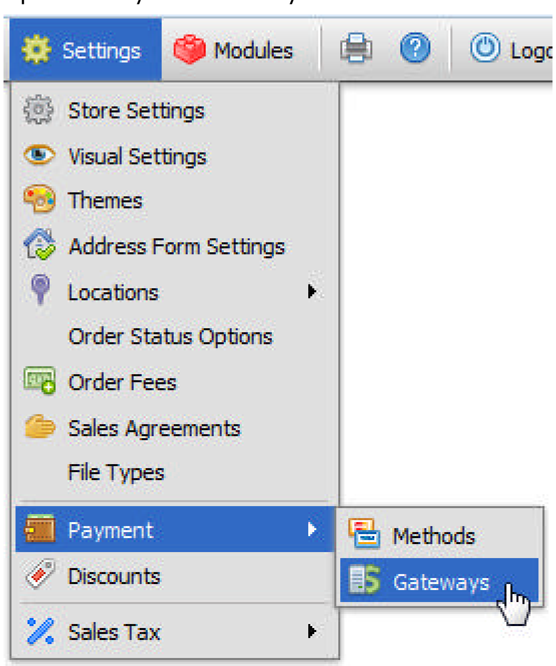
Requirements

No special requirements

Setup Instructions

1. Open Squirrelcart's control panel

2. Open the Payment Gateways table

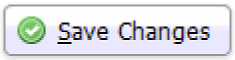


3. Click on the record row labeled **e-Path**

4. Enter "Your Unique e-Path Gateway URL" provided by e-Path in the field having the same name

5. Set the **Connection Method** field to **Gateway Hosted**

6. Check the **Enabled** field

7. Click 

> Checking the Test Mode field will cause Squirrelcart to use the test URL for e-Path, which is not connected to your account and is for demonstration purposes.

6.8.3.4.12 ePDQ (CPI & MPI, Barclays UK)

Overview

ePDQ is a payment gateway offered by Barclaycard, a bank in the UK. You can read more about ePDQ here:

http://www.epdq.com (http://www.epdq.com/)

They offer 2 connection methods, CPI and MPI. Both of these methods are supported by Squirrelcart.

CPI (Cardholder Payment Interface)

CPI uses Squirrelcart's "Gateway Hosted" **connection method (Section 6.8.3.1)**.

Requirements

- *CURL* or *fsockopen* support
- The domain name in the store URL must not be an IP address
- The store URL cannot contain a port number (as in **http://www.example.com:80 (http://www.example.com/)**)
- ePDQ CPI account information

Setup Instructions

1. Create user account with CPI access

   Barclaycard Business provides you with a user account to access the Store Admin. Your Store Admin user role is set at ePDQ Level 4. They recommend that you use a separate user account to integrate the ePDQ CPI, with a user role of CPI Access. This allows you to control the permissions of the person integrating the CPI and prevents access to the Store Admin.

   a. If you do not already have your Store Admin password login details contact ePDQ support.

b. Log into your ePDQ store, click Administration from the top four options
c. Select Users from the menu on the left
d. From the User Configuration Page (Please see the ePDQ User Guide section Controlling Access to your Store for details), select Add.
e. The Add User page will be displayed. Enter the details as required.
- The User ID must be at least 8 alpha/numeric characters and can be up to 32 characters. It must not contain any special characters (such as *,/,_,-). A User ID such as CPIUser1 is recommended.
- The Password must be at least 8 alpha/numeric characters and must not contain any special characters.
- Enter the Password again for validation purposes.
- Enter a Password Prompt. This must not be your password and must not compromise the password (i.e. same as user ID).
- Account Name and Account Description are optional, though entering a name and description such as CPI Integration User and User for CPI Access only is recommended.
- The Role is the level of permissions you wish to assign to the user. Use the drop down list to select the role of CPI Access.
- Set Pagination size according to how much data you wish to have displayed on each page.

f. You should elect for an email to be sent to the merchant confirming the creation of a new user.
g. Once you have entered all the details correctly, select Add. If you have entered any details incorrectly and wish to clear all fields, select Reset.
h. The new user will now be created, and can be viewed from the User Configuration Page.
i. Log on as the new user to confirm the user had been created correctly.
j. Sign off from the engine.

2. With the account you created above, login here to configure CPI access:
https://cpiadmin.epdq.co.uk/cgi-bin/CcxBarclaysEpdqAdminTool.e

3. Enter your numeric Client ID in the **Client ID** field

4. Enter the username and password you logged in with in the **User name** and **Password** fields.

5. Enter a unique phrase in the **Pass-phrase** field. You will need this later, so write it down.

6. In the **Allowed URL** field, enter the full address to your storefront page, followed by *?pm_redirect=1*.
Example: `http://www.example.com/store.php?pm_redirect=1`

7. Select **Yes** for all of the following fields:
Continue Option 1
Continue Option 2
Continue Option 3
POST Order result

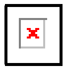
8. In the **POST URL** field, enter the full address to your storefront page.
Example: `http://www.example.com/store.php`

9. Make up a username and password for **POST User name** and **POST Password**. Do not use a colon symbol in either of these fields. Write them down as you will need them later. This user will be used to validate information sent to your website from ePDQ.

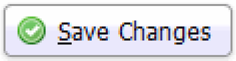
10. The **POST Email** field is not used, but ePDQ will not let you submit the form without it. Enter your email address in this field.

11. Click **Submit**

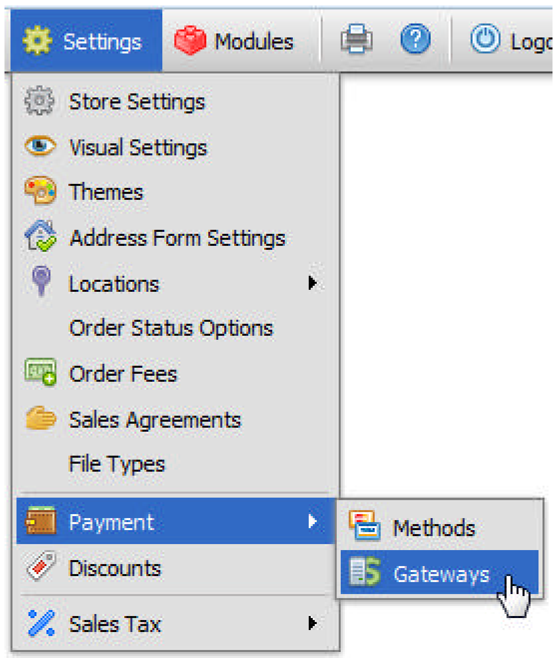
12. Open your Squirrelcart control panel

13. Click the  icon in the toolbar to open your Store Settings page

14. If not already present, enter your company name in the **Company Name** field and click



15. Click the Payment Gateways menu link:



16. Click the record row labeled **ePDQ**

17. Enter your ePDQ numeric **Client ID** in the **ID** field

18. Enter your **Pass-phrase** in the **Password** field

19. Enter your **POST User name** and **POST Password** in the **Alias** field. Separate the username and password with a colon. For example, if your **POST User name** is "testuser" and your **POST Password** is "example", you would enter:

    `testuser:example`

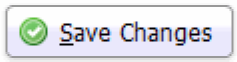
20. Choose a transaction type using the **Transaction Type** field

21. Set the **Connection Method** field to **Gateway Hosted** (the other method is for ePDQ MPI)

22. ePDQ defaults to a currency type of British Pound Sterling. If your account uses this currency, set the **Currency Code** field to **826**. If you wish to use another currency type, contact ePDQ for the correct

code.

23. Check the **Enabled** field

24. Click 

MPI (Merchant Payment Interface)

MPI uses Squirrelcart's "Server to Server" **connection method (Section 6.8.3.1)**.

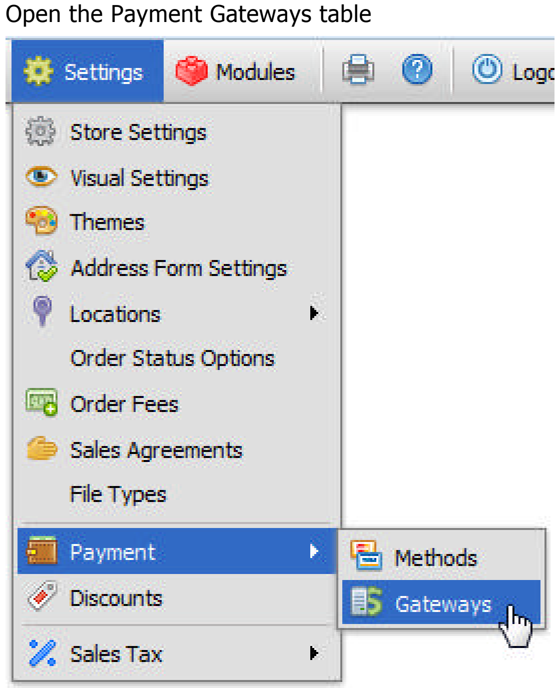
Requirements

- *CURL* or *fsockopen* support
- *SSL* certificate
- *Expat*
- ePDQ MPI User ID, Password, and Alias (this information is provided by Barclaycard)

Setup Instructions

1. Open Squirrelcart's control panel

2. Open the Payment Gateways table



3. Click on the record row labeled **ePDQ**

4. Enter your ePDQ MPI User ID in the **ID** field

5. Enter your ePDQ MPI Password in the **Password** field

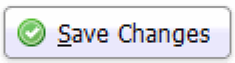
6. Enter your ePDQ MPI Alias in the **Alias** field

7. Choose your transaction type using the **Transaction Type** field

8. Set the **Connection Method** field to **Store Hosted / Server to Gateway**

9. ePDQ defaults to a currency type of British Pound Sterling. If your account uses this currency, set the **Currency Code** field to **826**. If you wish to use another currency type, contact ePDQ for the correct code.

10. Check the **Enabled** field

11. Click 

6.8.3.4.13 ePDQ (Direct Link, e-Commerce)

Overview

ePDQ is a payment gateway offered by Barclaycard, a bank in the UK. You can read more about ePDQ here:

http://www.barclaycard.co.uk/business/accepting-payments/e-commerce-services-for-sme/extraplus

Squirrelcart supports two different connection options offered by ePDQ:

Direct Link (API)
With this option, credit card information is collected on your website.

e-Commerce
With this option, credit card information is collected on the gateway's website.

Instructions for enabling each method can be found below.

ePDQ Direct Link

Direct Link uses Squirrelcart's "Store Hosted / Server to Gateway" **connection method (Section 6.8.3.1)**. Optionally, Squirrelcart supports their 3D secure feature, used to authenticate credit cards that have been enrolled in the 3D secure service.

Requirements

- *CURL* or *fsockopen* support
- *SSL* certificate
- TLS 1.0 support is required for the 3D Secure feature, as of this writing (5/15/2015). This protocol is

deprecated. TLS 1.0 support may not be needed in the future. Check with your web host to determine if your web server supports TLS 1.0.

- ePDQ user account, with Direct Link enabled.
  If you wish to use the 3D secure feature, "Direct Link 3D" must also be enabled on your account. Contact ePDQ support to have these features enabled.

3D secure process

With DirectLink, if you enable 3D secure and a credit card is entered that is NOT enrolled in 3D secure, the order will complete normally.

If a credit card is entered that is enrolled in 3D secure, the customer will be taken to a page where they can enter their verification code to confirm that they are the owner of the card. Upon successful verification, the customer is returned to the thank you page on your site and the order is completed. Note that the thank you page is actually requested by ePDQ's servers, and the HTML is presented to them while still being at the payment gateway URL.

3D secure is optional. The setup instructions for DirectLink below include additional steps for enabling 3D secure.

Setup Instructions

1. Enter Squirrelcart's control panel

2. Click **Tools > Diagnostics > CURL & OpenSSL**

3. Click the second link, under "To test a secure HTTPS (SSL) connection via curl...". This will perform a request back to our website to test CURL. Your server's IP address will be shown. Write it down.

4. Login to the ePDQ control panel: **https://payments.epdq.co.uk/ncol/PROD/admin_epdq.asp**

5. Click **Configuration > Technical Information**

6. Click **Data and Origin Verification**

7. Enter your server's IP address in the IP address field, under the **Checks for Barclaycard Direct Link and Barclaycard Batch (Automatic)** heading

8. In the same section, enter a 16 character unique string in the **SHA-IN pass phrase** field. You will need this value again, write it down or save it to a text file.

9. Click **SAVE**

10. Each credit card type you wish to accept must be enabled in your ePDQ control panel. Click **Configuration > Payment Methods** and use the links contained within. Contact ePDQ support if you need assistance with this.

    If you wish to enable 3D secure, you will need to enable it for each credit card payment method on this same page, as follows:

    a. Click the edit link for the payment method
    b. Select the **3D Secure Activation** tab
    c. Under **Activation** , choose the option to activate full 3D (3-D Secure, Secure Code, ...)
    d. Save changes

11. Click **Configuration > Users**

12. Click **NEW USER**

13. Enter a value for **UserID** (write it down or save it to a text file)

14. Enter a value for **User's name**

15. Enter a value for **E-mail address**

16. Check the **Special user for API (no access to admin.)** field.

17. Enter your password again in the **To confirm the modification, please enter your own password** field

18. Keep the default values for the remaining fields

19. Click **SAVE**

20. You will be prompted to enter your own password, and a new password for this new user. Write down the new password or save it to a text file.

21. If you wish to enable the **3D secure feature**:

    a. Click **Configuration > Technical Information**

    b. Click the **Transaction Feedback** tab

    c. Below the heading **e-Commerce,** you'll find a subheading of **HTTP redirection in the browser**. In that section, check both of these checkboxes:
    _ *I would like to receive transaction feedback parameters on the redirection URLs.*

    _ *I would like Barclaycard to display a short text to the customer on the secure payment page if a redirection to my website*
    is detected immediately after the payment process.

    d. Below those fields, you'll find a section labeled **Direct HTTP server-to-server request.** In that section, make the following changes:

    - Set **Timing of the request** to **Always online**

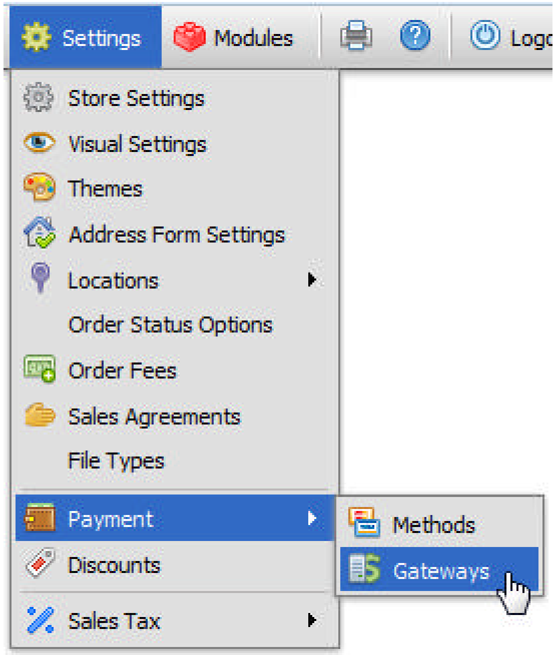
    - For both URL fields below that setting, enter the secure URL to your storefront page. Example: https://www.example.com/store.php

    - Set **Request method** to **POST**

    e. Below the heading **All transaction submission modes**, you'll find a section labeled **Security for request parameters.**
    Enter a unique value in the **SHA-OUT pass phrase** field. You will need to save this value for later use.

    f. Click the **SAVE** button

22. Open the Payment Gateways table



23. Click on the record row labeled **ePDQ (Direct Link, Barclays UK)**

24. Enter your ePDQ PSPID in the **PSPID** field. This is the same username you used to login for step #4 above.

25. Enter the user ID you created in the **User ID** field.

26. Enter the password for that account in the **Password** field.

27. Enter the **SHA-IN Passphrase** from step #8

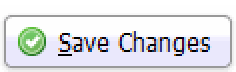
28. If you wish to use 3D secure, enter the **SHA-OUT Passhphrase** you configured earlier in the **SHA-Out Passphrase** field, and check the **3D Secure** checkbox.

29. Choose your transaction type using the **Transaction Type** field

30. Set the **Connection Method** field to **Store Hosted / Server to Gateway**

31. Set the **Currency Code** field.

32. Check the **Enabled** field

33. Click 

ePDQ e-Commerce

ePDQ e-Commerce uses Squirrelcart's "Gateway Hosted" **connection method** **(Section 6.8.3.1)**.

Requirements

- *SSL* certificate
- TLS 1.0 support is required. This protocol is deprecated. TLS 1.0 support may not be needed in the future. Check with your web host to determine if your web server supports TLS 1.0.
- ePDQ user account, with "e-Commerce" enabled.

Setup Instructions

1. Enter Squirrelcart's control panel

2. Login to the ePDQ control panel: **https://payments.epdq.co.uk/ncol/PROD/admin_epdq.asp**

3. Click **Configuration > Technical Information**

4. Click **Data and Origin Verification**

5. Locate the **Checks for e-Commerce** section of the form

6. Enter your secure storefront URL in the field labeled:
   URL of the merchant page containing the payment form that will call the page: orderstandard.asp

   Example: https://www.example.com/store.php

7. In the same section, enter a 16 character unique string in the **SHA-IN pass phrase** field. You will need this value again, write it down or save it to a text file.

8. Click **SAVE**

9. Each credit card type you wish to accept must be enabled in your ePDQ control panel. Click **Configuration > Payment Methods** and use the links contained within. Contact ePDQ support if you need assistance with this.

   If you wish to enable 3D secure, you will need to enable it for each credit card payment method on this same page, as follows:

   a. Click the edit link for the payment method
   b. Select the **3D Secure Activation** tab
   c. Under **Activation** , choose the option to activate full 3D (3-D Secure, Secure Code, ...)
   d. Save changes

10. Click **Configuration > Users**

11. Click **NEW USER**

12. Enter a value for **UserID** (write it down or save it to a text file)

13. Enter a value for **User's name**

14. Enter a value for **E-mail address**

15. Check the **Special user for API (no access to admin.)** field.

16. Enter your password again in the **To confirm the modification, please enter your own password** field

17. Keep the default values for the remaining fields

18. Click **SAVE**

19. You will be prompted to enter your own password, and a new password for this new user. Write down the new password or save it to a text file.

20. Click **Configuration > Technical Information**

21. Click the **Transaction Feedback** tab

22. Below the heading **e-Commerce,** you'll find a subheading of **HTTP redirection in the browser**. In that section, check both of these checkboxes:
    _ *I would like to receive transaction feedback parameters on the redirection URLs.*

    _ *I would like Barclaycard to display a short text to the customer on the secure payment page if a redirection to my website*
    is detected immediately after the payment process.

23. Below those fields, you'll find a section labeled **Direct HTTP server-to-server request.** In that section, make the following changes:

    - Set **Timing of the request** to **Always online**

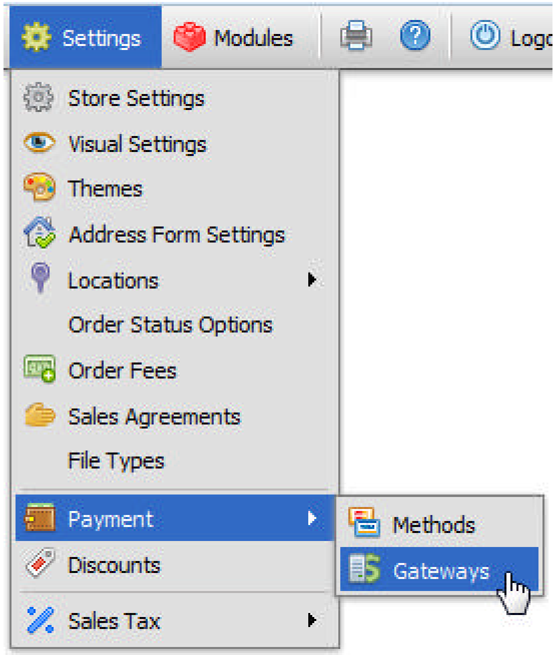
    - For both URL fields below that setting, enter the secure URL to your storefront page. Example: https://www.example.com/store.php

    - Set **Request method** to **POST**

24. Below the heading **All transaction submission modes**, you'll find a section labeled **Security for request parameters.**
    Enter a unique value in the **SHA-OUT pass phrase** field. You will need to save this value for later use.

25. Click the **SAVE** button

26. Open the Payment Gateways table



27. Click on the record row labeled **ePDQ (Direct Link, Barclays UK)**

28. Enter your ePDQ PSPID in the **PSPID** field. This is the same username you used to login for step #4 above.

29. Enter the user ID you created in the **User ID** field.

30. Enter the password for that account in the **Password** field.

31. Enter the **SHA-IN Passphrase** from step #8

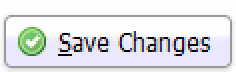
32. Enter the **SHA-OUT Passhphrase** you configured earlier in the **SHA-Out Passhprase** field.

33. Choose your transaction type using the **Transaction Type** field

34. Set the **Connection Method** field to **Gateway Hosted**

35. Set the **Currency Code** field.

36. Check the **Enabled** field

37. Click 

6.8.3.4.14 eProcessingNetwork

Overview

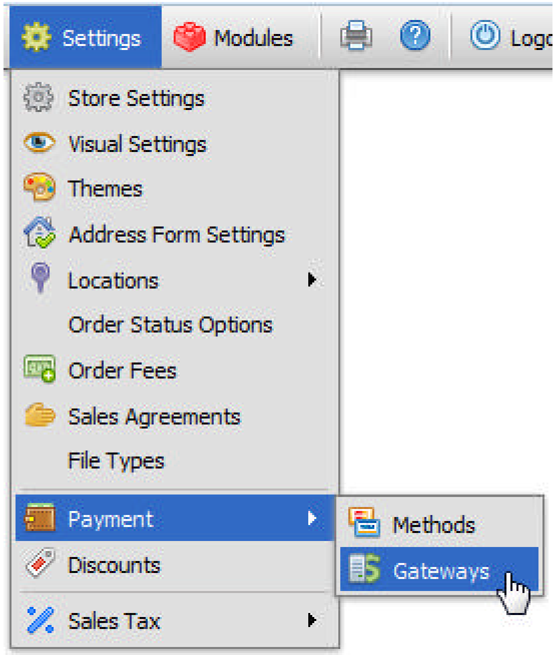
eProcessingNetwork is a US based payment gateway. You can find out more about it on their website: **http://www.eProcessingNetwork.com (http://www.eprocessingnetwork.com/)**

Requirements

eProcessingNetwork supports the **Store Hosted / Server to Gateway, Store Hosted / Browser to Gateway (Relay)**, and **Gateway Hosted** connection methodsoffered by Squirrelcart. Requirements vary based on the **connection method (Section 6.8.3.1)** you choose in Squirrelcart.

Setup Instructions

1. Determine which **connection method (Section 6.8.3.1)** you are going to use.
2. If you are using the **Gateway Hosted** connection method, skip to step #9 below.
3. Login to your eProcessingNetwork's Merchant Support Center. As of this writing, the URL is **https://www.eprocessingnetwork.com/MSCLogin.html**
4. Select **Processing Controls**
5. In the **Advanced** section, click on the checkbox "Check to use RestrictKey to Restrict TDBE/Authorize.NetTM Emulator Usage"
6. Click the **Generate RestrictKey Button** to generate a random restrict key
7. Write down the key carefully. It is case sensitive
8. Click the **Save** button
9. Open Squirrelcart's control panel
10. Open the Payment Gateways table



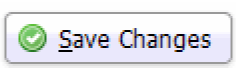
11. Click on the record row labeled **eProcessingNetwork**

12. Enter your eProcessingNetwork account in the **ePN Account** field

13. If you are not using the **Gateway Hosted** connection method, enter your RestrictKey in the **RestrictKey** field

14. Set the **Connection Method** field to the choice you made in step 1

15. Check the **Enabled** field

16. Click 

6.8.3.4.15 eSelect Plus (Canada) - Moneris

Overview

eSelect Plus is a Canadian based payment gateway offered by Moneris. You can get more information about eSelect Plus here: **https://www3.moneris.com/connect/en/index.html**

> ⚠ This documentation is for the Canada version of eSelect Plus. If you are a US merchant, see **the US version (Section 6.8.3.4.16)**.

Connection Methods

eSelect Plus offers 2 connection methods:

- DirectPost - this method corresponds to Squirrelcart's **Store Hosted / Server to Gateway** and **Store Hosted / Browser to Gateway (Relay) connection methods (Section 6.8.3.1)**
- Hosted Paypage - this method corresponds to Squirrelcart's **Gateway Hosted connection method (Section 6.8.3.1)**

Requirements

The requirements vary depending on the connection method, and match the default requirements listed on the **connection methods page (Section 6.8.3.1)**. You will need to visit this page and determine which connection method you wish to use.

Initial Setup

Before you can setup Squirrelcart to use eSelect Plus, you must configure settings in the eSelect Plus control panel. The procedures vary depending on whether you choose DirectPost or Hosted Paypage. Follow the steps below for the method you wish to use.

DirectPost Procedures

1. Login to eSelect Plus. As of this writing, the URL is:

   https://www3.moneris.com/connect/en/index.html

2. Click the **ADMIN** link in the left navigation

3. Click the **DIRECTPOST CONFIG** link in the left navigation

4. Click the **Generate a New Configuration** button

5. The top of the page will have a heading labeled **DirectPost Configuration**. Below this heading are 2 fields labeled **ps_store_id** (this is your eSelect Plus ID) and **hpp_key** (this is your eSelect Plus Token)**.** Write both of these down, paying careful attention to case.

6. In the section labeled **DirectPost Response Methods:**

   If you are using Squirrelcart's **Store Hosted / Server to Gateway** connection method, click the radio button for the option labeled **Displayed as key/value pairs on our server**.
   If you are using Squirrelcart's **Store Hosted / Browser to Gateway (Relay)** connection method:

   a. Click the radio button for the option labeled **Sent to your server as a POST.**

   b. For the **Approved URL** field, enter the secure URL for your *storefront* page, including the "https://" at the beginning.

   c. For the **Declined URL** field, enter the same URL you entered for **Approved URL**

7. If you are using Squirrelcart's **Store Hosted / Server to Gateway** connection method, scroll to the very bottom of the page. In the section labeled **Security**, click the **Configure** Security button. Check the checkbox before **Enable Transaction Verification**. This will add additional security to verify

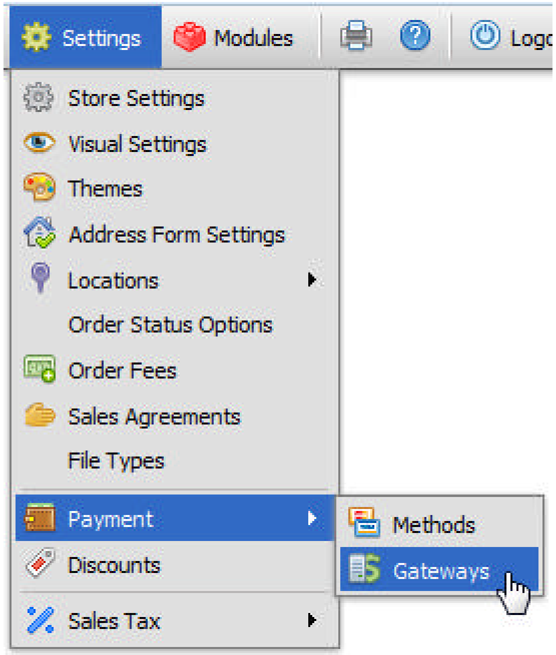
transaction data that is received from the gateway using an additional post back to the gateway. Enter your storefront page URL in the Response URL field and click the **Save Verification Settings** button.

Hosted Paypage Procedures

1. Login to eSelect Plus. As of this writing, the URL is: **https://www3.moneris.com/connect/en/index.html**
2. Click the **ADMIN** link in the left navigation
3. Click the **HOSTED PAGE CONFIG** link in the left navigation
4. Click the **Generate a New Configuration** button
5. The top of the page will have a heading labeled **Hosted Paypage Configuration**. Below this heading are 2 fields labeled **Hosted Paypage ID** and **Hosted Paypage Token.** Write both of these down, paying careful attention to case.
6. In the section labeled **Hosted Paypage Response Methods**, select the **Sent to your server as a POST** option for the **Response Method** field.
7. In the same section, for the **Approved URL** field, enter the full URL for your *storefront* page, including the "http://" at the beginning.
8. For the **Declined URL** field, enter the same URL you entered for **Approved URL**
9. Click the **Save Settings** button.

Squirrelcart Setup

1. Open the control panel in Squirrelcart
2. Open the Payment Gateways table



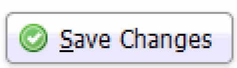
3. Click on the record labeled **eSelect Plus**

4. Enter the eSelect Plus ID you wrote down earlier in the **eSelect Plus ID** field

5. Enter the eSelect Plus Token you wrote down earlier in the **eSelect Plus Token** field

6. Choose your **connection method (Section 6.8.3.1)** using the **Connection Method** field

7. Check the **Enabled** field

8. Click 

Testing

eSelect Plus offers a development environment that can be used for testing. If you would like to setup Squirrelcart and eSelect Plus to use this test environment, follow the exact same procedures listed above, but use the development eSelect Plus control panel instead: **https://esqa.moneris.com/mpg/**

You will also need to check the **Test Mode** field on the eSelect Plus record in Squirrelcart's control panel.

> You can not use Test Mode with your regular eSelect Plus account. It is for use only with the eSelect Plus development environment.

6.8.3.4.16 eSelect Plus (USA) - Moneris

Overview

eSelect Plus is a US based payment gateway offered by Moneris. You can get more information about eSelect Plus here: **http://www.monerisusa.com/products/possolutions/eselectplusoverview**

⚠ This documentation is for the US version of eSelect Plus. If you are a Canadian merchant, see **the Canadian version (Section 6.8.3.4.15)**.

Connection Methods

eSelect Plus offers 2 connection methods:

- DirectPost - this method corresponds to Squirrelcart's **Store Hosted / Server to Gateway** and **Store Hosted / Browser to Gateway (Relay) connection methods (Section 6.8.3.1)**
- Hosted Paypage - this method corresponds to Squirrelcart's **Gateway Hosted connection method (Section 6.8.3.1)**

Requirements

The requirements vary depending on the connection method, and match the default requirements listed on the **connection methods page (Section 6.8.3.1)**. You will need to visit this page and determine which connection method you wish to use.

Initial Setup

Before you can setup Squirrelcart to use eSelect Plus, you must configure settings in the eSelect Plus control panel. The procedures vary depending on whether you choose DirectPost or Hosted Paypage. Follow the steps below for the method you wish to use.

DirectPost Procedures

1. Login to eSelect Plus. As of this writing, the URL is: **https://esplus.moneris.com/usmpg**

2. Click the **ADMIN** link in the left navigation

3. Click the **DIRECTPOST CONFIG** link in the left navigation

4. Click the **Generate a New Configuration** button

5. The top of the page will have a heading labeled **DirectPost Configuration**. Below this heading are 2 fields labeled **dp_id** (this is your eSelect Plus ID) and **dp_key** (this is your eSelect Plus Token)**.** Write both of these down, paying careful attention to case.

6. In the section labeled **Response Method:**

   If you are using Squirrelcart's **Store Hosted / Server to Gateway** connection method, click the radio button for the option labeled **Displayed as key/value pairs on our server**.

If you are using Squirrelcart's **Store Hosted / Browser to Gateway (Relay)** connection method:

a. Click the radio button for the option labeled **Sent to your server as a POST.**

b. For the **Response URL** field, enter the secure URL for your *storefront* page, including the "https://" at the beginning.

7. Click the **Save Changes** button

8. If you are using Squirrelcart's **Store Hosted / Server to Gateway** connection method, scroll to the very bottom of the page. In the section labeled **Security**, click the **Configure Security** button. Check the checkbox before **Enable Transaction Verification**. This will add additional security to verify transaction data that is received from the gateway using an additional post back to the gateway. Check the radio button before **Displayed as key/value paris on our server.** Enter your storefront page URL in the Response URL field and click the **Save Verification Settings** button.

Hosted Paypage Procedures

1. Login to eSelect Plus. As of this writing, the URL is: **https://www3.moneris.com/connect/en/index.html**

2. Click the **ADMIN** link in the left navigation

3. Click the **HOSTED CONFIG** link in the left navigation

4. Click the **Generate a New Configuration** button

5. The top of the page will have a heading labeled **Hosted Paypage Configuration**. Below this heading are 2 fields labeled **hpp_id** and **hpp_key.** Write both of these down, paying careful attention to case.

6. In the section labeled **Response Method**, select the **Sent to your server as a POST** option for the **Response Method** field.

7. In the same section, for the **Response URL** field, enter the full URL for your *storefront* page, including the "http://" at the beginning.

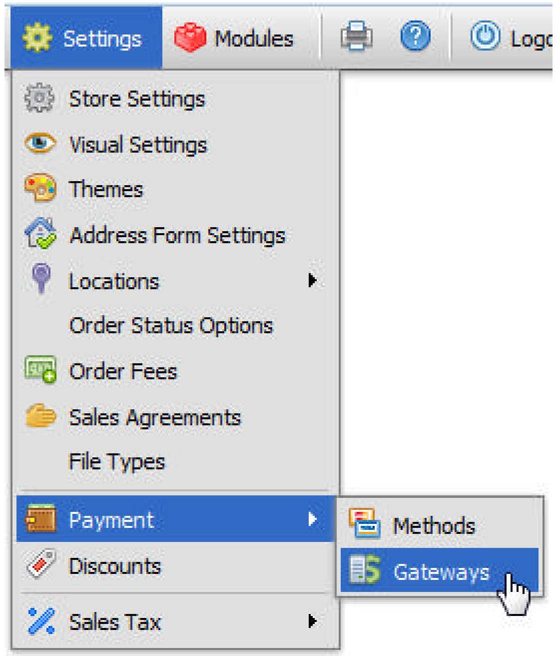
8. For the **Declined URL** field, enter the same URL you entered for **Approved URL**

9. Click the **Save Settings** button.

Squirrelcart Setup

1. Open the control panel in Squirrelcart

2. Open the Payment Gateways table



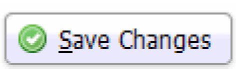
3. Click on the record labeled **eSelect Plus**

4. Enter the **id** (hpp_id OR dp_id) you wrote down earlier in the **ID** field

5. Enter the **key** (hpp_key OR dp_key) you wrote down earlier in the **Key** field

6. Choose your **connection method (Section 6.8.3.1)** using the **Connection Method** field

7. Check the **Enabled** field

8. Click 

Testing

eSelect Plus offers a development environment that can be used for testing. If you would like to setup Squirrelcart and eSelect Plus to use this test environment, follow the exact same procedures listed above, but use the development eSelect Plus control panel instead: **https://esplusqa.moneris.com/usmpg**

You will also need to check the **Test Mode** field on the eSelect Plus record in Squirrelcart's control panel.

> ⚠ You can not use Test Mode with your regular eSelect Plus account. It is for use only with the eSelect Plus development environment.

6.8.3.4.17 eWay - Australia

Overview

eWay is an Australian payment gateway. You can get more information about them here:
http://www.eway.com.au (http://www.eway.com.au/)
eWay defines 2 ways to connect to them. They are named XML and Shared. XML uses Squirrelcart's "Store Hosted / Server to Gateway" **connection method (Section 6.8.3.1)**, and "Shared" uses Squirrelcart's "Gateway Hosted" method. XML is the preferred of the 2 methods.

XML Method

Requirements

- *SSL* certificate
- *XML* support in PHP (*expat* extension)
- *CURL* OR *fsockopen* support
- *OpenSSL*

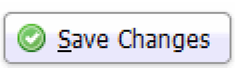
Setup Instructions for XML method

1. Open the payment gateway record labeled **eWay** in the control panel of Squirrelcart

2. Enter your eWay ID in the **eWay ID** field.

3. Set **Connection Method** to **Store Hosted / Server to Gateway**

4. Click **Enabled**

5. Click 

Shared Method

Requirements

No special requirements

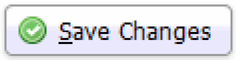
Setup Instructions for Shared method

1. Open the payment gateway record labeled **eWay** in the control panel of Squirrelcart

2. Enter your account name in the **eWay ID** field.

3. Set **Connection Method** to **Gateway Hosted**

4. Click **Enabled**

5. Click 

6.8.3.4.18 eWay - New Zealand

Overview

You can find more information about eWay NZ here: **http://www.eway.co.nz (http://www.eway.co.nz/)**

eWay NZ uses Squirrelcart's Gateway Hosted **connection method (Section 6.8.3.1)**.

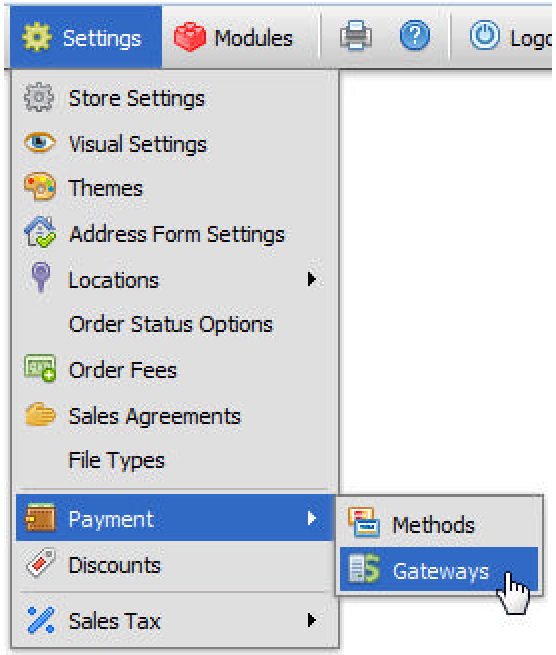
Requirements

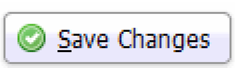
No special requirements

Setup Instructions

1. Open Squirrelcart's control panel

2. Open the Payment Gateways table



3. Click on the record row labeled **eWay - NZ**
4. Enter your **eWay Customer ID**
5. Enter your **eWay Customer User Name**
6. Set the **Connection Method** field to **Gateway Hosted**.
7. Choose your **Currency Code**
8. Click 

6.8.3.4.19 eWay - UK

Overview

You can find more information about eWay UK here: **http://www.eway.co.uk (http://www.eway.co.uk/)**

eWay UK uses Squirrelcart's Gateway Hosted **connection method (Section 6.8.3.1)**.

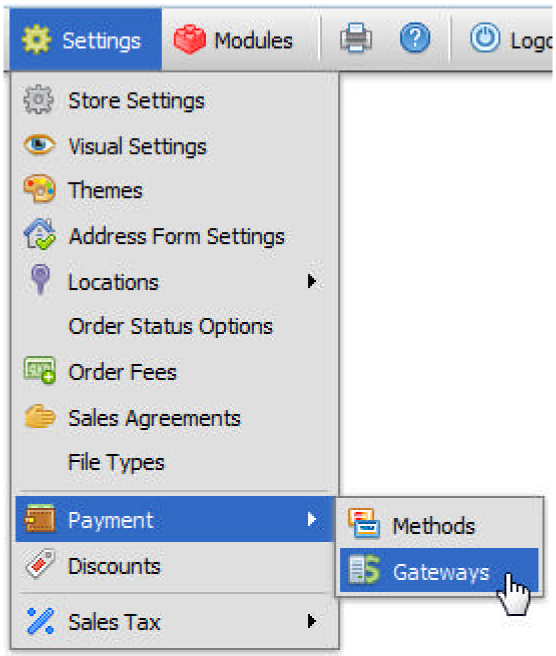
Requirements

No special requirements

Setup Instructions

1. Open Squirrelcart's control panel

2. Open the Payment Gateways table



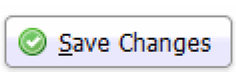
3. Click on the record row labeled **eWay - UK**

4. Enter your **eWay Customer ID**

5. Enter your **eWay Customer User Name**

6. Set the **Connection Method** field to **Gateway Hosted**.

7. Choose your **Currency Code**

8. Click 

6.8.3.4.20 Ezic

Overview

You can find more information about Ezic here: **http://www.ezic.com (http://www.ezic.com/)**

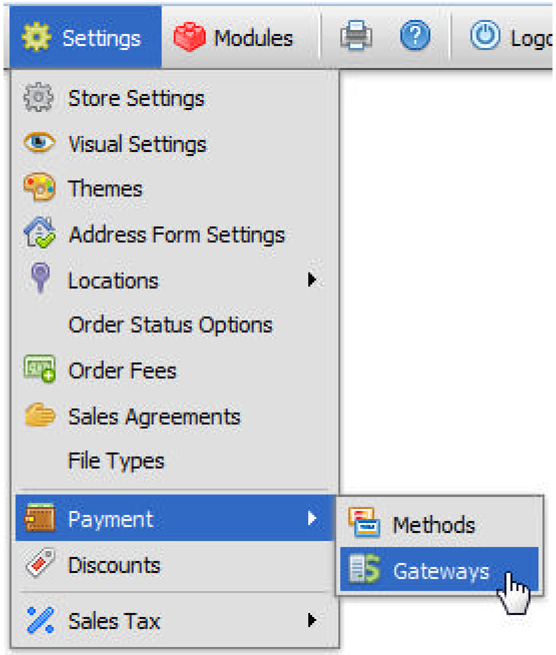
Requirements

Ezic has the standard requirements that vary based on the **connection method (Section 6.8.3.1)** you choose in Squirrelcart. They support the **Store Hosted / Server to Gateway, Store Hosted / Browser to Gateway (Relay)**, and **Gateway Hosted** connection methods offered by Squirrelcart.
Requirements vary based on the **connection method** **(Section 6.8.3.1)** you choose in Squirrelcart.

Decide which connection method you wish to use, and then follow the instructions below that correspond to that connection method.

Store Hosted / Server to Gateway Connection Method Instructions

1. Login to the merchant control panel at Ezic.com
2. Click **Security**
3. Click **Access Security**
4. Click the **Generate** button next to the **Dynamic IP Security Code** field
5. Copy the generated value to your clipboard or write it down.
6. Click **Apply**
7. Open Squirrelcart's control panel
8. Open the Payment Gateways table



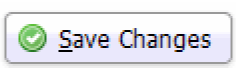
9. Click on the record row labeled **Ezic**

10. Enter your 12 digit Ezic Account ID in the **Account ID** field

11. Enter the Dynamic IP Security Code you obtained earlier in the **IP Security Code / Key** field

12. Choose your transaction type using the **Transaction Type** field

13. Set the **Connection Method** field to **Server to Server**

14. Click 

Gateway Hosted and Store Hosted / Browser to Gateway (Relay) Connection Methods Instructions

1. Login to the merchant control panel at Ezic.com

2. Click **Browse Sites**

3. Write down the value under the **Site tag** column for the site configuraion you wish to use. If one is not listed, enter a short Site tag, Site name, and URL and then click **Add site**

4. Click the **config** link next to the site you are using

5. Change **Return Method** field to **HTTP POST**

6. Enter the following in the **Postback CGI URL** field:

   - The secure URL to your cart page as in:
     `https://www.example.com/store.php`

   OR

   - If you do not have a secure URL, enter your regular cart page URL as in:
     `http://www.example.com/store.php`

7. Click **Apply**

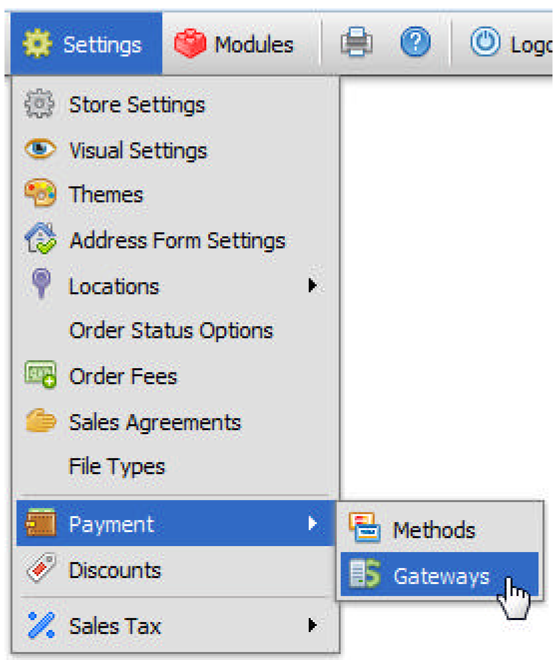
8. Click **Fraud Controls**

9. Click **Fraud Barricade**

10. In the row labeled **Step 11**, copy the value in the **Order Integrity Key** field to your clipboard or write it down.

11. Open Squirrelcart's control panel

12. Open the Payment Gateways table



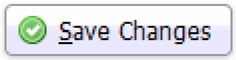
13. Click on the record row labeled **Ezic**

14. Enter your 12 digit Ezic Account ID , a colon, and your Site Tag in the **Account ID** field, in this format: 123456789012:SITETAG

15. Enter the **Order Integrity Key** in the **IP Security Code / Key** field

16. Choose your transaction type using the **Transaction Type** field

17. Set the **Connection Method** field to either **Gateway Hosted** or **Store Hosted / Browser to Gateway (Relay).**

18. Click 

6.8.3.4.21 FastCharge

You can find more information about FastCharge here: **http://www.fastcharge.com (http://www.fastcharge.com/)**

FastCharge uses the Online Commerce Suite payment gateway, provided by MerchantPartners.com. To setup FastCharge, follow the instructions for "**MerchantPartners (Section 6.8.3.4.29)**", in this section. When it instructs you to open the record in the control panel of Squirrelcart, open the record labeled "FastCharge".

6.8.3.4.22 First Data Global Gateway (formerly Linkpoint)

Overview

More information about First Data Global Gateway can be found **here (http://www.firstdata.com/product_solutions/ecommerce/global_gateway/index.htm)**. First Data Global Gateway offers 2 ways to connect to their gateway - API, and Connect. Squirrelcart supports both of these method, and allows you to accept credit cards and electronic checks (if enabled on your First Data Global Gateway account).

> Read this page in its entirety before attempting to setup First Data Global Gateway.
> First Data Global Gateway used to be known as LinkPoint and YourPay. Some of the screenshots below may still show that older branding.

API

Requirements

- *CURL*
- *OpenSSL*
- *SSL* certificate
- TCP Port 1129 must be open on your server. First Data Global Gateway API communicates on this port. If you are unsure as to whether or not this port is open, ask your web host.

Setup Instructions

1. Login to First Data Global Gateway central

2. Click **Support > Download Center**

3. Click **Download Now** under **Store CERT Files**

4. Enter your tax id in the Tax ID field

5. Click the **Download** link next to **For API** to download your PEM file

6. Upload the pem file to your web site. There are 3 places you can store this file. Choose one of the following locations:

    - **Above your web root folder** - This is the best place to put the PEM file, because this folder is not accessible via a web browser. For example, if your web pages are inside a folder as follows:

      ```
      /home/myacct/www/
      ```

      you can put the .PEM file here:

      ```
      home/myacct/123456.pem
      ```

    - **Inside the payment_gateways folder:**

      ```
      /home/myacct/squirrelcart/payment_gateways/123456.pem
      ```

    - **Custom path** - this can be any path on the server. If you choose to use a custom path, make sure you write it down as you will need it later.

7. Open the payment gateway record labeled **First Data Global Gateway** in the control panel of Squirrelcart

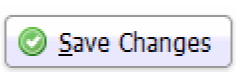
8. Enter your First Data Global Gateway storename in the **Store Number** field. This is usually a long number, and is the same number you enter when logging into their control panel.

9. If you chose a custom path for your pem file, enter that path in the **Certificate Path** field (excluding the filename and trailing slash):

    ```
    /home/myacct/somefolder
    ```

    > There is no need to enter anything in the Certificate Path field unless you used a custom path, as described in step 5.

10. Set **Connection Method (Section 6.8.3.1)** to **Store Hosted / Server to Gateway**

11. Click 

Connect

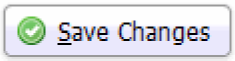
1. Open the payment gateway record labeled **First Data Global Gateway** in the control panel of Squirrelcart

2. Enter your First Data Global Gateway storename in the **Store Name** field

3. Leave the **Certificate Path** field blank

4. Set the Connection Method field to either **Gateway Hosted** or **Store Hosted / Browser to Gateway (Relay)**.

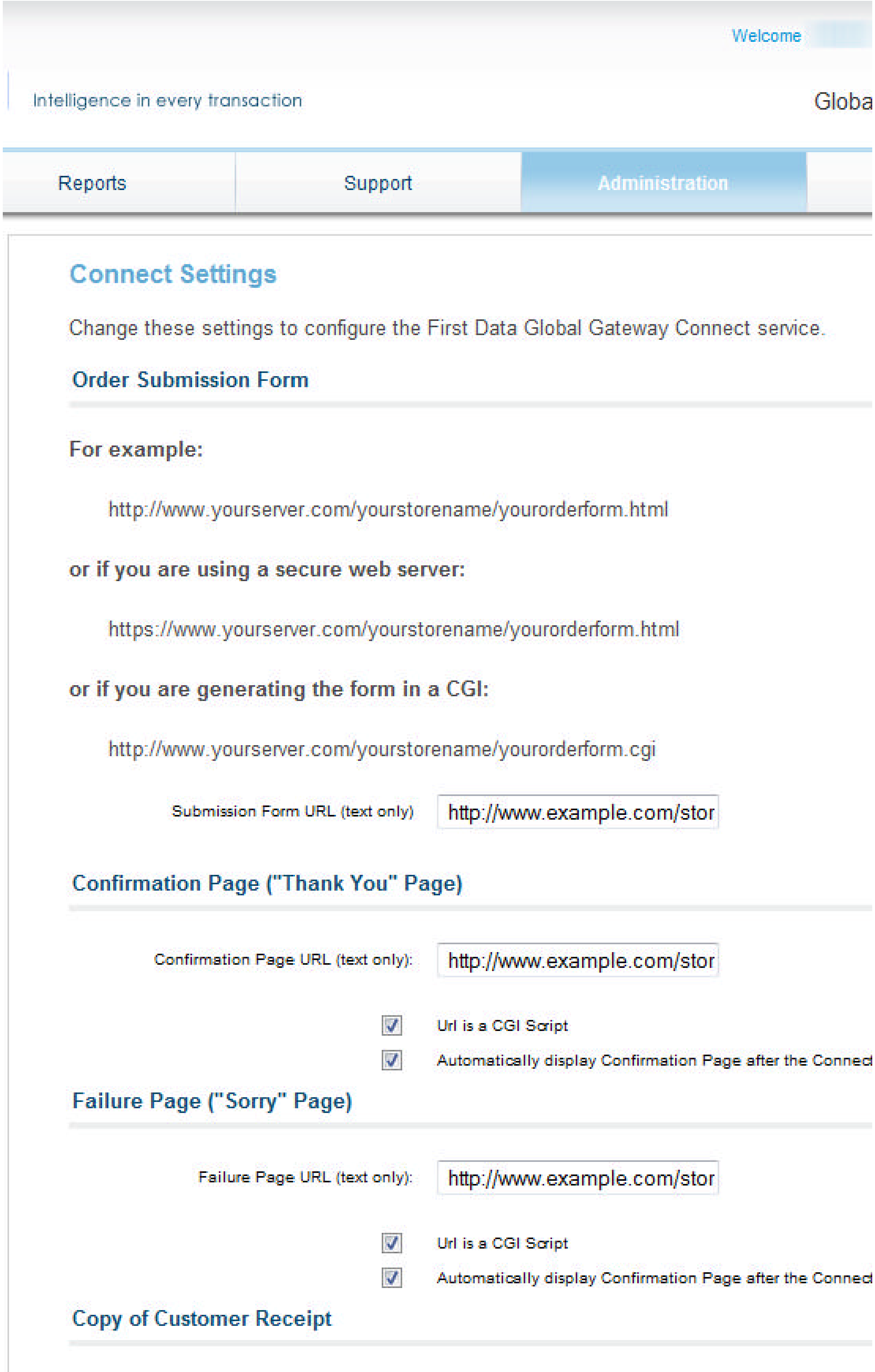
5. Check the **Enabled** field

6. Click 

7. Go to First Data Global Gateway central, and login. Information for this should have been sent to you from First Data Global Gateway.

8. Click **Customization** in the top menu

9. Mouseover the **Administration** menu link, and click the option labeled **Connect Settings**



Welcome
Intelligence in every transaction
Globa
Reports
Support
Administration
Connect Settings
Change these settings to configure the First Data Global Gateway Connect service.
Order Submission Form
For example:
http://www.yourserver.com/yourstorename/yourorderform.html
or if you are using a secure web server:
https://www.yourserver.com/yourstorename/yourorderform.html
or if you are generating the form in a CGI:
http://www.yourserver.com/yourstorename/yourorderform.cgi
Submission Form URL (text only)
http://www.example.com/stor
Confirmation Page ("Thank You" Page)
Confirmation Page URL (text only):
http://www.example.com/stor
Url is a CGI Script
Automatically display Confirmation Page after the Connect
Failure Page ("Sorry" Page)
Failure Page URL (text only):
http://www.example.com/stor
Url is a CGI Script
Automatically display Confirmation Page after the Connect
Copy of Customer Receipt

10. In the **Order Submission Form** section, enter the secure path to your cart page in the **Submission Form URL** field, with "?pm_redirect=1" immediately following it. For example:

    ```
    https://www.example.com/store.php?pm_redirect=1
    ```

    This is the same URL you see when you are checking out, and are entering your credit card information - followed by "?pm_redirect=1".

    > ⚠ If this URL does not match the exact URL that the customer is at when they submit the order to First Data Global Gateway followed by "?pm_redirect=1", you will get the error:
    > - It is not possible to order from the store at this time.
    > - Contact the merchant for further information (error 1002).

11. In the **Confirmation Page** section, enter the URL to your *storefront*. It should be the same URL you entered in step 10 but without "?pm_redirect=1" at the end.

    ```
    https://www.example.com/store.php
    ```

12. Check the box next to **URL is a CGI script**.

13. Check the box below **Auto Forwarding**, which reads **Automatically display Confirmation Page after the Connect receipt page**.

14. In the **Failure Page** section, enter the same URL:

    ```
    https://www.example.com/store.php
    ```

15. Check the box next to **URL is a CGI script**.

16. Check the box below **Auto Forwarding**, which reads **Automatically display Confirmation Page after the Connect receipt page**.

17. Click **Submit** at the bottom of the First Data Global Gateway Central page ww

6.8.3.4.23 Payeezy (formerly Global Gateway e4)

Overview

Payeezy was formerly known as First Data Global Gateway e4.
More information about Payeezy can be found **here (http://www.firstdata.com/ecommerce/)**.
Payeezy offers 2 ways to connect to their gateway - Web Service API, and Hosted Payment Page.
Squirrelcart supports both services.

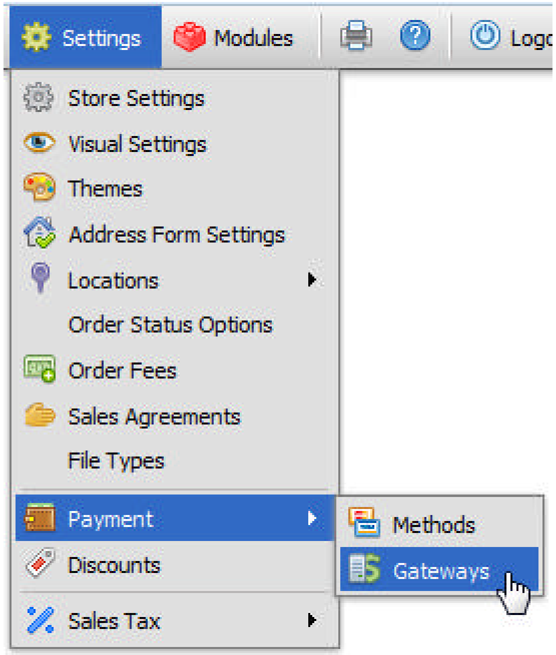
Enabling Payeezy (Web Service API)

Requirements

- *PHP* 5.1.2 or newer
- *CURL*
- *OpenSSL*
- *SSL* certificate

Setup Instructions

1. Login to the Payeezy control panel:
   https://globalgatewaye4.firstdata.com/?lang=en
2. Click the **Terminals** tab
3. Click on the terminal record to open it
4. On this page, you'll see a Gateway ID field. Copy this value and save it to a text file.
5. Change the **Type** field to **e-Commerce Transaction (CVV2)**
6. Enter a password in the **Password** field. Save this to a text file.
7. Click **Update**
8. Click **API Access**
9. Copy the value of **Key id** and save it to a text file.
10. Click **Generate New Key**, to the right of the **Hmac key** field.
11. A value will be generated in the **Hmace key** field. Save it to a text file.
12. Click **Update**
13. Open your Squirrelcart control panel
14. Click **Settings > Payment > Gateways**



15. Click on the row labeled **Payeezy** to open it in edit mode

16. Enter your Gateway ID (from step #4) in the **Exact ID (aka Gateway ID)** field.

17. Enter your password (from step #6) in the **Password** field.

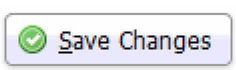
18. Enter your Key ID (from step #9) in the **Key ID** field.

19. Enter your HMAC Key (from step #11) in the **HMAC Key** field.

20. Choose your transaction type using the **Transaction Type** field (mouse over the field name for help).

21. Set **Connection Method (Section 6.8.3.1)** to **Store Hosted / Server to Gateway**

22. Check **Enabled**

23. Click 

To process level 3 credit cards, you will need to specify a **Commodity Code** and a **Unit of Measure** for each of your products. This can be done storewide using fields of the same name on the **All Products** category record. It can be set for individual categories and products using the same field on your category and product records.

For a list of commodity codes: **https://firstdata.zendesk.com/attachments/token/djgxolkycohpwho/?name=commodity_codes.pdf**

For a list of units of measure: **https://firstdata.zendesk.com/entries/23393247-Units-of-**

Measure

Enabling Payeezy (Hosted Payment Page)

Recommended

- *SSL* certificate - While it is not a requirement, we strongly recommend that you have an SSL certificate for your website when using GGe4 Hosted Payment Page. When the customer submits their payment information at the GGe4 website, they are redirected back to your store. If you do not have an SSL certificate, most browsers will issue a warning about being redriected to a page that is not secure. Having an SSL certificate will prevent this.

Setup Instructions

1. Login to the Payeezy control panel: **https://globalgatewaye4.firstdata.com/?lang=en**
2. Click **Payment Pages**
3. Click **Create a New Payment Page**
4. You should be on the **General** tab. Enter a value in **Payment Page Title**. You can use your company name, or whatever you like.
5. For **"Return to Your Site" URL**, enter the URL to your Squirrelcart storefront page.
6. Adjust the other fields according to your preference.
7. Click the **Payment Types** tab
8. Check **Make CVV2 Input Mandatory** under **CVV2 Options**
9. Click the **Receipt Page** tab
10. Under **Receipt Page Settings**, set **Return Link Method** to "Automatic linking to the receipt page including result parameters using HTTP POST method (AUTO-POST)"
11. enter your storefront URL in the **Receipt Link URL** field. If you have an SSL certificate, start the URL with "https://".
12. Under **Authorize.Net Protocol - Relay Response Settings**, check the box next to **Allow Relay Response**.
13. In the **Relay Response URL** field, if you have an SSL certificate installed enter the secure URL to

your storefront page as in:
`https://www.example.com/store.php`

If you do not have an SSL certificate, enter your regular storefront page URL as in:
`http://www.example.com/store.php`

Note: this setting requires approval by E4 support staff. You'll need to keep checking this setting until it indicates approval before this will work.

14. Click the **Security** tab

15. Under **HMAC Calculation** , set **Encryption Type** to **MD5**

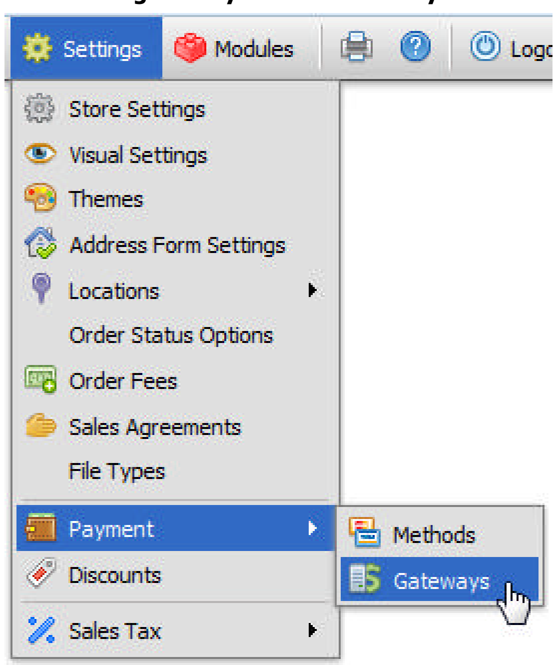
16. Copy the value from the **Transaction Key** field, and paste it into a text file for reference later.

17. Copy the value shown at the top of the page, after **"New Payment Page:"** . This is your Payment Page ID. Paste it into a text file for reference later.

18. Click the **Create** button

19. Open your Squirrelcart control panel

20. Click **Settings > Payment > Gateways**



21. Click on the row labeled **Payeezy** to open it in edit mode

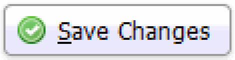
22. Enter your **Payment Page ID** in the **Exact ID (aka Gateway ID)** field.

23. Enter your **Transaction Key** in the **Key ID** field.

24. Set the **Connection Method** field to **Gateway Hosted**

25. Check the **Enabled** field

26. Make sure **Test Mode** is unchecked.

27. Click 

28. You may need to wait up to 1 business day for the setting entered in step #12 to be approved. To check for approval, review that setting on their website. When approved, a checkmark will appear to the right of the setting. Once this setting is approved, the gateway should be operational.

> **Test Mode**
>
> In order to use Test Mode, you must enter credentials corresponding to a test account. You cannot use Test Mode with a live production account.

6.8.3.4.24 GoEmerchant

Overview

For more information on GoEmerchant, visit **http://www.goemerchant.com (http://www.goemerchant.com/)**

Squirrelcart uses GoEmerchant's "XML Based API" connection method**.**

XML Based API (server to server)

Requirements

- *expat* PHP extension for *XML* parsing
- *CURL* or *fsockopen* support
- *OpenSSL*
- *SSL* certificate

Setup Instructions

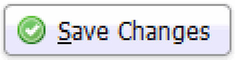
1. Open the payment gateway record labeled "**GoEmerchant**" in the control panel of Squirrelcart

2. Enter your Goemerchant account number in the **Account Number** field

3. Enter your account password in the **Account Password** field

4. Choose the *Transaction Type*

5. Set **Connection Method (Section 6.8.3.1)** to **Store Hosted / Server to Gateway**

6. Click 

Test account: 1264
Password: password

6.8.3.4.25 iDeposit.net

Overview

You can get more information about iDeposit.net here:

http://www.ideposit.net (http://www.ideposit.net/)

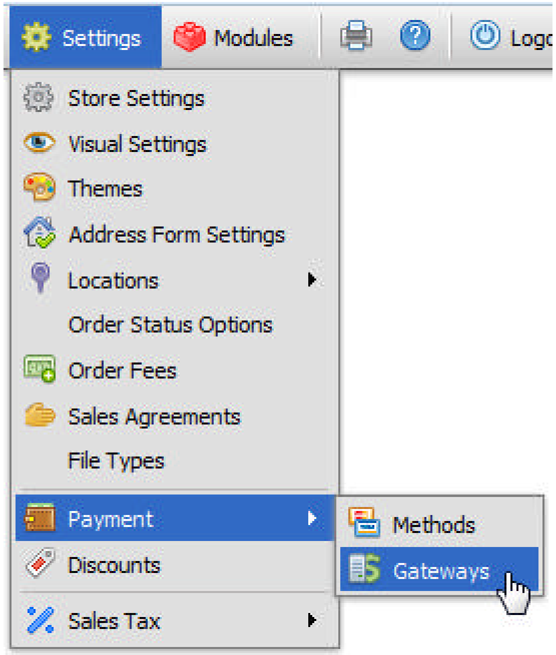
Requirements

iDeposit.net uses Squirrelcart's Store Hosted / Server to Gateway **connection method (Section 6.8.3.1)**, which requires the following:

- *SSL* certificate
- *CURL* or *fsockopen* support
- *OpenSSL*

Setup Instructions

1. Login to Squirrelcart's control panel, and click the Payment Gateways menu link:



2. Click on the row for the record labeled **iDeposit.net**

3. Enter your merchant user name in the **Merchant Username** field

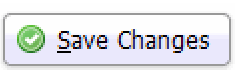
4. Enter your merchant password in the **Merchant Password** field

5. Choose your transaction type using the **Transaction Type** field.

6. Make sure the **Connection Method** field is set to **Store Hosted / Server to Gateway**

7. Check the **Enabled** field

8. If you wish to use iDeposit.net's test account, check the **Test Mode** field. Uncheck this for production use.

9. Click 

Testing

To test communication with iDeposit.net, check the **Test Mode** field on the payment gateway record for iDeposit.net. When you do this, it will cause Squirrelcart to use the iDeposit.net test account username "vitale" and password "test". When in test mode, choose Visa for your payment method, with a card number of 4111111111111111, and a CVV code of 999. You should get an approval when using this info and a grand total between $1 and $100.

6.8.3.4.26 Intuit QuickBooks Payments (QBMS)

Overview

Information about Intuit QuickBooks Payments can be found here:
http://payments.intuit.com/ecommerce-payment-processing

Squirrelcart supports accepting payments via credit card through Intuit QuickBooks Payments. They offer two methods of connecting to their gateway, QBMS SDK and Hosted PayPage.

Squirrelcart implements QBMS SDK when you set "**Connection Method** **(Section 6.8.3.1)**" to "Store Hosted / Server to Gateway", and Hosted PayPage when you set it to "Gateway Hosted".

QBMS SDK

Requirements

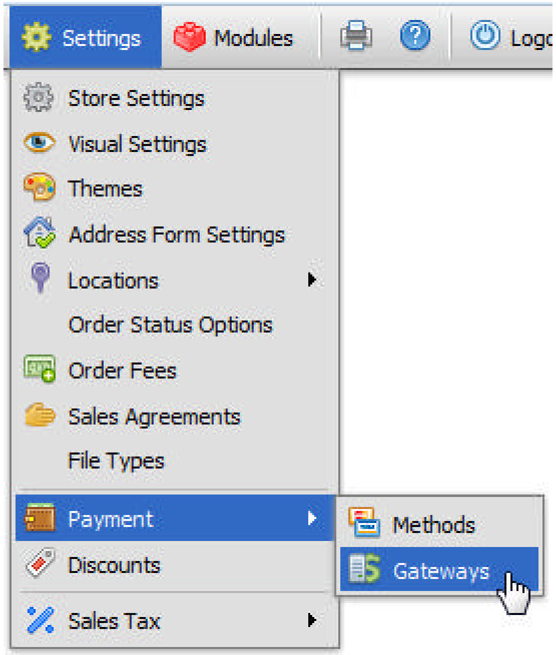
- *CURL* OR *fsockopen* support
- *OpenSSL*
- *SSL* Certificate
- Intuit QuickBooks Merchant account, with access to their QBMS SDK

Setup Instructions

1. Go here: **https://merchantaccount.quickbooks.com/j/sdkconnection?appid=1143224660&sessionEnabled=false**

2. You will be prompted to login to your Intuit merchant account. After logging in, they will provide you with a "connection ticket". Copy it to your clipboard.

3. In your Squirrelcart control panel, click **Settings > Payment > Gateways**



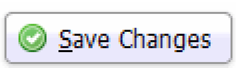
4. Click anywhere on the record row named **Intuit QuickBooks Payments (QBMS)**

5. Paste the connection ticket into the **Connection Ticket** field

6. Set **Connection Method** to **Store Hosted / Server to Gateway**

7. Set the **Transaction Type** field (mouseover the field name for more info)

8. Check the **Enabled** field

9. Click 

Test Environment

If you wish to test QBMS SDK in their test environment, you will need:

1. Signup for a test Intuit merchant account: **https://merchant.ptcfe.intuit.com/signup/?emulated=true&nonQBmerchant=true**

2. Follow the steps listed in the setup instructions section above, using your test merchant account instead of your live one. When creating a connection ticket, use this URL instead: **https://merchantaccount.ptc.quickbooks.com/j/sdkconnection?appid=1052941681&sessionEnabled=false**

3. Check the **Test Mode** checkbox on the **Intuit QuickBooks Payments (QBMS)** payment gateway record in Squirrelcart to switch to the test environment

4. When testing the checkout process, use Visa #4111111111111111 and any expiration date in the future.

5. When you are done testing, you'll need to change the **Connection Ticket** field on the settings record in Squirrelcart to use a connection ticket that was obtained from the production environment. You will also need to uncheck the **Test Mode** field.

Hosted PayPage

Requirements

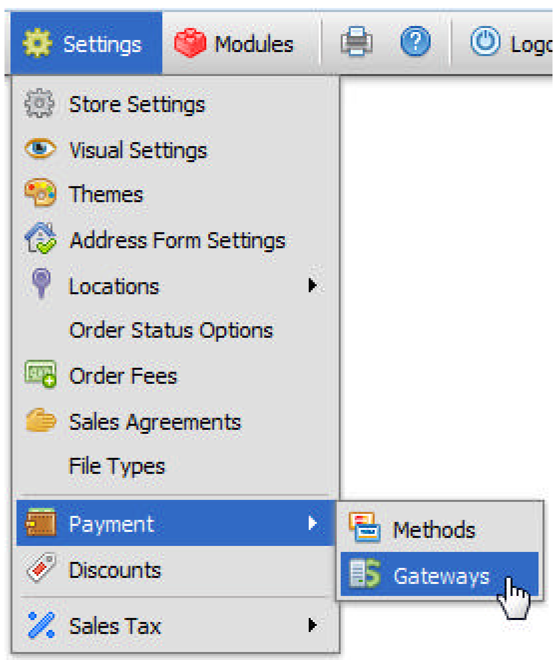
- *CURL* OR *fsockopen* support
- *OpenSSL*
- Intuit QuickBooks Merchant account, with access to their Hosted PayPage service

Setup instructions

1. Go here: **https://merchantaccount.quickbooks.com/j/sdkconnection?appid=1052941681&sessionEnabled=false**

2. You will be prompted to login to your Intuit merchant account. After logging in, they will provide you with a "connection ticket". Copy it to your clipboard.

3. In your Squirrelcart control panel, click **Settings > Payment > Gateways**



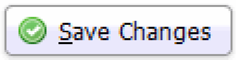
4. Click anywhere on the record row named **Intuit QuickBooks Payments (QBMS)**

5. Paste the connection ticket into the **Connection Ticket** field

6. Set **Connection Method** to **Gateway Hosted**

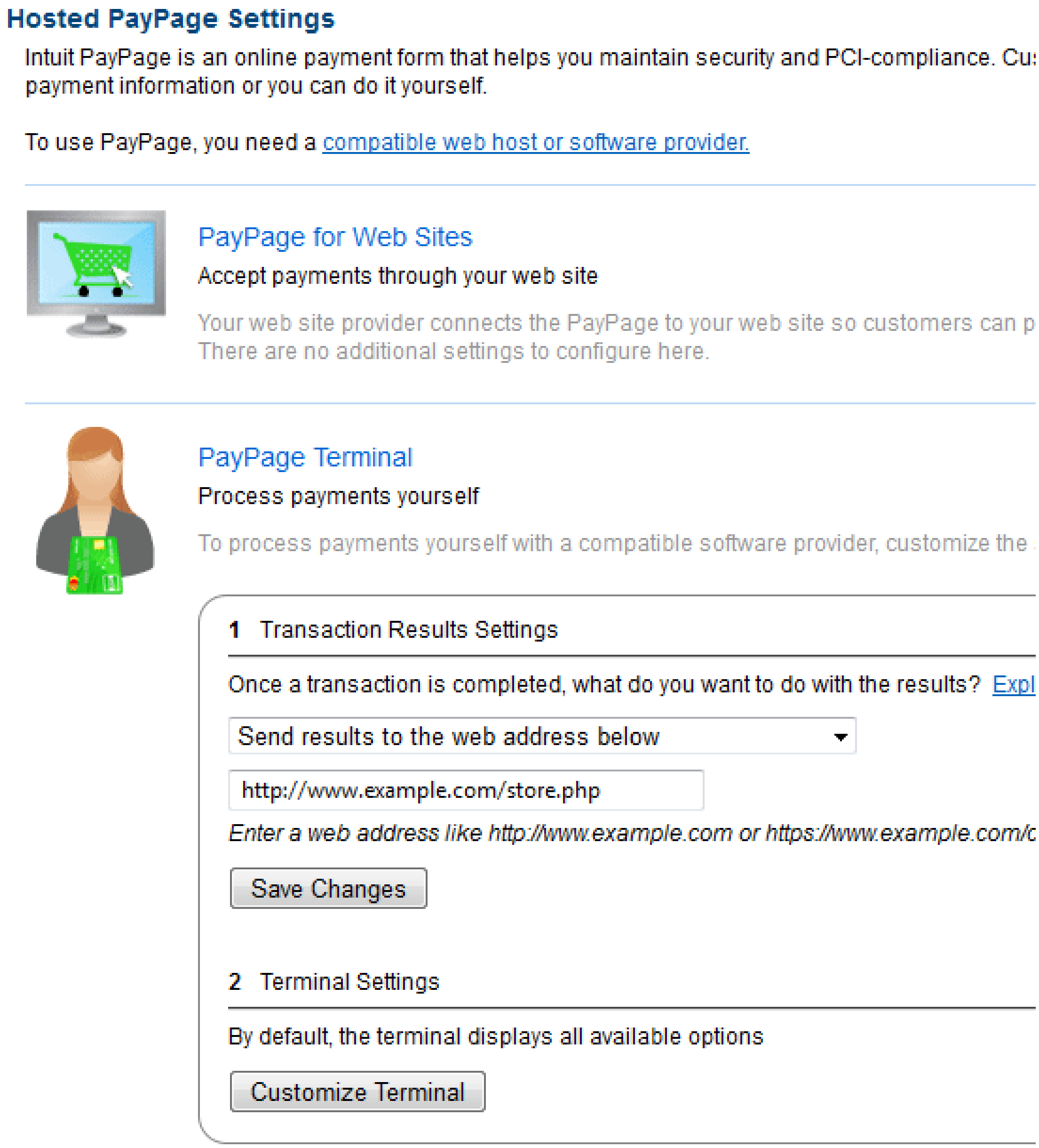
7. Set the **Transaction Type** field (mouseover the field name for more info)

8. Check the **Enabled** field

9. Click 

10. Go here to configure your Hosted PayPage settings on Intuit's website:
https://merchantcenter.ptcfe.intuit.com/portal/authsec/portal/qbms/Manage+merchant+

11. In the **PayPage Terminal** section, set the drop down field to **Send results to the web address below**.
Enter the full URL to your storefront page in the field directly below the drop down. If you have an SSL certificate, use "https://" to start the URL. See the below screenshot for an example:



12. Click **Save Changes**

Test Environment

If you wish to test Hosted PayPage in their test environment, you will need:

1. Signup for a test Intuit merchant account: **https://merchant.ptcfe.intuit.com/signup/?emulated=true&nonQBmerchant=true**

2. Follow the steps listed in the setup instructions section above, using your test merchant account instead of your live one. When creating a connection ticket, use this URL instead:

https://merchantaccount.ptc.quickbooks.com/j/sdkconnection?appid=1052941681&sessionEnabled=false

3. Check the **Test Mode** checkbox on the **Intuit QuickBooks Payments (QBMS)** payment gateway record in Squirrelcart to switch to the test environment

4. When testing the checkout process, use Visa #4111111111111111 and any expiration date in the future.

5. When you are done testing, you'll need to change the **Connection Ticket** field on the settings record in Squirrelcart to use a connection ticket that was obtained from the production environment. You will also need to uncheck the **Test Mode** field.

6.8.3.4.27 iTransact

Overview

More information on iTransact can be found here: **http://itransact.com. (http://itransact.com./)**

iTransact defines 2 connection methods - XML, and HTML.

The XML method uses Squirrelcart's "Store Hosted / Server to Gateway" **connection method (Section 6.8.3.1)**. The HTML method uses Squirrelcart's Gateway Hosted and Store Hosted / Browser to Gateway (Relay) **connection methods (Section 6.8.3.1)**.

XML Method

Requirements

- *CURL* or *fsockopen* support
- *OpenSSL*
- *SSL* Certificate
- *XML* support (*expat* PHP extension)
- *IP Address* of your webserver

Setup Instructions

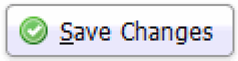
1. Open the payment gateway record labeled **iTransact** in the control panel of Squirrelcart

2. Enter your iTransact **Gateway ID** in the **Gateway ID**

3. Enter your iTransact password in the **Password** field.

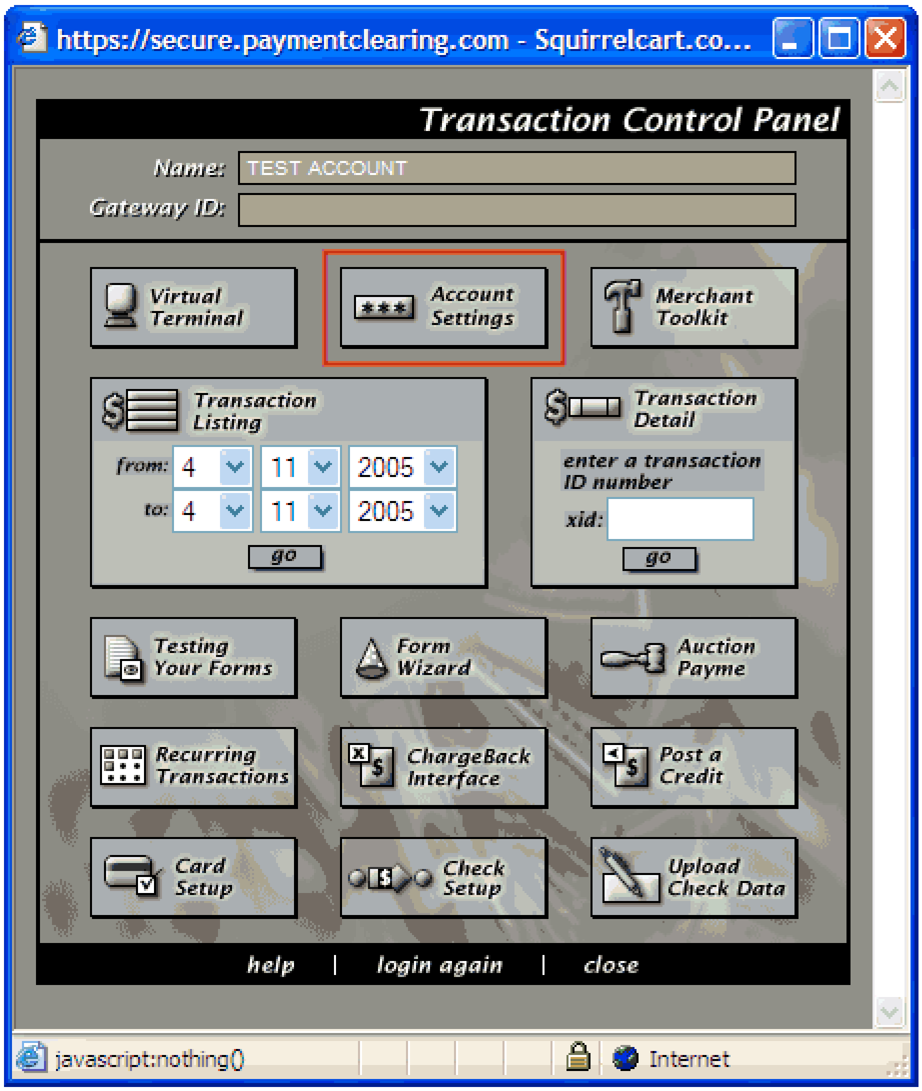
4. Check the **Enabled** check box.

5. Set **Connection Method** to **Store Hosted / Server to Gateway**

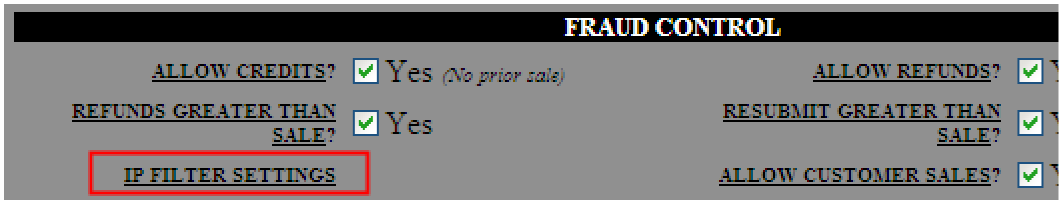
6. Click 

7. Login to your control panel at iTransact

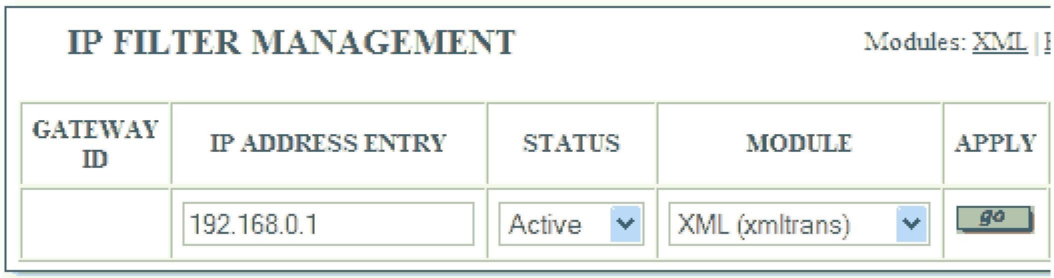
8. Click **Account Settings**



9. A new window will open. In the **Fraud Control** section, click **IP FILTER SETTINGS**



10. A page titled **IP FILTER MANAGEMENT** should open. Click **XML** in the top right after the text **Modules:**



11. In the **IP ADDRESS ENTRY** column, enter the IP address of your web server. If you are not sure what it is, you will need to ask your web host.

12. In the **STATUS** column, make sure it reads **Active**

13. In the **MODULE** column, set the field to **XML (xmltrans)**

14. In the **APPLY** column, click **go**

HTML Method

Requirements

No special requirements. If you have an SSL certificate, you can collect the payment information on your site, otherwise it is collected on iTransact's website.

Setup Instructions

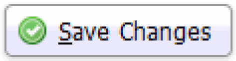
1. Open the payment gateway record labeled **iTransact** in the control panel of Squirrelcart

2. Enter your **Gateway ID** in the **Account Name** field

⚠ Do not enter your password. It is not needed for this method.

3. Set the **Connection Method** field to one of the **Gateway Hosted** or **Store Hosted / Browser to Gateway (Relay)** methods.

4. Check the **Enabled** field

5. Click 

6.8.3.4.28 Merchant Accounts.ca

Merchant Accounts.ca is a Canadian based payment gateway. More information about it can be found here: **http://www.merchant-accounts.ca/**

Merchant Accounts.ca uses Worldpay as the underlying gateway. To setup WorldPay, follow the instructions for **WorldPay (Section 6.8.3.4.62)** in this section.

6.8.3.4.29 MerchantPartners

Overview

You can get more information about Merchant Partners on their website: **http://www.MerchantPartners.com (http://www.merchantpartners.com/)**. The name of the gateway product they provide is **Online Commerce Suite**.

Squirrelcart supports accepting payments via credit card and electronic check using the Online Commerce Suite gateway.

Requirements

Squirrelcart supports connecting to Online Commerce Suite using the **Store Hosted / Server to Gateway, Store Hosted / Browser to Gateway (Relay)**, and **Gateway Hosted** connection methods. Requirements vary based on the **connection method (Section 6.8.3.1)** you choose in Squirrelcart.

Setup Instructions

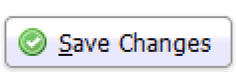
Open the payment gateway record in the control panel of Squirrelcart that corresponds to the gateway you signed up with.

1. Enter your account name in the **Account Name** field

2. Set your *Transaction Type*

3. Decide how you want to connect to the gateway, and set the **Connection Method (Section 6.8.3.1)** field accordingly.

4. Check the **Enable**d field

5. Click 

Testing

1. Place a test transaction, using Visa card #

    ```
    4111111111111111
    ```

2. If communication is working, you should get a **Payment Declined** message using the credit card number above.

3. Place a test transaction, using MasterCard #

    ```
    5454545454545454
    ```

    If everything is OK, you will get an approval message.

> You can test communications for all 3 connection methods using the account name **TEST0**

6.8.3.4.30 NAB Transact

Overview

NAB Transact is an Australian based payment gateway. Information about NAB Transact can be found here: **http://www.nab.com.au/wps/wcm/connect/nab/nab/home/Business_Solutions/1/3/12/**

Squirrelcart supports accepting single (non recurring) payments via credit card through NAB Transact.

NAB Transact offers three methods of connecting to their gateway, **Hosted Payment Page**, **XML API**, and **Direct Post**. Squirrelcart supports the Hosted Payment Page and XML API methods, and does not support Direct Post.

We implement the Hosted Payment Page method when you set "**Connection Method (Section 6.8.3.1)**" to "Gateway Hosted". We implement the XML API method when you set "**Connection Method (Section 6.8.3.1)**" to "Store Hosted / Server to Gateway".

> If you meet the requirements for XML API, it is the best method to use.

XML API

XML API Requirements

- *CURL* OR *fsockopen* support
- *OpenSSL*
- *SSL* Certificate
- NAB Transact *Merchant ID*
- NAB Transact *Transaction Password*

XML API Setup Instructions

1. Open your Squirrelcart control panel
2. Click **Settings > Payment > Gateways**
3. Open the record labeled **NAB Transact**
4. Enter your Merchant ID in the **Merchant ID** field
5. Enter your Transaction Password in the **Transaction Password** field
6. Set the **Connection Method** field to **Store Hosted / Server to Gateway**
7. Leave the **GST Rate** field blank
8. Choose your *Transaction Type*
9. Check the **Test Mode** field
10. Check the **Enabled** field
11. Click Save Changes
12. Follow the testing procedures found in the **Testing** section further down on this page.
13. When done testing, follow the steps found in the **Going Live** section further down on this page.

Hosted Payment Page

Hosted Payment Page Requirements

No special requirements

Hosted Payment Page Setup Instructions

1. Open your Squirrelcart control panel
2. Click **Settings > Payment > Gateways**
3. Open the record labeled **NAB Transact**

4. Enter your Merchant ID in the **Merchant ID** field

5. Leave the **Transaction Password** field blank

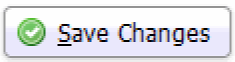
6. If your prices already include GST, enter the rate in the **GST Rate** field. For example, if your prices include 10% GST, enter **10** in the GST Rate field. Do not enter a percentage symbol.

7. Ignore the **Transaction Type** field. It does nothing when using the Hosted Payment Page connection method.

8. Set the **Connection Method** field to **Gateway Hosted**

9. Check the **Test Mode** field

10. Check the **Enabled** field

11. Click 

12. Follow the testing procedures found in the **Testing** section further down on this page.

13. When done testing, follow the steps found in the **Going Live** section further down on this page.

Testing

Add one or more items to your cart, and walk through the checkout process. When prompted for a card number, use Visa #4111111111111111 with any current expiration date. Order totals ending in .00, .08, .11, and .16 will trigger an approval response. All other amounts will trigger a decline.

Going Live

After testing, to go live:

1. NAB Transact requires you have the following policies somewhere on your website. If you do not have them, add them:
   - privacy policy
   - refund policy
   - shipping policy
   - security policy

   > You can use Squirrelcart to **create these policy pages (Section 9.3.13)**.

2. NAB Transact requires that your prices be shown with a currency suffix of AUD. This can be added on

the **Visual Settings page (Section 6.2)** in the control panel, using the Currency Prefix field.

3. Adjust any settings as you see fit in your NAB Transact control panel

4. Contact NAB Transact support to request that your account be given production access. After they approve you, continue below.

5. Open your Squirrelcart control panel

6. Click **Settings > Payment > Gateways**

7. Open the record labeled **NAB Transact**

8. Uncheck the **Test Mode** field

6.8.3.4.31 Netbilling

Overview

You can find more information about Netbilling here: **http://www.Netbilling.com (http://www.netbilling.com/)**

Requirements

Netbilling has the standard requirements that vary based on the **connection method (Section 6.8.3.1)** you choose in Squirrelcart. Decide which connection method you wish to use, and then follow the instructions below that correspond to that connection method.

Store Hosted / Server to Gateway Connection Method Instructions

1. Visit this URL in your browser (changing "www.example.com" to the domain name of your site):

   `http://www.example.com/squirrelcart/diag_curl.php`

2. Click the second link on the page

3. When the page loads, you should see a **Connection Successful** message indicating CURL and OpenSSL are working. If they are not, stop here and contact your web host.

4. On this page, you should see a message like "Your server's IP address is **10.4.89.123**". Write down this number.

5. Login to the merchant control panel at Netbilling.com

6. Click **Setup**

7. Click **Access Security**

8. Under **Direct Mode Interfaces**, check **Enable Native Direct Mode v.3 (SAS) Channel**

9. In the same section, you will find a field with this above it: "Specify Trusted Static IP Addresses[1,2] allowed to originate Direct Mode transactions:". Enter the IP address you wrote down from step #3 into this field.

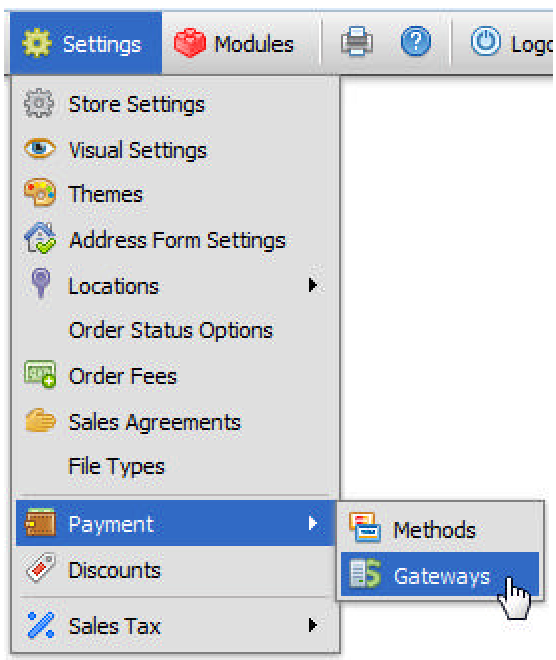
10. Click **Apply**

11. Click the **Site Tags** link under the **Site Tools** heading

12. Write down the value under the **Site tag** column for the site configuration you wish to use. If one is not listed, enter a short Site tag, Site name, and URL and then click **Add site**

13. Open Squirrelcart's control panel

14. Open the Payment Gateways table



15. Click on the record row labeled **Netbilling**

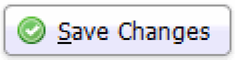
16. Enter your 12 digit Netbilling Account ID in the **Account ID** field

17. Leave the **Key** field blank

18. Enter your site tag in the **Site Tag** field

19. Choose your transaction type using the **Transaction Type** field

20. Set the **Connection Method** field to **Store Hosted / Server to Gateway**

21. Click 

Gateway Hosted and Store Hosted / Browser to Gateway (Relay) Connection Methods Instructions

1. Login to the merchant control panel at Netbilling.com

2. Click **Setup** on the left side of the page

3. Click the **Site Tags** link under the **Site Tools** heading

4. Write down the value under the **Site tag** column for the site configuration you wish to use. If one is not listed, enter a short Site tag, Site name, and URL and then click **Add site**

5. Click the **config** link next to the site you are using

6. Change **Return Method** field to **HTTP POST**

7. Enter the following in the **Postback CGI URL** field:

   - The secure URL to your cart page as in:
     `https://www.example.com/store.php`

   OR

   - If you do not have a secure URL, enter your regular cart page URL as in:
     `http://www.example.com/store.php`

8. Click **Apply**

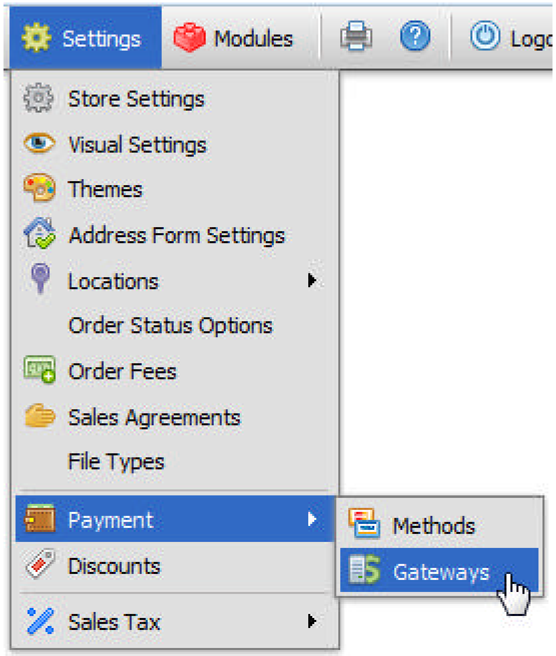
9. Click **Fraud Controls** on the left side of the page

10. Click **Fraud Defense**

11. In the row labeled **Step 12** (as of this writing), copy the value in the **Order Integrity Key** field to your clipboard or write it down.

12. Open Squirrelcart's control panel

13. Open the Payment Gateways table



14. Click on the record row labeled **Netbilling**

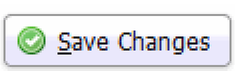
15. Enter your 12 digit Netbilling Account ID in the **Account ID** field

16. Enter the **Order Integrity Key** in the **Key** field

17. Enter your site tag in the **Site Tag** field

18. Choose your transaction type using the **Transaction Type** field

19. Set the **Connection Method** field to either **Gateway Hosted** or **Store Hosted / Browser to Gateway (Relay)**.

20. Click 

6.8.3.4.32 Netcash

Overview

Netcash is a South African based payment gateway. You can learn more about it here: **http://www.netcash.co.za (http://www.netcash.co.za/)**

Requirements

No special requirements

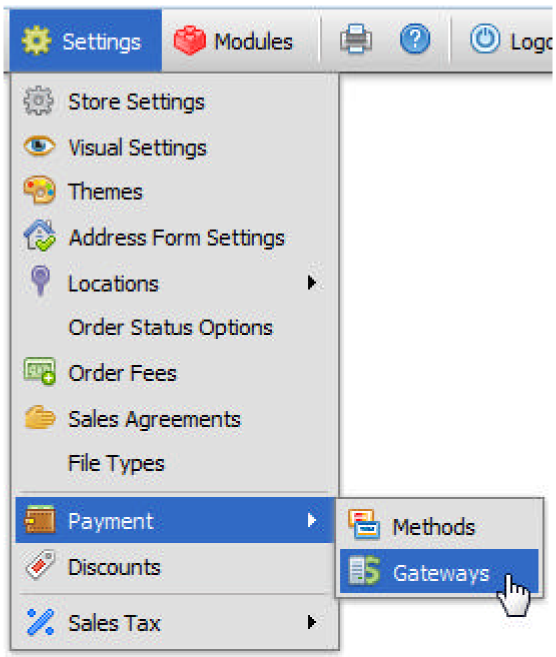
Setup Instructions

1. Contact Netcash support to obtain the following information:

   Electronic Username
   Electronic Password
   Electronic PIN
   Terminal Number

   These credentials are NOT the same as the credentials used to login to the Netcash website

2. Open the Payment Gateways table in Squirrelcart's control panel

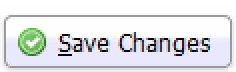


3. Click the record row labled **Netcash**

4. Enter the information you obtained in step 1 into the corresponding fields

5. Set **Connection Method** to **Gateway Hosted**

6. Check the **Enabled** field

7. Click 

8. Go to Netcash's website: **http://www.netcash.co.za (http://www.netcash.co.za/)**

9. Login using your Netcash account

10. Click the link labeled **credit cards**

11. Click the **Adjust Gateway Defaults** link

12. Enter your storefront URL in the **Accept URL** and **Reject URL** fields.
    Example: **http://www.example.com/store.php**

13. Save changes

6.8.3.4.33 Optimal Payments

Overview

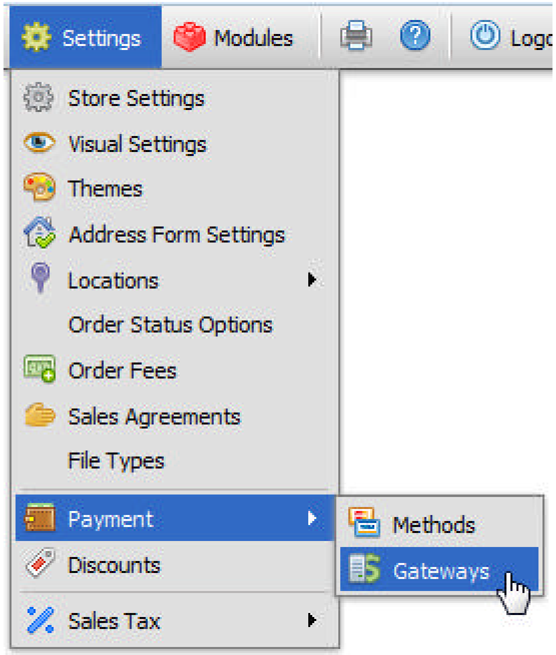
Orbital Payments is a payment gateway that provides services to merchants in the US, UK, and Canada. You can learn more about Optimal Payments here: **http://www.optimalpayments.com (http://www.optimalpayments.com/)**

Requirements

- *CURL* OR *fsockopen* support
- *OpenSSL*
- *SSL* Certificate

Setup Instructions

1. Open the Payment Gateways table in Squirrelcart's control panel



2. Click the record row labled **Optimal Payments**

3. Enter your **Merchant Account Number** in the **Merchant Account Number** field. This should be a 10 digit number.

4. Enter your **Merchant Password** in the **Merchant Password** field.

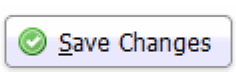
5. Enter your **Merchant ID** in the **Merchant ID** field.

6. Choose your **Transaction Type**

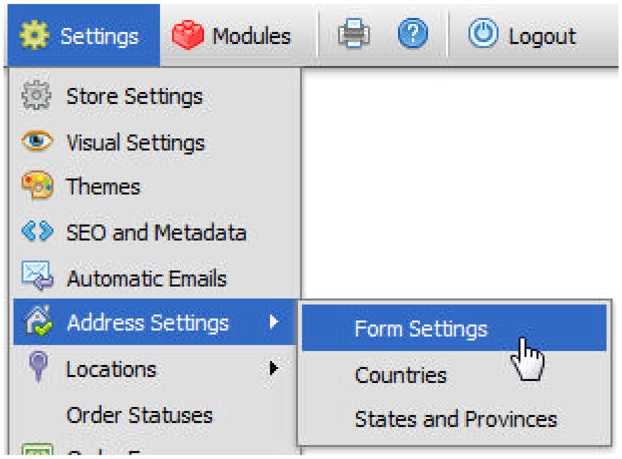
7. Set the **Connetion Method** field to **Store Hosted / Server to Gateway**

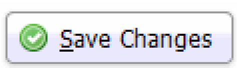
8. Check the **Enabled** field

9. If you are using a test account, check the **Test Mode** field. If you are using a live account, do not check this field.

10. Click 

11. Open your Address Form Settings page:



12. Optimal requires certain fields for transactions. Make sure all the fields below are checked under **Billing Fields** and **Required Billing Fields**:
    - First Name
    - Last Name
    - Street
    - State or Province (if this is required and set to "other", the **State Other** field is automatically required)
    - Postal Code
    - Country
    - Email Address
    - Phone
13. Click 

6.8.3.4.34 Orbital

Overview

Orbital is a payment gateway offered by Chase Paymentech. You can get more information about Orbital here:

http://www.paymentech.com/solgat.do

Squirrelcart is a certified Value Added Resource for Orbital. This means that Orbital has certified that Squirrelcart works with their system. This allows you to setup Squirrelcart to use Orbital without having to go through as many certification steps with Orbital as you normally would.

Squirrelcart supports accepting credit cards and electronic checks through Orbital.

Requirements

Orbital uses Squirrelcart's Server to Server **connection method (Section 6.8.3.1)**, which requires the following:

- *SSL* certificate
- *CURL* or *fsockopen* support
- *OpenSSL*

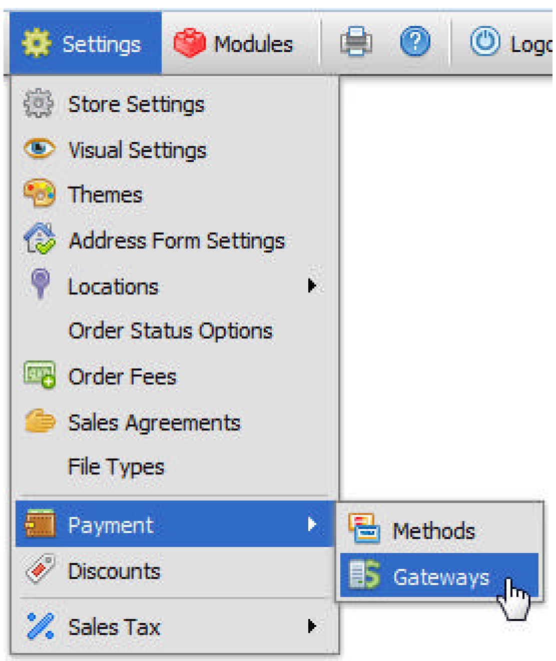
Platforms

Orbital has 2 processing platforms that it supports. They are referred to as **Tampa** and **Salem**. You will need to know which platform your Orbital account uses. If you are in the United States and are not accepting electronic checks you are most likely on their Tampa platform. If you are unsure which platform you are on, contact Orbital for assistance.

Setup Instructions

1. While Squirrelcart is certified for Orbital, you will still need to certify that your website is working properly with Orbital. To start this process, contact Orbital support and let them know you are read to being the certification process. Inform them that you are using Squirrecart (provided by Lighthouse Development), and that we are a certified VAR. They will provide you with instructions for their certification process. This process will include sending the IP address of your web server to Orbital so they can add it to their firewall access list.

2. Login to Squirrlecart's control panel, and click the Payment Gateways menu link:



3. Click on the row for the record labeled **Orbital**

4. Enter your merchant identifier number in the **Merchant ID** field. As of this writing, if you are using the Tampa platform your account will be 12 digits. If you are using the Salem platform, your account will be 6 digits.

5. In the **Platform Number** field, enter one of the following numbers, based on the platform you are on:

   For Tampa: 000002
   For Salem: 000001

   Be sure to enter the number exactly as it appears above or connection will fail.

6. In the **Terminal ID** field, enter the terminal ID provided by Orbital (default is 001)

7. Choose your transaction type using the **Transaction Type** field.

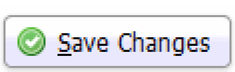
8. Make sure the **Connection Method** field is set to **Store Hosted / Server to Gateway**

9. Set the **Currency Code** field using the table below as a reference

Currency	Code
US Dollar	840
Canadian Dollar	124
British Pound	826
Sweden Krona	752
Norwegian Kroner	578
Danish Krone	208
Swiss Franc	756
Australian Dollars	036
New Zealand Dollars	554
Hong Kong Dollar	344
Japanese Yen	392
Euro	978
Singapore Dollar	702
South African Rand	710

10. Check the **Enabled** field

11. If you wish to use Orbital's test certification servers, check the **Test Mode** field. Uncheck this for production use.

12. Click 

6.8.3.4.35 Pay-Me-Now

You can find more information about Pay-Me-Now here: **http://www.paymenow.com (http://www.paymenow.com/)**

Pay-Me-Now uses the Online Commerce Suite payment gateway, provided by MerchantPartners.com. To setup Pay-Me-Now, follow the instructions for **MerchantPartners (Section 6.8.3.4.29)**, in this section. When it instructs you to open the record in the control panel of Squirrelcart, open the record labeled **Pay-Me-Now**.

6.8.3.4.36 PayFuse

Overview

PayFuse is a payment gateway offered by 1st National Merchant Solutions. You can learn more about it here:

http://www.firstnationalmerchants.com/msup/products/internet/payfuse_short.asp

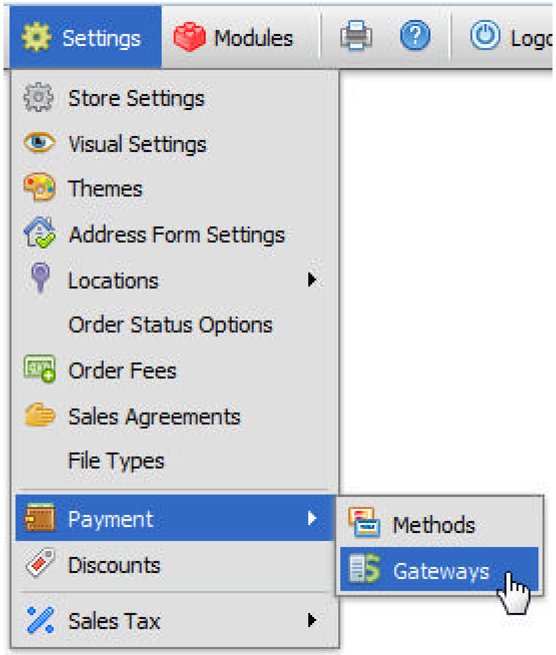
PayFuse uses Squirrelcart's **Store Hosted / Server to Gateway connection method (Section 6.8.3.1)**.

Requirements

- *SSL* Certificate
- *CURL* or *fsockopen* support
- *OpenSSL*
- *Expat*
- PayFuse User ID, Password, and Alias (this information is provided via telephone by PayFuse)

Setup Instructions

1. Open Squirrelcart's control panel
2. Open the Payment Gateways table



3. Click on the record row labeled **PayFuse**

4. Enter your PayFuse User ID in the **User ID** field

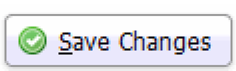
5. Enter your PayFuse Password in the **Password** field

6. Enter your PayFuse Alias in the **Alias** field

7. Choose your transaction type using the **Transaction Type** field

8. Set the **Connection Method** field to **Store Hosted / Server to Gateway**

9. Check the **Enabled** field

10. Click 

6.8.3.4.37 PayJunction

Overview

PayJunction is a payment gateway system provided by PayJunction.com. You can read more about it on their website: **http://www.payjunction.com (http://www.payjunction.com/)**

This gateway used to be known as "Trinity".

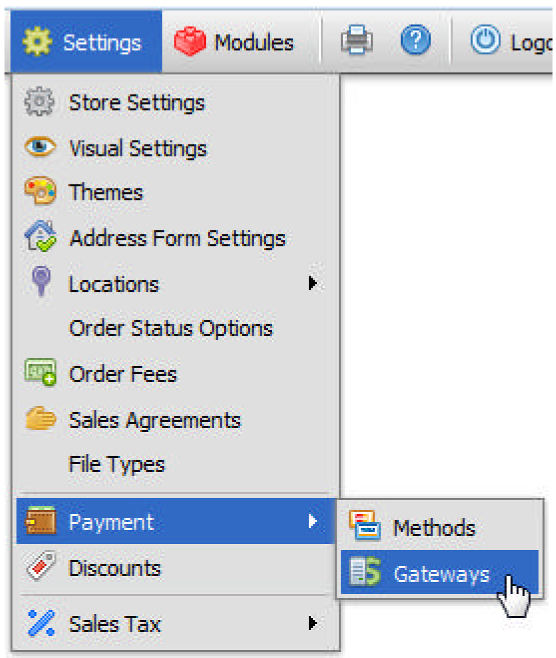
Requirements

- *SSL* Certificate
- *CURL* or *fsockopen* support
- *OpenSSL*
- API Login ID and API Password (contact their support department for this information)

Setup Instructions

1. Open Squirrelcart's control panel

2. Open the Payment Gateways table



3. Click on the record row labeled **PayJunction**

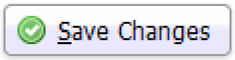
4. Enter your API Login ID in the **API Login ID** field

5. Enter your API Password in the **API Password** field

6. Set the **Transaction Type** field (mouse over the field name for help)

7. Set the **Connection Method** field to **Store Hosted / Server to Gateway**

8. Check the **Enabled** field

9. Click 

6.8.3.4.38 PayPal Payflow Link / Payments Advanced

Overview

Please note: Our integration for PayPal Payflow Link is identical to that of PayPal Payments Advanced. You can use the instructions on this page to setup either service.

You can find more information on Payflow Link here:
https://www.paypal.com/webapps/mpp/payflow-payment-gateway.

You can find more information on PayPal Payments Advanced here:
https://www.paypal.com/webapps/mpp/brc/paypal-payments-advanced

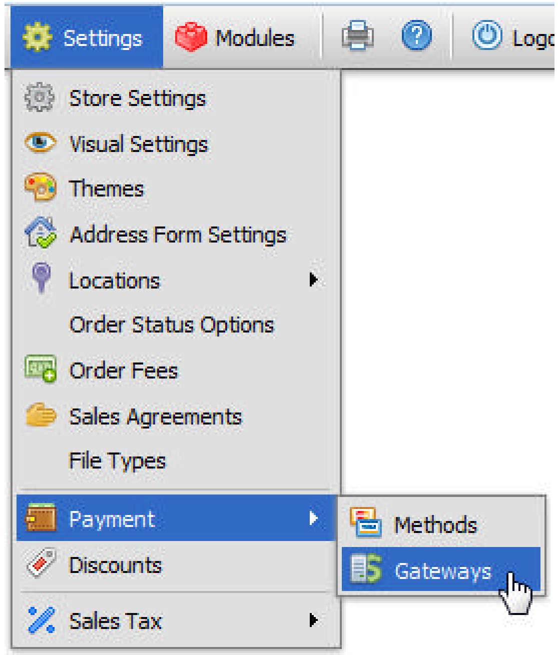
> This documentation is for the newer version of PayPal Payflow Link.
>
> As of this writing (4/12/2013), earlier versions of this gateway are now known as PayPal Payflow Link Legacy. See the **PayPal Payflow Link (legacy) (Section 6.8.3.4.39)** topic for instructions for that older implementation of this gateway.

Requirements

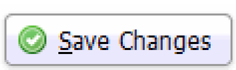
- *CURL* or *fsockopen* support
- *OpenSSL*
- *SSL* certificate

Setup Instructions

1. In your control panel, click the Gateways link



2. Click the record row labeled **PayPal Payflow Link / PayPal Payments Advanced**
3. Enter your PayPal PayFlow account name in the **Merchant Login** field.
4. Enter your password in the **Password** field.
5. Enter your **Partner ID** in **Partner ID**.
6. Set your *Transaction Type*.
7. Set **Connection Method** to **Gateway Hosted (Iframe).**

   Note: the *Gateway Hosted* option will also work, but will take customers away from your website to pay.
8. Check **Enabled**
9. Click 

10. Login to PayPal PayFlow manager: **https://manager.paypal.com/**
11. Click **Service Settings** at the top of the page

12. Under the **Hosted Checkout Pages** heading, click the **Set Up** link. If you do not see **"Hosted Checkout Pages"** you probably have a **PayPal Payflow Link (legacy) (Section 6.8.3.4.39)** account.

13. Set the **Transaction Process Mode** field to either Live or Test depending on your needs.

14. Under the **Display options on payment page** heading, enter these settings:
    a. For the **Enter Text for Cancel URL** field, enter the text **Cancel and Return to Our Site**

    b. Enter your secure *storefront* page URL in the **Enter Cancel URL** field. Example:
    `https://www.example.com/store.php`

    c. Set the **Cancel URL Method** field to **POST**

    d. Enter your secure *storefront* page URL in the **Enter Error URL** field followed by "?cc_return=4". Example:
    `https://www.example.com/store.php?cc_return=4`

15. Under the heading **PayPal Express Checkout**, enter your PayPal email address in the field of the same name.

16. Under the heading **Billing Information**, uncheck all the fields except for both occurrences of **CSC**

17. Under the heading **Shipping Information**, uncheck all the fields

18. Under the heading **Payment Confirmation...**
    a. Set **Show confirmation page** to **On my website**

    b. Enter your secure *storefront* page URL followed by "?cc_return=4" in the **Enter Return URL** field. Example:
    `https://www.example.com/store.php?cc_return=4`

    c. Set **Return URL Method** field to **Post**

19. Under the heading **Silent Post for Data Transfer**
    a. Set **Use Silent Post** to **Yes**

    b. In the **Enter Silent Post URL** field, enter your secure *storefront* page URL. Example:
    `https://www.example.com/store.php`

    c. Leave the **Void transaction when my server fails to receive data sent by the silent post** field unchecked.

20. Under the heading **Security Options**, set the **Enable Secure Token** field to **Yes.**

21. Click the **Save Changes** button

22. Under the **Hosted Checkout Pages** heading, click the **Customize** link.

23. Click **Layout C** to select it

24. Click **Save and Publish**

Testing information

To test, you will need to login to PayPal Payflow's manager, and set the **Transaction Process Mode** field to **TEST**. You should also check the **Test Mode** field on the PayPal Payflow Link payment gateway record in Squirrelcart.

You can then test with the following MasterCard CC#

`5555555555554444`

6.8.3.4.39 PayPal Payflow Link (legacy)

Overview

You can find more information on Payflow Link here:
https://www.paypal.com/webapps/mpp/payflow-payment-gateway.

Our integration of Payflow Link allows you to accept credit card and electronic check payments.

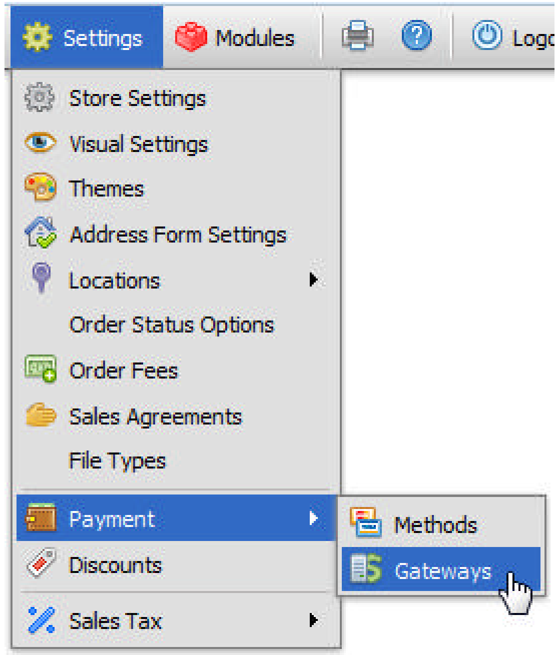
> This documentation is for the older version of PayPal Payflow Link, which is now referred to by PayPal as PayPal Payflow Link Legacy.
>
> As of this writing (4/12/2013), the new updated version of PayPal Payflow Link is being offered by PayPal. See the **PayPal Payflow Link (Section 6.8.3.4.38)** topic for instructions for that newer implementation of this gateway.

Requirements

There are no special requirements for Payflow Link. If you would like the customer to enter payment information on your website instead of PayPal's, you will need at an *SSL* certificate.

Setup Instructions

1. In your control panel, click the Gateways link



2. Click the record row labeled **PayPal Payflow Link (legacy)**

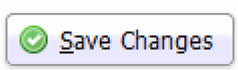
3. Enter your PayPal PayFlow account name in the **Merchant Login** field.

4. Enter your **Partner ID** in **Partner ID**.

5. Set your *Transaction Type*.

6. Set **Connection Method** to either **Gateway Hosted** or **Store Hosted / Browser to Gateway (Relay)** methods. You can get more information on connection methods **here (Section 6.8.3.1)**.

7. Check **Enabled**

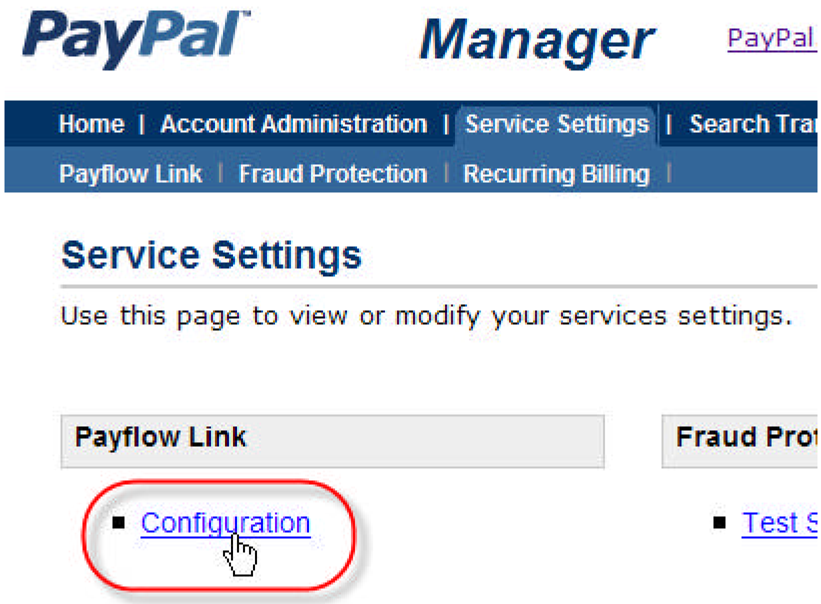
8. Click 

9. Login to PayPal PayFlow manager: **https://manager.paypal.com/**

10. Click **Service Settings** at the top of the page

11. Click **Configuration** link under the heading **Payflow Link** in the left navigation. If you do

not see a **Payflow Link** section, you should contact PayPal support.



12. Under the heading **Form Configuration,** set the **Return URL Method** field to **POST**

13. Enter your *storefront* page URL in both **Return URL** and **Silent Post URL fields**. If you have an *SSL* certificate, you can use your secure URL (https://) otherwise use http://. Examples:

    `https://www.YourSite.com/store.php`

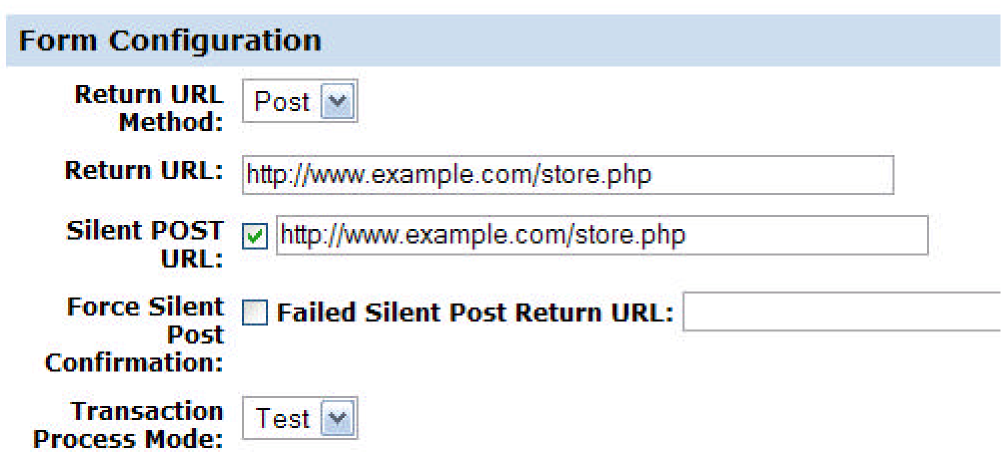
    OR

    `http://www.YourSite.com/store.php`

14. Check the box directly after the **Silent Post URL** text, and right before the field following it.

    Do NOT check **Force Silent Post Confirmation** or enter a URL next to it.

    The **Form Configuration** section should now look something like this:



15. Set the billing fields you would like displayed under **Billing Information**

16. DO NOT check any fields in the **Shipping Information** section

17. If you would like to put your account in test mode, set **Transaction Process Mode** to **TEST**

18. Click the **Save Changes** button

Testing information

To test, you will need to login to PayPal Payflow's manager, and set the **Transaction Process Mode** field to **TEST**.

You can then test with the following MasterCard CC#

`5555555555554444`

6.8.3.4.40 PayPal Payflow Pro

Overview

⚠ Please read this entire page before attempting to setup Payflow Pro!

More information on PayPal Payflow Pro can be found here: **https://www.paypal.com/cgi-bin/webscr?cmd=_payflow-gateway-overview-outside&nav=2.0.3**

Requirements

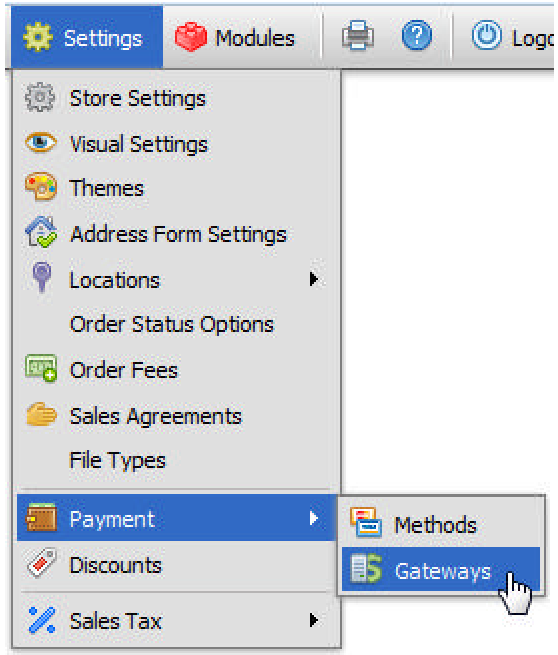
- *SSL* certificate
- *CURL* or *fsockopen* support
- *OpenSSL*.

Our integration with PayPal Payflow Pro supports payments via credit card and electronic checks.

Enabling PayPal Payflow Pro

Initial Setup Instructions

1. In your control panel, click the Gateways link



2. Click the record row labeled **PayPal Payflow Pro**

3. Enter your Payflow Pro **Merchant Login** in the **Merchant Login** field

4. Enter your Payflow Pro password in the **Password** field

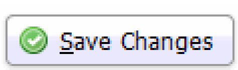
5. Enter your Payflow Pro **Partner ID** in the **Partner ID** field (this is usually **Verisign**)

6. Set the **Transaction Type** field.

7. Set the **Connection Method** field to **Store Hosted / Server to Gateway** (all other methods are for Payflow Link)

8. Check **Enabled**

9. Check **Test Mode**

10. Click 

Testing

1. Make sure you checked **Test Mode** on the gateway record in Squirrelcart

2. Add an item to your cart, and go through checkout until you get to the payment method page.

3. Enter the information corresponding to the type of response you would like to test using the testing information below.

Test Card Numbers - (any other card number will cause an error)

Card Type	Card Number
American Express	378282246310005
American Express	371449635398431
Amex Corporate	378734493671000
Discover	6011111111111117
Discover	6011000990139424
MasterCard	5555555555554444
MasterCard	5105105105105100
Visa	4111111111111111
Visa	4012888888881881
Visa	4222222222222

Test Check Numbers

Check Number	Routing Number	Account Number	Response
1001	123456780	439085000	Approved
1001	123456780	439085007	Declined/Failed

To test for an approval, make sure the grand total of the order is less than $1000. To test a decline, use an amount higher than $2001.

If testing is successful, you will need to open the payment gateway record in Squirrelcart again, uncheck the "Test Mode" checkbox, and save changes.

6.8.3.4.41 PayPal Payments Advanced

Overview

The steps to enable PayPal Payments Advanced are identical to that of PayPal Payflow Link. Follow the **PayPal Payflow Link / Payments Advanced documentation (Section 6.8.3.4.38)** to enable PayPal Payments Advanced.

6.8.3.4.42 PayPal Payments Pro

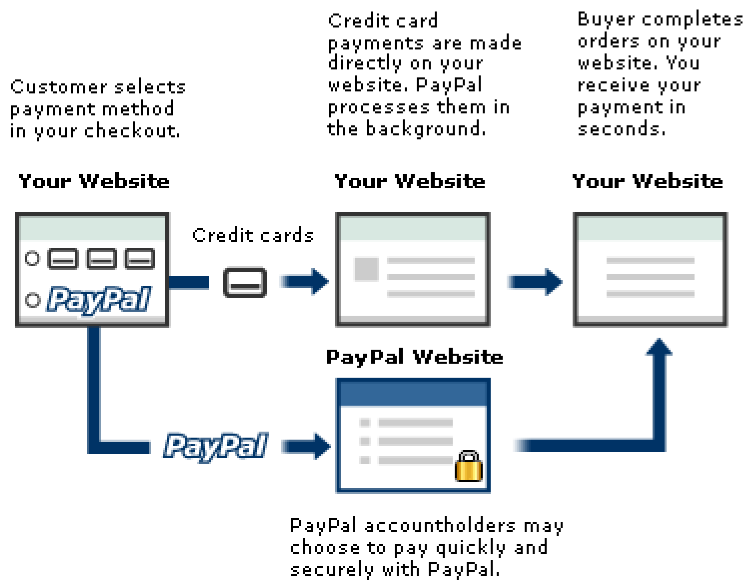
Overview

PayPal Payments Pro allows you to accept payments through PayPal directly on your website, using Visa, MasterCard, American Express, and Discover. It also allows you to accept PayPal payments if the customer wishes to pay with their PayPal account instead of paying directly with a credit card.

More information on PayPal Payments Pro can be found here:

https://www.paypal.com/cgi-bin/webscr?cmd=_wp-pro-overview-outside

How it Works



In the diagram above, when the customer pays using a credit card directly on your website, Squirrelcart makes use of PayPal's Direct API method. When the customer pays using their PayPal account, Squirrelcart uses PayPal's Express Checkout method.

Express Checkout

With Express Checkout, your customer can bypass Squirrelcart's address form. They are sent to PayPal to choose a shipping address, and funding method. PayPal sends them back to your site to choose their shipping method and to complete payment.

Technical Requirements

Website Payments Pro has the following requirements:

- *SSL* Certificate
- *CURL* or *fsockopen* support
- *OpenSSL*

Notes

- As of this writing, Squirrelcart supports PayPal Payments Pro for the US, CA, and UK.
- For UK merchants, Squirrelcart does not yet support 3-D Secure. Maestro (credit card) requires the use of 3-D secure. With that in mind, if using PayPal Payments Pro in the UK you will not be able to offer Maestro as a payment method.
- PayPal requires that you offer Express Checkout AND Direct (API) payments. Squirrelcart abides by this PayPal business requirement when you enable PayPal Payments Pro.
- Because PayPal Express Checkout must be offered, you cannot force the customer to create an account on your website (per PayPal's documentation). If PayPal Payments Pro is enabled, Squirrelcart will ignore the Force User Creation checkbox in your **store settings (Section 6.1)** if it is checked.

Enabling PayPal Payments Pro

1. **Sign Up**

   You will need a PayPal Business account in order to use PayPal Payments Pro. If you do not have one, go to **https://www.paypal.com (https://www.paypal.com/)** and click **Sign Up**. Be sure to choose a business account when signing up. After you sign up, you will receive an email with confirmation instructions. Confirm your account, and then continue below.

2. **Apply for PayPal Payments Pro**

   Navigate to **Merchant Tools** and select **PayPal Website Payments Pro.** Enter the required information about you and your business. You will be notified by email when your application review is complete; typically, applications are reviewed in one business day.

3. **Accept Agreement**

   After you receive the approval email from PayPal, you must accept their billing agreement.

   a. Log in to **https://www.paypal.com (https://www.paypal.com/)**

   b. In the top left corner, click **Accept Billing Agreement**

   c. Stay logged into PayPal for the next steps.

4. **Add your bank account**

   You must have a bank account added to your PayPal Business Account. If you do not have one, you can add one as follows:

   a. Click **Profile**

   b. Under **Financial Information**, select **Bank Accounts**

   c. Enter your bank account information

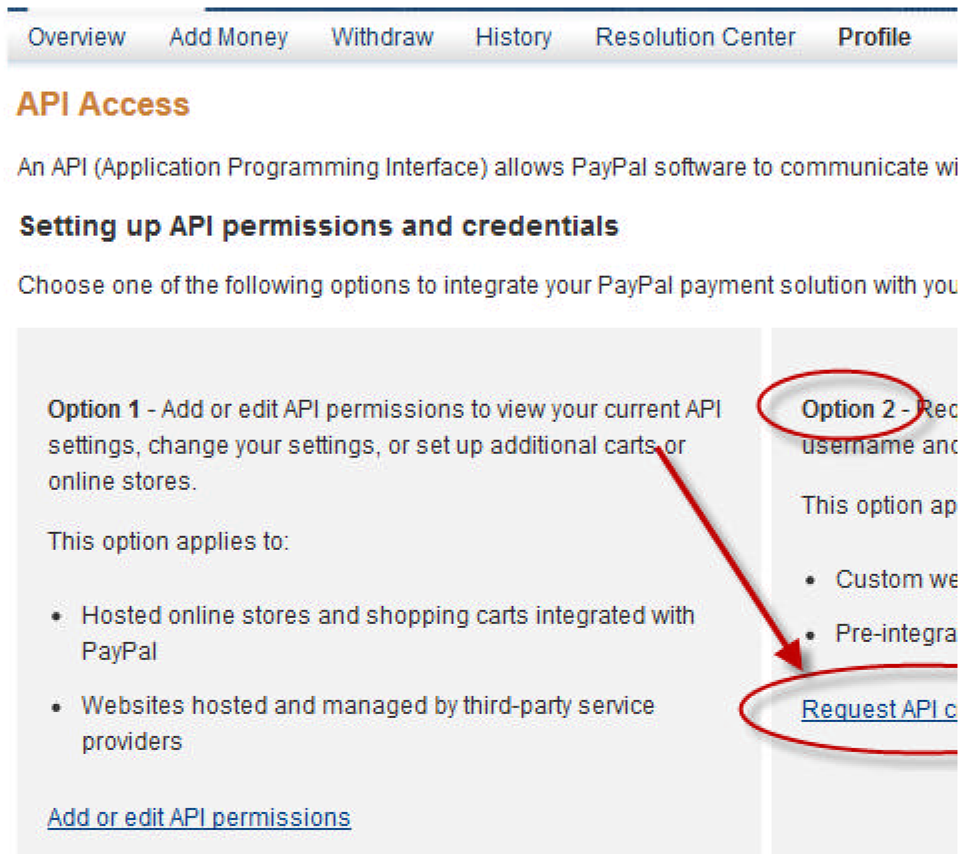
5. **Obtain API credentials**

   a. Log in to **https://www.paypal.com (https://www.paypal.com/)**

   b. Click **Profile**

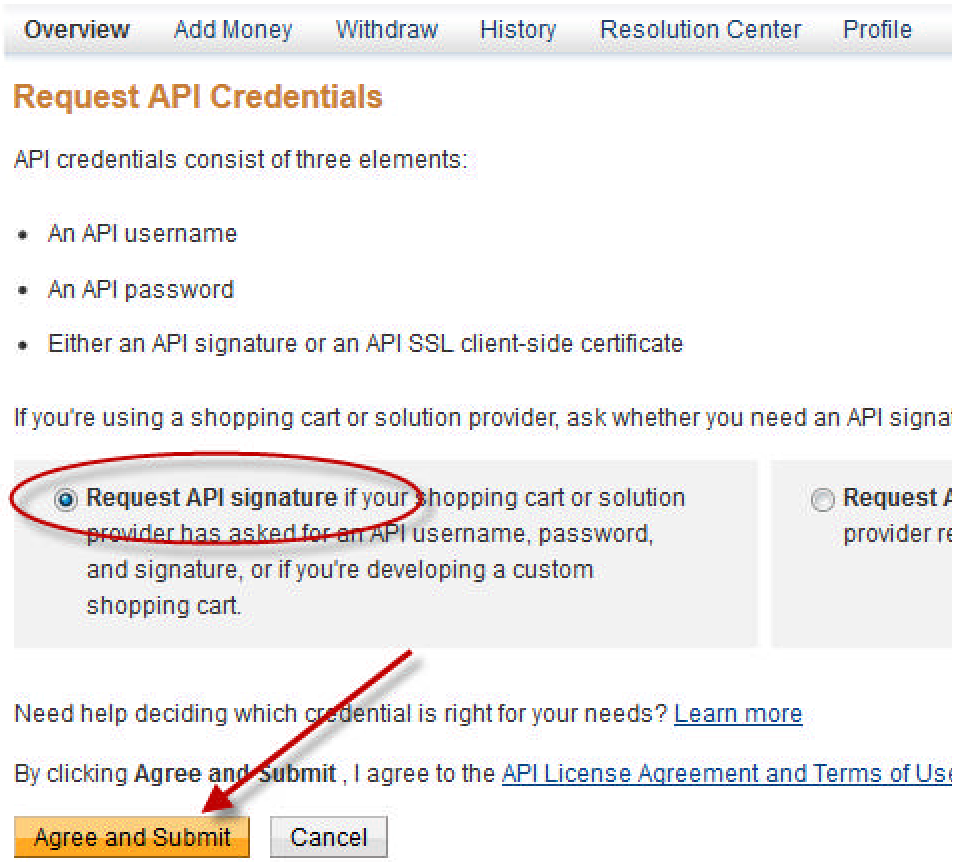
   c. Click **API Access**

   d. Click **Request API Credentials**



> If you already requested API credentials, the link under Option 2 will read differently and will allow you to view those credentials. You can use those already existing API credentials with Squirrelcart if needed.

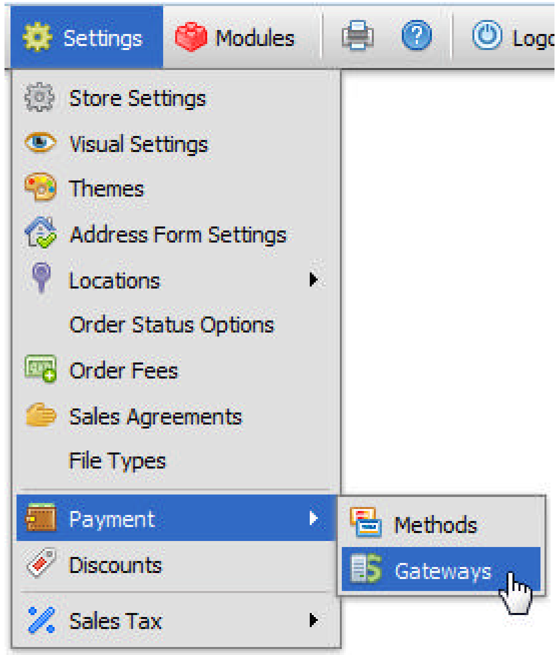
   e. Click the radio button next to **Request API signature**:



f. Click the **Agree and Submit** button

g. An API username, password, and signature will be generated for you. Write this information down or save it in a file for reference.

6. Open the PayPal Payments Pro record in Squirrelcart



7. Enter your API Username in the **API Username** field

8. Enter your API Password in the **API Password** field

9. Enter your API Signature in the **API Signature** field

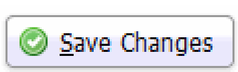
10. Choose your transaction type using the **Transaction Type** field. Mouse over the field name for more information.

11. Set **Connection Method** to **Store Hosted / Server to Gateway**

12. Choose your **Currency Code**

13. Check the **Enabled** field

14. Set the **Payment Mode** field to Live

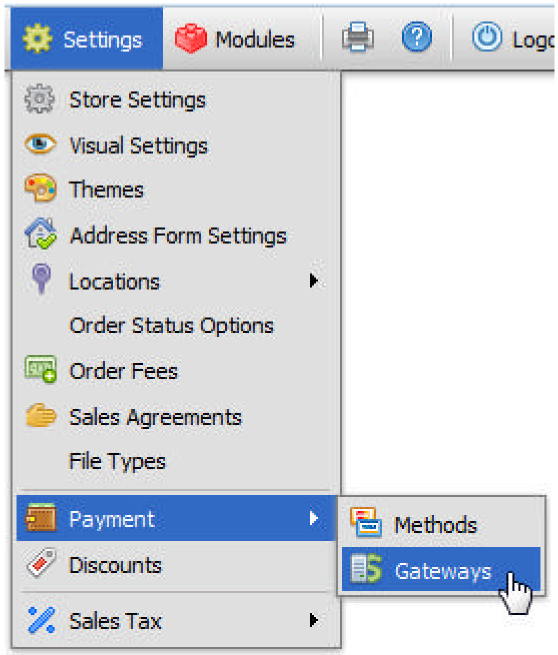
15. Click 

IPN (Instant Payment Notification)

PayPal's Instant Payment Notification allows you to integrate PayPal payments with Squirrelcart's order management feature. IPN provides immediate notification and confirmation of PayPal payments you receive, and allows Squirrelcart to update the payment status on orders in your database. If you activate IPN, you will receive an IPN when a payment is first received, which will display the status of the payment (Completed or Pending). If the payment status was Pending, you will receive another IPN when the payment clears, fails, or is denied.

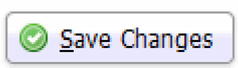
Enabling IPN

1. Open the PayPal Website Payments Pro record in Squirrelcart



2. Check the **IPN** field

3. If you wish to receive an email from Squirrelcart each time an IPN is received from PayPal, check the **Test IPN** field

4. Click 

6.8.3.4.43 PayPointUSA

You can find more information about PayPointUSA here: **http://www.PayPointUSA.com (http://www.paypointusa.com/)**

PayPointUSA uses the Online Commerce Suite payment gateway, provided by MerchantPartners.com. To setup PayPointUSA, follow the instructions for **MerchantPartners (Section 6.8.3.4.29)**, in this section. When it instructs you to open the record in the control panel of Squirrelcart, open the record labeled **PayPointUSA**.

6.8.3.4.44 PayPoint.net

Overview

PayPoint.net (formerly SECPay) is a UK based payment gateway. You can find more information about PayPoint.net here: **http://www.PayPoint.net (http://www.paypoint.net/)**

The SECDirect method offered by PayPoint.net corresponds to Squirrelcart's Store Hosted / Server to Gateway connection method.

The SECPage method corresponds to Squirrelcart's Gateway Hosted and Store Hosted / Browser to Gateway (Relay) connection methods.

Requirements

PayPoint.net has the standard requirements that vary based on the **connection method (Section 6.8.3.1)** you choose in Squirrelcart.

Setup Instructions

1. Read the topic describing **connection methods (Section 6.8.3.1)** in this section, and decide which connection method you would like to use.

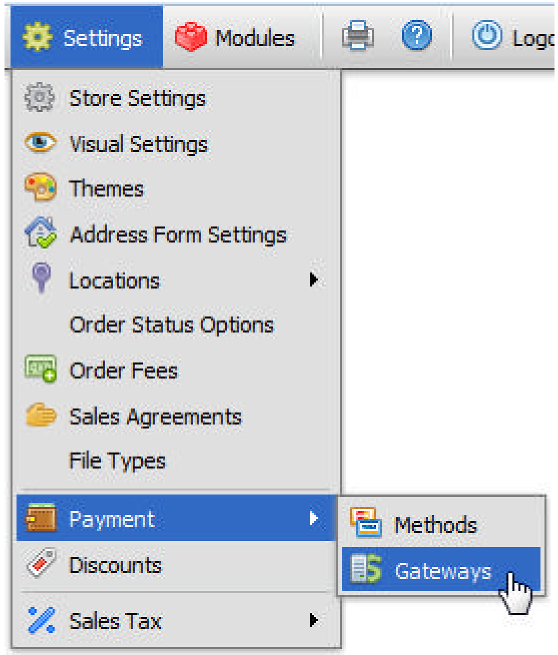
2. Login to your PayPoint.net control panel at **http://www.PayPoint.net (http://www.paypoint.net/)**

3. Click the "Change Remote Passwords" link

4. You will need to different types of passwords depending on the connection method you are using.
   For the **Store Hosted / Server to Gateway** connection method: You will need a VPN Password, and a Remote Password. Generate both, and write them down.
   For either the **Gateway Hosted** or **Store Hosted / Browser to Gateway (Relay)** connection method: You will need a Remote Password, and a Digest Key. Generate both, and write them down.

5. Open Squirrelcart's control panel

6. Open the Payment Gateways table



7. Click on the record row labeled **PayPoint.net**

8. Enter your PayPoint.net username in the **Username** field

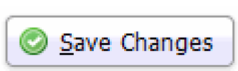
9. If you are using the Server to Server connection method, enter your PayPoint.net VPN Password in the **VPN Password / Digest Key** field. If you are using either of the Client Side connection methods, enter your PayPoint.net Digest Key in the **VPN Password / Digest Key** field.

10. Enter your PayPoint.net Remote Password in the **Remote Password** field

11. Choose your transaction type using the **Transaction Type** field

12. Choose your connection method using the **Connection Method** field

13. Check the **Enabled** field

14. Click 

Important Information on Gateway Hosted Connection Methods

The Gateway Hosted connection methods in Squirrelcart utilize PayPoint.net's SECPage option. SECPage will show the customer Squirrelcart's thank you page after the transaction has been submitted. They refer to this as a callback. The callback does not actually return the customer directly to your webpage. The page should look identical to your storefront page, but the URL will actually still be on PayPoint.net.com. PayPoint.net makes a request for your storefront page behind the scenes, and then displays that HTML code to the customer, without leaving

PayPoint.net.com.

Squirrelcart automatically uses full URL paths for images, and by default the page will look fine. If you have any custom images on your storefront page that are not part of Squirrelcart, you will need to use full URLs in their paths, or they will appear as broken images when the callback occurs. The same precaution should be taken for any other files that are loaded by the browser, such as CSS stylesheets, external javascript files, etc...

If you are using the "Client Side secure form post" connection method, the URLs will also need to be secure (https:// instead of http://). You can dynamically change the root path of URLs by using this PHP variable:

```
<?=$SC['dyn_root']?>
```

For example, instead of having a custom image tag with a relative URL like this:

```
<img src="images/myimage.gif" >
```

You can add the full path to your store root folder like this:

```
<img src="<?=$SC['dyn_root']?>/images/myimage.gif" >
```

When your page is accessed securely, the image src will be "https://www.example.com/images/myimage.gif". When accessed normally, the image src will be "http://www.example.com/images/myimage.gif".

Testing

To test with your own PayPoint.net account, check the **Test Mode** field on PayPoint.net's record in Squirrelcart.
PayPoint.net also offers a test account with the following information:
Username: secpay
VPN password: secpay
Remote password: secpay
Digest Key: secpay

6.8.3.4.45 Paystation

Overview

Paystation is a New Zealand based payment gateway. You can read more about it on their official website: **http://www.paystation.co.nz (http://www.paystation.co.nz/)**

Paystation offers 2 modes that map to Squirrelcart's connection methods:

- Two Party - This corresponds to Squirrelcart's "Store Hosted / Server to Gateway" **connection method (Section 6.8.3.1)**.
- Three Party - This corresponds to Squirrelcart's "Gateway Hosted" **connection method (Section 6.8.3.1)**.

As of this writing, Paystation must assign you an account for use with either their Two Party or Three Party connection method. You can't use an account created for one method on the other.

Information Needed

- Paystation ID
- Your web server's *IP address* (ask your web host for this if you don't know it)

Two Party

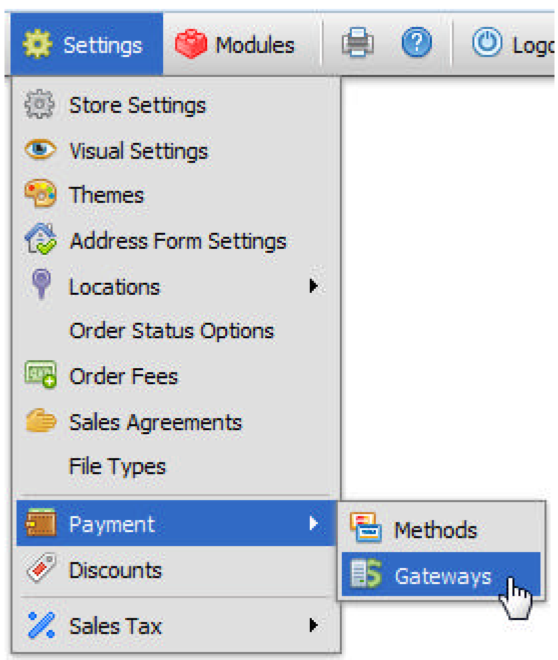
Requirements

- *CURL* or *fsockopen* support
- *OpenSSL*
- *SSL* certificate
- Paystation 2 Party Account

Setup Instructions

1. Contact Paystation support, and ask them to add your server's IP address to their firewall. Do not continue until Paystation support has confirmed that they have done this.

2. Click the Payment Gateways link in your control panel



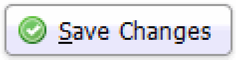
3. Click the record row labeled **Paystation**

4. Enter your Paystation ID in the **Paystation ID** field. This is also your Paystation username.

5. Leave the **Quick Lookup** field blank

6. Set the **Connection Method** field to **Store Hosted / Server to Gateway**.

7. Check the **Enabled** field

8. Click 

Three Party

Security

With Paystation's "Three Party" connection method, your customer is sent to Paystation's website to submit their payment information. Paystation then returns the customer to your website, along with some data in the URL to tell Squirrelcart the status of that transaction. Squirrelcart uses the information in that URL to decide whether to approve or decline an order. It's possible for a customer to alter this URL to fake an "approved" statuts even if Paystation issued a decline.

To add security, Paystation has a "quick lookup" feature that allows your server to make a separate behind the scenes request to Paystation to see if the transaction is legitimate. We recommend that you make use of this feature, which has additional requirements outlined below.

If you do not make use of their "quick lookup" feature, you should always confirm in your Paystation control panel that a transaction has been approved and for the correct amount before shipping any goods.

Requirements

Other than a Paystation Three Party account, there are no special requirements. If you make use of the "quick lookup" feature (recommended), it has the following requirements:

- *CURL* or *fsockopen* support
- *OpenSSL*

Setup Instructions

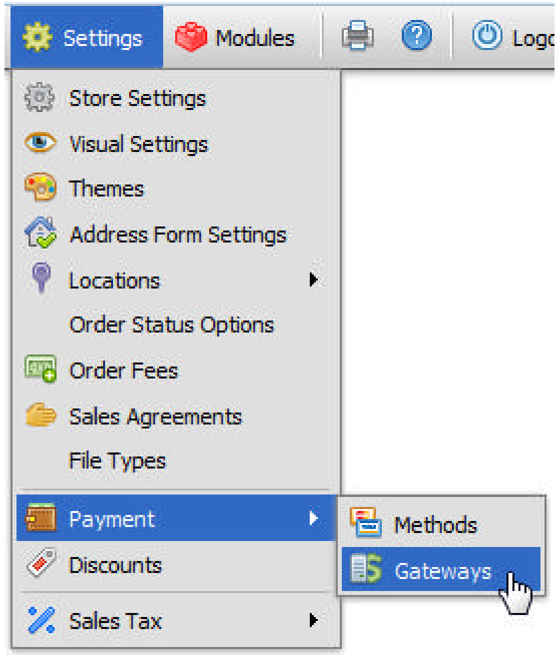
1. Contact Paystation support, and ask them to add your server's IP address to their firewall.

   You will also need to tell them your return URL, which is the same as your *storefront* page URL, as in **http://www.example.com/store.php**.

   If you plan on using the Quick Lookup feature as explained in the **Security** section above, you will also need to tell Paystation support to add your server's IP address to the firewall for Quick Lookup.

   Do not continue until Paystation support has confirmed that they have setup these things for you in their system.

2. Click the Payment Gateways link in your control panel



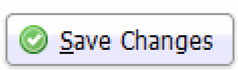
3. Click the record row labeled **Paystation**

4. Enter your Paystation ID in the **Paystation ID** field. This is also your Paystation username.

5. If you wish to use the "quick lookup" feature described in the Security section above, enter the number "1" in the **Quick Lookup** field. If you do not want to enable "quick lookup", leave this field blank.

6. Set the **Connection Method** field to **Gateway Hosted**.

7. Check the **Enabled** field

8. Click 

6.8.3.4.46 PayWay Net by Westpac

Overview

PayWay Net is an Australian based payment gateway provided by Westpac. You can learn more about PayWay here: **http://www.payway.com.au (http://www.payway.com.au/)**

Requirements

- *CURL* OR *fsockopen* support
- *OpenSSL*
- *SSL* Certificate

- Mcrypt PHP extension

Setup Instructions

1. If you are unsure if your web host meets the requirements above, contact them to check.
2. Login to your PayWay control panel using the information provided by PayWay: **https://www.payway.com.au/**
3. Click the **Setup Net** link on the left side of the page
4. Click the **Setup** link
5. Select the third option on the page which reads **Bill Payments/Shopping Cart - I need to pass across information from my website**
6. Click **Next**
7. This page gives you an option to change the appearance of your PayWay hosted payment page. While you are free to do so, Squirrelcart does not require that you alter these settings. Click **Next** to go to the next settings page.
8. Under the heading **Browser Return:**

   a. Set the **Browser Return URL Pre Payment** field to your storefront page URL:

   `http://www.example.com/store.php`

   b. Set the **Browser Return Type** field to **Redirect**

   c. Set the **Browser Return URL** field to the same URL you entered for **a.** above

   d. Set the **Browser Return Payment Status** field to **all**
9. Under the heading **Server-to-Server Payment Notification**

   a. Set the **Notification URL** field to the same URL you entered for step **8a** above.

   b. Set the **Notification Payment Status** field to **approved**

   c. Set the **Notification Post Type** field to **extended**
10. Click **Next**
11. You should now be on a settings page titled **Security Information**. Very carefully write down (or copy and paste to a text file) your Encryption Key, Username, and Password.
12. Enter your web server's IP address in the IP address section. If you don't have it, ask your web host.

13. Click **Next** through all remaining settings pages

14. To go live, click the **go live** link under **Setup Net** on the left side of the page

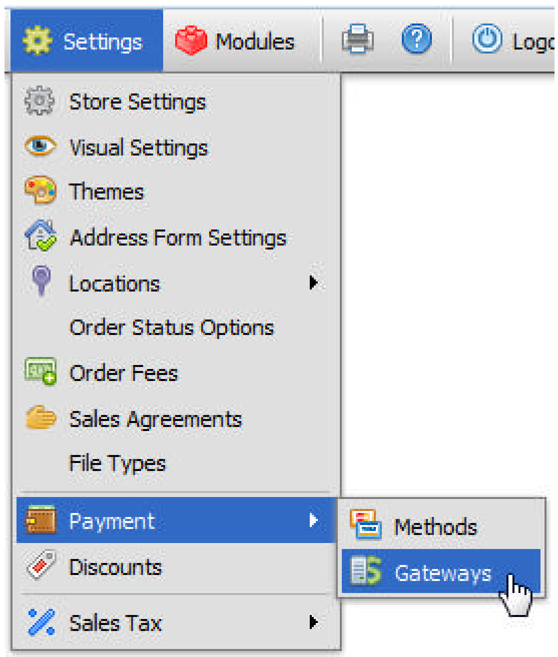
15. Click the **Administration** link on the left side of the page

16. Click **Merchants**

17. Your Merchant ID is located in the **Merchant ID** column. Write it down.

18. Look in the upper right hand corner of the page. You should see your Biller Code after the text **Biller Code:** . Write it down.

19. Open the Payment Gateways table in Squirrelcart's control panel



20. Click the record row labeled **PayWay Net**

21. Enter your Biller Code in the **Biller Code** field.

22. Enter your Merchant ID in the **Merchant ID** field

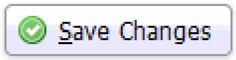
23. Enter your Encryption Key in the **Encryption Key** field

24. In the **Security Token Credentials** field, enter your Username, followed a colon, followed by your Password. For example, if your Username and Password from step 11 above was "Q999222" and "pd8Wv6m9", you would enter the following in Squirrelcart's **Security Token Credentials** field:

Q999222:PD8wV6M9

25. Check the **Enabled** field

26. Set **Connection Method** to **Gateway Hosted**

27. Click 

Testing

PayWay allows you to submit test transactions by setting your Merchant ID to **TEST**. Squirrelcart can do that for you if you check the **Test Mode** checkbox on your PayWay payment gateway record in your Squirrelcart control panel. When testing, use the following Visa credentials:

Card #: 4564710000000004

Card Security Code: 847

Exp. Date: 02/19

PayWay should approve test transactions when you use the card data above.

6.8.3.4.47 PSiGate

Overview

You can find more information on PSiGate here: **http://www.psigate.com (http://www.psigate.com/)**. Squirrelcart supports connecting to PSiGate supports the **Store Hosted / Server to Gateway, Gateway Hosted,** and **Store Hosted / Browser to Gateway (Relay)** connection methods offered by Squirrelcart. Requirements vary based on the **connection method (Section 6.8.3.1)** you choose in Squirrelcart..

The table below shows how PSiGate's connection method names correlate to Squirrelcart's.

Squirrelcart's Connection Method	**PSiGate's connection method**
Store Hosted / Server to Gateway	XML Messenger Interface
Store Hosted / Browser to Gateway (Relay)	HTML Messenger Interface
Gateway Hosted	HTML Messenger Interface

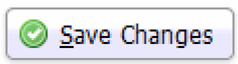
XML Messenger Interface

Requirements

- *SSL* certificate
- *XML* support in PHP (*expat* extension)

- *CURL* OR *fsockopen* support
- *OpenSSL*

Setup Instructions

1. Open the payment gateway record labeled **PSiGate** in the control panel of Squirrelcart
2. Enter your PSiGate account name in the **Account Name** field
3. Enter your PSiGate passphrase in the **Account Password** field.
4. Set the *Transaction Type* field.
5. Set the **Connection Method** field to **Store Hosted / Server to Gateway**
6. Check the **Enabled** field
7. Click 

HTML Messenger Interface

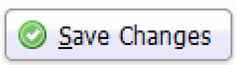
Requirements

No special requirements for "Client side non-secure form POST" method. "Client side secure form POST" method requires an *SSL* certificate.

Setup Instructions

1. Login to your PSiGate control panel at **https://secure.psigate.com (https://secure.psigate.com/)**
2. Click the **HTML Capture Settings** link
3. Set **Enabled** to **Yes**
4. Input your Store Account Name (StoreID) given within your PSiGate Welcome Email within the **StoreKey** field. This setting informs PSiGate of the store account that is to receive the transaction request. Write this number down as you will need it later.
5. If you are using the **Client side secure form POST** connection method, set **DBA Display Name** to your company name.
6. Leave the **Approved URL** and **Declined URL** fields blank
7. If you are using the **Client side secure form POST** connection method, set the **Capture**

Setting field to **Card Data is Passed to PSiGate.** If you are using the **Client side non-secure form POST** connection method, set it to **PSiGate Captures Card Data.**

8. Set the **Restrict Referring Hosts** field to **No**
9. Set the **Results** field to **1.2**
10. Click the **Save** button
11. Open the payment gateway record labeled PSiGate in the control panel of Squirrelcart
12. Enter your PSiGate StoreKey in the **Account Name** field
13. Leave the **Account Password** field blank. It is only used for the XML Messenger Interface
14. Set the *Transaction Type* field.
15. Set **Connection Method** to **Gateway Hosted** or **Store Hosted / Browser to Gateway (Relay)**
16. Check the **Enabled** field
17. Click 

6.8.3.4.48 QuickCommerce Pro

You can find more information about QuickCommerce Pro here: **http://www.ecx.com (http://www.ecx.com/)**

QuickCommerce Pro uses the Online Commerce Suite payment gateway, provided by MerchantPartners.com. To setup QuickCommerce Pro, follow the instructions for **MerchantPartners (Section 6.8.3.4.29)**, in this section. When it instructs you to open the record in the control panel of Squirrelcart, open the record labeled **QuickCommerce Pro**.

6.8.3.4.49 Sage (Formerly Eftnet)

Overview

Information about Sage can be found here: **http://www.sagepayments.com/**

Store Hosted / Server to Gateway Connection Method

The **Store Hosted / Server to Gateway connection method (Section 6.8.3.1)** requires *CURL* or *fsockopen* support, and *OpenSSL*.

1. Open the Sage payment gateway record in your **control panel (Section 3)**

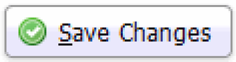
2. Enter your 12 digit Merchant ID (Virtual Terminal ID) in the **Mercant ID** field

3. Enter your Merchant Key in the **Merchant Key** field

4. Choose your transaction type using the **Transaction Type** field

5. Check the **Enabled** field

6. Set **Connection Method** to **Store Hosted / Server to Gateway**

7. Click 

Gateway Hosted Connection Method

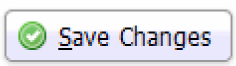
1. Open the Sage payment gateway record in your **control panel (Section 3)**

2. Enter your 12 digit Merchant ID (Virtual Terminal ID) in the **Merchant ID** field

3. Leave the **Merchant Key** field blank

4. Check the **Enabled** field

5. Set **Connection Method** to **Gateway Hosted**

6. Click 

7. Login to the control panel at sagepayments.com

8. Click the **Products > Shopping Cart** link

9. Set the **Notify on Failed/Declined Shopping Cart Orders** field to **Yes**

10. Enter your *storefront* page URL in the **Approved URL** field, followed by **?sage_return=1** as in this example:

    http://www.example.com/store.php?sage_return=1

11. Enter the same URL you entered in the **Approved URL** field in the **Declined URL** field

12. Set the **Post Back Service** field to **Yes**

13. Enter the URL to your *storefront* page in the **Post Back URL** field

14. Click **Update Shopping Cart Properties**

6.8.3.4.50 Sage Pay

Overview

More information on Sage Pay can be found here: **http://www.sagepay.com (http://www.sagepay.com/)**

Sage Pay offers different connection options. We support Sage Pay Form and Sage Pay Direct.

Sage Pay was formerly known as Protx.

Sage Pay Direct

Sage Pay Direct uses Squirrelcart's **Store Hosted / Server to Gateway connection method (Section 6.8.3.1)**.

Requirements

- *SSL* Certificate
- *CURL* or *fsockopen* support
- *OpenSSL*

Setup Instructions

1. Open the Sage Pay payment gateway record in the control panel.

2. Enter the VSP Vendor Name in the **VSP Vendor Name** field. This was supplied to you by Sage Pay when your account was created.

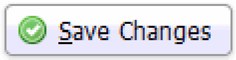
3. Leave the **VSP Encryption Password** field blank

4. Set the **Transaction Type** field.

5. Set **Connection Method** to **Store Hosted / Server to Gateway**

6. Set the **Currency Code** field to match the currency that you will be accepting with Sage Pay.

7. Check the **Enabled** field

8. Click 

9. Login to the live VSP Admin page:
   https://live.sagepay.com/mysagepay

10. Click **Settings**

11. Click **Valid Ips**

12. Click **Add**

13. Enter your IP address.

14. For Subnet Mask, enter 255.255.255.255.

15. Enter a description if desired.

16. Click **Add**

17. In the **Valid Currencies for this Account** section, choose your desired currency and click the **Add** button. The currency you choose must match the currency you specified in step 5 above.

18. Test using the general testing steps in the **Testing topic (Section 6.8.3.5)** in this section of the documentation.

Sage Pay Form

Requirements

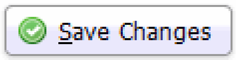
PHP Mcrypt extension must be enabled, with support for the MCRYPT_RIJNDAEL_128 encryption algorithm.

Setup Instructions

1. Open the Sage Pay payment gateway record in the control panel.

2. Enter the VSP Vendor Name in the **VSP Vendor Name** field. This was supplied to you by Sage Pay when your account was created.

3. Enter the VSP Encryption Password in the **VSP Encryption Password** field. This was supplied to you by Sage Pay when your account was created.

4. Set the **Transaction Type** field.
5. Set **Connection Method** to **Gateway Hosted**
6. Set the **Currency Code** field to match the currency that you will be accepting with Sage Pay.
7. Check the **Enabled** field
8. Click 

9. Login to the live VSP Admin page:
https://live.sagepay.com/mysagepay
10. Click **Settings**
11. Click **Valid Ips**
12. Click **Add**
13. Enter your IP address.
14. For Subnet Mask, enter 255.255.255.255.
15. Enter a description if desired.
16. Click **Add**
17. In the **Valid Currencies for this Account** section, choose your desired currency and click the **Add** button. The currency you choose must match the currency you specified in step 5 above.

Troubleshooting

The following error may occur after arriving at Sage Pay to submit payment information:

3045: The Currency field is missing.

If you have correctly specified your currency on the Sage Pay record in Squirrelcart's control panel, this error is usually false and is an indication that your VPS Encryption Password is incorrect.

Testing

Live Mode

To test, place an order for a small amount using a real credit card number. Upon approval, login to the VSP Admin page, and void the transaction.

Test Mode

Squirrelcart has a Test Mode checkbox on the Sage Pay payment gateway record in the control panel. When checked, it will cause Squirrelcart to communicate with Sage Pay's test environment. That environment mirrors their live environment. It requires a separate test account which must be setup by Sage Pay support. If you wish to use test mode, you'll need to request a test account from Sage Pay support, for this URL:

https://test.sagepay.com/mysagepay

If using test mode, Substitute the above URL in the setup instructions above wherever you see this live control panel URL: **https://live.sagepay.com/mysagepay**

6.8.3.4.51 SECPay

Overview

PayPoint.net (formerly SECPay) is a UK based payment gateway. You can find more information about PayPoint.net here: **http://www.PayPoint.net (http://www.paypoint.net/)**

The SECDirect method offered by PayPoint.net corresponds to Squirrelcart's Store Hosted / Server to Gateway connection method.

The SECPage method corresponds to Squirrelcart's Gateway Hosted and Store Hosted / Browser to Gateway (Relay) connection methods.

Requirements

PayPoint.net has the standard requirements that vary based on the **connection method (Section 6.8.3.1)** you choose in Squirrelcart.

Setup Instructions

1. Read the topic describing **connection methods (Section 6.8.3.1)** in this section, and decide which connection method you would like to use.

2. Login to your PayPoint.net control panel at **http://www.PayPoint.net (http://www.paypoint.net/)**

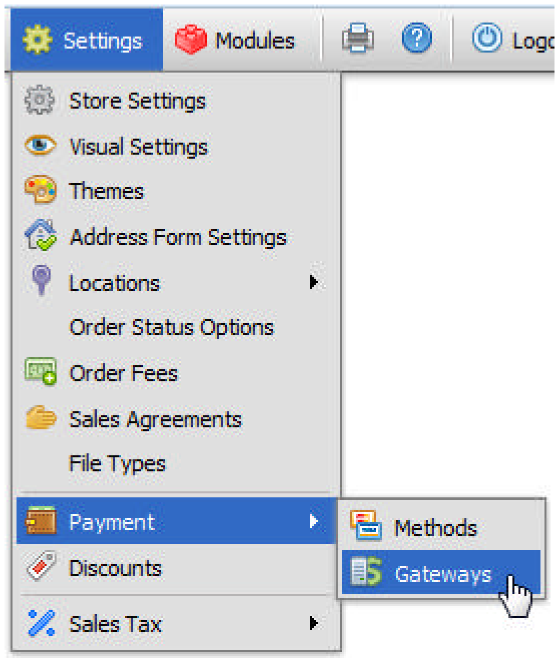
3. Click the "Change Remote Passwords" link

4. You will need to different types of passwords depending on the connection method you are using.

For the **Store Hosted / Server to Gateway** connection method: You will need a VPN Password, and a Remote Password. Generate both, and write them down.
For either the **Gateway Hosted** or **Store Hosted / Browser to Gateway (Relay)** connection method: You will need a Remote Password, and a Digest Key. Generate both, and write them down.

5. Open Squirrelcart's control panel

6. Open the Payment Gateways table



7. Click on the record row labeled **PayPoint.net**

8. Enter your PayPoint.net username in the **Username** field

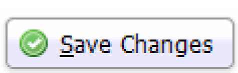
9. If you are using the Server to Server connection method, enter your PayPoint.net VPN Password in the **VPN Password / Digest Key** field. If you are using either of the Client Side connection methods, enter your PayPoint.net Digest Key in the **VPN Password / Digest Key** field.

10. Enter your PayPoint.net Remote Password in the **Remote Password** field

11. Choose your transaction type using the **Transaction Type** field

12. Choose your connection method using the **Connection Method** field

13. Check the **Enabled** field

14. Click 

Important Information on Gateway Hosted Connection Methods

The Gateway Hosted connection methods in Squirrelcart utilize PayPoint.net's SECPage option. SECPage will show the customer Squirrelcart's thank you page after the transaction has been submitted. They refer to this as a callback. The callback does not actually return the customer directly to your webpage. The page should look identical to your storefront page, but the URL will actually still be on PayPoint.net.com. PayPoint.net makes a request for your storefront page behind the scenes, and then displays that HTML code to the customer, without leaving PayPoint.net.com.

Squirrelcart automatically uses full URL paths for images, and by default the page will look fine. If you have any custom images on your storefront page that are not part of Squirrelcart, you will need to use full URLs in their paths, or they will appear as broken images when the callback occurs. The same precaution should be taken for any other files that are loaded by the browser, such as CSS stylesheets, external javascript files, etc...

If you are using the "Client Side secure form post" connection method, the URLs will also need to be secure (https:// instead of http://). You can dynamically change the root path of URLs by using this PHP variable:

```
<?=$SC['dyn_root']?>
```

For example, instead of having a custom image tag with a relative URL like this:

```
<img src="images/myimage.gif" >
```

You can add the full path to your store root folder like this:

```
<img src="<?=$SC['dyn_root']?>/images/myimage.gif" >
```

When your page is accessed securely, the image src will be "https://www.example.com/images/myimage.gif". When accessed normally, the image src will be "http://www.example.com/images/myimage.gif".

Testing

To test with your own PayPoint.net account, check the **Test Mode** field on PayPoint.net's record in Squirrelcart.
PayPoint.net also offers a test account with the following information:
Username: secpay
VPN password: secpay
Remote password: secpay
Digest Key: secpay

6.8.3.4.52 Secure Pay

Overview

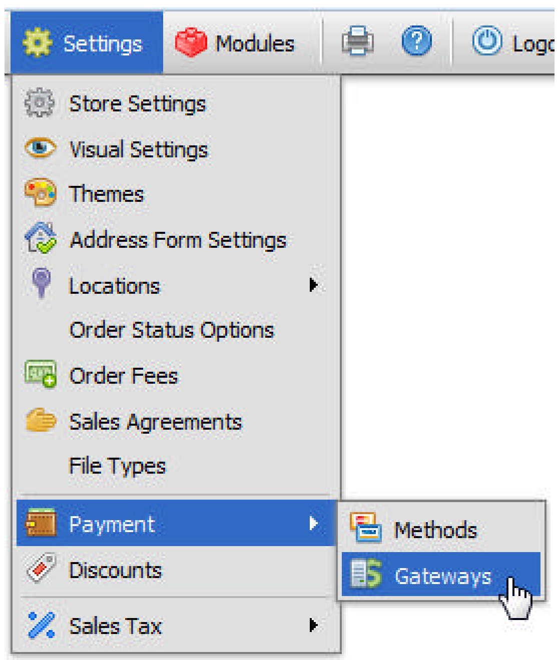
You can find more information about SecurePay here: **http://www.securepay.com (http://www.securepay.com/)**

Requirements

SecurePay supports the **Store Hosted / Server to Gateway, Store Hosted / Browser to Gateway (Relay),** and **Gateway Hosted** connection methods offered by Squirrelcart. Requirements vary based on the **connection method (Section 6.8.3.1)** you choose in Squirrelcart.

Setup Instructions

1. Read the topic describing **connection methods (Section 6.8.3.1)** in this section, and decide which connection method you would like to use.
2. Login to your SecurePay control panel, and select **Secure 16** as your interface in the Interface Selection area of Secure Guard.
3. Open Squirrelcart's control panel
4. Open the Payment Gateways table



5. Click on the record row labeled **SecurePay**
6. Enter your SecurePay assigned merchant identifier in the **Merchant ID** field
7. Choose your transaction type using the **Transaction Type** field

8. Choose your connection method using the **Connection Method** field

9. Check the **Enabled** field

10. Click Save Changes

SecurePay requires the customer provide a billing email address. Be sure to make the Billing Email Address filed required in **Address Form Settings (Section 6.4.1)**.

If you receive a **SECURITY VIOLATION** when using one of the Client Side connection methods, you will need to contact SecurePay support for assistance.

6.8.3.4.53 Skipjack

Overview

Information on Skipjack can be found here: **http://www.skipjack.com (http://www.skipjack.com/)**.

Requirements

Skipjack supports the **Store Hosted / Server to Gateway, Store Hosted / Browser to Gateway (Relay)**, and **Gateway Hosted** connection methods. If you use the **Store Hosted / Server to Gateway** connection method, *CURL* or *fsockopen* support, and *OpenSSL* are required. There are no special requirements for the other two connection methods.

Setup Instructions

1. Skipjack requires the usual address fields PLUS the following fields for all transactions:

   Billing Email Address
   Shipping Phone Number

   For this reason, you should mark these fields as required on the **Address Form Settings page (Section 6.4.1)**.

2. Determine the connection method you will use. Use the **Connection Methods topic (Section 6.8.3.1)** in this section as a guide.

3. If you are using the **Store Hosted / Server to Gateway** connection method, skip ahead to step #10

4. Login to SkipJack's control panel

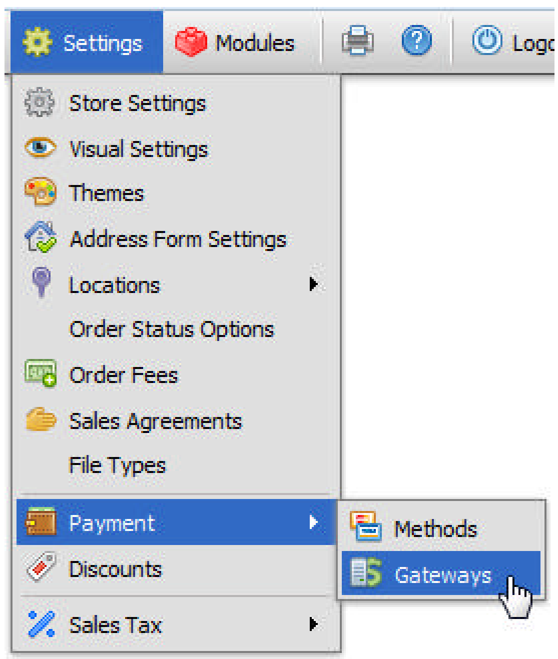
5. Click the **Preferences** link on the top of the page

6. Click the **Response Files** link

7. Click the radio button to the left of "**Send Customer to the following WebPages/URLs**"

8. For all 4 fields immediately below the radio button, enter the URL to your *storefront* page. If you have an *SSL* certificate, enter the secure URL. Examples:
   http://www.example.com/store.php
   OR
   https://www.example.com/store.php

9. Click **Submit**

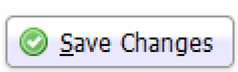
10. Open the Payment Gateways table:


11. Click the Skipjack record row

12. Enter your HTML serial number provided by Skipjack in the **HTML Serial Number** field. Do not user your Skipjack login serial number, as it is not the same thing.

13. Choose your connection method using the **Connection Method** field.

14. Check the **Enabled** field

15. Click 

6.8.3.4.54 Transaction Central

Overview

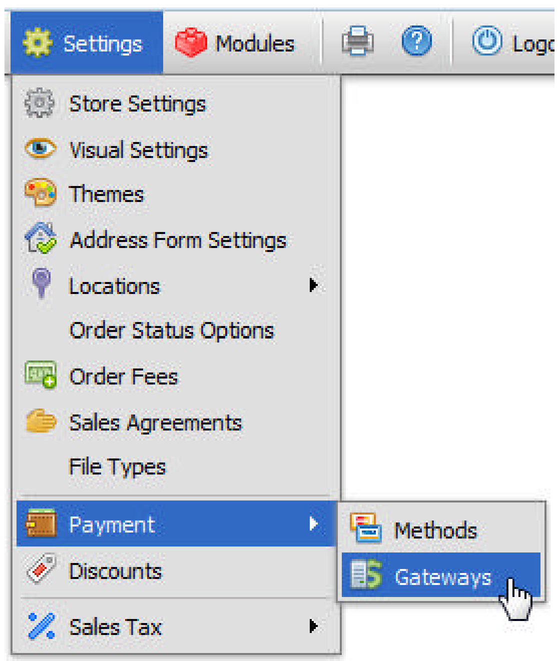
Transaction Central is a payment gateway by TransFirst.com, which is sold through several different merchant account / gateway providers.

Requirements

Requirements vary based on the connection method you choose. Transaction Central supports the **Store Hosted / Server to Gateway, Store Hosted / Browser to Gateway (Relay)**, and **Gateway Hosted** connection methods.

Setup Instructions

1. Open the Payment Gateways table in Squirrelcart's control panel.



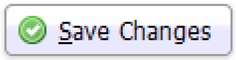
2. Click on the record row labeled Transaction Central

3. Enter your TransFirst Merchant ID in the **Merchant ID** field

4. Enter your TransFirst Security Key in the **Security Key** field

5. Choose your connection method using the Connection Method field. Use the **Payment Gateways > Connection Methods (Section 6.8.3.1)** topic for reference.

6. Check the **Enabled** field

7. Click 

6.8.3.4.55 TransFirst ePayment Services

Overview

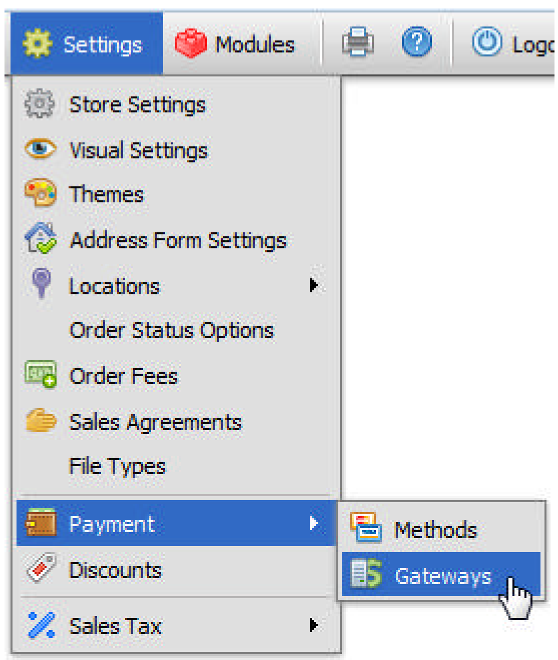
More information about TransFirst can be found here: **http://www.transfirst.com (http://www.transfirst.com/)**

Requirements

- *SSL* certificate
- *CURL* OR *fsockopen* support, and *OpenSSL* (for the Server to Server **connection method (Section 6.8.3.1)**)
- TransFirst Account Number and URL Password

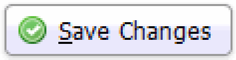
Setup Instructions

1. Open the Payment Gateways table in Squirrelcart's control panel.



2. Click on the record row labeled **TransFirst ePayment Services.**

3. Enter your TransFirst Account Number in the **Account Number** field.

4. Enter your TransFirst URL Password in the **URL Password** field.
5. Choose your transaction type using the **Transaction Type** field
6. Check the **Enabled** field
7. Set **Connection Method** to **Store Hosted / Server to Gateway**
8. Click 

6.8.3.4.56 Tranzila

Overview

Tranzila is a payment gateway based in Israel. You can learn more about it here:

http://www.tranzila.co.il (http://www.tranzila.co.il/)

Tranzila supports Squirrelcart's **Store Hosted / Server to Gateway** and **Gateway Hosted** connection methods. See the **Connection Methods topic (Section 6.8.3.1)** for more information.

Server to Server connection method

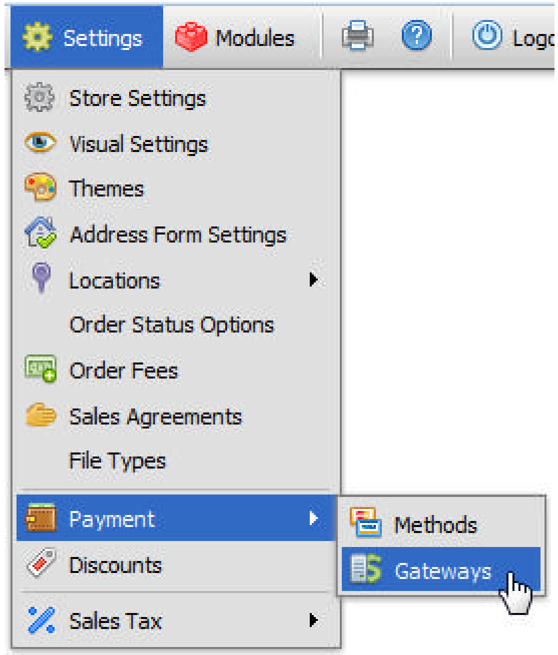
Requirements

CURL OR *fsockopen* support

- *OpenSSL*
- *SSL* Certificate

Setup Instructions

1. Open the Payment Gateways table in Squirrelcart's control panel

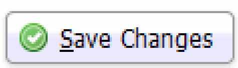


2. Click on the record row labeled **Tranzila**

3. Enter your Tranzila username in the **Username** field

4. Set the **Connection Method** field to **Store Hosted / Server to Gateway**

5. Check the **Enabled** field

6. Click 

7. Login to your Tranzila control panel. As of this writing (08/17/2006) the URL is **https://secure.tranzila.com (https://secure.tranzila.com/)**

8. Click the **Settings** link

9. Click the **Config 1** link

10. Click the radio button next to **Respond to a User Agent object including http headers**

11. Enter your server's *IP address* below the field just selected, in the **Server IP** field. If you do not know your server's IP address, your webhost can provide it to you.

12. Select **yes** next to the text **Include Variables in return string**

13. To the right of the field you just selected, choose **Omit CC Number**

14. Click the **Update** button

15. Click the **Settings** link

16. Click the **Config 2** link

17. Scroll to **Section 2**. Tranzila gives you the option to change the name of the fields sent to them. The defaults work fine with Squirrelcart. If you haven't changed them in the past, you should be able to leave section 2 as is. If you have changed fields, you'll need to set them back to defaults as seen in the screenshot below:

18. Scroll to **Section 3** and for **User 1**, enter the following:
    Field name on form: sc_order_number
    Field name on screen: Squirrelcart Order No.

19. Click the **Update** button

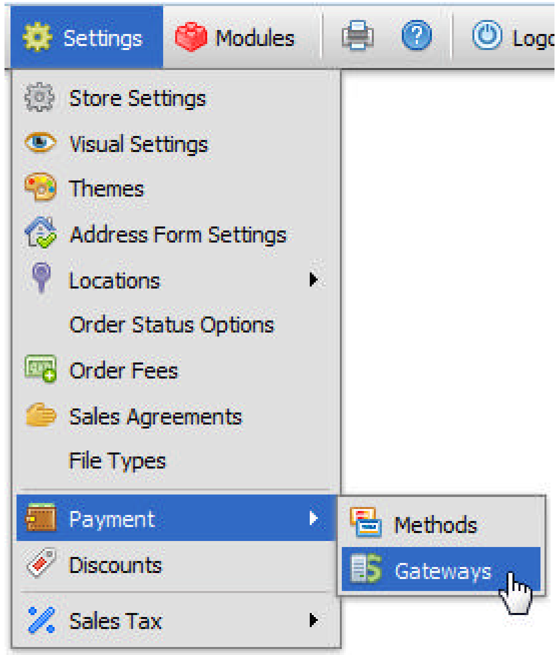
Client side secure form POST connection method

Requirements

- *SSL* Certificate

Setup Instructions

1. Open the Payment Gateways table in Squirrelcart's control panel

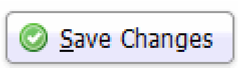


2. Click on the record row labeled **Tranzila**

3. Enter your Tranzila username in the **Account Name** field

4. Set the **Connection Method** field to **Gateway Hosted**

5. Check the **Enabled** field

6. Click 

7. Login to your Tranzila control panel. As of this writing (08/17/2006) the URL is **https://secure.tranzila.com (https://secure.tranzila.com/)**

8. Click the **Settings** link

9. Click the **Config 1** link

10. Click the radio button next to **Respond by redirecting the browser (default)**

11. In the **Referrers** section, enter the secure URL to your storefront page in the first field. By default, it's something like this:
`https://www.example.com/store.php`

12. In both the **Success URL** and **Failure URL** fields, enter the same URL you entered in the last step.

13. Select **yes** next to the text **Include Variables in return string**

14. To the right of the field you just selected, choose **Omit CC Number**

15. Click the **Update** button

16. Click the **Settings** link

17. Click the **Config 2** link

18. Scroll to **Section 2**. Tranzila gives you the option to change the name of the fields sent to them. The defaults work fine with Squirrelcart. If you haven't changed them in the past, you should be able to leave section 2 as is. If you have changed fields, you'll need to set them back to defaults as seen in the screenshot below:


19. Scroll to **Section 3** and for **User 1**, enter the following:
Field name on form: sc_order_number
Field name on screen: Squirrelcart Order No.

20. Click the **Update** button

6.8.3.4.57 TrustCommerce

You can find more information about TrustCommerce here: **http://www.trustcommerce.com (http://www.trustcommerce.com/)**

Squirrelcart supports accepting credit card and electronic check payments with TrustCommerce.

Requirements

- *CURL* or *fsockopen* support
- *OpenSSL*
- *SSL* Certificate

Setup Instructions

1. Open the payment gateway record labeled **TrustCommerce** in the control panel of Squirrelcart

2. Enter your TrustCommerce Store Name in the **Store Name** field

3. Enter your TrustCommerce Password in the **Password** field

4. Check the **Enabled** field

5. Set **Connection Method** to **Store Hosted / Server to Gateway**

6. Click Save Changes

Testing Information

You can test using your account by checking the **Test Mode** field on TrustCommerce's record in Squirrelcart. You can also test using the account name **TestMerchant** and the password **password**.

The Visa number 4111111111111111 will return an approval. The Visa number 4012345678909 will return a decline.

6.8.3.4.58 USAePay

Overview

You can find more information about USAePay here: **http://www.usaepay.com (http://www.usaepay.com/)**

Squirrelcart supports connecting to USAePay using the **Store Hosted / Server to Gateway, Store Hosted / Browser to Gateway (Relay)**, and **Gateway Hosted connection methods (Section 6.8.3.1)**.

Setup Instructions

The screenshot below can be used as a guide:

1. Login to your control panel at USAePay

2. You will need to create a Key and a PIN to access USAePay as follows:

   a. Click **Settings**
   b. Go to **Sources/Keys**
   c. Click **Add Source**
   d. Give your source a name (eg. Squirrelcart)
   e. Enter a PIN in the **PIN** field. This can be anything you like, and you should write it down for subsequent steps.
   f. Copy the **Key** into your clipboard or write it down. This is case sensitive.
   g. Click **Save**

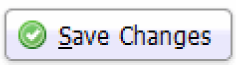
3. Open the payment gateway record labeled **USAePay** in the control panel of Squirrelcart

4. Enter (or paste) your key into the **Key** field

5. Enter your PIN in the **PIN** field

6. Set the **connection method (Section 6.8.3.1)** field according to how you would like to connect.

7. Check the **Enabled** check box

8. Click 

6.8.3.4.59 Converge

Overview

You can find out more about Converge (formerly Virtual Merchant) on their website:
http://www.myvirtualmerchant.com (http://www.myvirtualmerchant.com/)

Requirements

Converge supports the **Store Hosted / Server to Gateway, Store Hosted / Browser to Gateway (Relay)**, and **Gateway Hosted** connection methods. Requirements for each can be found **here (Section 6.8.3.1)**.

Setup Instructions

1. Login to your account at **http://www.myvirtualmerchant.com (http://www.myvirtualmerchant.com/)**

2. Click **Terminal > Advanced > System Setup**

3. In the **Authorized Referrers** field, enter the URL to your storefront page. If you have an *SSL* certificate, enter your secure storefront page URL. If this URL is not entered properly, transactions will fail.

4. Click the **Add Referrer** button

5. Confirm that **Enable HTTP Transactions** is checked

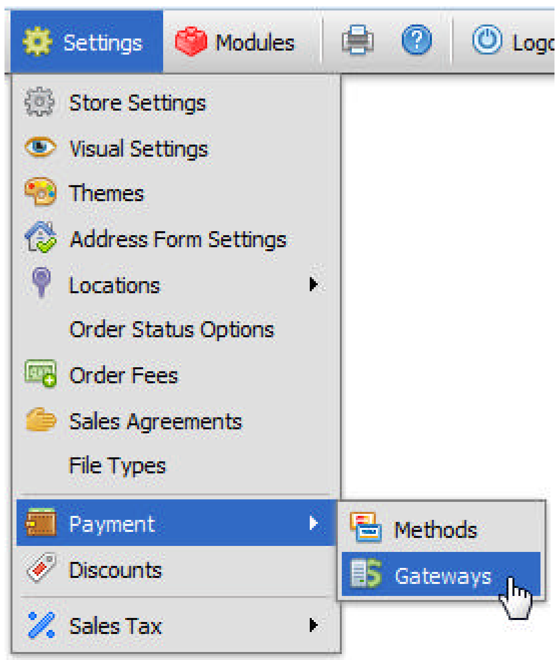
6. Confirm that **Use HTTP Referrers** is checked

7. Click the **Update** button

8. Click **User > Change PIN**

9. You should see a number under the **PIN** column. Write this down.

10. Open Squirrelcart's Payment Gateways table in your control panel:



11. Click on the record row labeled **Converge**

12. Enter your merchant ID (also called "account id") in the **Merchant ID** field

13. Enter your PIN in the **PIN** field

14. Set the **Transaction Type** field (mouse over the field name for help)

15. Set the **Connection Method** field. Use **this page (Section 6.8.3.1)** as a guide ("Server to

Server" is the preferred method).

16. Check the **Enabled** field

17. Click Save Changes

Testing

Checking the **Testing** field on the payment gateway record for Virtual Merchant will cause all transactions to be approved and not sent for processing.

Precautions

> When using any connection method other than **Server to Server**, Converge does not provide the means to verify that the transaction data being returned to your site has not been tampered with by the customer via the URL. For this reason, you should always confirm receipt of payment in your Converge control panel before shipping goods.

6.8.3.4.60 Westpac

Overview

You can find out more about Westpac here: **http://www.westpac.com.au (http://www.westpac.com.au/)**

Squirrelcart supports Westpac via their "Web Advantage Standard" method.

Requirements

There no special requirements for Westpac.

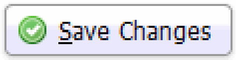
Setup Instructions

1. Open the payment gateway record labeled **Westpac - Web Advantage Standard** in the control panel of Squirrelcart

2. Enter your Westpac **Account Name** in the **Account Name** field. According to Westpac's documentation:

   > Your Account Name will be supplied when your account is activated. It will be of the format "ABC0021", where ABC is your unique three letter account code, also used for logging in to the online Web Advantage Administration area.

3. Make sure the **Connection Method** field is set to **Gateway Hosted**.

4. Click 

> Please note - because of the way Westpac works, there is no way to reliably return your customer back to your website to complete the order. Because of this, Squirrelcart will complete the order PRIOR to sending the customer to Westpac for payment. You will receive an email from Squirrelcart (if enabled), regardless of whether or not payment was submitted. Because of this, you should confirm that you have received payment via Westpac before fulfilling an order.

6.8.3.4.61 Wonderpay

You can find more information about Wonderpay here: **http://www.wonderpay.com (http://www.wonderpay.com/)**

Wonderpay uses the Online Commerce Suite payment gateway, provided by MerchantPartners.com. To setup Wonderpay, follow the instructions for **MerchantPartners (Section 6.8.3.4.29)**, in this section. When it instructs you to open the record in the control panel of Squirrelcart, open the record labeled **Wonderpay**.

6.8.3.4.62 WorldPay

Overview

You can find more information on WorldPay here: **http://www.worldpay.com (http://www.worldpay.com/)**

Squirrelcart supports the WorldPay Select Junior method, as described here: **http://support.worldpay.com/integrations/jnr/index.html**

Setup Instructions

1. Login to your account at worldpay.com: **https://select.worldpay.com/wcc/admin**
2. Click **configuration options** below the Installation ID section
3. Set the **Calback URL** to:

```
<WPDISPLAY ITEM=MC_callback>
```

4. Check **Callback enabled?**
5. Check **Use callback response?**
6. Click **Save Changes**

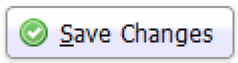
7. Open the payment gateway record labeled **WorldPay** in the control panel of Squirrelcart

8. Enter the installation ID provided by WorldPay into the **Installation ID** field

9. Choose your **Currency Code**

10. Check the **Enabled** check box.

11. Set **Connection Method** to **Gateway Hosted**

12. Click 

6.8.3.5 Testing

This is a generalized testing procedure which should work for most gateways. Some of the instructions for specific gateways in the Supported Gateways section of the documentation have specific testing instructions. If the page for your gateway has these specific instructions, then use those instructions instead of these.

To test your communication with your payment gateway:

1. Walk through a test order in your storefront as a customer until you reach the payment page.

2. Select **Visa** for a payment method

3. Enter this credit card number
   4111111111111111

4. Enter any expiration date that is in the future.

5. Submit the transaction by clicking "Continue"

6. Continue through the process, and you should get a declined message. This will indicate that communication is working properly. You may want to place an order using an actual credit card number as a final test. You should be able to void the transaction afterwards, using your payment gateway's control panel.

> If you set the **Connection Method** for your gateway to **Server to Server**, your server will need to have *CURL* and *OpenSSL* installed. To make sure they are working properly, open the diag_curl.php file in your browser, which is located in your squirrelcart folder. The URL should be similar to:
>
> **http://www.example.com/squirrelcart/diag_curl.php**

6.9 Locations

6.9.1 Locations - Overview

Overview

Location records can be used to keep track of your retail store, warehouse, and other locations. Squirrelcart comes with one built-in location named **Main Location** by default. It represents the location of your company as defined on your **Store Settings page (Section 6.1)** in the control panel.

Location Types

Warehouses - marking a location as a warehouse allows you to use that location in conjunction with our Inventory Control, Shipping, and VAT features.

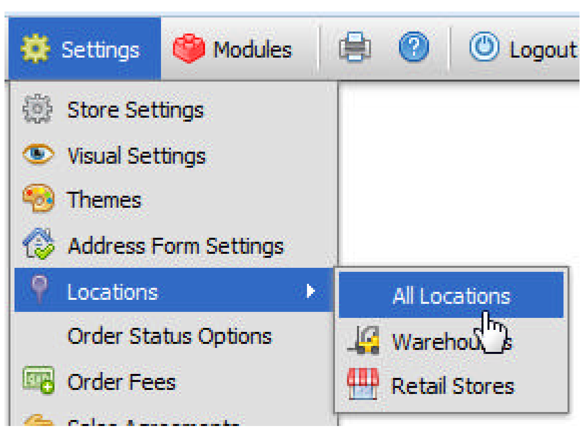
Retail Stores - marking a location as a retail store primarily is for your information only. However, if you have the **Contact module (Section 10.5.1)** installed it has the ability to display your retail store locations on your contact page.

6.9.2 Locations - Creating and Modifying

Instructions

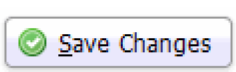
1. Open the **control panel (Section 3)**

2. Click the All Locations menu link



3. Click the  link

4. Fill out the form using the field descriptions below as a guide

5. Click .

Details

Name

The name of this location. This may appear to your customers if you have the Contact module installed and configured to display retail stores on your contact page.

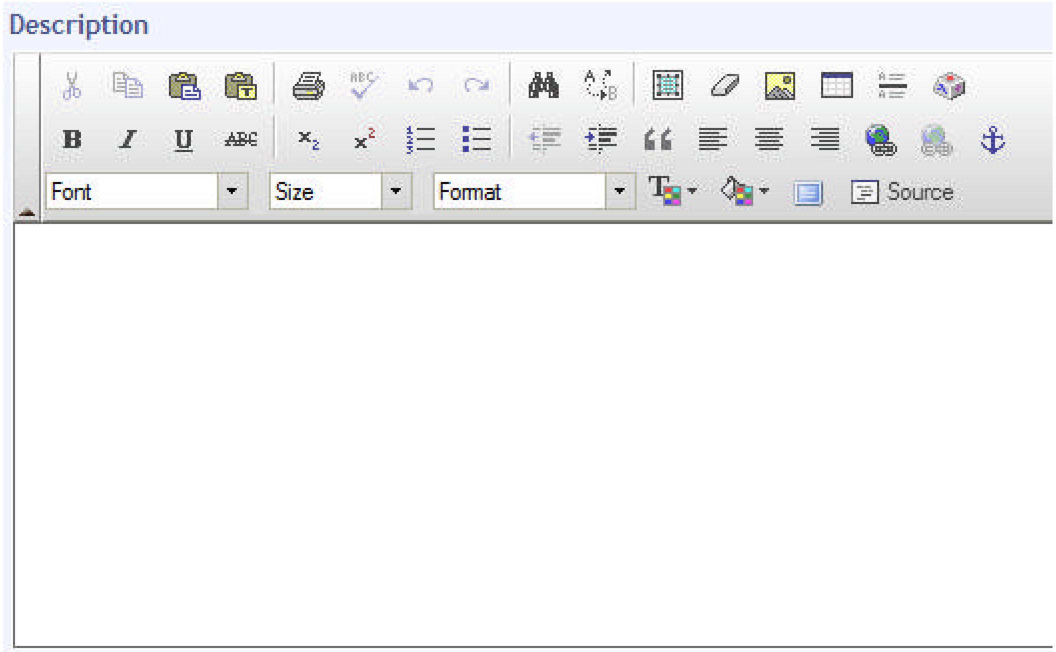
Phone Number(s)

This may appear to your customers if you have the Contact module installed and configured to display retail stores on your contact page.

VAT Enabled

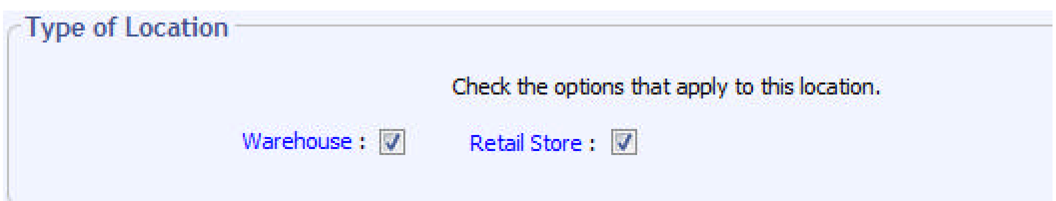
For information on how to enable VAT via this field, see the **VAT topic (Section 6.11.2)**.

Description



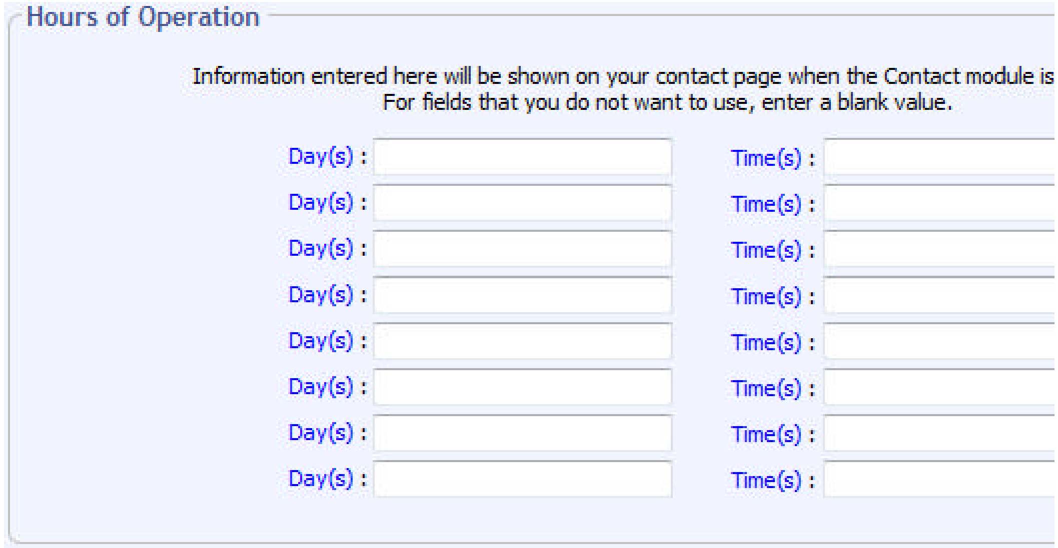
This field is optional. The info here may appear to your customers if you have the Contact module installed and configured to display retail stores on your contact page.

Type of Location



The fields in this section control what type of location this record defines.

Hours of Operation



6.9.3 Warehouses

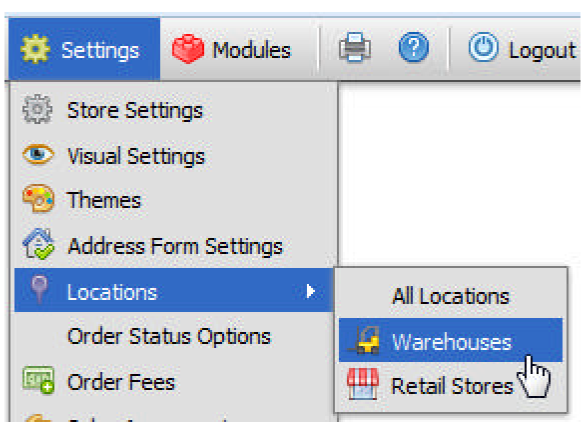
Overview

Warehouses are Location records that have been marked as being Warehouses. They are used to designate additional locations to ship your products from. Warehouses are used by the Shipping, Inventory Control, and VAT Tax features. Each of those sections will address Warehouses as they pertain to each feature. This topic is an overview of Warehouses in general terms.

Adding a Warehouse

1. Open the **control panel (Section 3)**

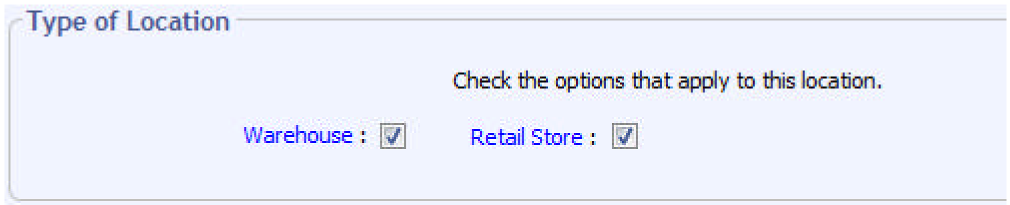
2. Click the Warehouses menu link

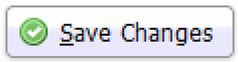


3. Click the Add New link

4. Fill out the form

5. In the **Type of Location** fieldset, check the **Warehouse** field to indicate that this location is a warehouse:



6. Click 

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6.10 File Types

Overview

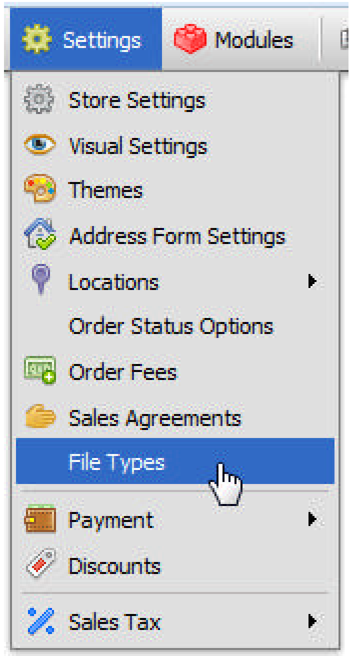
File Types give Squirrelcart a way to recognize particular files. If you have the Download Delivery module installed, the file extension for each file you add to a download will be checked against the file extensions listed in the File Types table. If a match is found, the icon for that extension is shown next to that file on the Downloads page:

If you are using **File Upload product options (Section 7.1.13.7)**, File Types tell that feature what file types are available for you to configure.

You can change the default icons via the records in the File Types table, or directly by replacing the corresponding image in your sc_images/icons folder.

Viewing File Types

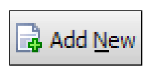
To view the file type records, click this menu link:



Adding / Modifying File Types

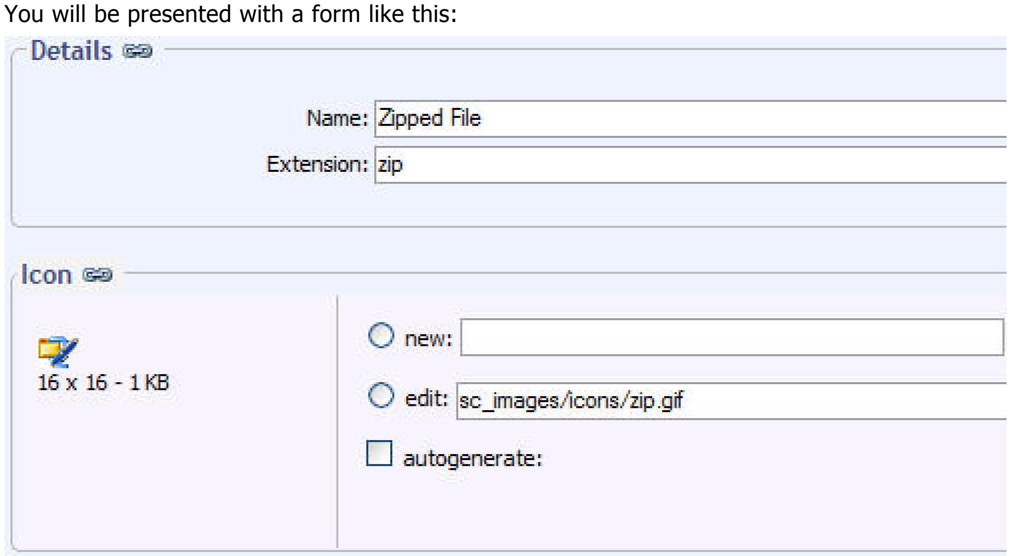
You can add new file types, or edit existing ones as follows:

1. Click the menu link in your control panel shown above

2. If you want to create a new file type, click the 

button. If you want to edit one that already exists, click on a record row.

3. You will be presented with a form like this:

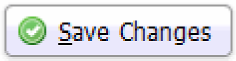


4. Fill out the form using the field definitions below as a guide:

Name
This is for your reference only

Extension
This should be entered in lowercase with no period preceding it.

Icon
This is the image file that will appear for this file type. Recommended size is 16 x 16 pixels.

5. Click 

6.11 Sales Tax

6.11.1 State or Province Based

Overview

Squirrelcart allows you to charge sales tax on a State or Province basis. You can exclude or include items from being taxed on a per category or per product basis.

How it Works

1. Customer adds item to their cart

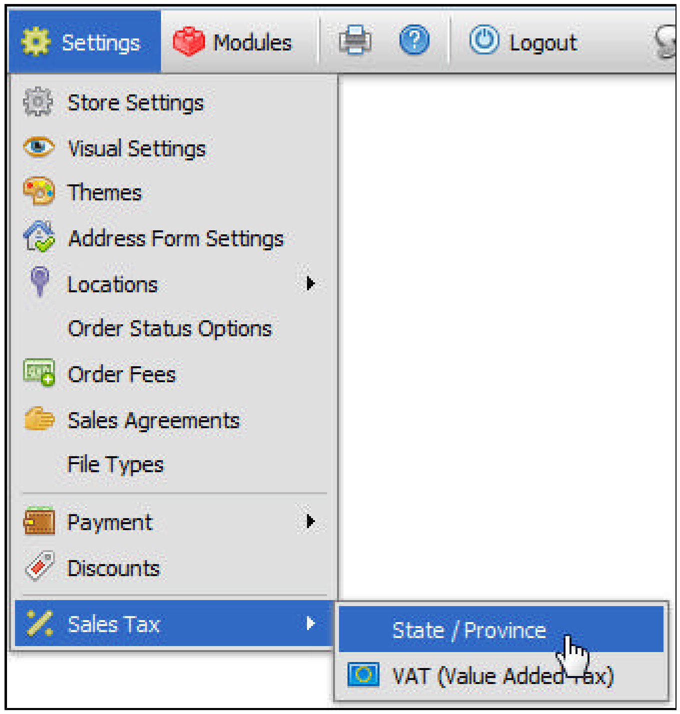
2. Customer proceeds through checkout, and specifies their shipping address. Let's assume that they specified "Massachusetts" as their state

3. Squirrelcart checks the items in the cart to see if they are designated as taxable. If they are not, no tax is applied. If they are, it continues to the next step below.

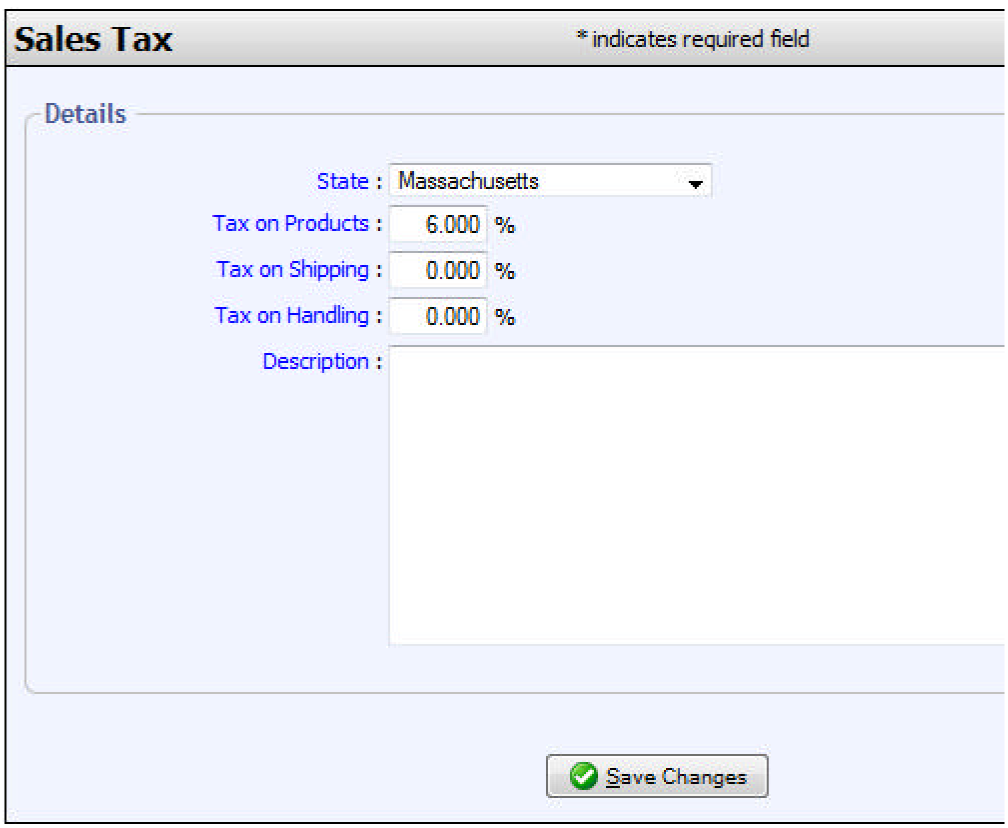
4. Squirrelcart checks your database to see if you have any sales tax records created for Massachusetts. If it finds one, it charges the customer sales tax based on the percentage specified for Massachusetts in the **Tax** field on the Sales Tax record.

Specifying States / Provinces You Collect Tax In

1. Click the **State / Province** Sales Tax menu link

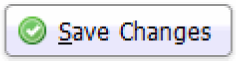


2. Click Add New
   You will see a form like this:



3. Choose the State from the State field

4. Enter a decimal value for the **Tax on Products**, **Tax on Shipping**, and **Tax on Handling** fields as needed.

5. Click 

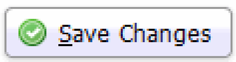
Designating Products as Taxable

There are 2 ways to designate a product as taxable.

At the Category Level

1. Open the category you want to work with in the **control panel (Section 3)**.

2. Set the **Tax Items** field to **yes**
   After doing this, a **VAT Rate** field will appear. Ignore this field unless you use VAT, which is described later in this section.

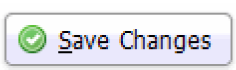
3. Click 

4. Products by default will use the sales tax setting on their category. To ensure that the product is setup to use this default, open it's record and check the **Tax Item** field. It should be set to **Category Default**.

At the Product Level

1. Open the product you wish to work with

2. Set the **Tax Item** field to **yes**

3. Click 

6.11.2 VAT (Value Added Tax)

Overview

The following information is a general overview of VAT. This information is copyright European Communities, 1995-2005, and was obtained from this URL:

http://ec.europa.eu/taxation_customs/taxation/vat/how_vat_works/vat_on_service

When entering your prices in the control panel, you should enter them before VAT.

Squirrelcart will add VAT as needed.

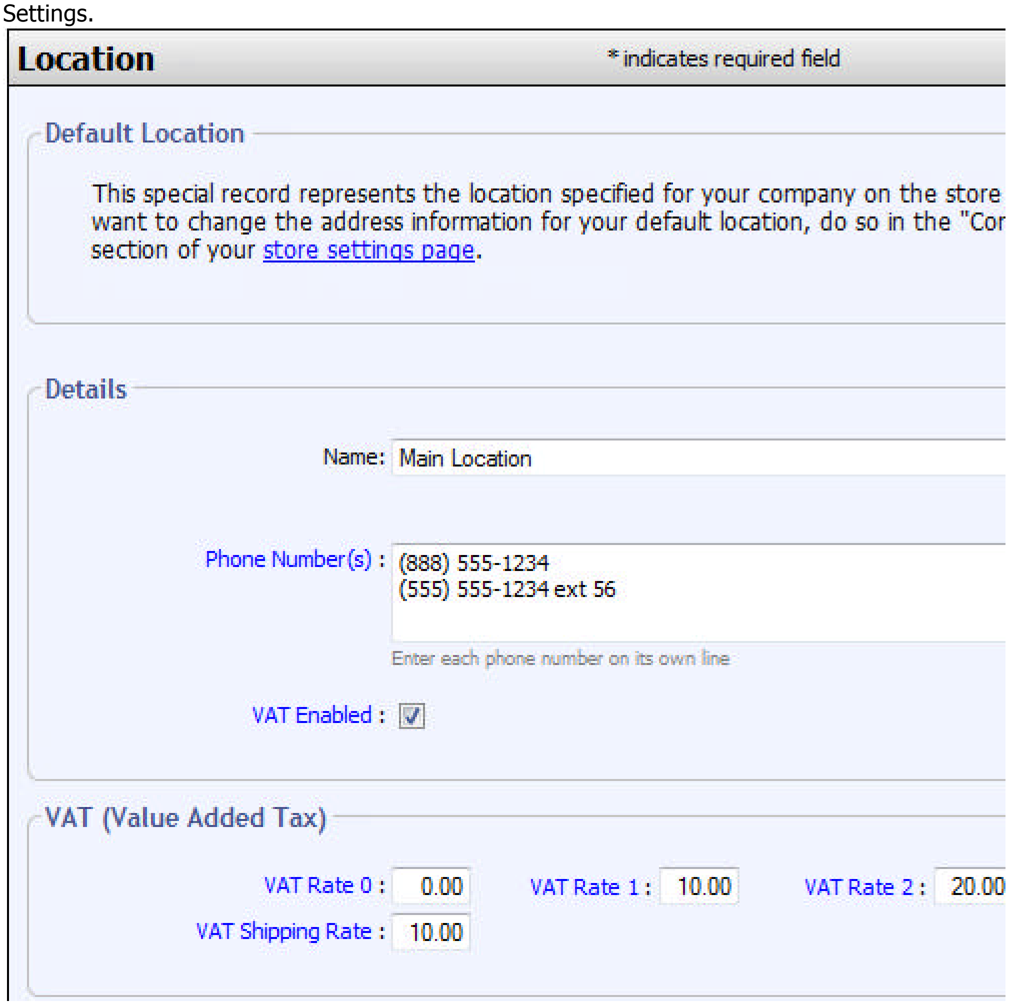
As of version 3.4.0, Squirrelcart will display prices inclusive of VAT by default. If the customer is exempt from VAT or in a country that does not require they be charged for VAT, they will see prices without VAT.

Enabling VAT

1. Specify your company's address in the Company Information section of the **Store Settings (Section 6.1)** page. Be sure to set your country to one of the European Union countries or VAT will not work.

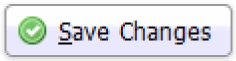
2. Click **Settings > Sales Tax > VAT** in the control panel menu

3. Click record #1, labeled **Main Location**. This represents the address you entered in Store Settings.



4. Check the **VAT Enabled** field. The VAT section will then appear below

5. Specify decimal values for each VAT rate. These rates are specific to your country.

6. Click 

> VAT may also be enabled for additional warehouses by following the same steps. See the **Warehouses (Section 6.9.3)** topic for more information.

Designating VAT Rate for Products

At the Category Level

1. Open the category you want to work with

2. Set the **Tax Items** field to **yes**
   The VAT Rate field will appear

3. Specify the VAT Rate for this Category
   All items in the category will be charged this VAT Rate according to the rules of VAT.

At the Product Level

1. Open the product you want to work with

2. Set the **Tax Item** field to **yes**
   The VAT Rate field will appear

3. Specify the VAT Rate for this product

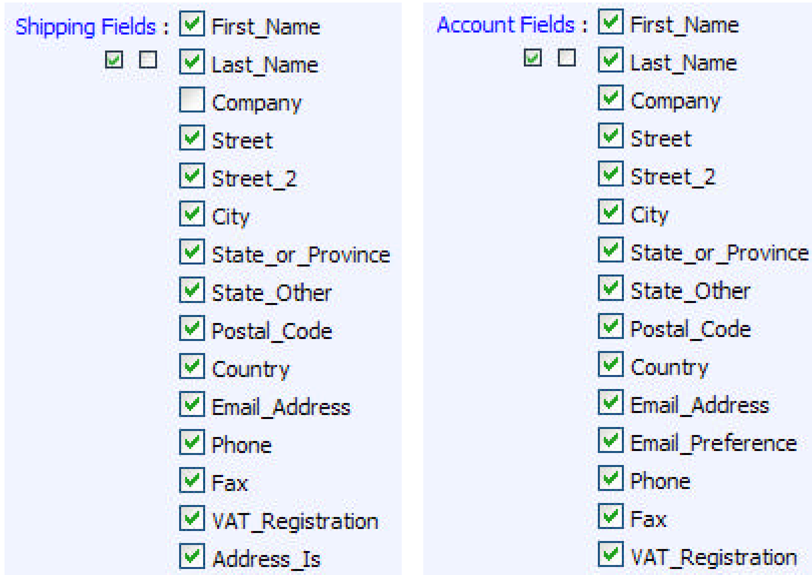
VAT Exemption

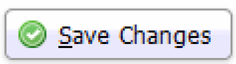
When shipping goods from one EU member state to a different EU member state, the customer can receive VAT Exemption if they provide a valid VAT registration number. Exemption is NOT allowed under any cirumstances if the goods are being shipped to the same country as they are being shipped from.

Enabling VAT Exemption

1. Open the **Address Form Settings (Section 6.4.1)** page

2. Check the **VAT_Registration** field, in the **Shipping Fields** and **Account Fields** sections



3. Click 

This will allow the VAT Registration field to appear on the address forms. If a customer enters a valid VAT registration number, they will not be charged VAT.

VAT ID Validation and Verification

VAT ID Validation

Squirrelcart will validate VAT numbers entered by your customers, to ensure the form at entered meets the syntax of a valid VAT ID number. Validation does not indicate whether or not a VAT ID # entered is actually registered. You do not need to turn on VAT ID Validation. It is automatic.

VAT ID Verification

VAT ID Verification is a feature that will verfiy whether or not an entered VAT ID # is actually registered. This is done via a free web service provided by VIES:

http://ec.europa.eu/taxation_customs/vies/faq.html

With VAT ID Verification enabled, the user will not be allowed to enter a VAT ID number that is not verified.

> While the VIES service does a great job of determine if a VAT ID is valid, Squirrelcart will not guarantee the results of VAT ID verification. It is your responsibility to ensure VAT IDs are accurate.

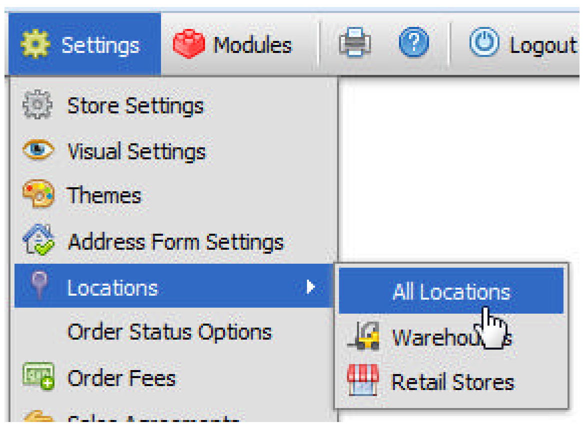
Requirements

This feature requires the *SOAP* PHP extension.

Enabling VAT ID Verification

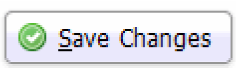
1. Open the control panel

2. Click the **Locations** menu link:



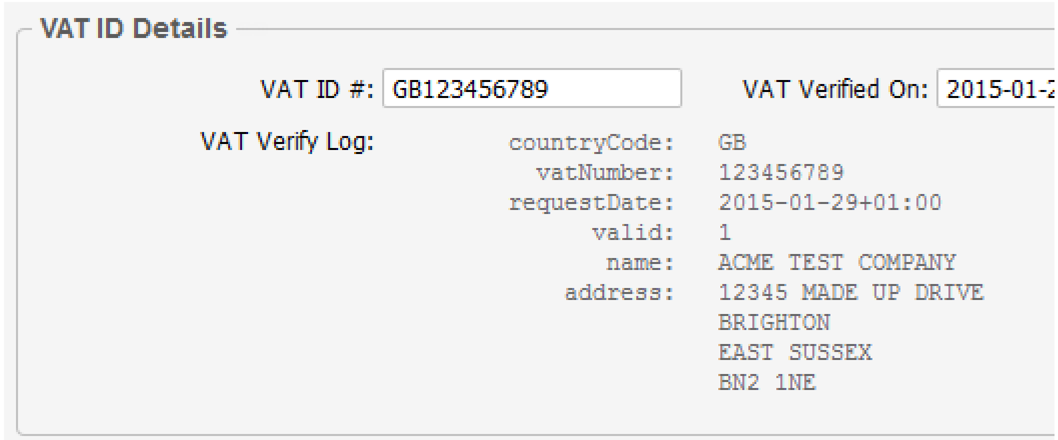
3. Click the row for record #1, which is listed as **Main Location**

4. Check the **Verify VAT ID** field, in the **Details** section

5. Click 

Viewing VAT ID Verification Response

When VAT ID Verification is enabled, and a user enters a VAT ID # on their account, a request is made behind the scenes to a web service provided by VIES for the purpose of verifying VAT ID numbers. If the VAT ID is verified, the **VAT Verified On** field on the user's record in the control panel will show the date on which the verification was made. The **VAT Verify Log** field immediately below it will show the actual data received from the web service:



6.11.3 Tax Exemption

Excluding Customers from Sales Tax

To exclude wholesale customers from paying sales tax, they must have a customer account.

1. You will need a group to put your tax exempt customers in. If you don't have one, **create one (Section 7.3.7)** for that purpose.
2. On the group record, check the **Tax Exempt** checkbox
3. **Add customers to the group ('Adding a Customer to a Group' in the on-line documentation)**.

6.12 SEO and Metadata

6.12.1 SEO Overview

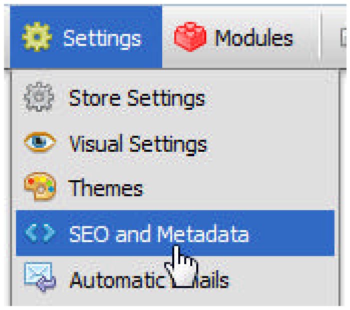
Overview

SEO stands for Search Engine Optimization. It is the practice of optimizing your web pages so they can be ranked and displayed properly by search engines, and social networking sites like Facebook, Google+, and Twitter.

Pages in this section discuss settings specific to controlling how the content of your pages will appear in search engines and social networks, and how URLs will appear to your customers.

SEO and Metadata Settings

Squirrelcart's SEO and Metadata settings can be found via this control panel menu link:



6.12.2 Meta and Title Tags

Overview

Metadata is used to describe your web pages to other systems, like search engines, social networks, and browsers.

Squirrelcart supports four different types of metadata:

- Standard HTML Title Tag, Description and Keywords Meta Tags
- Facebook Open Graph
- Schema.org Microdata
- Twitter Cards

Standard HTML Title Tag, Description and Keywords Meta Tags

Tag Overview

Squirrelcart will automatically set the following tags inside the <head/> tag of your *storefront* pages, based on what is currently being viewed:

Title Tag

```
<title>Digital Camera | Your Store Name</title>
```

The title tag also controls the title of the page, seen in your browser:

Keywords Meta Tag

```
<meta name="keywords" content="16mp digital camera" />
```

Description Meta Tag

```
<meta name="description" content="16 Megapixel camera with long
lasting battery life. | Your Store Name" />
```

PHP Code

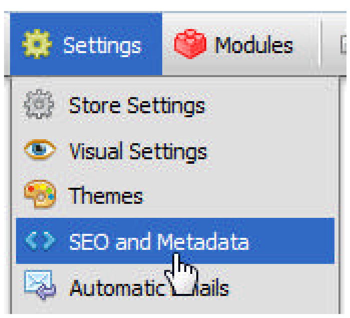
For this feature to work, the following lines of code must appear inside your `<head />` tag:

```
<meta name="keywords"    content="<?php print $Keywords ?>">
<meta name="description" content="<?php print $Description ?>">
<title><?php print $Title ?></title>
```

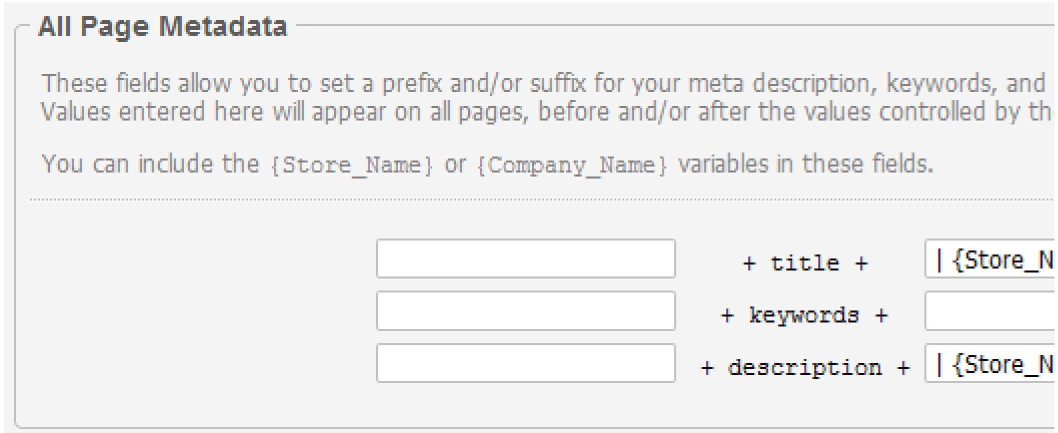
This code is present by default in the store_main.tpl.php.

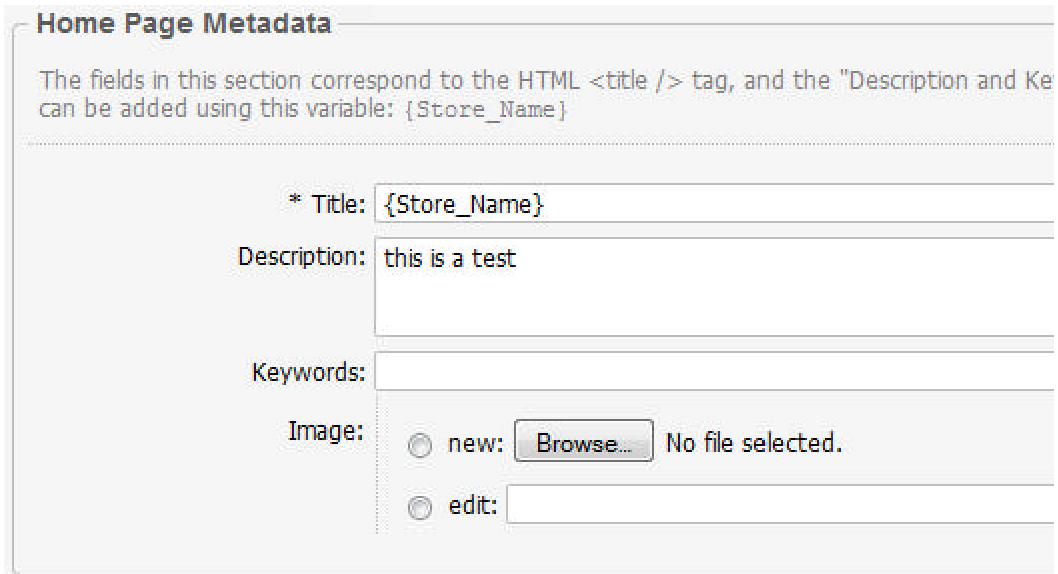
Settings

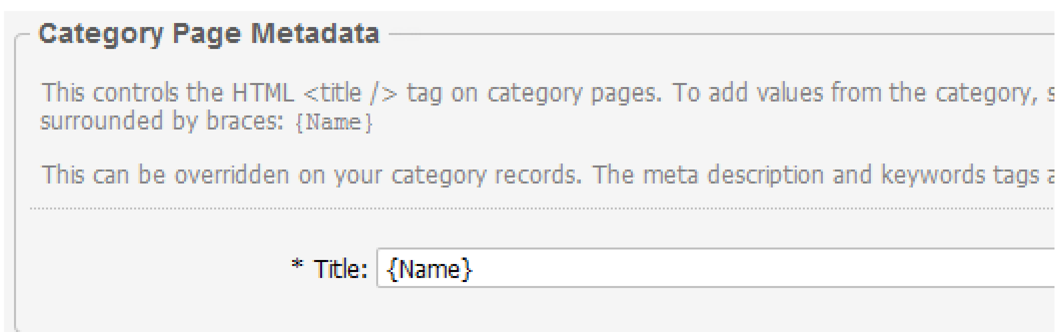
The settings to control the default values for these tags are on the SEO and Metada settings page in your control panel:

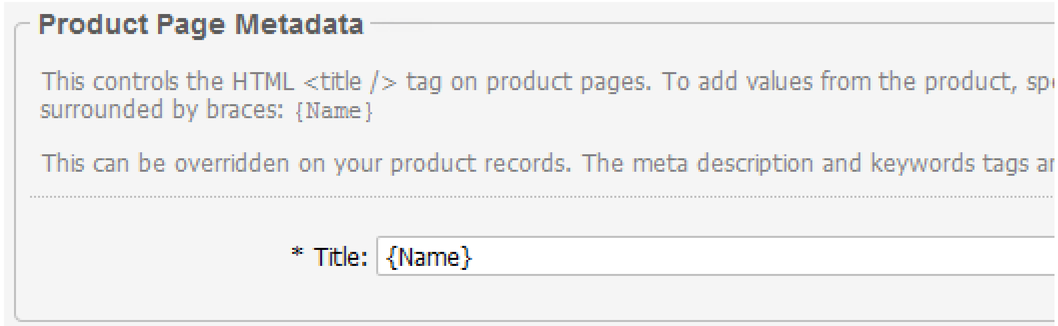


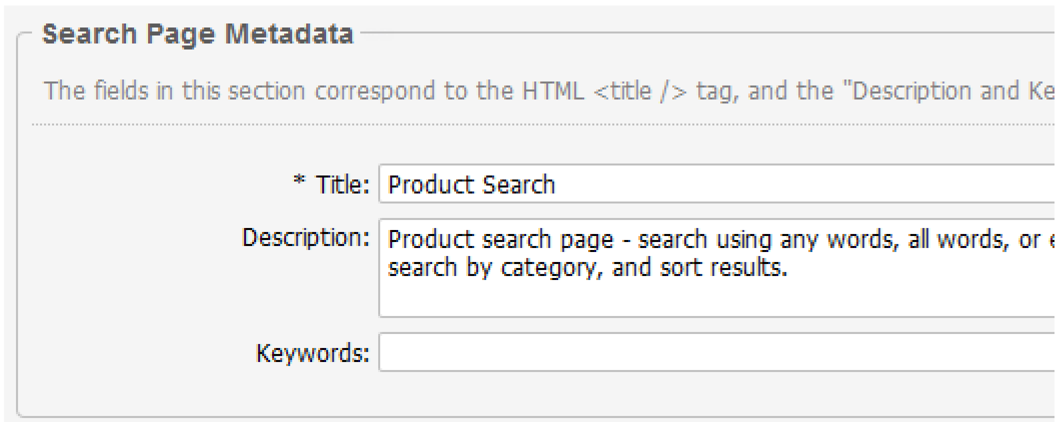
You will find fieldsets on this page to control the default values for these tags, for different pages throughout your store, as follows (see text inside each image for detailed info):

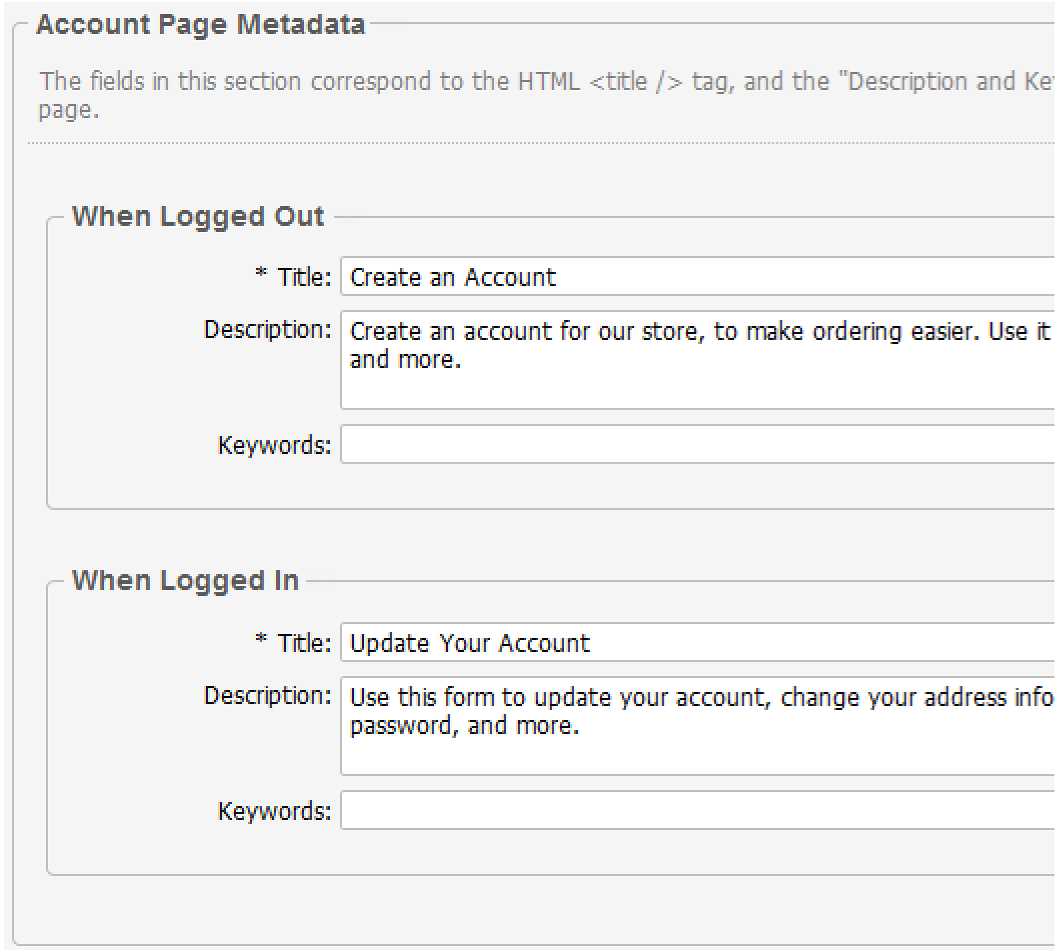

All Page Metadata
These fields allow you to set a prefix and/or suffix for your meta description, keywords, and
Values entered here will appear on all pages, before and/or after the values controlled by th
You can include the {Store_Name} or {Company_Name} variables in these fields.
+ title +
| {Store_N
+ keywords +
+ description +
| {Store_N

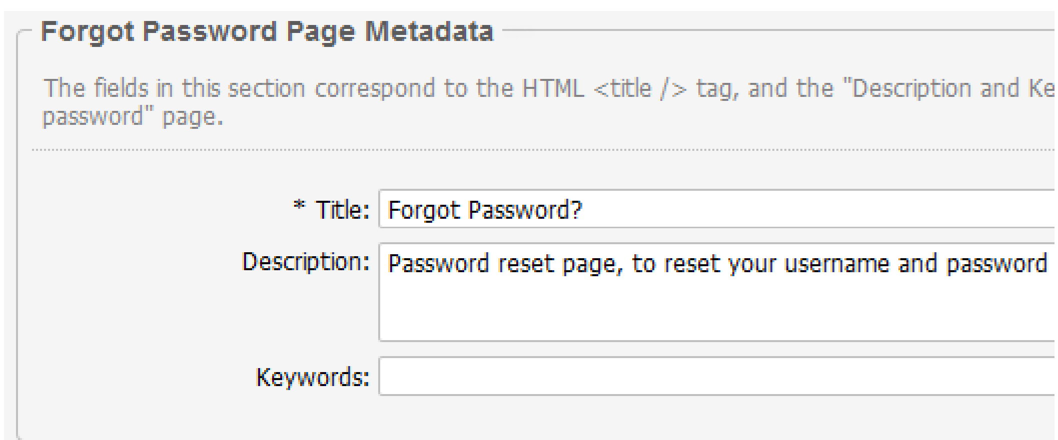

Home Page Metadata
The fields in this section correspond to the HTML <title /> tag, and the "Description and Ke
can be added using this variable: {Store_Name}
* Title:
{Store_Name}
Description:
this is a test
Keywords:
Image:
new:
Browse...
No file selected.
edit:

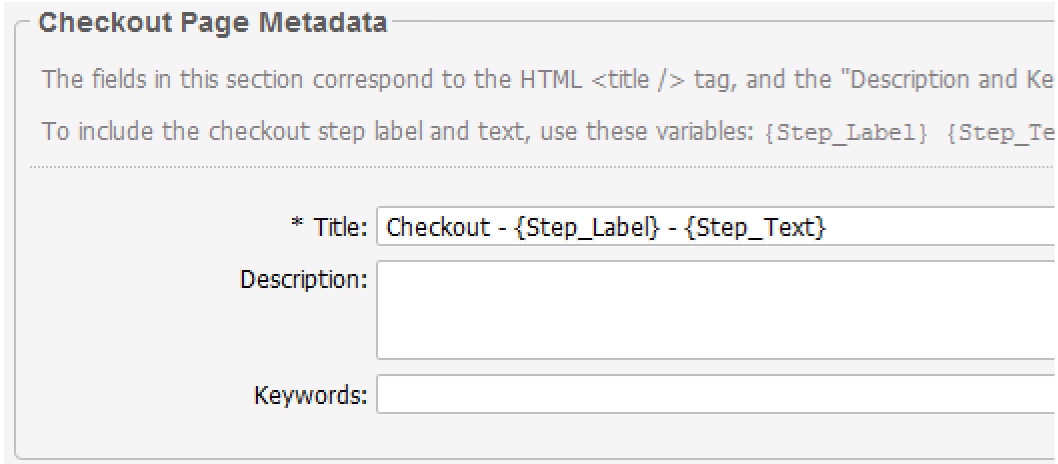

Category Page Metadata
This controls the HTML <title /> tag on category pages. To add values from the category, s
surrounded by braces: {Name}
This can be overridden on your category records. The meta description and keywords tags a
* Title:
{Name}

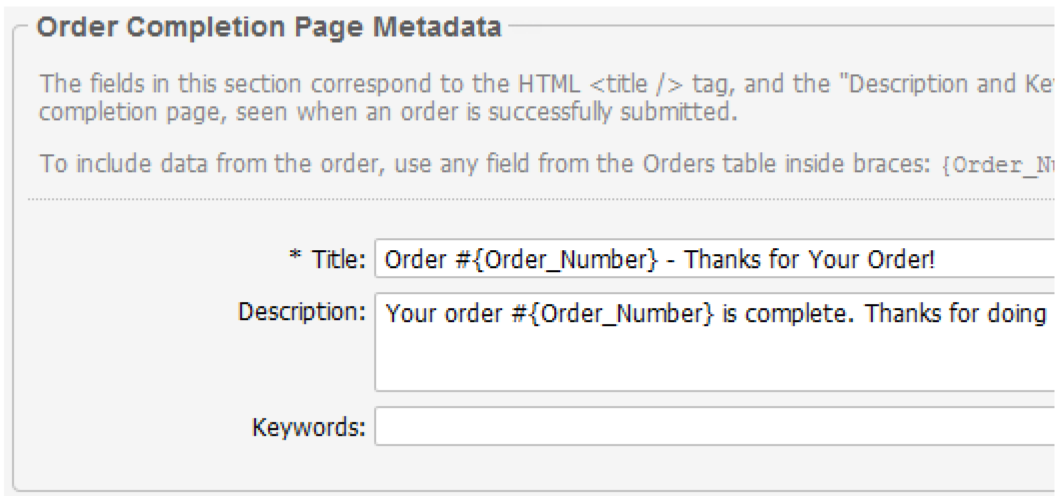

Product Page Metadata
This controls the HTML <title /> tag on product pages. To add values from the product, sp
surrounded by braces: {Name}
This can be overridden on your product records. The meta description and keywords tags ar
* Title:
{Name}

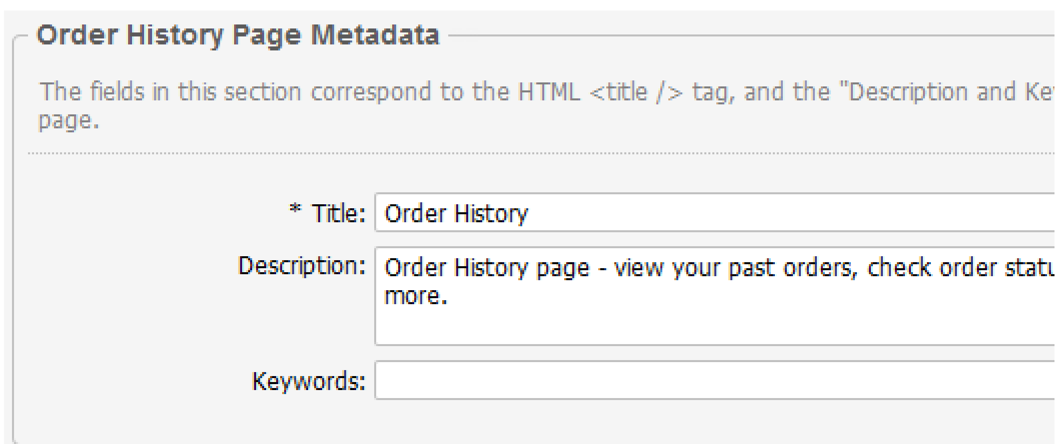

Search Page Metadata
The fields in this section correspond to the HTML <title /> tag, and the "Description and Ke
* Title:
Product Search
Description:
Product search page - search using any words, all words, or
search by category, and sort results.
Keywords:

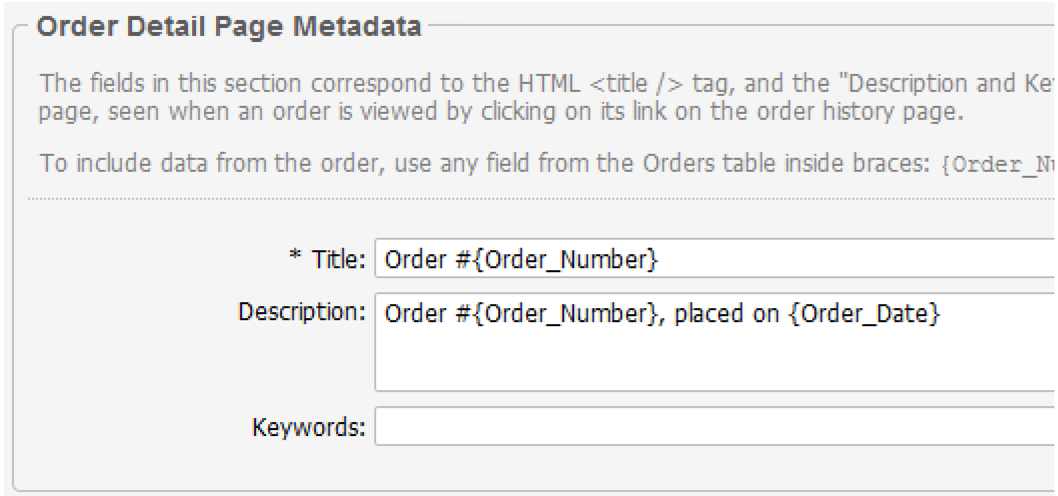

Account Page Metadata
The fields in this section correspond to the HTML <title /> tag, and the "Description and Ke
page.
When Logged Out
* Title:
Create an Account
Description:
Create an account for our store, to make ordering easier. Use it
and more.
Keywords:
When Logged In
* Title:
Update Your Account
Description:
Use this form to update your account, change your address info
password, and more.
Keywords:


Forgot Password Page Metadata
The fields in this section correspond to the HTML <title /> tag, and the "Description and Ke
password" page.
* Title:
Forgot Password?
Description:
Password reset page, to reset your username and password
Keywords:


Checkout Page Metadata
The fields in this section correspond to the HTML <title /> tag, and the "Description and Ke
To include the checkout step label and text, use these variables: {Step_Label} {Step_Te
* Title: Checkout - {Step_Label} - {Step_Text}
Description:
Keywords:

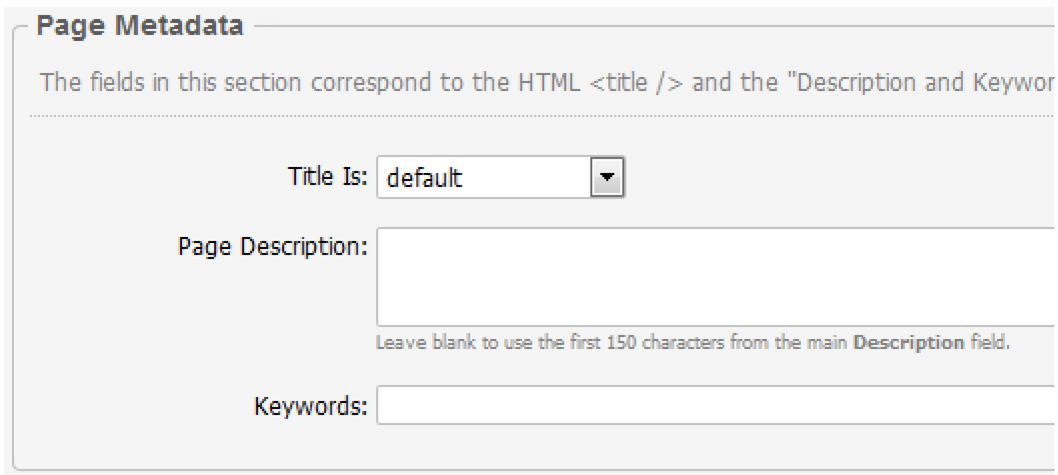

Order Completion Page Metadata
The fields in this section correspond to the HTML <title /> tag, and the "Description and Ke
completion page, seen when an order is successfully submitted.
To include data from the order, use any field from the Orders table inside braces: {Order_N
* Title: Order #{Order_Number} - Thanks for Your Order!
Description: Your order #{Order_Number} is complete. Thanks for doing
Keywords:


Order History Page Metadata
The fields in this section correspond to the HTML <title /> tag, and the "Description and Ke
page.
* Title: Order History
Description: Order History page - view your past orders, check order statu
more.
Keywords:



Settings for Products and Categories

On your product and category records, you'll find a **Page Metadata** fieldset like this:



Title Is

By default, the **Title** tag for product and category records will be set to match the name of the product or category. You can override this on a per record basis by changing this field to **specified below** and entering a new title in the field that will appear below it.

Page Description
This controls the description meta tag for this product or category's page.

Keywords

This controls the description meta tag for this product or category's page.

Facebook Open Graph

Overview

Open Graph (https://developers.facebook.com/docs/opengraph) is an open protocol created by Facebook. It is a standard which allows you to add additional meta tags to a page to aid other systems in understanding that page.

When Open Graph meta tags are present on a webpage and you share that page on Facebook, Facebook uses those tags to help determine how to handle that page. By adding Open Graph meta tags, Facebook can better handle your pages. While created and used primarily by Facebook, it is also used by other systems.

Product Page Example

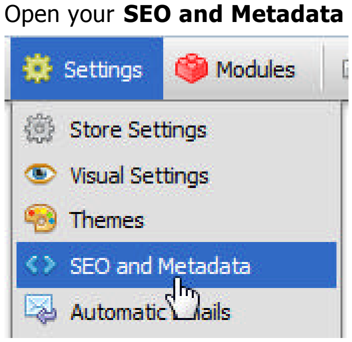
When enabled, Squirrelcart will automatically include open graph meta tags specific to the page being viewed. Here is an example for a product page:

```
<meta property="og:title" content="Digital Camera | Your Store
Name" />
<meta property="og:url" content="http://www.example.com/digital-
cameras/16-megapixel-digital-camera" />
<meta property="og:description" content="16 Megapixel camera with
long lasting battery life. | Your Store Name" />
<meta property="og:type" content="product" />
<meta property="og:site_name" content="Your Store Name" />
<meta property="og:image"
content="http://www.example.com/sc_images/products/263_large_image.jpg"
```

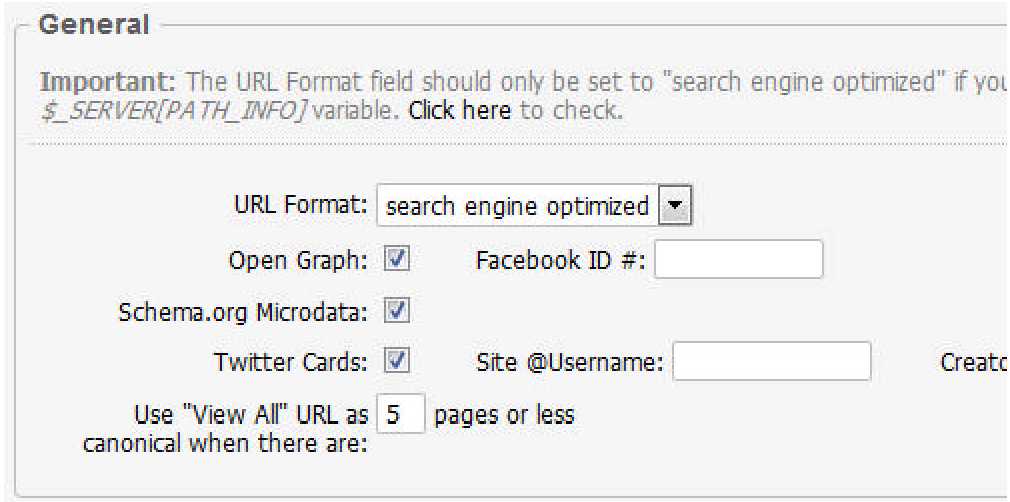
Enabling Open Graph

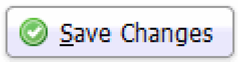
Open Graph is enabled by default. To enable/disable:

1. Open your **SEO and Metadata** settings page:



2. Check the **Open Graph** field, in the **General** fieldset:



3. Click 

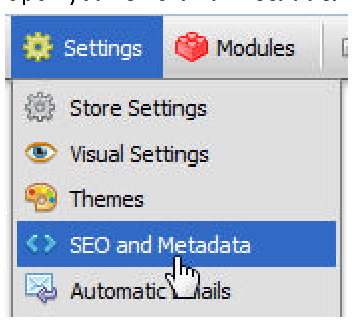
Enabling Facebook Domain Insights

Facebook Insights gives you information about how Facebook users are interacting with your website.

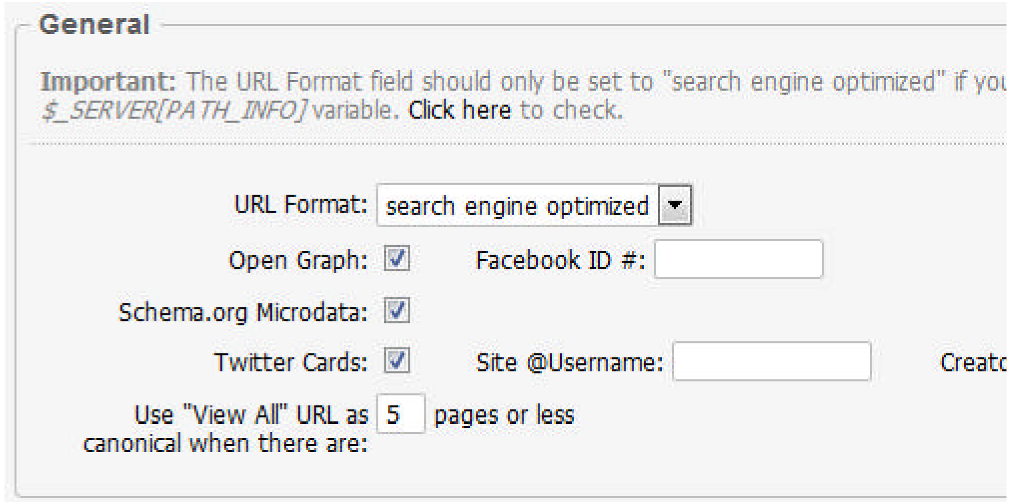
To enable, enable Open Graph (see above). Then:

1. Find your Facebook numeric ID # associated with your Facebook user account: **http://findmyfacebookid.com/**

2. Open your **SEO and Metadata** settings page:



3. Enter your Facebook numeric ID in the **Facebook ID #** field., in the **General** fieldset:



4. Click 

5. Login to Facebook

6. Go to the Insights Dashboard:
   https://www.facebook.com/insights

7. In the **Domain Insights** section, click **Add Your Domain**

8. Enter your domain name in the **Domain** field and choose your username in the **Link With** field.

9. Click **Get Insights**

10. After doing this, when you go to the Facebook Insights Dashboard, you'll see a link corresponding to your domain name. Clicking it will give you insights about your domain.

Schema.org Microdata

Overview

Schema.org (http://www.schema.org/) Microdata is an open standard similar to Open Graph. It is used by many search engines and other systems. This is Google's preferred means of specifying metadata. Using Schema.org Microdata on your pages will help Google and other sites better understand your pages.

When enabled, Squirrelcart will automatically add the correct Schema.org Microdata to your pages, using a combination of <meta/> tags inside the <head/> tag of a page, and tag attributes throughout the page.

Testing with Google's Structured Data Testing Tool

When Schema.org is enabled, you can test your store page URLs to see how Google sees them by using their Structured Data Testing Tool:
http://www.google.com/webmasters/tools/richsnippets

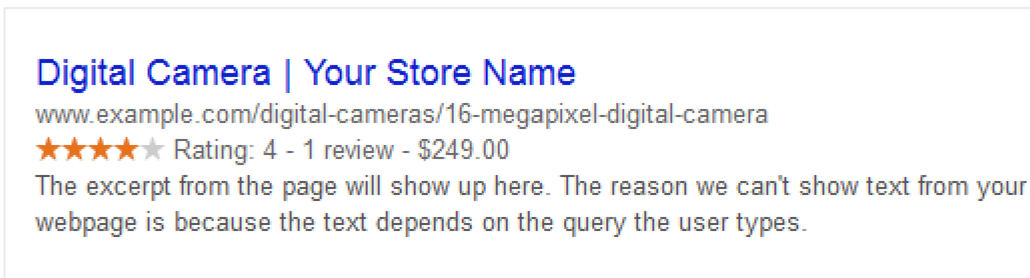
Product Page Example, with Aggregate Rating

When enabled, Squirrelcart will automatically include open graph meta tags specific to the page being viewed. Here is an example of the Schema.org Microdata meta tags for a product page:

```
<meta itemprop="name" content="Digital Camera | Your Store Name" />
<meta itemprop="description" content="16 Megapixel camera with long
lasting battery life. | Your Store Name" />
<meta itemprop="image"
content="http://www.example.com/sc_images/products/263_large_image.jpg"
<meta itemprop="itemCondition" content="New" />
```

Squirrelcart also includes some Microdata within the page, to include pricing and review info (if the Reviews module is installed).

When testing the above example using Google's Structured Data Testing Tool, the preview looks like this:



Product Page Example, with Inventory Details

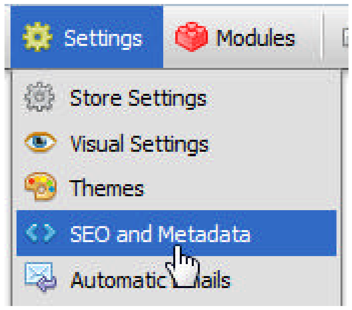
Squirrelcart allows you to specify optional data about your products, such as Brand, Condition, Product Code, ISBN, and more:

```
<meta itemprop="name" content="Test Product | Your Store Name" />
<meta itemprop="image"
content="http://www.example.com/sc_images/products/image.png" />
<meta itemprop="brand" content="Levis" />
<meta itemprop="gtin13" content="0004294967295" />
<meta itemprop="manufacturer" content="ACME" />
<meta itemprop="mpn" content="19KQ-2" />
<meta itemprop="model" content="47A-ULTRA" />
<meta itemprop="sku" content="888271172" />
<meta itemprop="itemCondition" content="New" />
<meta itemprop="productID" content="isbn:7820009187222" />
```

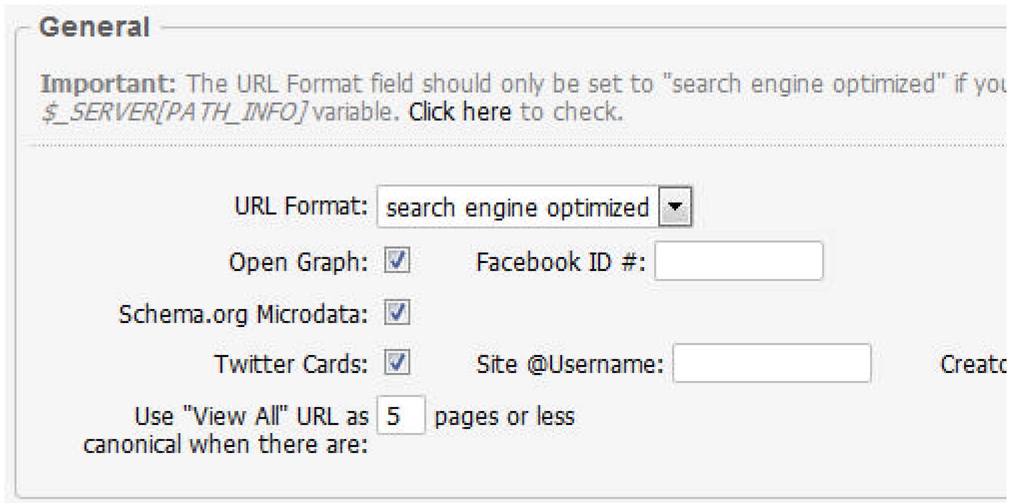
Enabling Schema.org Microdata

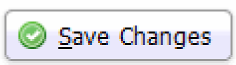
Schema.org Microdata is enabled by default. To enable/disable:

1. Open your **SEO and Metadata** settings page:



2. Check or uncheck the **Schema.org Microdata** field, in the **General** fieldset:



3. Click 

Twitter Cards

Overview

Twitter Cards (https://dev.twitter.com/cards/overview) , as described at **https://dev.twitter.com/cards/overview**:

> *With Twitter Cards, you can attach rich photos, videos and media experience to Tweets that drive traffic to your website. Simply add a few lines of HTML to your webpage, and users who Tweet links to your content will have a "Card" added to the Tweet that's visible to all of their followers.*

With Twitter Cards enabled, Squirrelcart will automatically include meta tags based on the current page being viewed.

Product Page Example, with Inventory Details

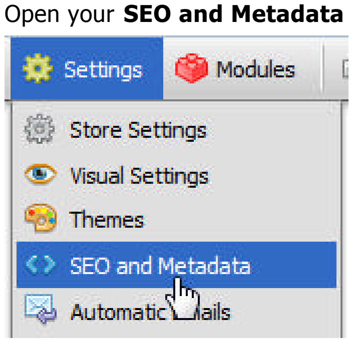
Squirrelcart allows you to specify optional data about your products, such as Brand, Condition, Product Code, ISBN, and more. Here is an example of the Twitter Cards meta tags that Squirrelcart can include on your pages:

```
<meta name="twitter:card" content="product" />
<meta name="twitter:url" content="http://www.example.com/test-
product" />
<meta name="twitter:title" content="Test Product | Your Store
Name" />
<meta name="twitter:image"
content="http://www.example.com/sc_images/products/image.jpg" />
<meta name="twitter:site" content="@Squirrelcart" />
<meta name="twitter:creator" content="@Squirrelcart" />
<meta name="twitter:label1" content="Price" />
<meta name="twitter:data1" content="149.00" />
<meta name="twitter:label2" content="Brand" />
<meta name="twitter:data2" content="Brand Name" />
<meta name="twitter:label3" content="GTIN13" />
<meta name="twitter:data3" content="0004294967295" />
<meta name="twitter:label4" content="Manufacturer" />
<meta name="twitter:data4" content="ACME" />
<meta name="twitter:label5" content="Mnf. Part #" />
<meta name="twitter:data5" content="19KQ-2" />
<meta name="twitter:label6" content="Model #" />
<meta name="twitter:data6" content="47A-ULTRA" />
<meta name="twitter:label7" content="SKU" />
<meta name="twitter:data7" content="888271172" />
<meta name="twitter:label8" content="Condition" />
<meta name="twitter:data8" content="New" />
<meta name="twitter:label9" content="ISBN" />
<meta name="twitter:data9" content="7820009187222" />
```

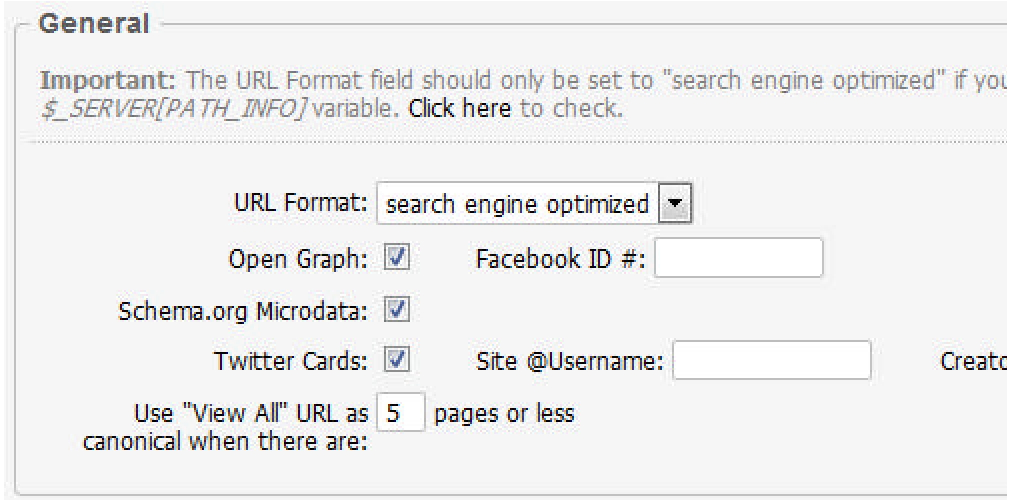
Enabling Twitter Cards

Twitter Cards are enabled by default. To enable/disable:

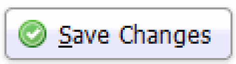
1. Open your **SEO and Metadata** settings page:



2. Check or uncheck the **Twitter Cards** field, in the **General** fieldset:



3. Optionally, you can enter a Twitter @Username corresponding to your site, or yourself as the creator. Use the **Site @Username** and **Creator @Username** fields to enter this info if desired.

4. Click 

Validation and Approval

You can validate your Squirrelcart Twitter Cards by entering the URL to a Squirrelcart store page here:

https://cards-dev.twitter.com/validator

For a Twitter Card to appear in a tweet, it must be approved. For approval, use the above URL to validate a page and click the link to request approval. Once approved, the Twitter Card will appear in tweets that mention the corresponding page.

6.12.3 URLs

Overview

Squirrelcart allows you to control the format of your URLs that link to products, categories, and other pages. We will refer to this feature with the term **SEO URLs**, (SEO stands for Search Engine Optimized). Here are 4 examples of product page URLs based on how you have your SEO URL settings configured:

Query String URL: (OK)

`http://www.example.com/store.php?crn=180&rn=279&action=show_detail`

This method has data in the URL that helps Squirrelcart determine what to show your customer. That data is only meaningful to your web server.

Search Engine Optimized URL: (better!)

`http://www.example.com/store.php/products/deluxe-bookshelf/`

This method removes the query string data and replaces it with more meaningful information. If this page was indexed in a search engine, searching for "deluxe bookshelf" is more likely to generate a result linking to this page.

Search Engine Optimized URL - Advanced: (much better!)

`http://www.example.com/products/deluxe-bookshelf/`

This method is identical to the previous one with the exception that the storefront page is no longer present (store.php by default).

Search Engine Optimized URL - Advanced: (best!)

`http://www.example.com/furniture/deluxe-bookshelf/`

This method is identical to the previous one with the exception that the category, product, and content bases are not used. When viewing a product, it is preceded by a base matching it's category for better SEO. Category and content URLs are not prefixed with any base, and the storefront page is no longer present (store.php by default).

For this setup, enable SEO URLs, then follow the steps under SEO URLs (Advanced) below, and be sure to check the **Smart Bases** checkbox.

Query String URLs

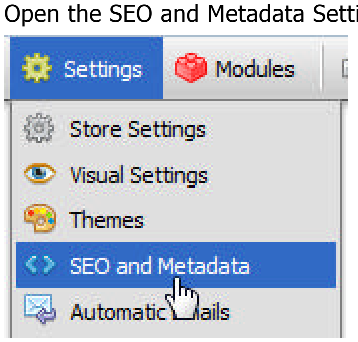
Requirements:

None

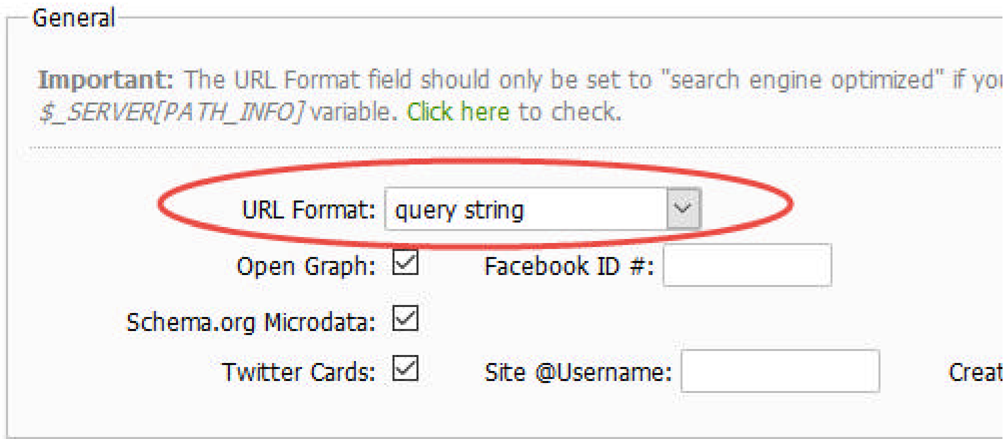
Setup Instructions:

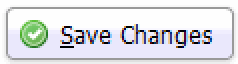
We recommend using SEO URLs when possible. If your server doesn't support them, here's how to configure Squirrelcart to use query string URLs.

1. Open the SEO and Metadata Settings page.



2. Change the **URL Format** field in the **General** fieldset to **query string**:



3. Click 

SEO URLs

Requirements:

Your server must support the $_SERVER['PATH_INFO'] variable OR support both the $_SERVER ['SCRIPT_NAME'] and $_SERVER['REQUEST_URI'] variables.

Precautions:

⚠ When enabling SEO URLs, you are changing the URL structure for Squirrelcart content. Because of this, any code you've written yourself in your storefront must use absolute URLs. If you are using relative URLs in your Squirrelcart storefront, those URLs will not be valid. This will result in broken links, broken images, etc... See the *Broken Images and Links* section at the end of this page for more information.

Overview

Enabling SEO URLs will turn your URLs from something like this:

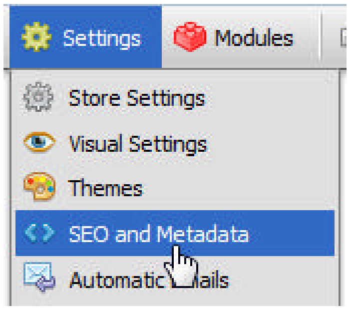
```
http://www.example.com/store.php?crn=180&rn=279&action=show_detail
```

To this:

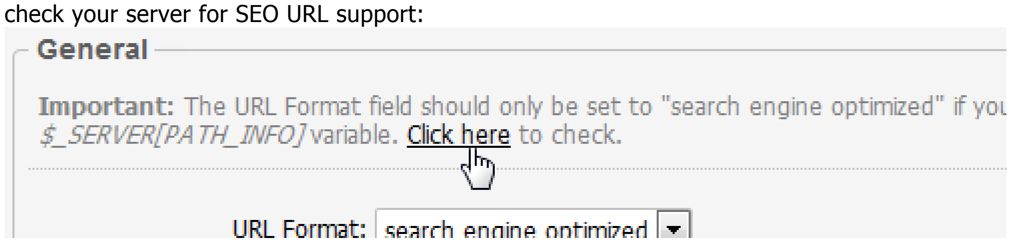
```
http://www.example.com/store.php/products/deluxe-bookshelf/
```

Setup Instructions:

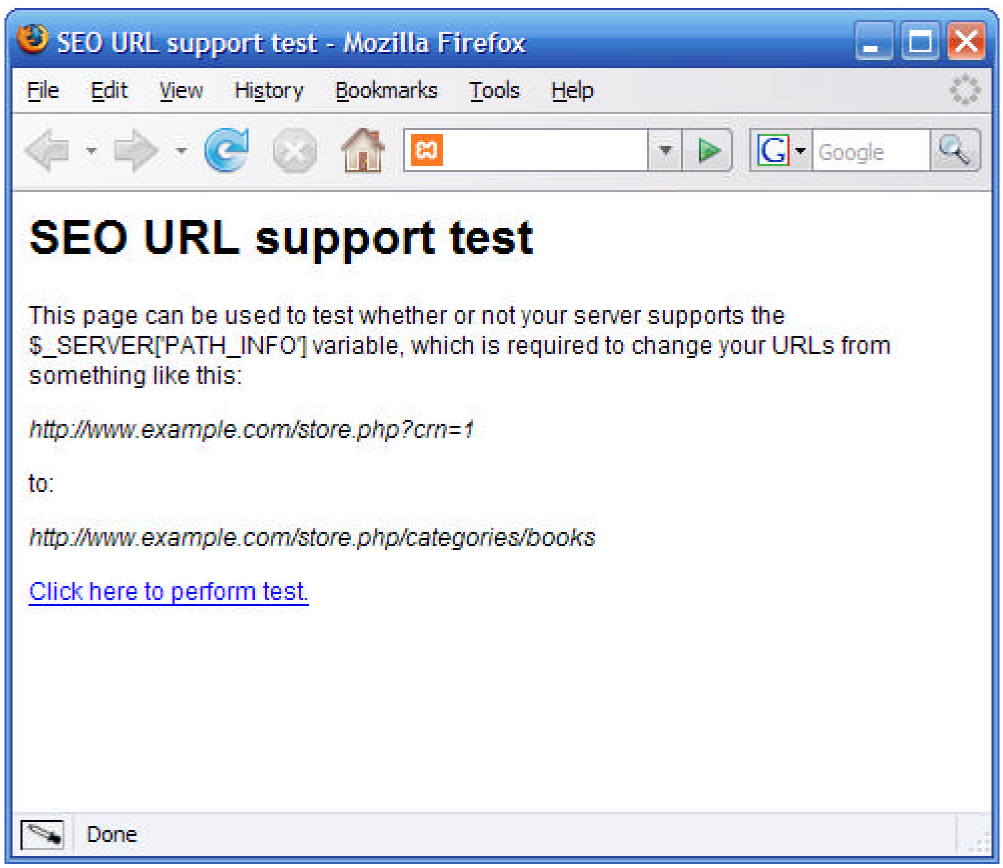
1. Open the SEO and Metadata Settings page.



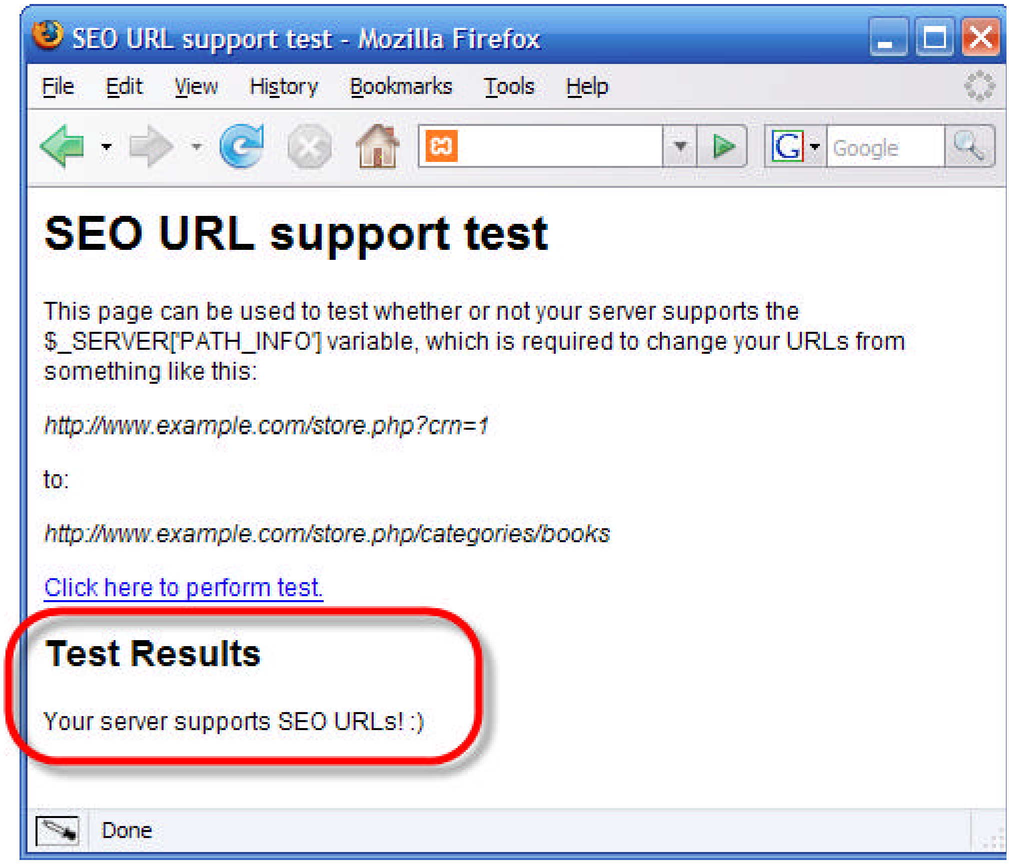
2. Locate the **General** fieldset**.** Towards the top of that fieldset, click the **Click here** link to check your server for SEO URL support:



3. This will open the SEO URL test page:

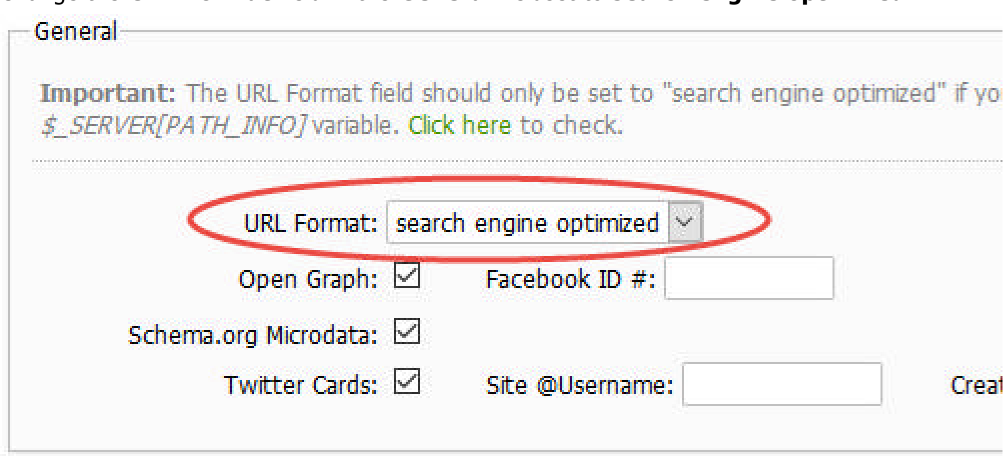


4. Click the link labeled "Click here to perform test".

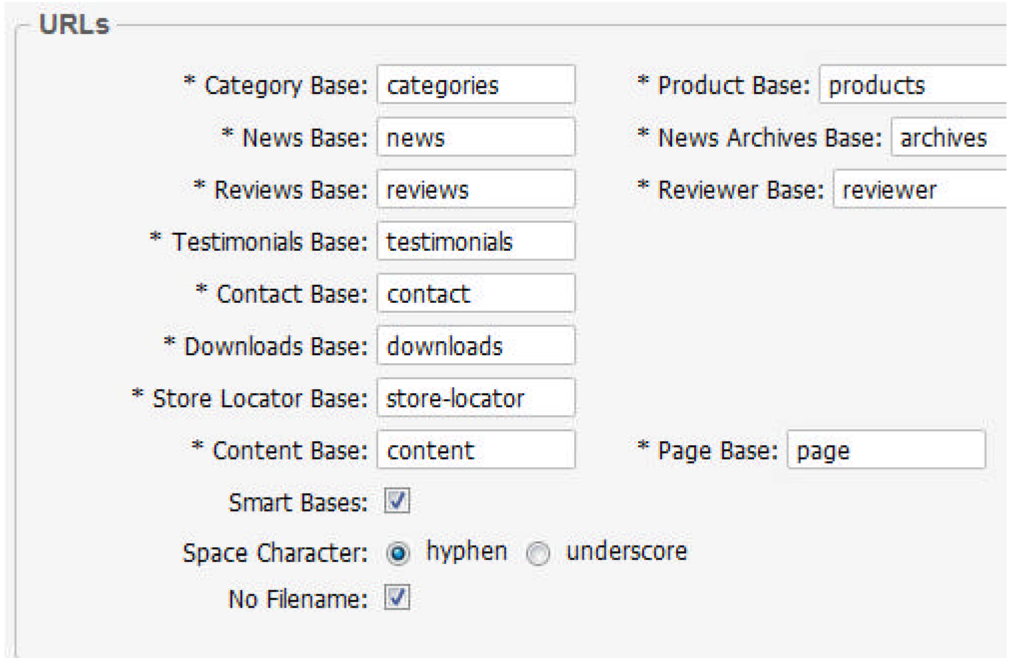


5. If the test passed, you will see the message above and can continue to the next step. If you do not see this message, your server does not support PATH_INFO and you should stop here. If you contact your webhost, they may be able to add support for PATH_INFO for you.

6. Change the **URL Format** field in the **General** fieldset to **search engine optimized**:



7. A new section will appear labeled **URLs**.



The fields in this section control certain aspects of your URLs. You can leave the defaults and skip to the next step. If you prefer to change these settings, here is what each one does:

Category Base
This is the part of your category URLs that precede the name of the category. The default value for this is "categories", which would be used in a category URL as follows:

```
http://www.example.com/store.php/categories/books
```

Product Base
This is the part of your product URLs that precede the name of the product. The default value for this is "products", which would be used in a product URL as follows:

```
http://www.example.com/store.php/products/coffee-table
```

News Base
This setting is only present when the News module installed. This is the part of your news URLs that precede the name of a news post. The default value for this is "news", which would be used in a news post URL as follows:
store.php/*news*/2008/11/25/post-name

```
http://www.example.com/store.php/news/2008/11/25/post-name
```

News Archives Base
This setting is only present when the News module installed. This is the part of your news URLs that represents the term "archives". The default value for this is "archives", which would be used in your news archives URL as follows:

```
http://www.example.com/store.php/news/archives
```

Reviews Base
This setting is only present when the Reviews module is installed. This is the part of your review URLs that precede the name of the product. The default value for this is "reviews", which would be used in a review URL as follows:

```
http://www.example.com/store.php/reviews/product-name
```

Reviewer Base
This setting is only present when the Reviews module is installed. This is the part of your reviewer URLs that precede the record number of the reviewer. The default value for this is "reviewer", which would be used in a reviewer URL as follows:

`http://www.example.com/store.php/reviews/reviewer-382`

Testimonials Base
This setting is only present when the Testimonials module is installed. The default value for this is "testimonials", which would be used in your testimonials page URL as follows:

`http://www.example.com/store.php/testimonials`

Contact Base
This setting is only present when the Contact module is installed. The default value for this is "contact", which would be used in your contact page URL as follows:

`http://www.example.com/store.php/contact`

Downloads Base
This setting is only present when the Download Delivery module is installed. The default value for this is "downloads", which would be used in your download page URL as follows:

`http://www.example.com/store.php/downloads`

Store Locator Base
This setting is only present when the Store Locator module is installed. The default value for this is "store-locator", which would be used in your store locator page URL as follows:

`http://www.example.com/store.php/store-locator`

Content Base
The default value for this is "content", which appears in links to your own pages (via content records) as follows:

`http://www.example.com/store.php/content/about-us`

Page Base
This is the part of your URLs that represents the term "page", used in links to additional pages. The default value for this is "page", which would be used in a URL as follows:

`http://www.example.com/store.php/categories/books/page-4`

Smart Bases
When checked, product, category, and content bases are not used.

Category URLs for products that are in a category will appear with the category name as a base. Example:

`http://www.example.com/books`

Product URLs for products that are in a category will appear with the category name as a base. Example:

`http://www.example.com/books/gone-with-the-wind`

Product URLs for products that are not in a category will appear using just the product name base. Example:

`http://www.example.com/gone-with-the-wind`

Content URLs (links to non store pages) will appear using just the link name base. Example:

`http://www.example.com/about-us`

> With **Smart Bases** enabled, if you also enable **No Filename**, you must use **Method 1** in the **SEO URLs (Advanced)** steps towards the bottom of this page.

Space Character
This controls the default character used in place of a space in your URLs. The default value for this is "hyphen":

`http://www.example.com/store.php/products/this-is-a-long-product-name`

Setting this to "underscore" would make the above URL look like this:

`http://www.example.com/store.php/products/this_is_a_long_product_name`

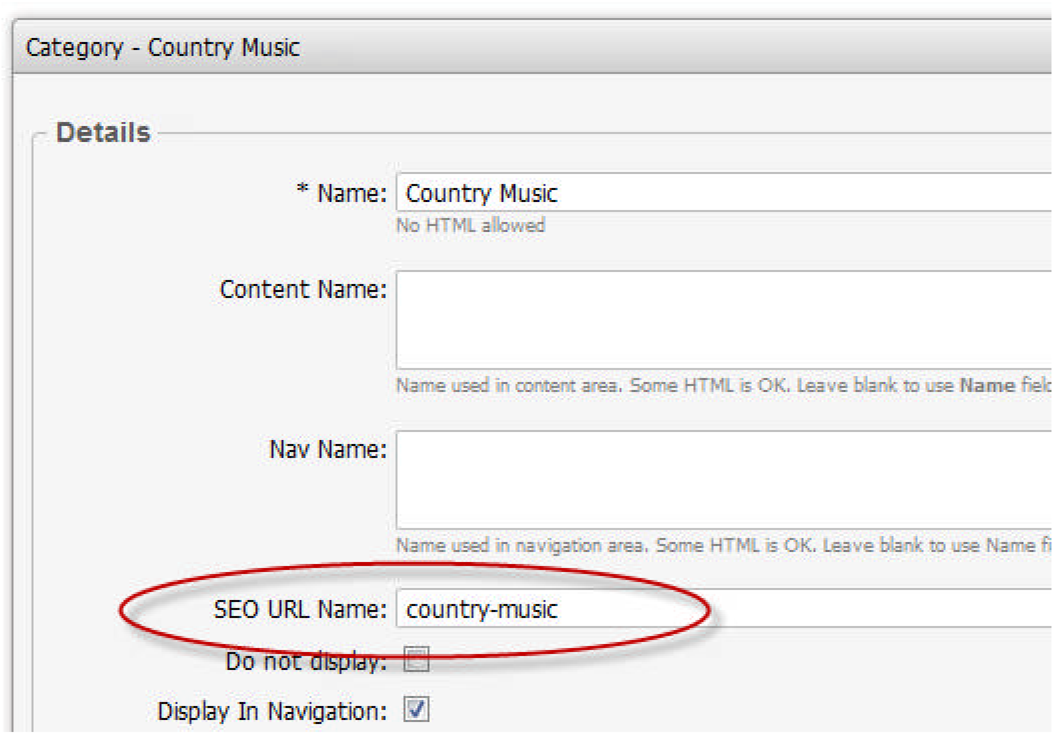
No Filename
This field can be checked to remove the storefront page name from most of your URLs.

> Do not check this field without following the instructions in the **Setting up SEO URLs (advanced)** section below!

8. Click Save Changes

Customizing

You can control how product, category, and news post names appear in your URLs by modifying the **SEO URL Name** field in each respective table in your control panel. Here's an example of this field on a category record.



Redirects

If a user tries to load a page using a query string URL after you have enabled SEO URLs, Squirrelcart will issue a redirect (HTTP code 301) to the equivalent SEO URL. This will ensure search engines know the page has moved to a different location, and help to avoid penalties for duplicate content.

If you decide to change the **SEO URL Name** field for a particular item (see **Customizing** section directly above), and a URL is requested using the prior value you had stored in that field, Squirrelcart will issue a redirect to the new URL.

Example: Using the image above, the URL to the "Compact Discs" category is:

`http://www.example.com/store.php/categories/compact-discs`

Now, 3 months after that page has been indexed by a search engine you decide to change your URL to this by changing the **SEO URL Name** field to **cds**:

`http://www.example.com/store.php/categories/cds`

If the old URL is requested by a user, they will automatically be redirected to the new URL.

`(http://www.example.com/store.php/categories/compact-discthis_is_a_long_product_name)`

SEO URLs (advanced)

Overview

This is an additional procedure you can follow to remove the storefront page from your URLs after you've followed the steps above to enable **SEO URLs.** This is an advanced topic, and caution should be taken when attempting this procedure.

This will change your URLs from something like this:

```
http://www.example.com/store.php/products/coffee-table
```

To this:

```
http://www.example.com/products/coffee-table
```

With the **Smart Bases** feature enabled, you can get even nicer URLs that don't use the category, product, and content bases:

```
http://www.example.com/furniture
http://www.example.com/furniture/coffee-table
http://www.example.com/about-us
```

Requirements

- PATH_INFO support
- Support for .htaccess files
- Support for either "mod_rewrite" OR either of the directives: ForceType, SetHandler

Setup Instructions Explained

There are 3 ways to handle this. All require .htaccess file support. The first two methods uses mod_rewrite, and the second uses either ForceType or SetHandler directives. Follow the section below that corresponds to what your server has support for. If you aren't sure, we recommend you follow the mod_rewrite instructions first. If they do not work, then try the "ForceType/SetHandler" instructions.

Method 1 (recommended): Setup Instructions Using Mod_Rewrite, Giving Squirrelcart Full Control

Mod_Rewrite is a feature built into Apache web servers that allows you to transform the URL requested by a client into a different URL without the client seeing their URL change in their browser. With this method, when the customer requests a URL like:

```
http://www.example.com/products/coffee-table
```

Mod_Rewrite will change their request to include your storefront page without changing the URL in their browser:

```
http://www.example.com/store.php/products/coffee-table
```

This method will send all page requests for any folder or file that does not actually exist on your server to Squirrelcart, in turn giving Squirrelcart full access to just about any URL. If you want to use the **Smart Bases** feature (highly recommended), you will need to use this method.

1. Follow the instructions above in the section titled **Setting up SEO URLs**

2. Create a blank file with the name **.htaccess** in the same folder that contains your *storefront* page.

3. Using a text editor, paste the following code into your blank .htaccess file:

```
RewriteEngine On

# This tells the rule to NOT redirect to index.php if request is
for a directory that exists
RewriteCond %{REQUEST_FILENAME} !-d

# This tells the rule to NOT redirect to index.php if request is
for a file that exists
RewriteCond %{REQUEST_FILENAME} !-f

# This tells the rule to NOT redirect if the request had an
extension other than .php
RewriteCond %{REQUEST_URI} \.php|/[^\.]*$ [NC]

# All other requests redirected to index.php
RewriteRule ^(.*)$ store.php/$1 [L]
```

4. If you've renamed your storefront page from it's default name of **store.php**, change that string from "store.php" to your actual storefront page name.

5. Save the file

6. Try loading your storefront page in a browser to confirm that your .htaccess file is not causing any errors. If you receive an Internal Server error, you either have a typo in your htaccess file OR your server doesn't support mod_rewrite. If you believe the problem is the latter, stop here and try the instructions further down labeled "Instructions Using ForceType/SetHandler".

7. Try loading the following URL (changing the domain name in the example to match yours):

   `http://www.example.com/products/`

   If you receive a page looking like your storefront page but with a red 404 error in the center, then the process worked. The 404 error appears because you aren't linking to a specific category. If you receive an Internal Server Error, your server probably doesn't support mod_rewrite - stop here and try the instructions below for **ForceType/SetHandler**.

8. Now that you have your .htaccess file configured and working properly, you just need to tell Squirrelcart to remove the storefront page from the URLs that it generates. To do this, check the **No Filename** field on your Store Settings page, in the section labeled **SEO URLs.** With this configuration you can also enable the **Smart Bases** option in the same section. If you enable either of these, click the "save changes" button.

9. You're done! Head to your storefront page and click your product and category links to make sure they are working OK.

Method 2: Setup Instructions Using Mod_Rewrite, Giving Squirrelcart Partial Control

Mod_Rewrite is a feature built into Apache web servers that allows you to transform the URL requested by a client into a different URL without the client seeing their URL change in their browser. With this method, when the customer requests a URL like:

`http://www.example.com/products/coffee-table`

Mod_Rewrite will change their request to include your storefront page without changing the URL in their browser:

`http://www.example.com/store.php/products/coffee-table`

If you want to use the **Smart Bases** feature (highly recommended), you cannot to use this method. See method 1 above.

1. Follow the instructions above in the section titled **Setting up SEO URLs**

2. Create a blank file with the name **.htaccess** in the same folder that contains your *storefront* page.

3. Using a text editor, paste the following code into your blank .htaccess file:

```
RewriteEngine On
RewriteRule ^
(products|categories|content|news|reviews|testimonials|contact|downl
-locator|auth)/?(.*)$ store.php/$1/$2 [L]
```

4. If you've renamed your storefront page from it's default name of **store.php**, change that string from "store.php" to your actual storefront page name.

5. Save the file

6. Try loading your storefront page in a browser to confirm that your .htaccess file is not causing any errors. If you receive an Internal Server error, you either have a typo in your htaccess file OR your server doesn't support mod_rewrite. If you believe the problem is the latter, stop here and try the instructions further down labeled "Instructions Using ForceType/SetHandler".

7. Try loading the following URL (changing the domain name in the example to match yours):

   `http://www.example.com/products/`

   If you receive a page looking like your storefront page but with a red 404 error in the center, then the process worked. The 404 error appears because you aren't linking to a specific category. If you receive an Internal Server Error, your server probably doesn't support mod_rewrite - stop here and try the instructions below for **ForceType/SetHandler**.

8. Now that you have your .htaccess file configured and working properly, you just need to tell Squirrelcart to remove the storefront page from the URLs that it generates. To do this, check the **No Filename** field on your Store Settings page, in the section labeled **SEO URLs** and click the "save changes" button.

9. You're done! Head to your storefront page and click your product and category links to make sure they are working OK.

Method 3: Setup Instructions Using ForceType/SetHandler

ForceType is a directive you can use in an htaccess file to force a file to be treated as a particular MIME type regardless of it's file extension. This method works by tricking your server into serving files named "products" and "categories" (with no file extension) into opening as PHP files. These file names will look just like directory names in your URLs, and your customers won't know that they are actually PHP pages.

1. Follow the instructions above in the section titled **Setting up SEO URLs**

2. Create a blank file with the name **.htaccess** in the same folder that contains your *storefront* page.

3. Using a text editor, paste the following code into your blank .htaccess file:

```
<Files ~
"categories|products|news|reviews|testimonials|contact|downloads|sto
-locator|auth">
ForceType application/x-httpd-php
</Files>
```

4. The first line of the code above contains the names of your URL bases, which correspond to the "Category Base", "Product Base", "News Base", and "Reviews Base" fields on your Store Settings page. If you changed the values of those fields from their defaults, you will also need to change the corresponding values in the first line of your .htaccess file.

5. Create a file with a name matching the value of your **Category Base** field (*categories* by default) in the same spot you put your .htaccess file, and put the following code in it:

```
<?php
// prefix path info with the name of this file, which should equal
the URL Base for whatever purpose this file servers
$_SERVER['PATH_INFO'] = '/'.basename(__FILE__).$_SERVER
['PATH_INFO'];

// include storefront page
include 'store.php';
?>
```

6. If you renamed your *storefront* page to something other than "store.php", change the string 'store.php' in the code to match your storefront page name.

7. Make a copy of that file, and rename it to match the value of your **Product Base** field (*products* by default).

8. If you have the News module installed, make another copy of the same file and rename it to match the value of your **News Base** field (*news* by default).

9. If you have the Reviews module installed, make another copy of the same file and rename it to match the value of your **Reviews Base** field (*reviews* by default).

10. If you have the Testimonials module installed, make another copy of the same file and rename it to match the value of your **Testimonials Base** field (*testimonials* by default).

11. If you have the Contact module installed, make another copy of the same file and rename it to match the value of your **Contact Base** field (*contact* by default).

12. Load the following URL in your browser (changing the domain name to your own):

    `http://www.example.com/products/`

    If you receive a page looking like your storefront page but with a red 404 error in the center, then the process worked. The 404 error appears because you aren't linking to a specific category. If you receive an Internal Server Error, your server may not support the "ForceType" directive. Open your .htaccess file, and change the word "ForceType" to "SetHandler", save the file, and try the test again. ForceType and SetHandler do the exact same thing.

13. If you couldn't get the test in step 10 to work, your server doesn't have support for ForceType or SetHandler. If you contact your webhost they may be able to add support for you. If the test did work, continue.

14. Now that you have your .htaccess file configured and working properly, you just need to tell Squirrelcart to remove the storefront page from the URLs that it generates. To do this, check the **No Filename** field on your Store Settings page, in the section labeled **SEO URLs** and click the "save changes" button.

15. You're done! Head to your storefront page and click your product and category links to make sure they are working OK.

Broken Images and Links

On a default installation of Squirrelcart, the SEO URL feature will work fine. If you have customized your storefront page or product/category descriptions to include image tags or links, those images and links may break. This explains why, and how to resolve it.

Absolute and Relative URLs

An absolute URL includes your domain name, as in the **src** attribute of the IMG tag below.

Example 1: absolute URL

```
<img src="http://www.example.com/images/my_logo.gif" />
```

A relative URL is relative to the page that you are currently on in your browser.

Example 2: relative URL

```
<img src="images/my_logo.gif" />
```

The image tag in example 1 would work on any page that contains that code, regardless of the location of the file (even on a different website). This is because it contains the full location pointing to the image file.

The image tag in example 2 will only work when it appears on a web page that is in a folder containing a folder named **images.**

How this applies to Squirrelcart's SEO URL feature

If you have the code shown in example 2 above on your storefront page (store.php in this example), and are using query string URLs in Squirrelcart, loading this example category URL would result in the image **my_logo.gif** loading without a problem:

```
http://www.example.com/store.php?crn=123
```

If you enable SEO URLs, your category (and other) URLs will change to something like this:

```
http://www.example.com/store.php/categories/mystery-novels
```

If you load that URL in a browser, the image tag shown in example 2 that used to work will now result in a broken image. This is because your browser is looking for the image relative to the current location. It is basically looking for the image here:

```
http://www.example.com/store.php/categories/mystery-
novels/images/my_logo.gif
```

How to resolve this

There are 2 ways to resolve this.

Option 1 - Change relative URLs to absolute URLs using Squirrelcart's root variables (recommended)

When the code appears on a PHP page with Squirrelcart's code on it, it's best to use Squirrelcart's built in constants to insert the root URL for your store or image directory into your code. For example, this constant will be set to the regular "http" URL of your image folder when you are on a regular page, and your secure root URL to the same folder when you are on a secure page.

Example 3: Absolute URL using Squirrelcart's SC_IMG_DIR_DYN constant

```
<img src="<?php print SC_IMG_DIR_DYN ?>/my_logo.gif" />
```

You can find a list of our constants at the bottom of **this page (Section 7.7)**.

Option 2 - Change relative URLs to be relative to the top level directory

When a relative URL starts with a forward slash, it tells your browser to start looking for that file in the top level directory. Changing your URLs like this will keep them working with the SEO URL feature enabled.

Example 4: relative to root of site

```
<img src="/images/my_logo.gif" />
```

Canonical Links

Pages may have a few different URLs that may point to the same page, for filtering results, sorting, changing page numbers, tracking affiliate links, etc...

This may cause search engines to treat those page variants as duplicate content. To prevent this, Squirrelcart automatically sets a **canonical** <link/> tag on these pages, pointing to the correct master URL for these variant URLs.

For example, if you are tracking add clicks to a product page via a custom parameter like **adclick**, you may want to send a customer to a product page like this so you can track the ad click via your web statistics software:

```
http://www.example.com/books/?adclick749af82734
```

If this page is indexed by a search engine, it looks just like the version without the **adclick** parameter and looks like duplicate content. For the above example, Squirrelcart will automatically add this link to prevent that from happening:

```
<link rel="canonical" href="http://www.example.com/books" />
```

Pagination

When viewing a category or when viewing search results, if more products are available than will fit on a page, that page may contain page navigation links to navigate to other pages in the data set.

Search engines may see these pages as duplicate content. To help search engines understand pagination, Squirrelcart implements one of two different features, depending on your settings:

Prev and Next Links

When there are more pages in a dataset than the number specified in the above setting, all paginated result pages automatically get a <link/> tag added to their <head/> tags, to explain the pagination, using the **rel="prev"** and **rel="next"** attributes. For example, on page 2 of a category containing 3 or more pages, these tags will be added to the <head/> tag:

```
<link rel="prev" href="http://www.example.com/books/page-1/" />
<link rel="next" href="http://www.example.com/books/page-3/" />
```

Linking to Products and Categories

We've added some functions to make it easier to link to products and categories in custom PHP code. If you need to do this, we recommend using these functions, as they will use the appropriate URL format based on your settings, and will automatically be updated should you change the SEO URL Name field on your records. Just plug in your product or category record number.

Linking to a Product Page

```
<a href="<?php print get_product_url(854) ?>">checkout this
product</a>
```

Linking to a Category Page

```
<a href="<?php print get_category_url(64) ?>">checkout this
category</a>
```

6.13 Cart Persistence

Overview

Squirrelcart includes features that allow you to control how long carts persist (remain viable). Carts can persist even when:

- Vistor closes their browser (on purpose, or by accident, or due to power loss), and then returns at a later time. This uses a SC_CART_ID cookie, and is independant of the user's session on the server.
- Logged in user has items in the cart, leaves the site, and logs back in at a later time (even from a different browser or computer)

Cart States

Carts can be in any one of the following four states:

#	State	Description
1	Active	This is a cart that is actively being added to, or is in the checkout process.
2	Inactive	This is a cart that has not had activity in awhile because the customer has left. Inactive carts automatically become active again when the customer returns.
3	Abandoned	This is a cart that is old, and has had no activity for a long time. Abandoned carts are deleted automatically.
4	Completed	This state indicates an order that has completed. It will show up as an order in Squirrelcart.

If a cart has any activity, it will be in an active state (#1). If payment is submitted, it will be in a completed state (#4). You do not have control over either of these states.

You can control when a cart is considered inactive (state #2), and when it is considered abandoned (state #3). See **Controlling Cart Persistence** below.

Cart Deactivation

When a cart changes from being active to inactive, it is deactivated. Squirrelcart will automatically:

- Flag the cart as inactive (viewable in the control panel under **Orders > Inactive Carts**
- Restock items (if inventory control is enabled). This will prevent a user from preventing another user from ordering an item that may have limited stock.

Cart Reactivation

Active and Inactive carts are just as viable to the customer. They can both be completed by submitting payment. When a cart becomes inactive, its in a paused state.

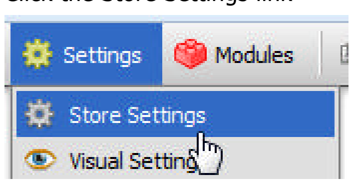
When a user visits the store after their cart has become inactive, it is automatically changed to an active state. At that time, Squirrelcart will automatically:

- Flag the cart as active (viewable in the control panel under **Orders > Active Carts**)
- Remove items that are no longer available (due to being out of stock, or deleted)
- Update prices for any items that have changed price since the cart went inactive
- Reduce stock levels for items in the cart (if inventory control is enabled)

Controlling Cart Persistence

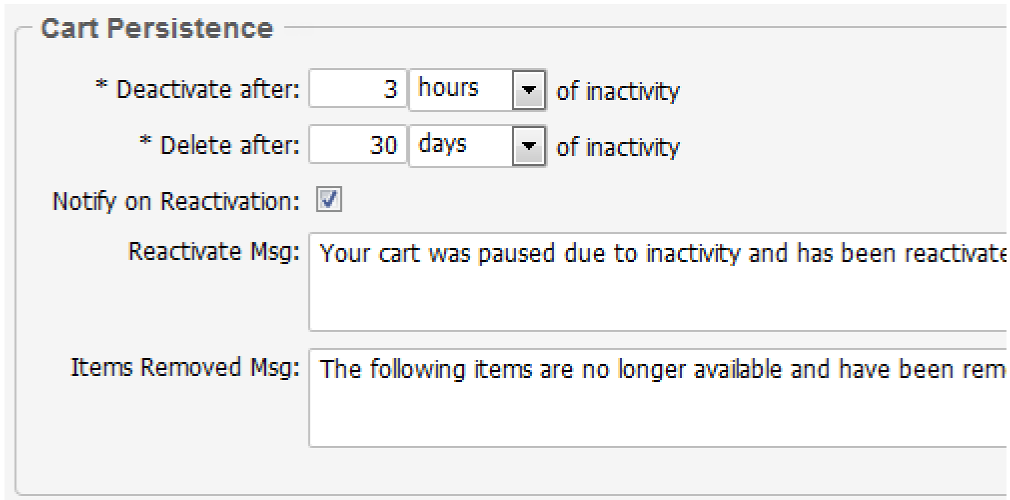
You can control when carts become inactive, when they are considered abandoned, and what your customer sees when their cart is reactivated.

1. Click the Store Settings link



2. Locate the **Checkout Settings** fieldset

3. Within that fieldset, you'll see a **Cart Persistence** fieldset which looks like this by default:



4. To change the time at which carts are considered inactive, change the **Deactivate after** setting.

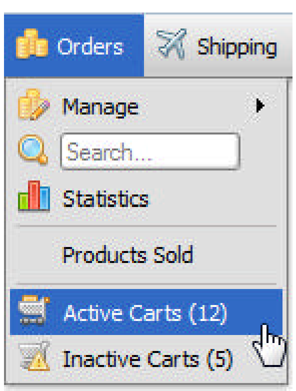
5. To change the time at which carts are considered abandoned, change the **Delete after** setting.

6. The **Notify on Reactivation** feature can be checked if you wish to notify your customers when their cart has been reactivated. When checked, you can specify the messages they will see using the **Reactivate Msg** and **Items Removed Msg** fields.

Working with Carts

Viewing Carts

You can view active and inactive carts in the control panel, using the **Active Carts** and **Inactive Carts** menu links, inside the **Orders** menu.



Viewing a Cart in Detail

To view an individual cart as the customer sees it during checkout, click anywhere on its record row.

Deleting a Cart

If you would like to prevent a cart from being completed by a customer, you can delete it by clicking the delete icon in its row.

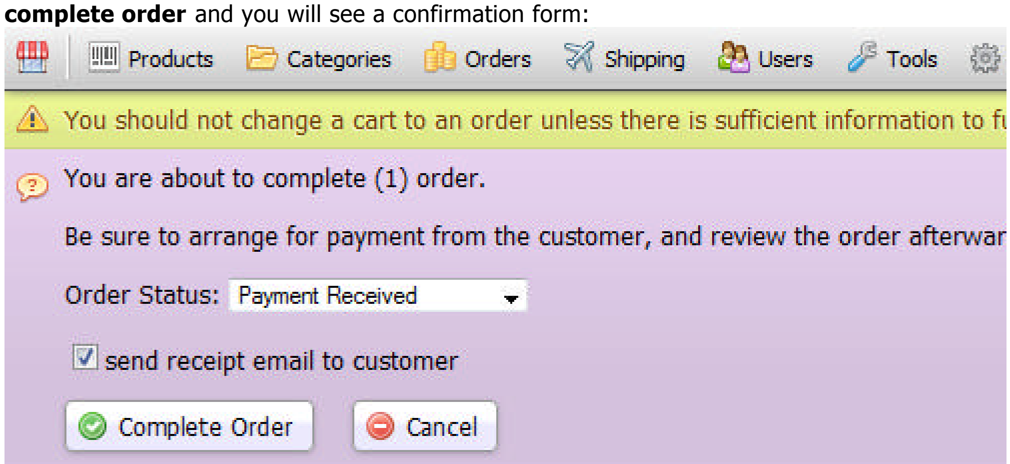
Completing a Cart

If a cart is not completed and you would like to change it to a completed order manually:

1. Locate the cart (see Viewing Carts above)

2. Check the checkbox corresponding to the cart you wish to complete

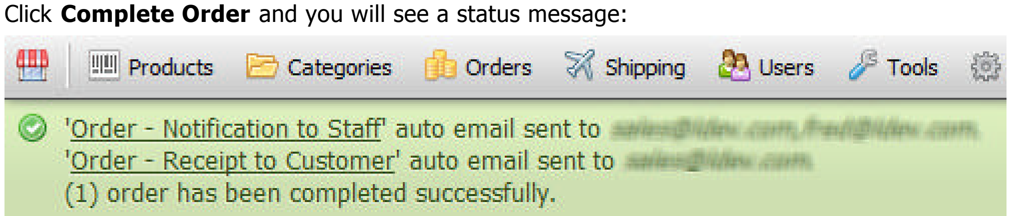
3. In the lower left hand corner of the control panel, change the **--choose action--** field to **complete order** and you will see a confirmation form:



4. Specify an order status

5. If you don't wish the customer to receive an email receipt, uncheck **send receipt email to customer**

6. Click **Complete Order** and you will see a status message:



6.14 Cron Script (for scheduled tasks)

Overview

Cron is a service that runs on Unix/Linux servers to schedule the execution of scripts at

predetermined intervals.
https://en.wikipedia.org/wiki/Cron

Squirrelcart's cron script is named **cron.php** and is located inside your squirrelcart/ folder. This script is used to perform scheduled operations. Use of this script is optional. It is only used for certain optional features that require scheduling.

Cron Script Management Page

You can manage your cron script by clicking **Tools > Cron Script Management** in the control panel menu.

Please note that this page cannot be used to schedule your cron script. See below for information on scheduling the script.

Running the Script

Calling the Script via a Schedule

If your web server supports cron jobs you can create a cron job to call this file:

```
squirrelcart/cron.php
```

You will need to use the full operating system path to the file. You can find that in your Squirrelcart control panel on the Cron Job Management page, under "If your web server supports cron jobs".

If you need help scheduling your cron job I'd recommend contacting your web host.

If your web server does not support cron jobs you can load the cron script URL via a pseudo cron job using services like SetCronJob.com. Example:

```
https://www.example.com/squirrelcart/cron.php
```

Frequency

Squirrelcart limits the number of operations for each script iteration, using the **Max Operations** setting. Running the cron job a few times a day should be sufficient for most stores. For busy stores, you may wish to run it more often or increase the **Max Operations** setting.

Running the Script Manually

For testing purposes, you can load the cron script manually using your browser:

1. Open the control panel
2. Click **Tools > Cron Job Management**
3. Click the **Run Now (manually)** button

   The results will be displayed in your browser. These are the same results you can find in the cron script logs mentioned below.

Limiting Run Time and Resource Usage

The **Max Operations** setting on the Cron Script Management page controls how many operations are processed each time this script is executed. An operation is considered to be any task that might slow the script down (even slightly).

For example, the built-in **Cart - Reminder to Complete Order** automatic email feature uses the cron script to determine when to send messages. Each email sent is considered one operation. Setting Max Operations to 50 would result in the script exiting after 50 emails have been sent.

Note that the Max Operations setting is cumulative across all features that use the cron script. If Max Operations is set to 50 and one feature uses 30 operations and another uses 20, the cron script will exit after the total of 50 operations has been met.

Logging

Squirrelcart automatically logs information each time the script is called. You can find the log file here:

```
sc_data/logs/log-cron.txt
```

You can view this log file by clicking the **View Logs** button on the Cron Job Management page.

Archiving

When the log file reaches the size specified in the Max Log Size setting on the Cron Job Management page, the log file is archived to this location:

```
sc_data/logs/log-cron-archive.txt
```

Only one archive file is kept.

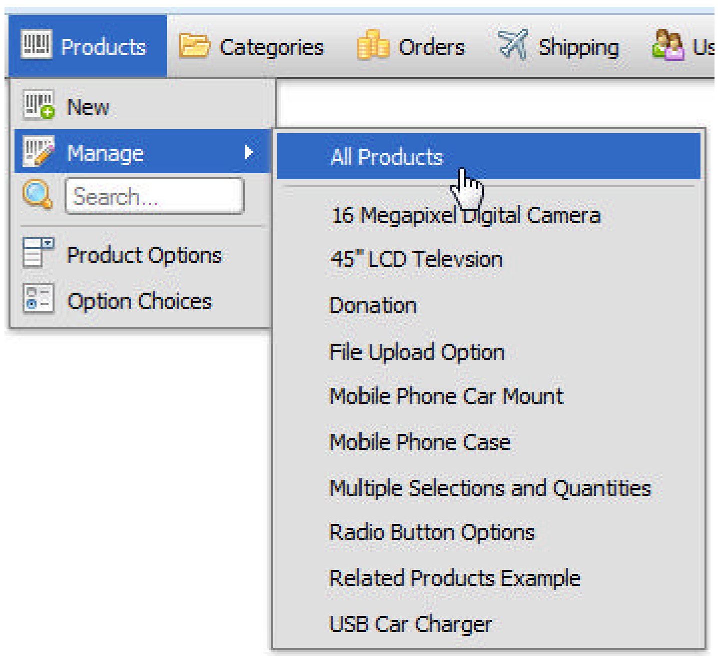
7 Managing Your Store

7.1 Products

7.1.1 Viewing Products

1. Open the **control panel (Section 3)**

2. Click the **Products** menu link

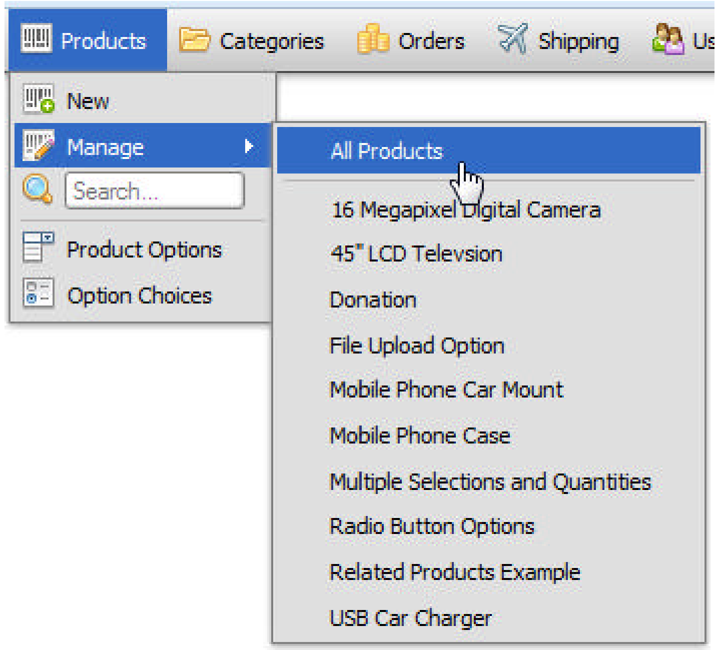


> You can click on any links shown above with a blue background:
>
> *Products*
> *Products > Manage*
> *Products > Manage > All Products*
>
> They will all take you to the Products table.

7.1.2 Creating and Modifying

Instructions

1. Click the **Products > Manage** link

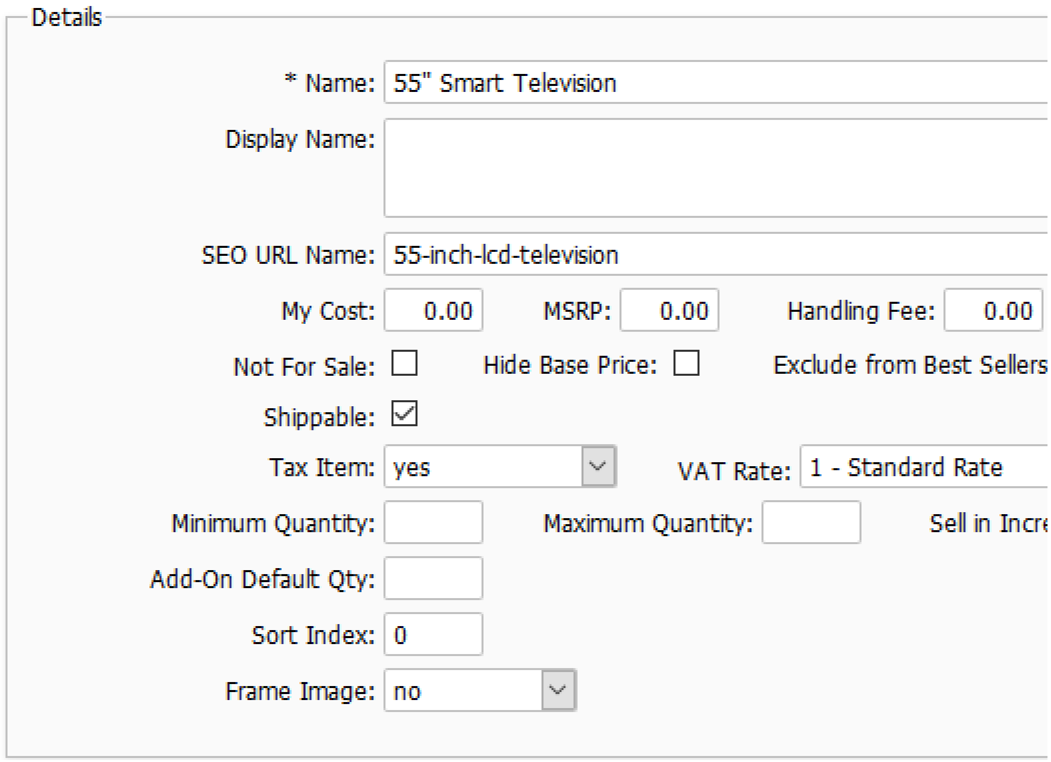


2. To add a new product, click Add New. To modify an existing one, click the pen icon at the beginning of it's record row. (You can also click anywhere on the row to edit a record)

3. Fill out the form fields, using the field descriptions below as a guide.

4. Click Save Changes

Details



Name

Name of the product - no HTML is allowed in this field

Display Name

This field is optional. If you wish to use a different name for this product when displayed in HTML, enter it here. This field supports HTML and plain text.

SEO URL Name

This field controls how this product's name will appear in URLs when the **SEO URLs feature (Section 6.12.3)** is enabled. Leave blank to take the default value, which is equal to this product's name with invalid characters removed.

My Cost

This field is only for your reference. You can use it to track how much you paid for the product.

MSRP

This field is not used by default. You can use it to store the Manufactures Suggested Retail Price of the product.

Handling Fee

This field is used to add a handling fee when this item is added to the cart. For more information, see the **Handling and Order Fees topic (Section 6.7)**.

Not For Sale

Checking this field will hide this item in your storefront.

Hide Base Price

Unchecking this field will hide the base price in the storefront.

Exclude from Best Sellers

Checking this field will prevent this item from appearing as a best seller, and as a "also ordered" product.

Searchable

Unchecking this field will cause the product to not be returned in searches.

Shippable

When checked, the product is considered to be one that physically ships to the customer's shipping address.

Tax Item

This field controls whether or not you will collect tax for this product.

VAT Rate

If **VAT (Section 6.11.2)** is enabled, this controls the rate that will be charged for this product.

Minimum Quantity

This field is used to enforce a minimum number of items to be ordered. Leave blank for no restriction.

Maximum Quantity

This field is used to enforce a maximum number of items to be ordered. Leave blank for no restriction.

Sell in Increments Of

Use this field to enforce selling an item in increments.

Add-On Default Qty

When a product is shown as an add-on for another product, this can be used to specify a default quantity.

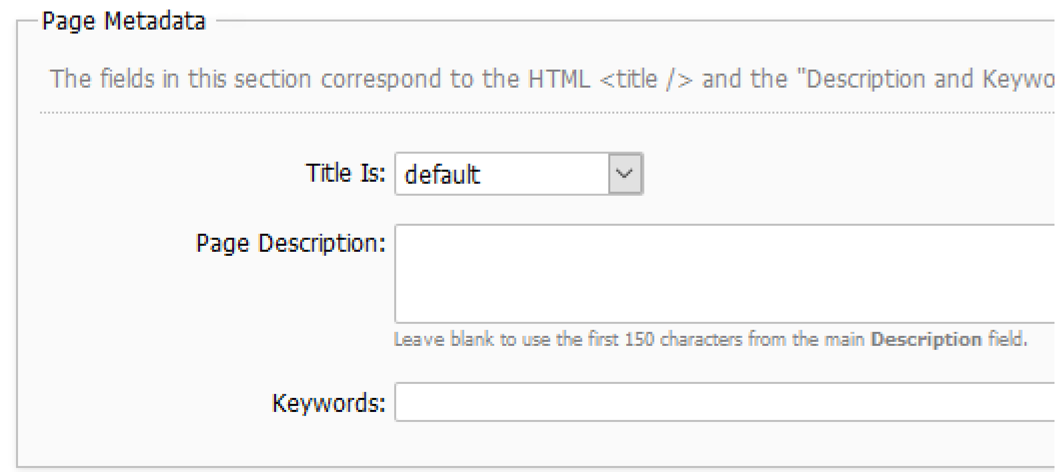
Sort Index

This field can be used to assist in sorting the product records for display.

Frame Image

When enabled, this puts a border and drop shadow on your thumbnail images.

Page Metadata



Title Is

This field allows you to specify a custom page title that will be seen when this product is clicked on.

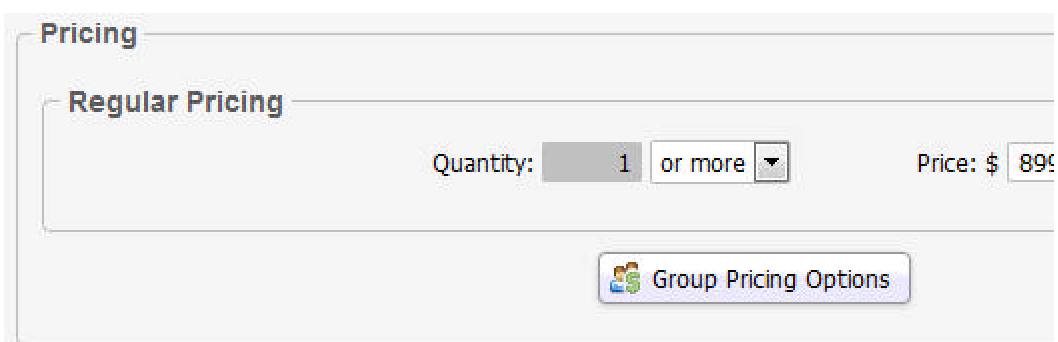
Page Description

This field is used to populate the description meta tag, and the description of the product seen at checkout.

Keywords

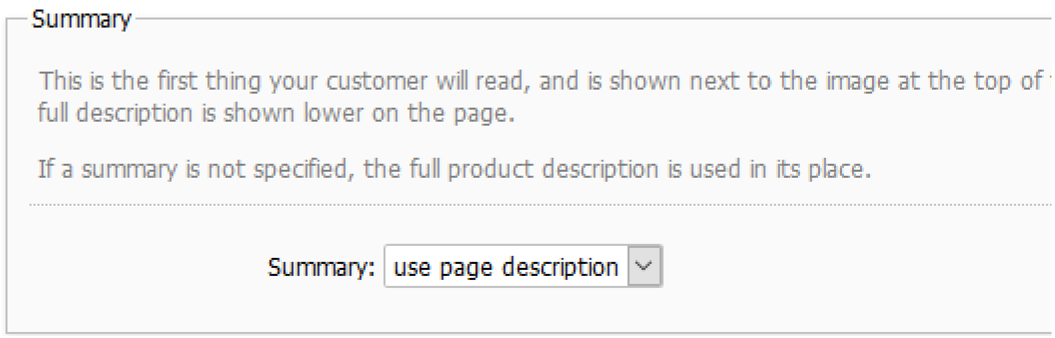
This field is used to populate the keywords meta tag, and to assist customers when searching for this product.

Pricing

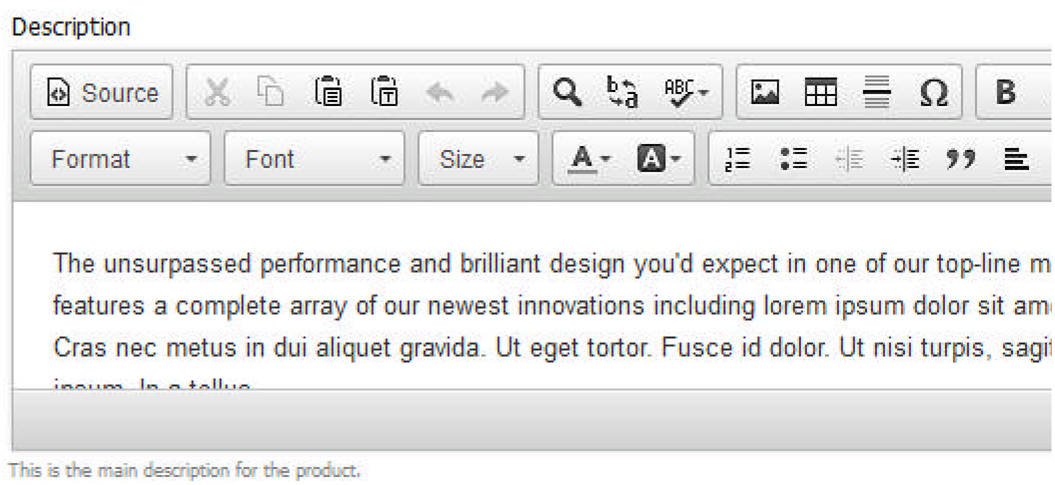


For regular pricing, enter a price in the **Price** field. This becomes the product's **Base Price.** This section can be used to offer quantity based discounts to customers and group members. For more information, see **this topic (Section 7.6)**.

Summary

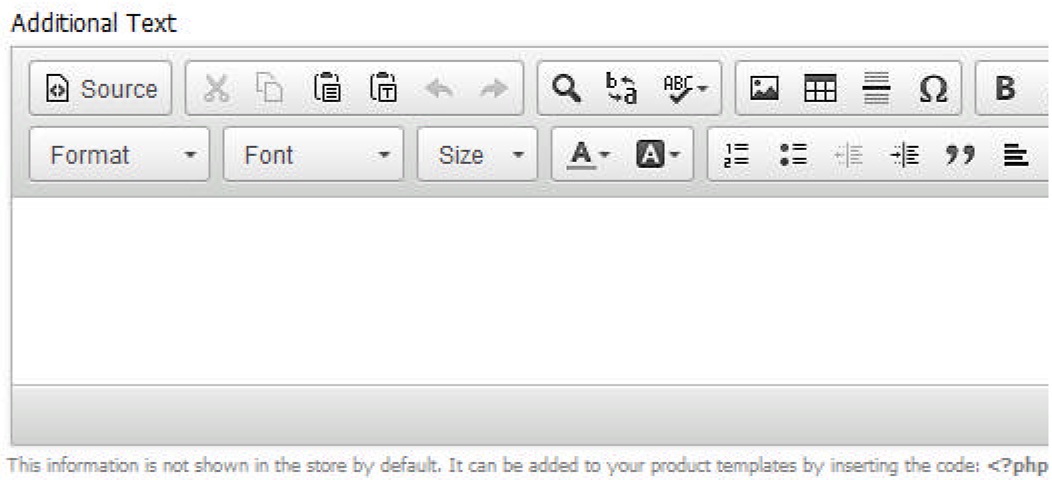


Description



This is the main description of the product. You can use HTML in this field.

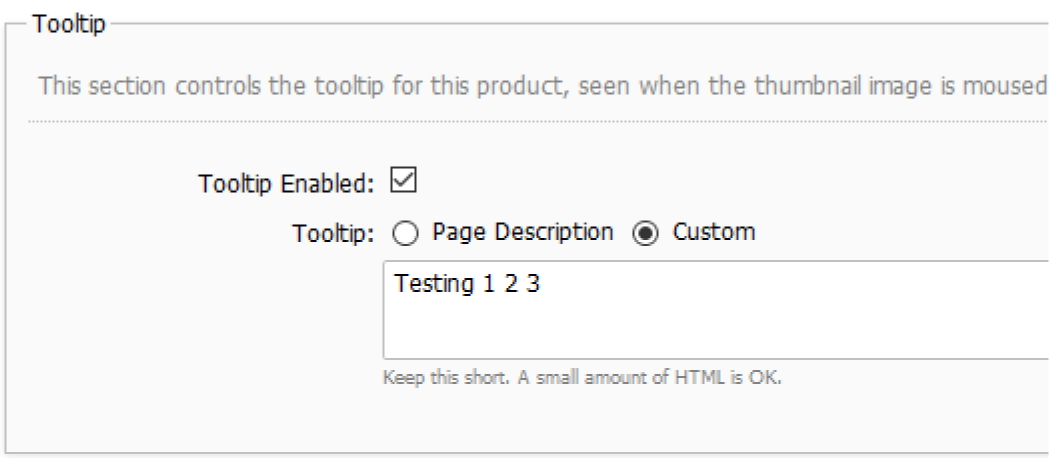
Additional Text



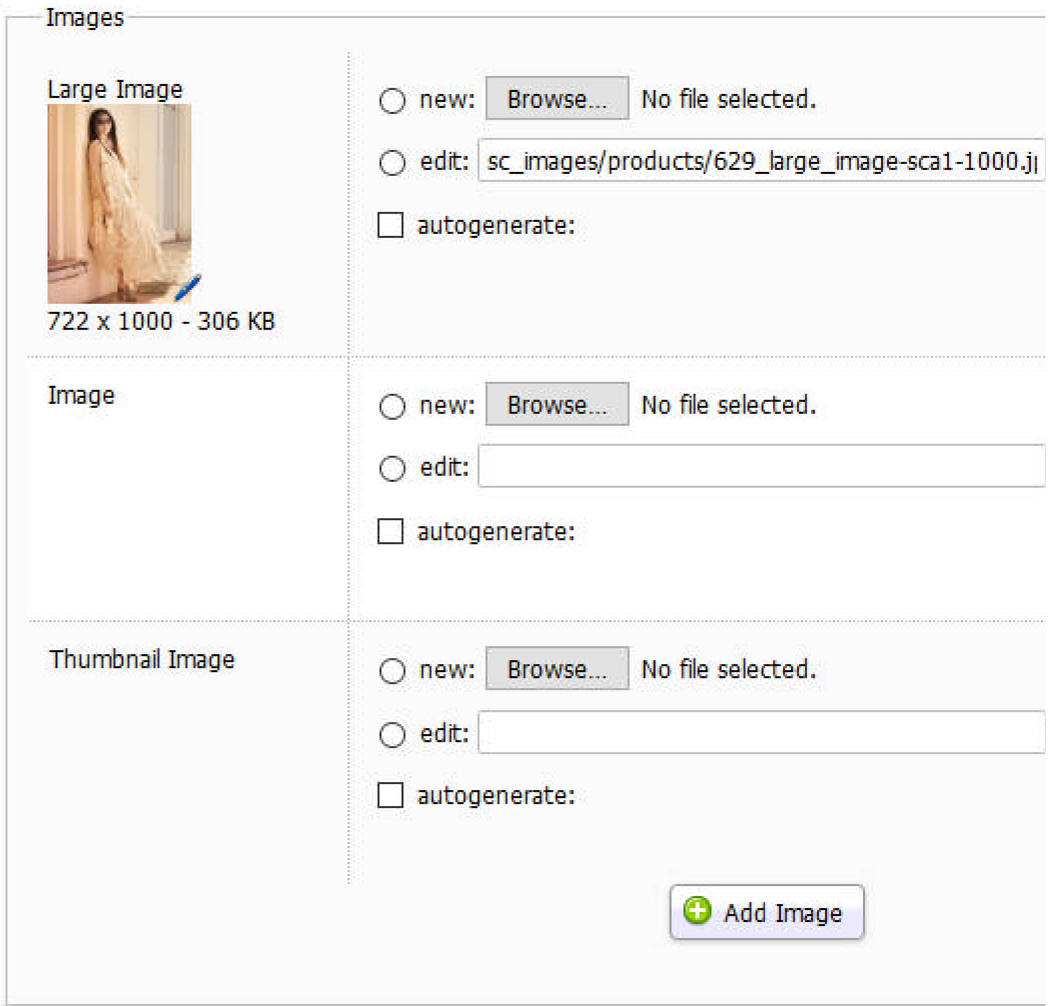
This field is not used by default, but can be added to templates to show additional info. To add to any product_* template file, use this code:

```
<?php print $Additional_Text ?>
```

Tooltip



Images



Large Image

This field is used to assign the largest image of this product to the product record. This image is seen when the customer clicks on the regular size image on the product detail page.

Image

If the **Auto Size feature (Section 5.5)** is enabled this field is usually hidden. This field is used to assign the regular image of this product to the product record. This image is seen on the product detail page.

Thumbnail Image

If the **Auto Size feature (Section 5.5)** is enabled this field is usually hidden. This field is used to assign the smallest image of this product to the product record. This image is seen on the product thumbnail view.

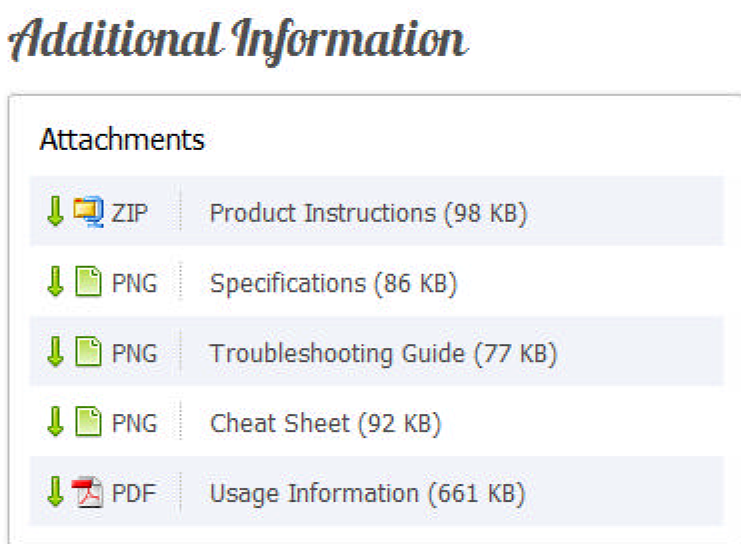
Extra Image 1 - 8

These fields can be used to add extra images, which will appear as thumbnails below the main product image on a product's page. They appear when you click the **Add Image** button.

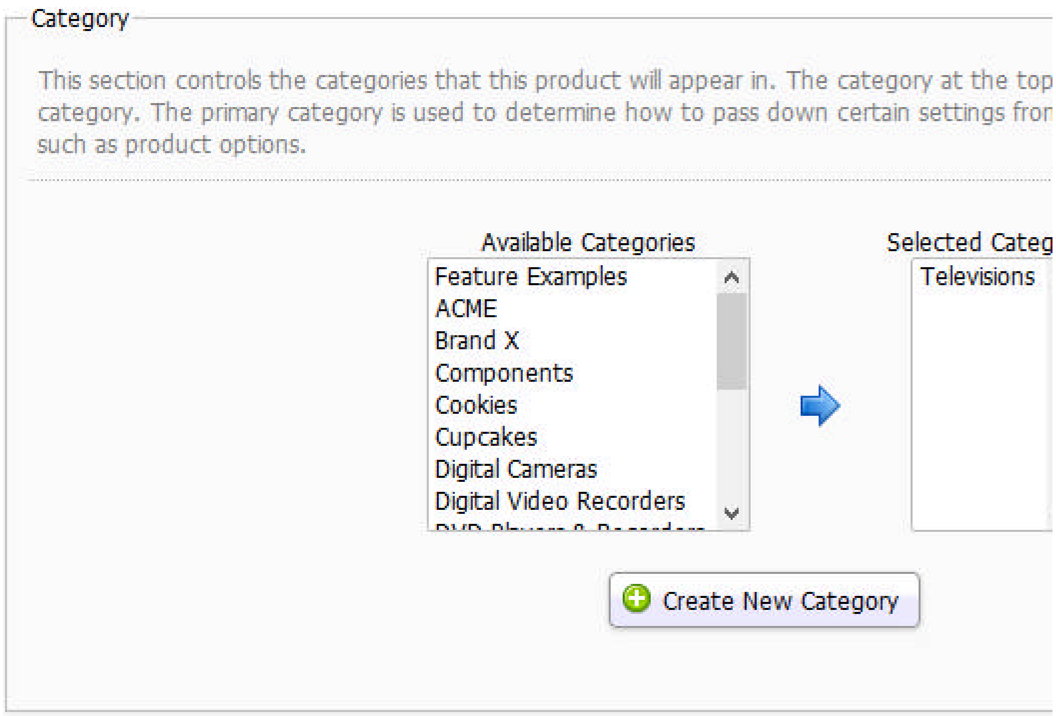
Attachments

This section can be used to add one or more informational files to help the customer when shopping for this product. For example, you could add PDF specification sheets, or other informational files.

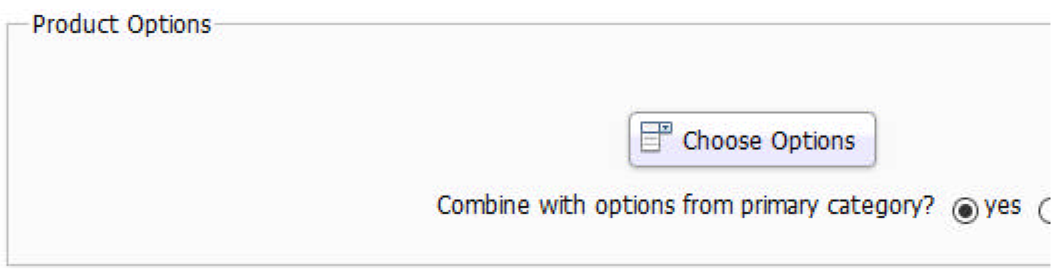
Attachments appear on the product detail page, in the **Attachments** section:



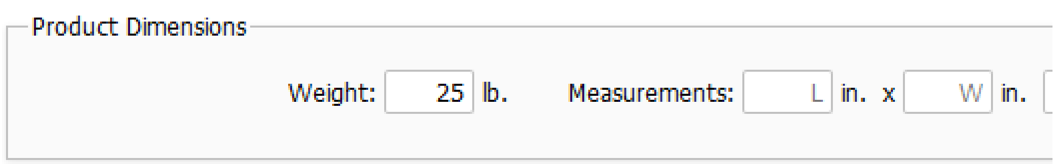
Category



Product Options

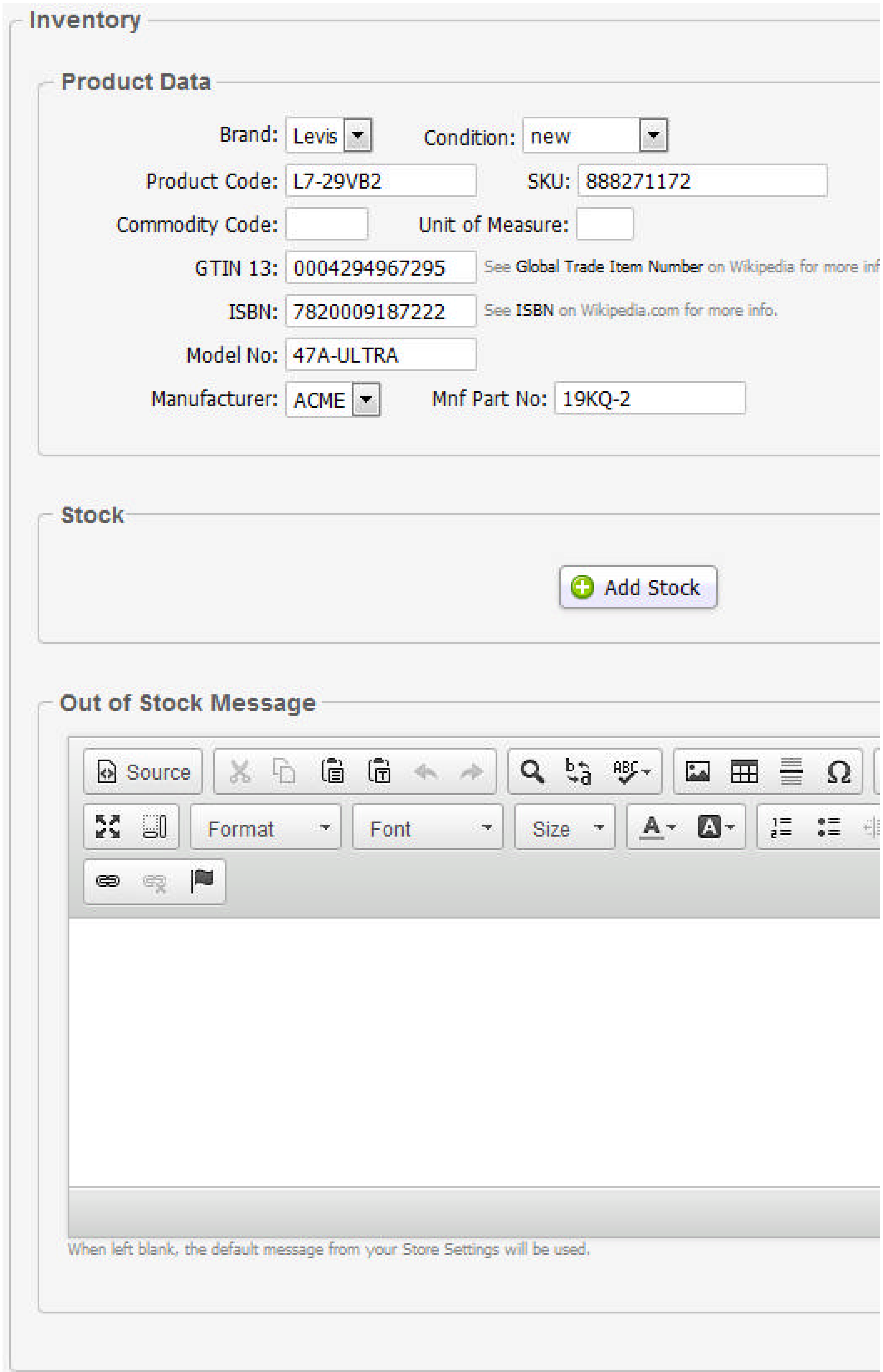


Product Dimensions



This section is used to specify product options for this product. This is explained in detail in the Product Options section of the documentation.

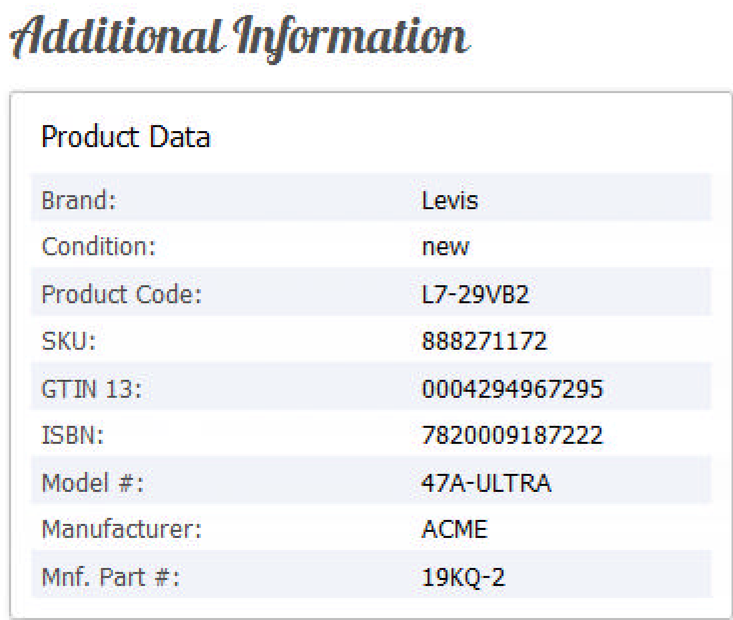
Inventory


Inventory
Product Data
Brand: Levis
Condition: new
Product Code: L7-29VB2
SKU: 888271172
Commodity Code:
Unit of Measure:
GTIN 13: 0004294967295
See Global Trade Item Number on Wikipedia for more
ISBN: 7820009187222
See ISBN on Wikipedia.com for more info.
Model No: 47A-ULTRA
Manufacturer: ACME
Mnf Part No: 19KQ-2
Stock
Add Stock
Out of Stock Message
Source
Format
Font
Size
When left blank, the default message from your Store Settings will be used.

Product Data

All the fields in this section are optional. Information entered here is used in the storefront as follows:

- for product searches
- to populate Schema.org microdata (see **SEO topic (Section 6.12.1)** for more info)
- on the product page, as **Product Data:**



Additional Information

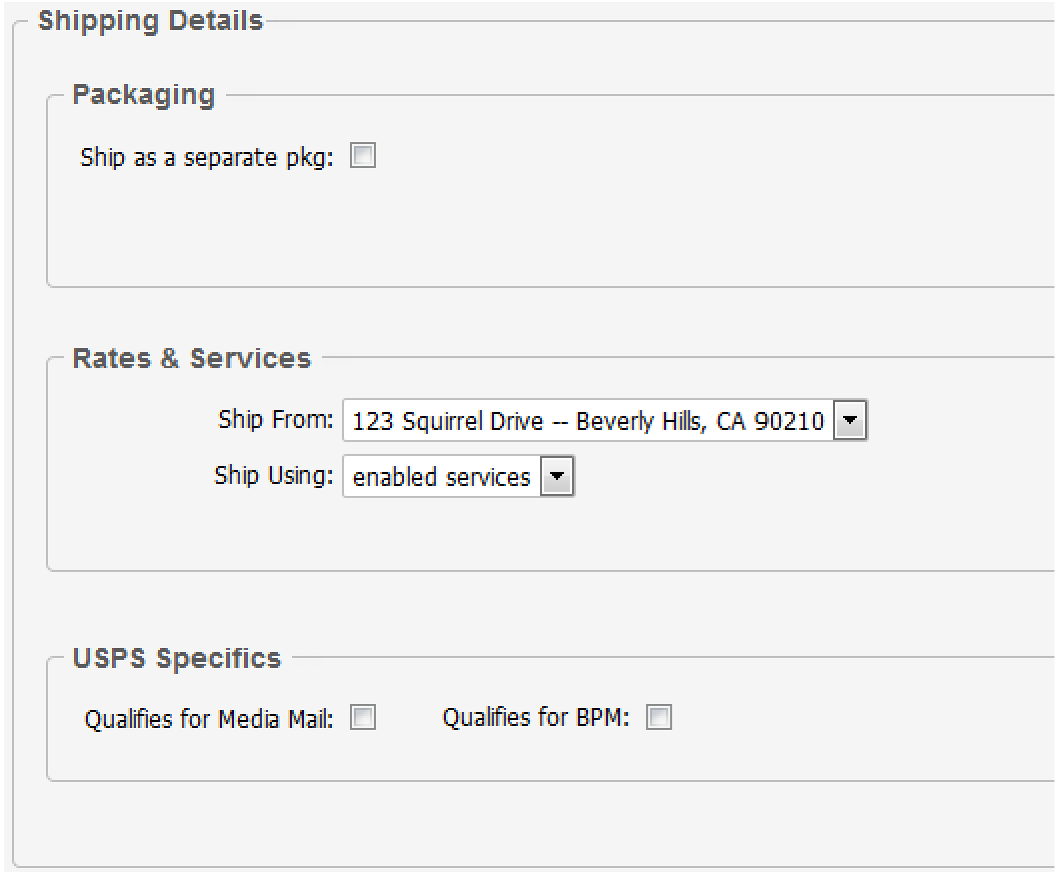
Product Data

Brand:	Levis
Condition:	new
Product Code:	L7-29VB2
SKU:	888271172
GTIN 13:	0004294967295
ISBN:	7820009187222
Model #:	47A-ULTRA
Manufacturer:	ACME
Mnf. Part #:	19KQ-2

Stock, and Out of Stock Message

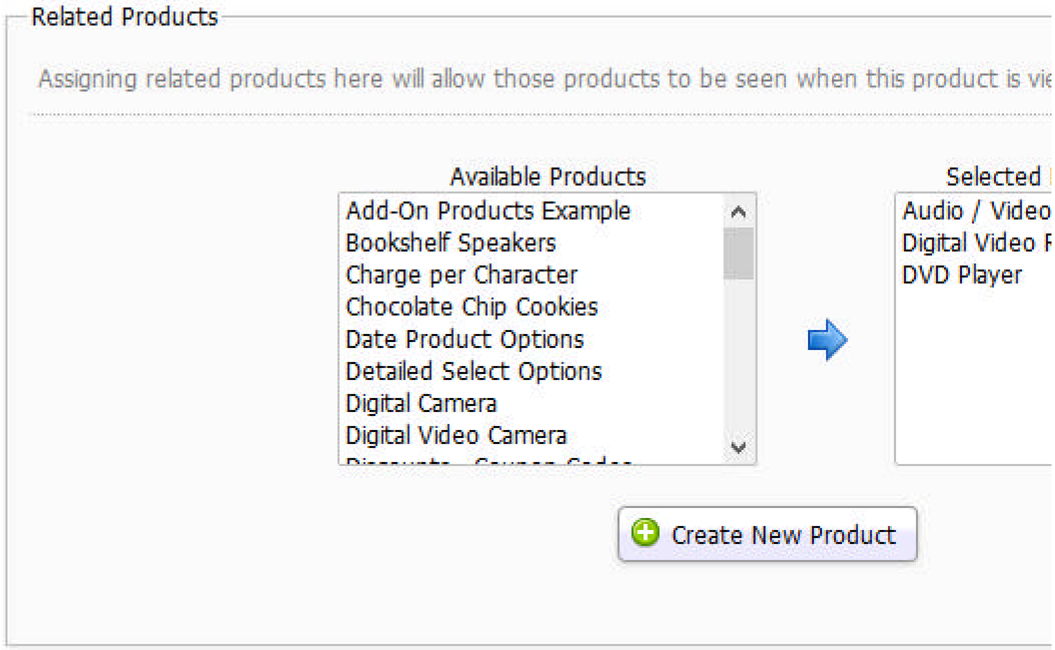
These sections only appear when the Inventory Control feature is turned on. These sections are used for inventory tracking purposes, and are explained in detail in the Inventory Control topic.

Shipping Details



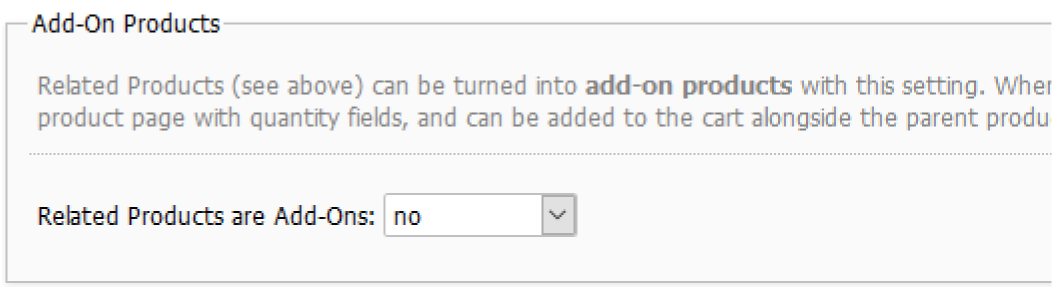
This section is covered in the **Configuration > Shipping** section of this documentation.

Related Products

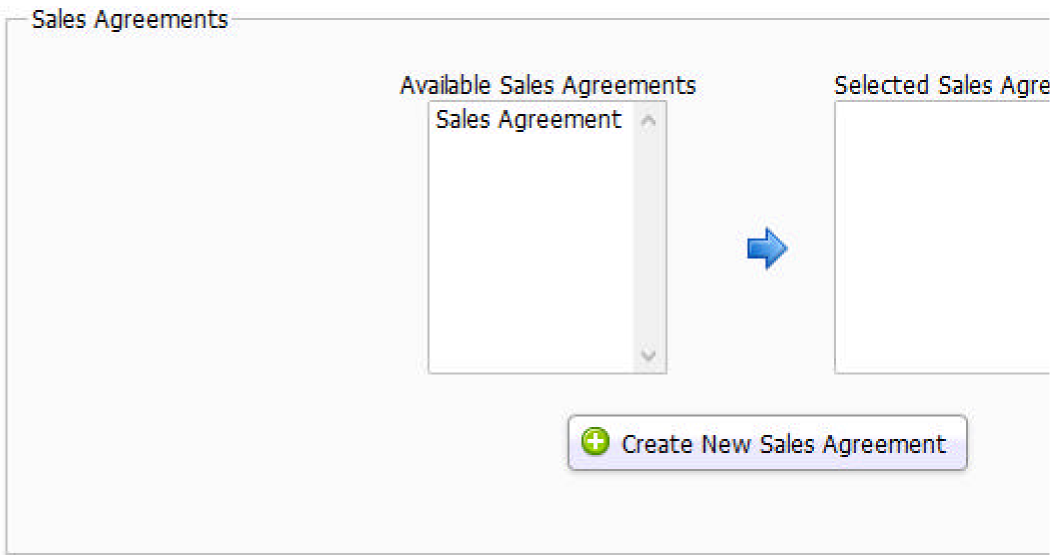


This section is used to assign related products. For example, if the product record you are editing is for a cell phone, you could add a cell phone charger as a related product. For more information on how to use this feature, see the **Related Products topic (Section 7.1.9)** in this section.

Add-On Products



Sales Agreements



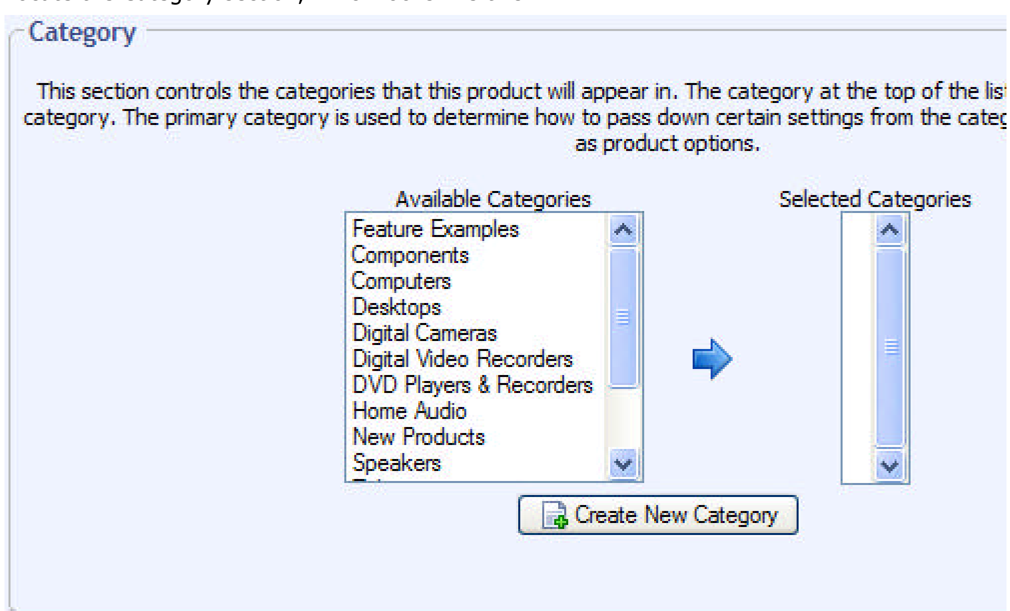
This section is used to assign sales agreements to this product.

7.1.3 Adding a Product to a Category

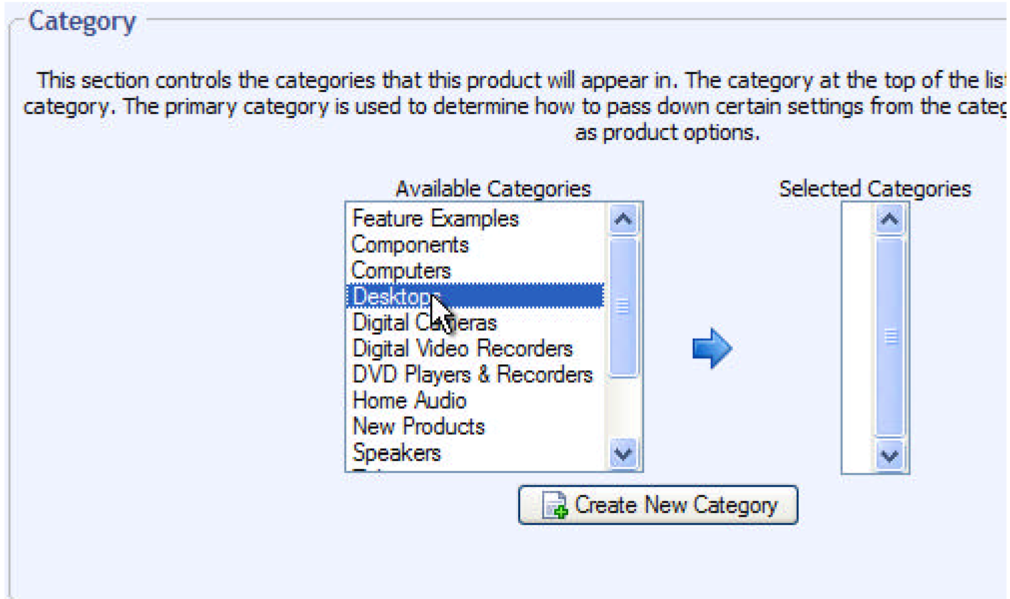
You can add a product to as many categories as you like. Here is how:

1. **Open the product record (Section 7.1.1)** you wish to work with.

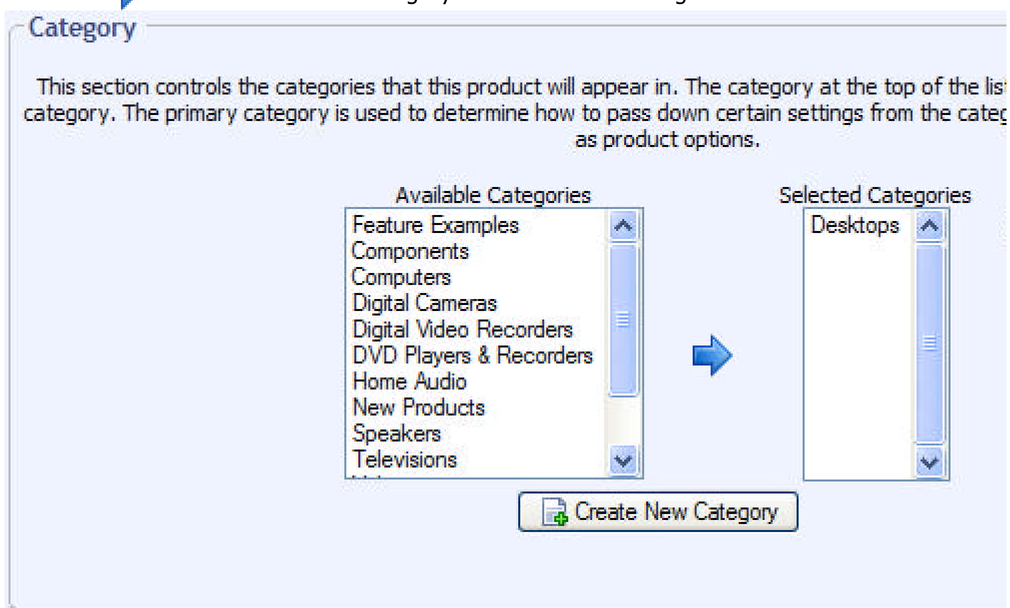
2. Locate the Category section, which looks like this:



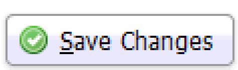
3. Select the category you wish to add the product to in the **Available Categories** box



4. Click the  button to move the category to the Selected Categories box



You can also move a category from one box to the other by double clicking on it.

5. Click 

7.1.4 Products - Changing Sort Order

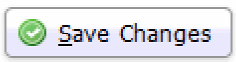
Overview

By default, products are displayed in your storefront in alphabetical ascending order (A-Z). Squirrelcart allows you to change the order by specifying any field on the product record to sort by

(Price, Date Added to Cart, etc..). You can also control the sort method (Ascending, or Descending). There are 2 places you can change the sort order.

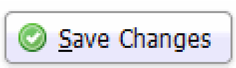
Store Setting

Changing the sort order for your entire store is done on the Visual Settings page as follows.

1. Open the **Visual Settings (Section 6.2)** page
2. Choose the field you wish to sort by in the **Order Products By** field. The fields listed represent the fields in the Products table.
3. Choose the sort method (Ascending or Descending) using the **Order Products How** field
4. Click 

Category Setting

You may override the default sort order for your products on a per category basis.

1. **Open the Category (Section 7.2.2)** you want to work with
2. Choose the field you wish to sort by in the **Order Products By** field. The fields listed represent the fields in the Products table.
3. Choose the sort method (Ascending or Descending) using the **Order Products How** field
4. Click 

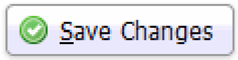
> If you need to sort in a way that is not provided by a standard Product field, try using the Sort Index field. You can then populate that field with numbers for your Product records to aid in sorting.

7.1.5 Improving Search Results

Sometimes a word associated with a product may have an alternate spelling. This can sometimes make it difficult for a customer to search for the terms that they expect will return product's with those alternate spellings in them. For example, "wind up toy" and "wind-up toy" could both be valid searches, but if your product contains the term "wind up toy" only, then a search for "wind-up toy" will not return results. To remedy this, you can add additional keywords to a product, that will help match various search strings. Here is how to add them:

1. **Open the product (Section 7.1.1)** you wish to work with

2. Add each keyword you want to associate with the product in the **Keywords** field, separating each with a space.

3. Click 

7.1.6 Best Sellers

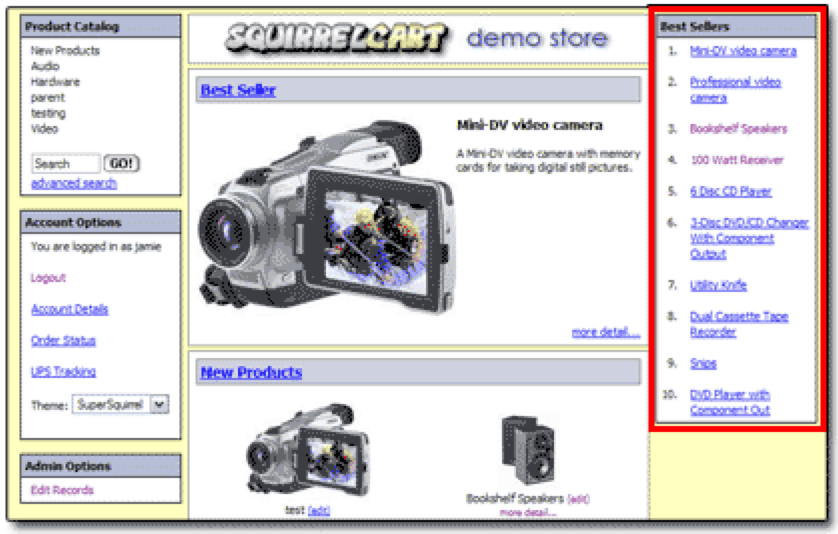
By Default, Squirrelcart automatically keeps track of your best selling items. It then displays them in your *storefront* in up to 3 different ways.

Best Seller Content

Your best selling product is displayed at the top of your *storefront*, when a customer first enters it. It is surrounded by red, below.

Best Sellers Navigation Block

Your best selling items (10 by default) appear on the right side of your *storefront*, when a customer first enters it. It is surrounded by red below.



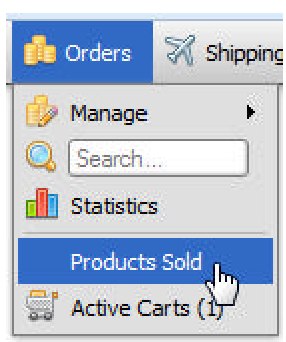
Best Sellers Automatic Category

Best Sellers can be seen by clicking the Best Sellers automatic category link. This is a special category that you cannot add products to. It automatically displays best selling products in the order of their popularity. You can control how many best sellers are shown in this category via the **Show up to X products** field on the Best Sellers category record in your control panel.

Manually Altering Best Seller Ranking

Squirrelcart uses the **Products Sold** table to track your best sellers. You may have a need to alter which products appear as best sellers. We recommend that you do this when your store is new, as you do not have enough sales to populate the **Products Sold** table. To manually alter the rank of your best sellers, see below:

1. Click the Products Sold menu link

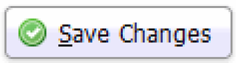


2. Modify Records

If you already have records in the Products Sold table, you can alter them, adjusting the number in the **Quantity** field so that it will rank as you want it to. If you do not have any records, add them, and specify quantities that will rank your products as you wish.

7.1.7 Temporarily Removing from Storefront

If you have products that you do not want to display in your *storefront* for whatever reason, you can mark them as not for sale. Then, at a later date, you can remove this setting, and they will appear in your storefront.

1. **Open the product (Section 7.1.1)** you wish to work with.
2. Check the **Not for Sale** field
3. Click 

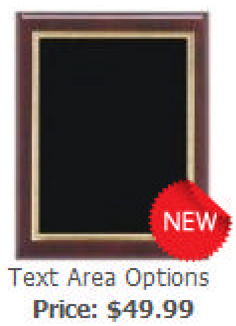
7.1.8 New Products

Overview

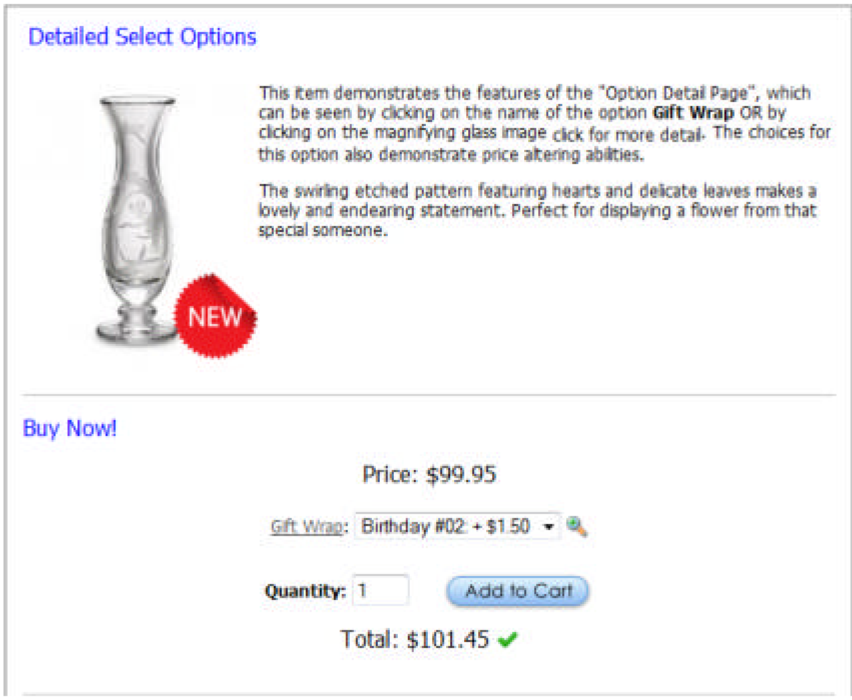
Squirrelcart has a few features to display new products so they stand out in your *storefront*.

New Badge

A **New** badge is displayed in thumbnail view:

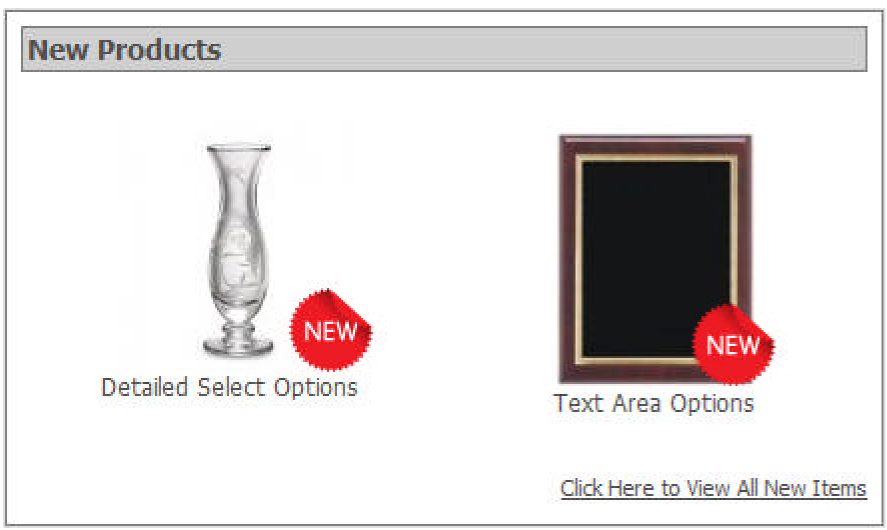


And in detail view:



New Products Content

A preview of your new products is displayed by default in the *storefront* homepage, via a **Content (Section 9.3.17.3.6)** record:



New Products Category

All new products can be viewed by clicking on the **New Products** automatic category. This is a special category that you cannot add products to. It automatically displays products that are considered new based on your settings (see below).

Settings

By default, Squirrelcart considers products added to your cart in the last 30 days as new. You can control this time span using the **New** field on the **Visual Settings (Section 6.2)** page. If you do not want the cart to keep track of your new products, uncheck the **Advertise New Products** field.

7.1.9 Related Products

Overview

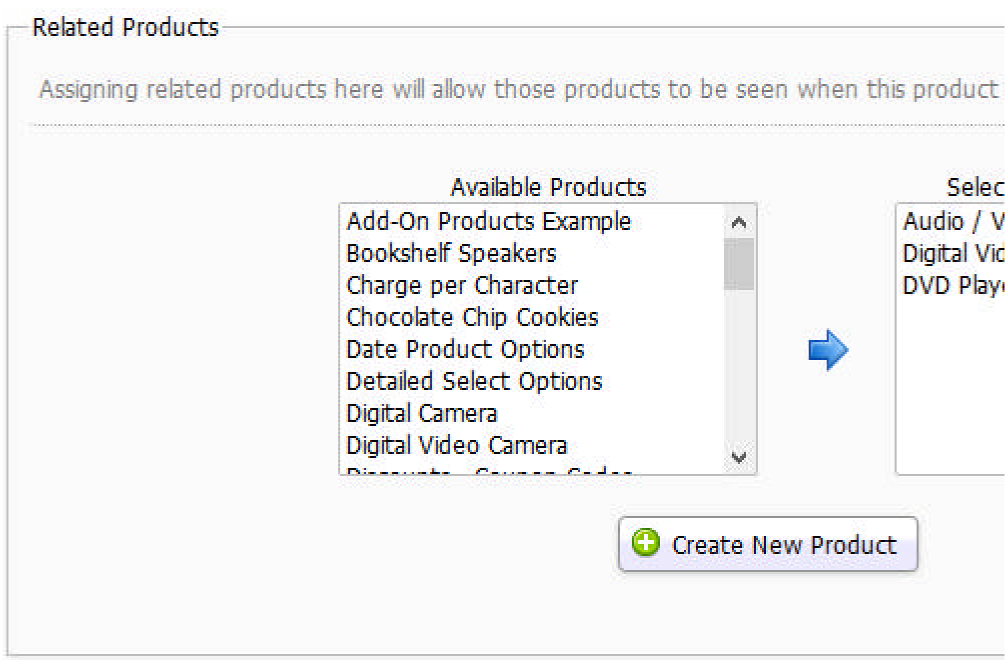
The Related Products feature allows you to associated related products to a product. Those related products can then be shown to your customer when they view the product's page in your store.

With the optional add-on products feature, your customers can add a product and one or more related products to the cart with a single operation.

Assigning Related Products

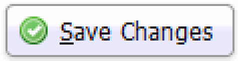
1. Open the product you want to assign related products to

2. Scroll down to the **Related Products** fieldset



3. Select a related product from the **Available Products** field by clicking it's name. To select more than one, hold down the CTRL key (in Windows) or the Command key (on Mac OSX).

4. Click the blue arrow to move the products to the **Selected Products** field

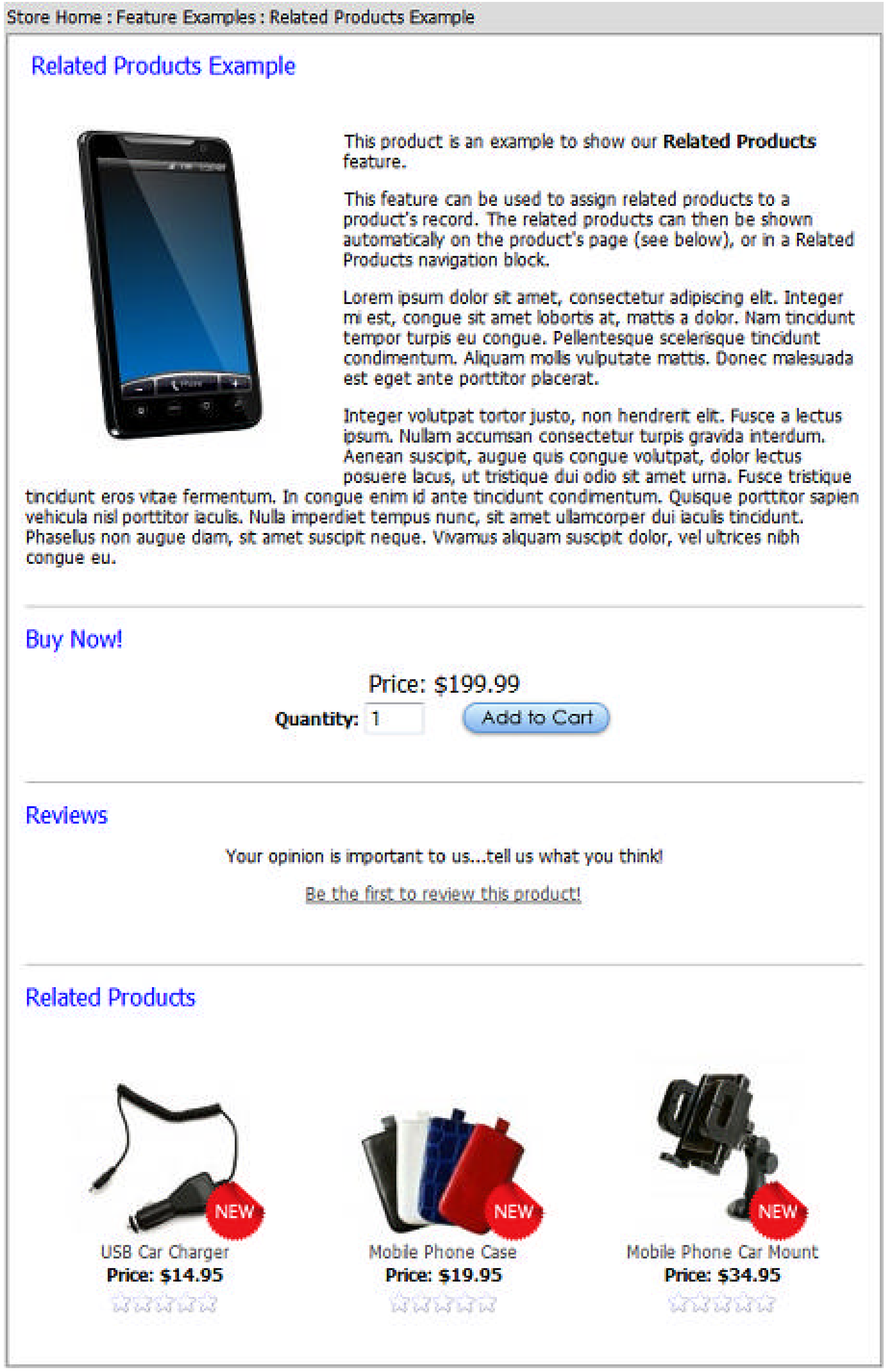
5. Click 

Deciding Where to Show Related Products

There are two places you can show related products by default.

Below Your Product Description

By default, related products should appear automatically after you assign them to a product (see above). The default location for this is below the product's description and pricing:



You should not normally have to do anything to make this happen, other than assigning the related products as described above.

Not working? If you have assigned related products to a product, and don't see them in this location, you may need to add this to your product_detail.tpl.php template file:

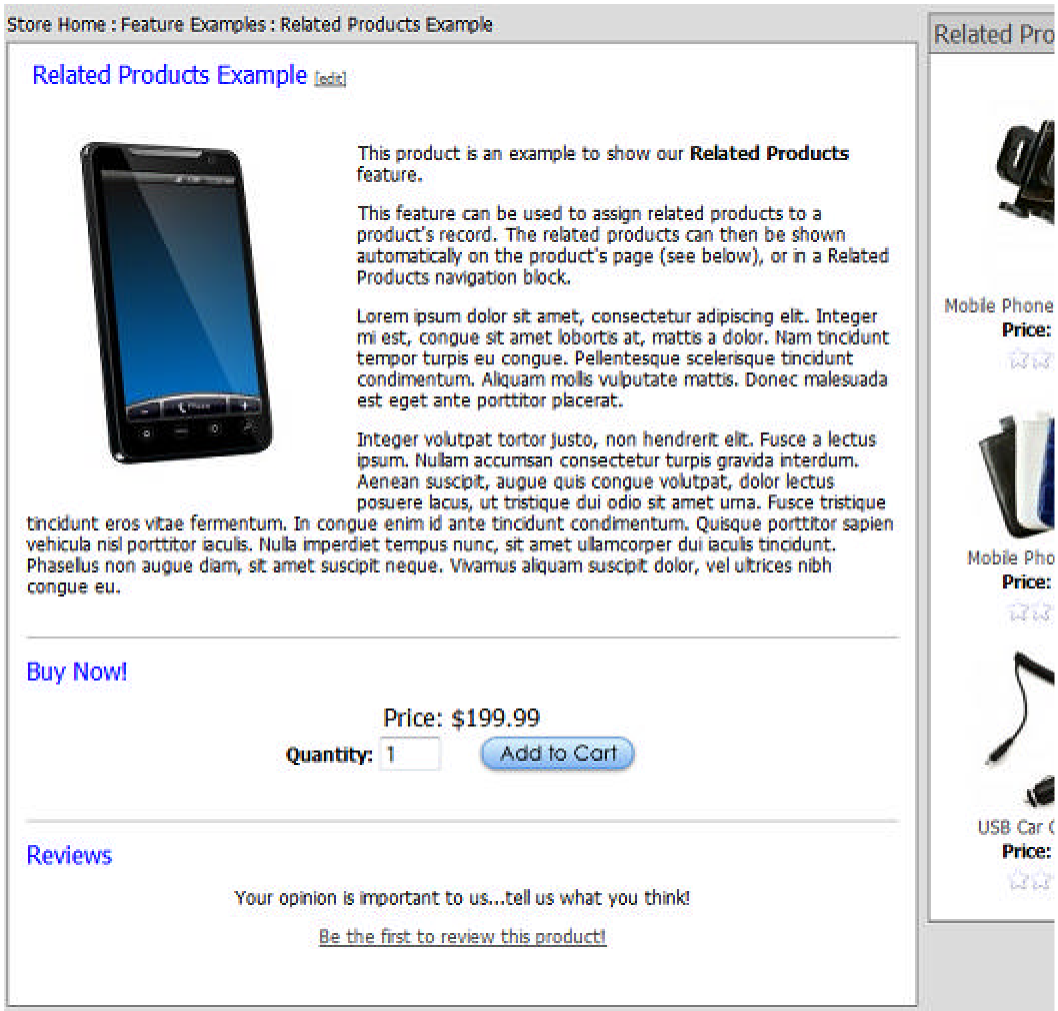
```
<?php print $Related_Products ?>
```

For more info on how to modify template files, see **this topic (Section 9.3.17.2)**.

When using this method, you can control how many related products appear in total, how many appear per row, and whether or not they appear in random order. You can find settings for that on the **Visual Settings page (Section 6.2)** of the control panel, inside the **Products (Related)** fieldset.

Related Products Navigation Block

If you prefer, you can show related products using the Related Products navigation block:



To do so, **add the built-in Related Products navigation block (Section 9.3.10.3)** to your storefront.

Controlling How Related Products Appear in the Nav Block

Related products are displayed in the nav block via this code that appears in the **Content** field on the Related Products nav block record in the control panel:

```
<?php
print sc_related_products(false,0,1,0,4);
?>
```

By default, up to a maximum of 4 related products will appear. To change that number, just change the last parameter in the nav block's **Content** field from a 4 as you see above to the number you wish to display. To display up to 10 related products, the code would look like this:

```
<?php
print sc_related_products(false,0,1,0,10);
?>
```

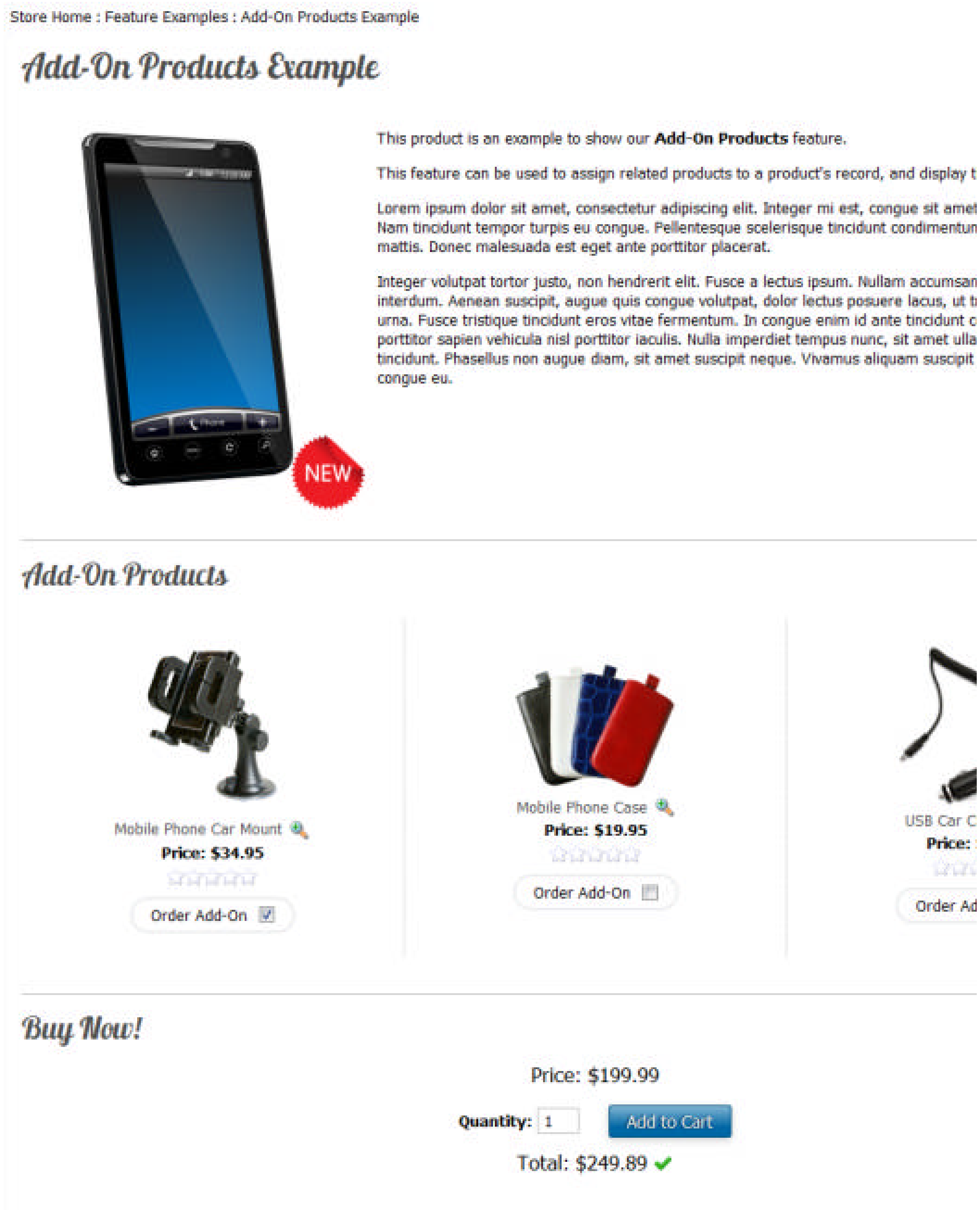
The 4th parameter in this function can be used to change the sort order. When set to 0 as shown above, related products appear in the order they are assigned on the product's record. If you would prefer to show products in a random order, change this 0 to a 1:

```
<?php
print sc_related_products(false,0,1,1,10);
?>
```

The code above will display up to 10 related products. It will choose them at random from the list of related products that you've assigned to the product being viewed.

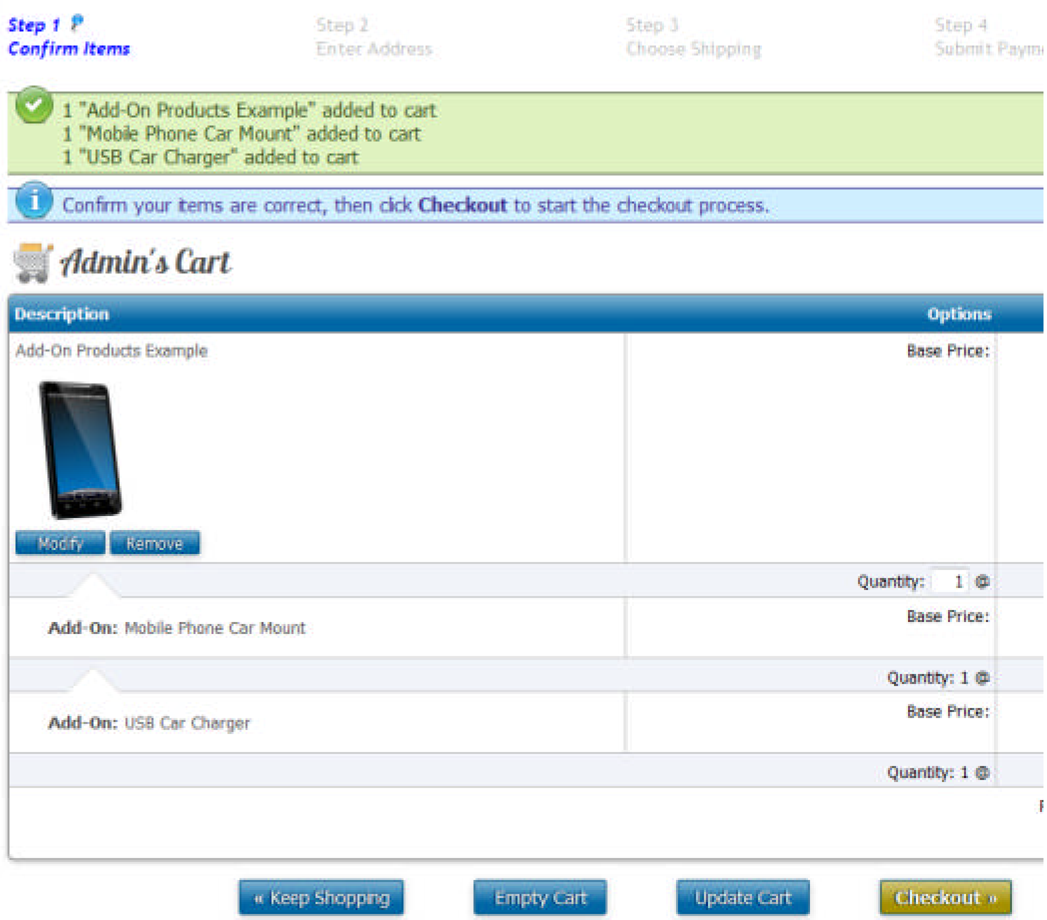
Add-On Products

Related products can be configured to be offered as "add-on products". Add-on products act like options for another product. For example, you may have a phone product and wish to offer other products as add-ons, such as chargers, cases, etc...



You can optionally add a quantity field for the add-ons. If you don't turn on the quantity fields, (which is the default behavior), a checkbox will appear to add the add-on to the cart as shown above.

It works with the QuickTotal module, which will display a grand total below the Add to Cart button. When you add the parent product to the cart, it looks like this:



By default, no thumbnails are shown during checkout (they can optionally be turned on). When clicking the **modify** button, the customer is taken back to the parent product record to modify the item and its add-ons.

When you remove the parent product from the cart, the add-ons are also removed.

How Add-On Products Differ from Product Options

Squirrelcart has very robust product option features (see **Managing Your Store > Products > Product Options**) which can be used to gather customization info for a product, such as size, color, etc... Options can also be used to offer extras for a product, with optional costs.

Add-On Products work very much like product options, with one important distinction - the add-on products are also sold separately and have their own product records.

If you wish to offer a product for sale and also would like to offer it as an add-on for another product, use the **Add-On Products** feature.

If you wish to offer an option for a product that does not also need to be sold on its own and does not require it's own product page, use our product option feature itself.

Because **add-on products** are also regular products, they can also have options themselves. For example, you may have a computer product and want to offer a hard drive as an add-on. That hard drive could have a capacity option to choose the size of the drive.

Enabling Add-On Products for a Single Parent Product

1. **Create one product record (Section 7.1.2)** for each add-on you wish to offer (if you haven't already done so).

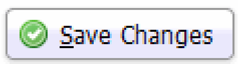
2. **Open the product record (Section 7.1.2)** you wish to assign add-ons to. We will call this the **parent product**.

3. Assign each add-on product to the parent product, using the **Related Products** fieldset.

4. Below the **Related Products** fieldset, you'll find a fieldset labeled **Add-On Products.** Set the **Related Products are Add-Ons** field in this fieldset to **yes**

5. Set the **per row** field, which controls how many add-on products will be shown per row on the parent product's page.

6. If you want the add-on products to have their own quantity fields, set the **Add-Ons Have Qty** field to **yes**. When set to **no**, chosen add-ons will have the same quantity as the parent product.

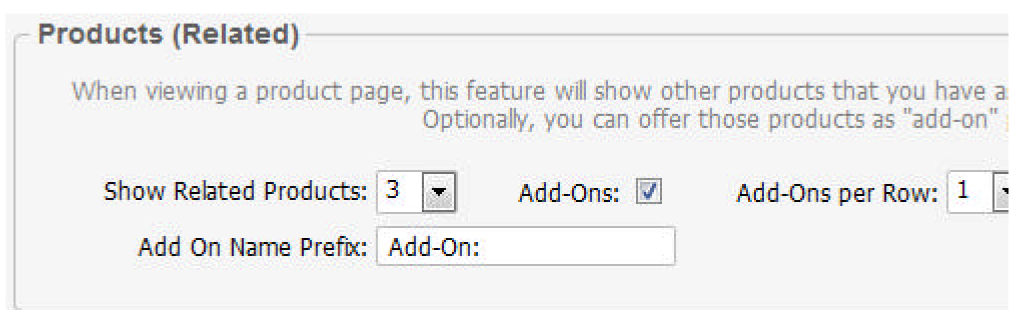
7. Click 

Enabling Add-On Products Storewide

You can make all related products act as add-on products, storewide.

1. Open the **Visual Settings page (Section 6.2)**

2. Scroll to the **Products (Related)** fieldset:



3. Set the **Show Related Products** field to anything other than 0

4. Check the **Add-Ons** field

5. Adjust the other settings as desired, and click **save changes**.

Specifying a Default Quantity

To specify a default quantity for an add-on, use the **Add-On Default Qty** field on the add-on product's record.

7.1.10 Add-On Products

Overview

The add-on products feature is an extension of the **Related Products feature (Section 7.1.9)**. See that topic for more information.

7.1.11 "Also Ordered" Products

Overview

The "Also Ordered" Products feature appears on your product detail pages. When viewing a product, this feature displays other products that were purchased alongside that product in order of popularity.

Enabling This Feature

This feature should be enabled by default. If the feature is disabled, here is how to enable it:

1. Open the **Visual Settings page (Section 6.2)** in the control panel

2. Set the **Show Also Ordered Products** field to a number larger than 0. This controls the maximum number of products that will appear in this section.

3. Set the **Also Ordered Products Per Row** field to the number of products you wish to display per row.

4. Click **Save Changes**

Not working?

If this section does not appear on a product page, it is most likely because that item has not been ordered alongside other items. If it has been ordered alongside other items and is still not appearing, you may need to add this code to the bottom of your

product_detail.tpl.php template file:

```
<?php print $Also_Ordered_Products ?>
```

For more info on how to modify template files, see **this topic (Section 9.3.17.2)**.

Disabling This Feature

This feature is enabled by default. To disable it:

1. Open the **Visual Settings page (Section 6.2)** in the control panel
2. Set the **Show Also Ordered Products** field to 0.
3. Click **Save Changes**

Excluding Items

If you have an item that you do not wish to appear as an "also ordered" product, check the **Exclude From Best Sellers** field on its product record.

7.1.12 Product Sales Agreements

For information on adding sales agreements to your products, see the main **Sales Agreements topic (Section 7.10)**.

7.1.13 Product Options - Overview

Overview

Product Options allow you to offer customizable products to your customers. You can use them to offer different sizes, colors, custom text for engravings, etc...You can also optionally add a cost for an option that will be added to the product's base price when chosen. We recommend that you read through the topics in this section in order to get a good understanding of the Options feature.

Option Types

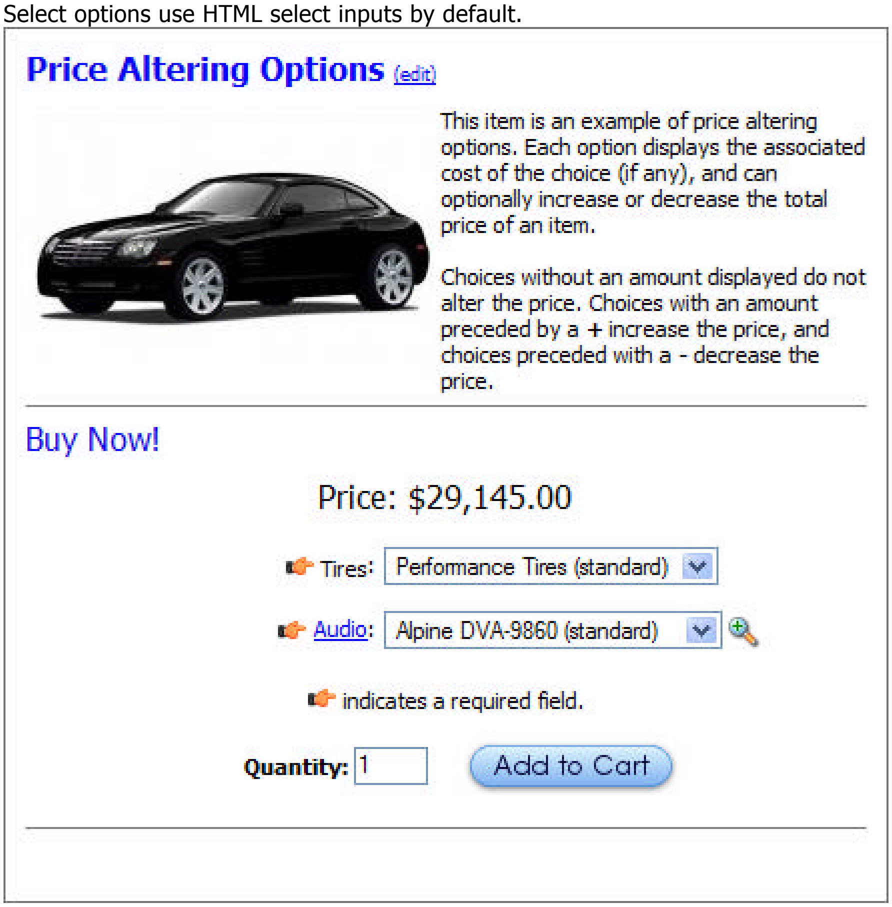
There are several different types of options you can choose from to handle a wide variety of product configurations. Squirrelcart supports an unlimited number of options, and you can combine any (or all!) of them on a single product record. The section below demonstrates the use of each type of option. Specific instructions for creating each option type can be found in other topics in this section.

Select

Select options are very powerful. They allow you to offer a customer multiple choices, and can be configured in many different ways.

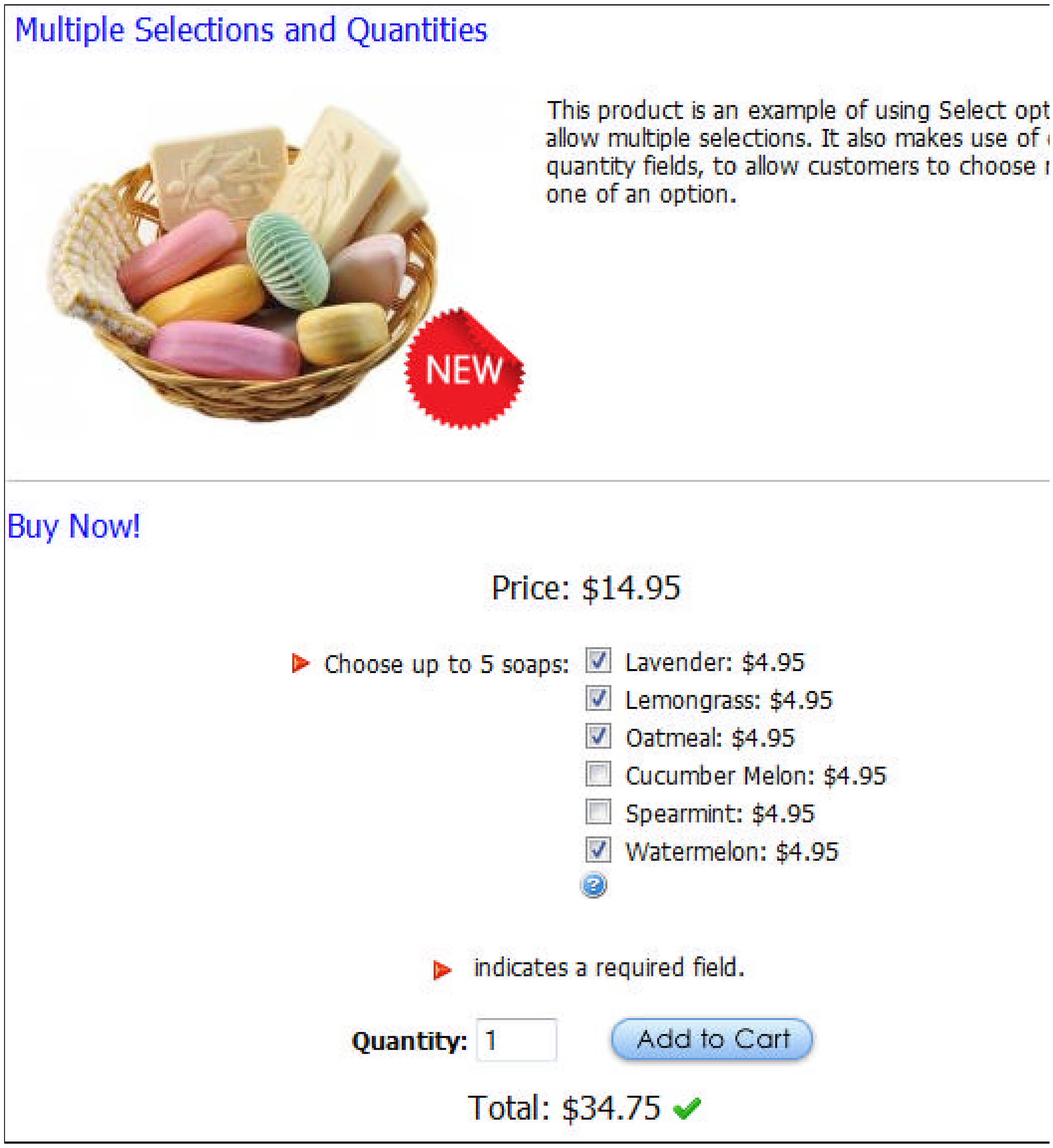
Default Functionality

Select options use HTML select inputs by default.



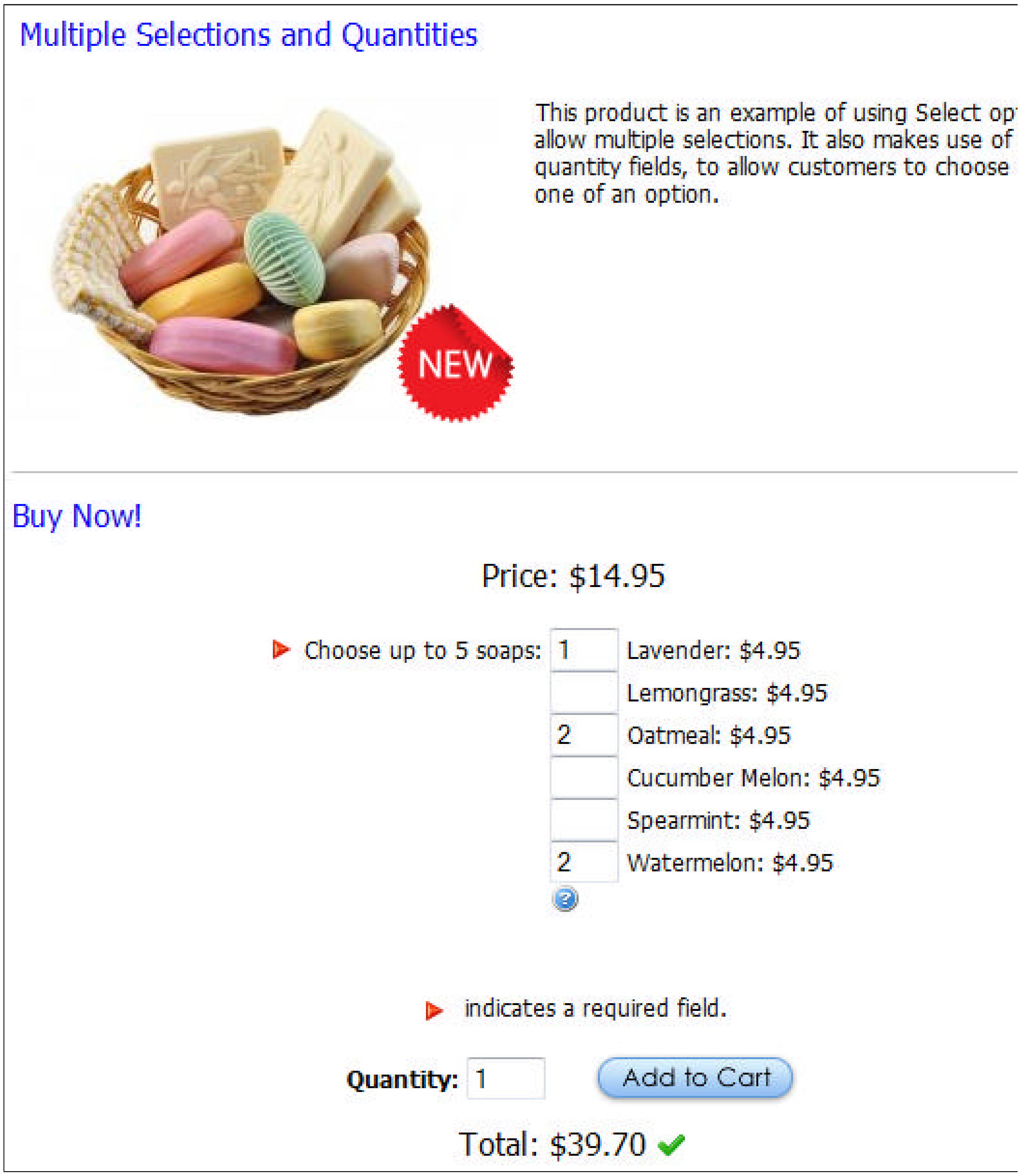
Allowing Multiple Selections

If you configure a Select option to allow multiple selections, Squirrelcart displays the choices using checkboxes to make it easier for customers to make selections:

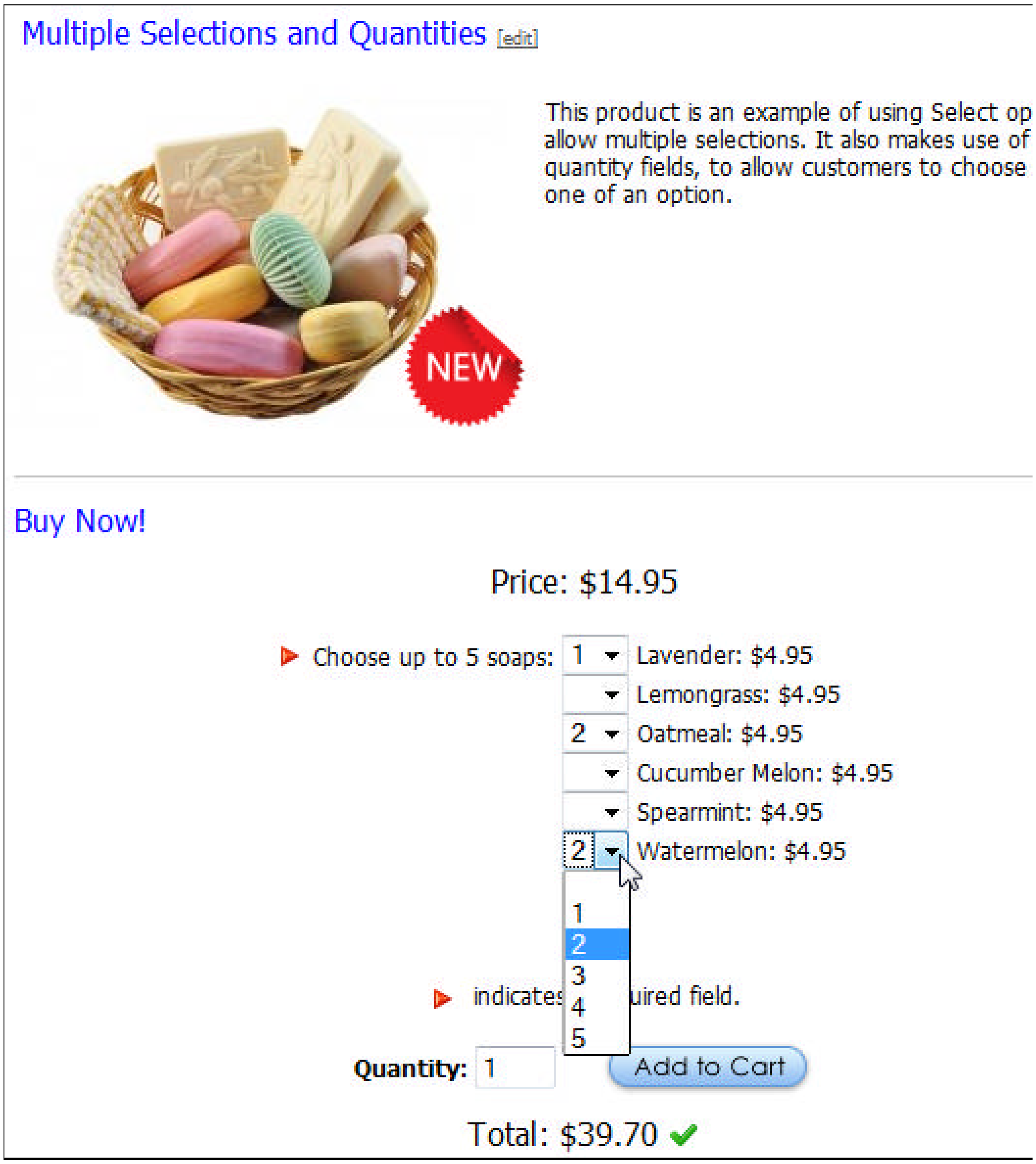


Allowing Multiple Selections with Quantity Fields

If you configure a Select option to allow multiple selections AND to allow quantities to be entered, the customer will see something like this:



You can also use a drop down field for the quantities if you prefer, with predefined values:



Text

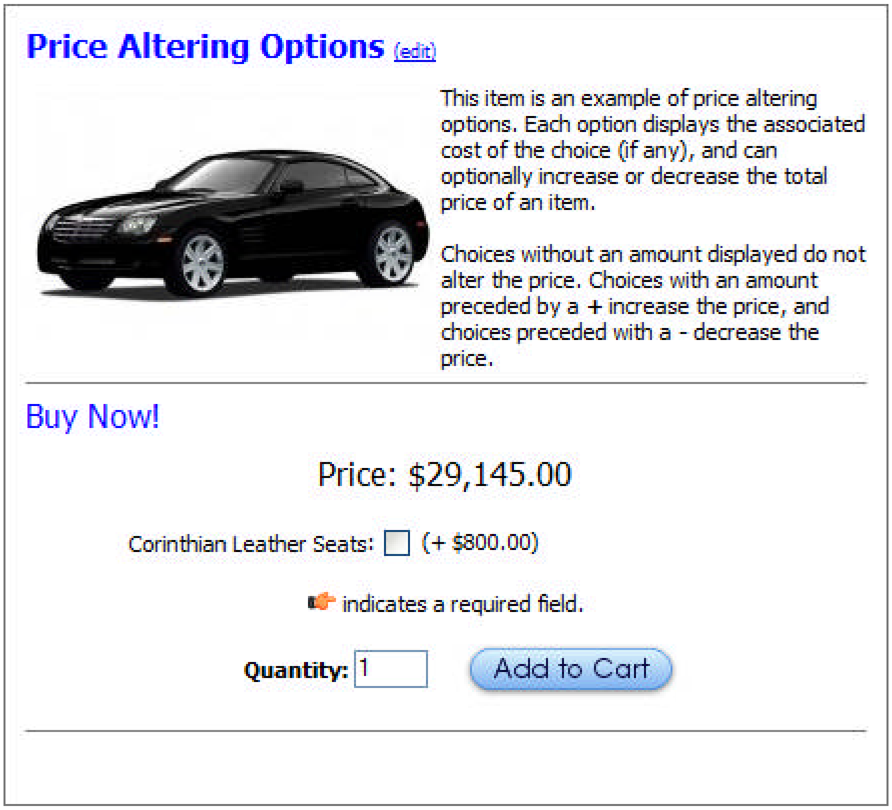
Text options allow you to gather input from your customers. This is useful for engravings, logos, etc...

Textarea

Textarea options allow you to get multiple lines of input from your customers. This is useful for such things as greeting card messages.

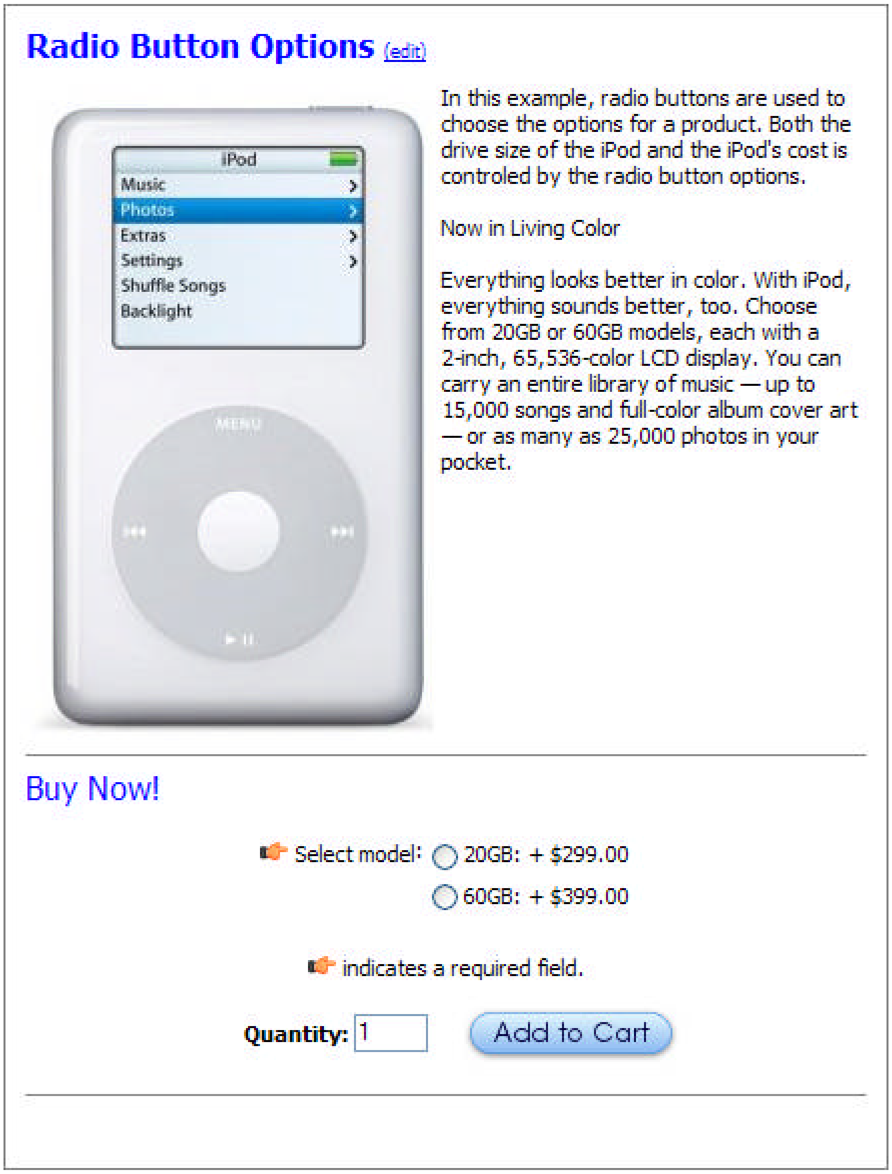
Checkbox

Checkbox options are used when you want to give a "yes or no" type of choice.



Radio Button

Radio Button choices are similar to Select options, in that the customer gets to choose between 2 or more choices. The only difference is that the choices appear as radio buttons instead of in a select input.

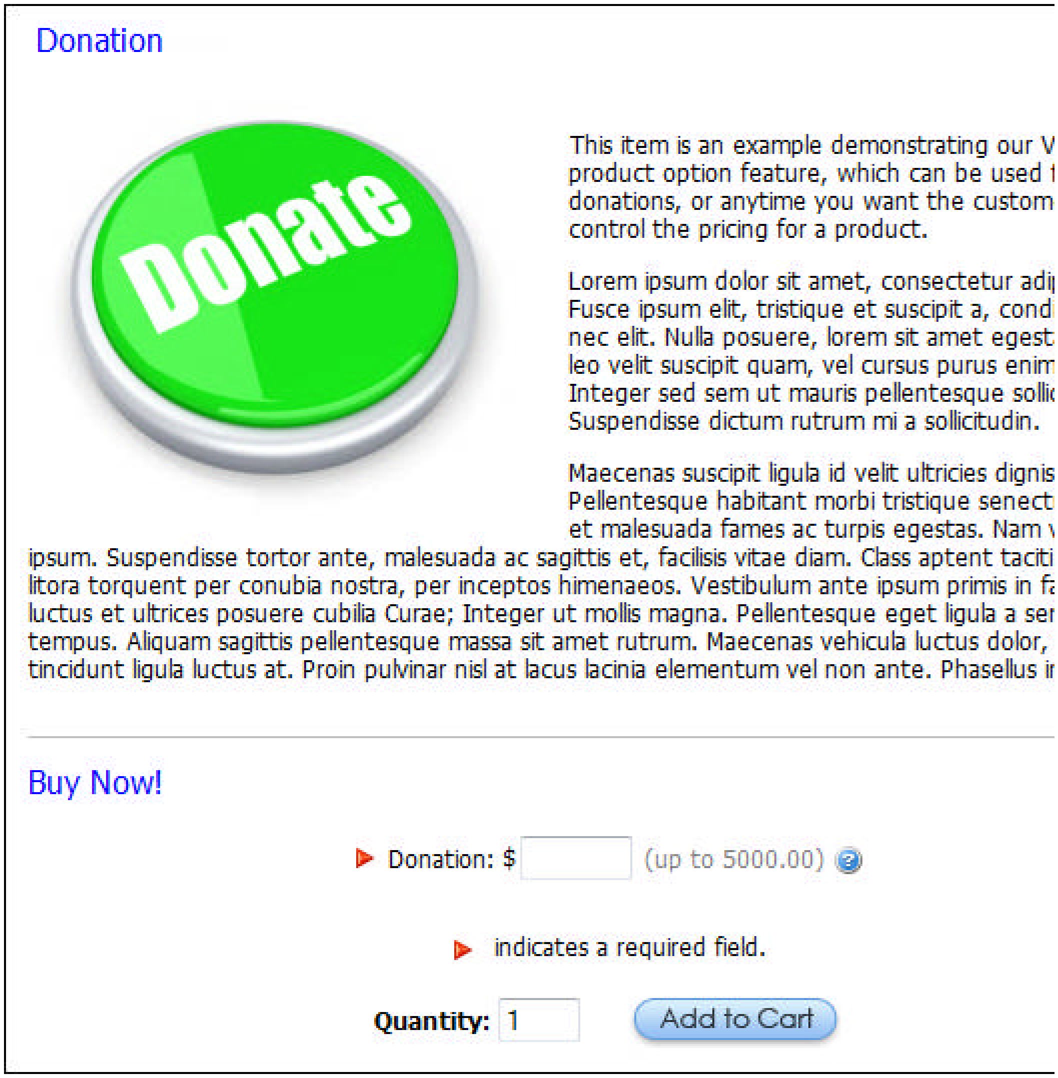


File Upload

File Upload options allow your customers to associate one or more image files with a product. This can be used to accept customer provided images for items such as t-shirts, brochures, etc...

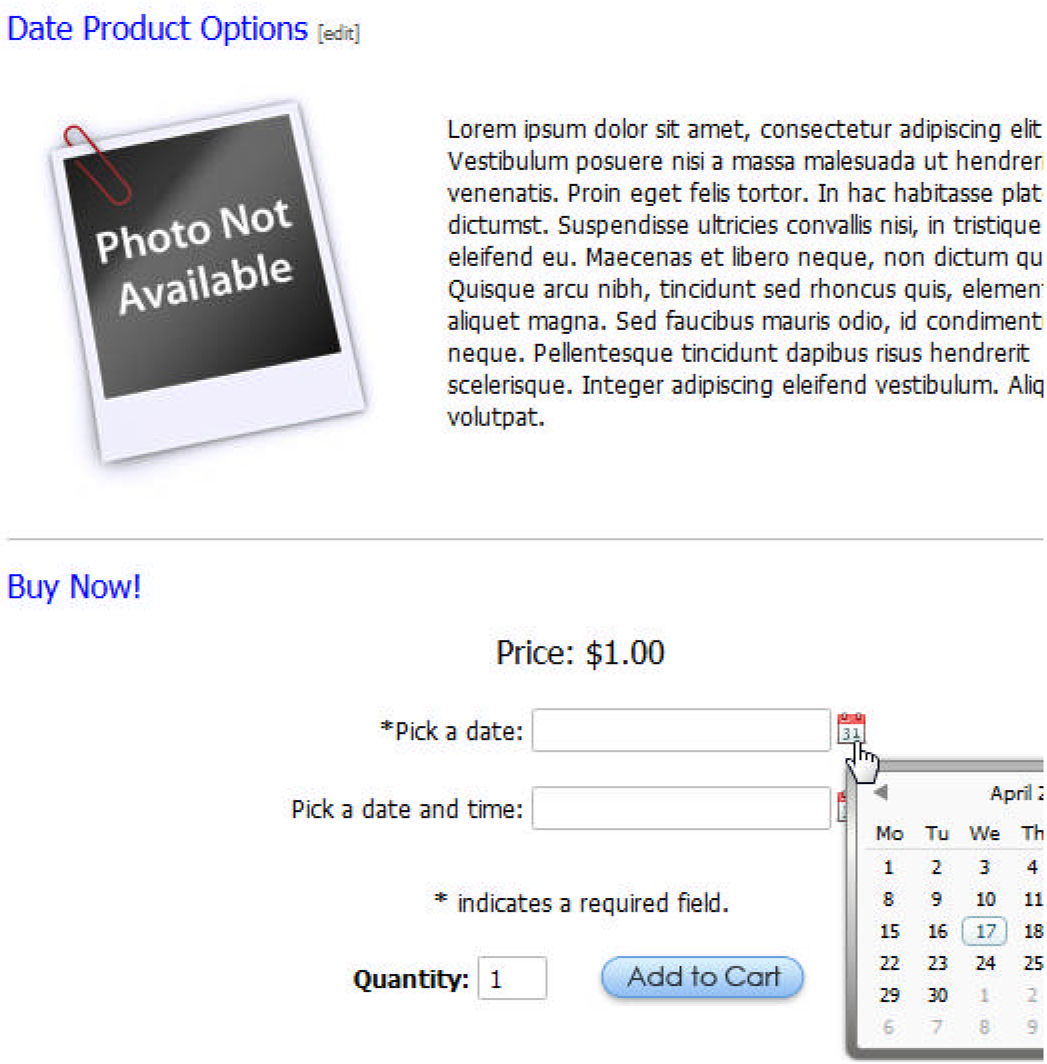
Variable Price

Variable Price options allow your customers to enter a price themselves. This can be used for donations, custom payments, or anytime you need your customers to be able to specify the amount they wish to pay.



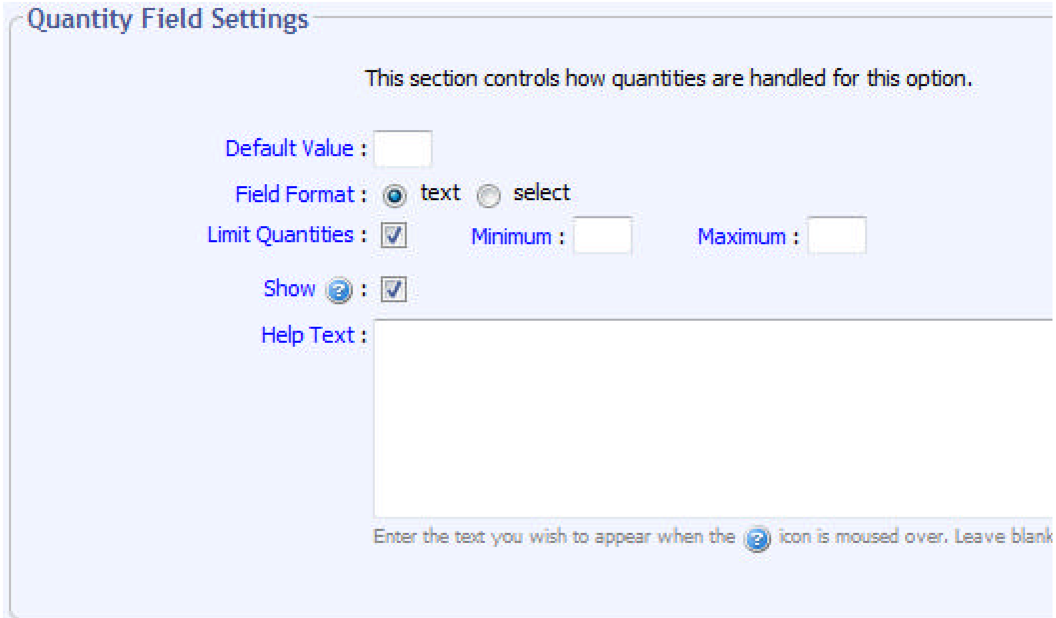
Date, Date and Time

Date options allow you to obtain a date from your customers using a calendar date picker. Date and Time options work exactly the same but allow them to also choose a time.



Option Quantity Field

For all of the option types above, you can add an optional quantity field. This will allow the customer to specify how many of each option they wish to order. This is enabled by checking the **Show Quantity Field** checkbox on the product option's record in the control panel. When enabled, a new fieldset will appear which controls how the quantity field looks and functions:

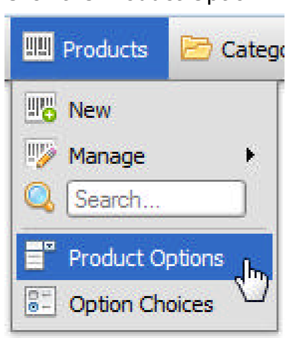


For help with each field, move your cursor over the field name.

7.1.13.1 Viewing Options

1. Open the **control panel (Section 3)**

2. Click the Product Option menu link



7.1.13.2 Adding a Select Option

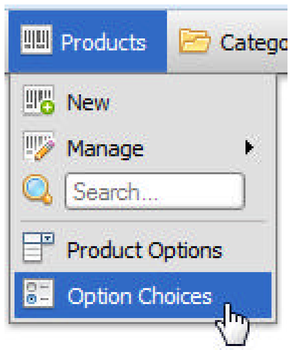
Overview

Select options make use of 2 tables in your database. The Options table defines the option itself, for example, "size". The Choices table defines the choices, such as "small, medium, large". In the walk through below, we will use these same examples.

> Please keep in mind that the walk through below starts from a store that has no options or choices in the database. If you have the built in example items, or your own option/choice records, some of the screen shots will differ from what you will see in your control panel.

Step 1 - Create Choices

1. Click the **Option Choices** menu link



2. Click Add New. You will see a form like this:

3.

4.

5.

> The price and weight set here becomes the default whenever you assign this option to a product. It can be overridden on a per product (or category) basis. See the **Overriding Option/Choice Defaults (Section 7.1.13.11)** topic for details.

6.

7.

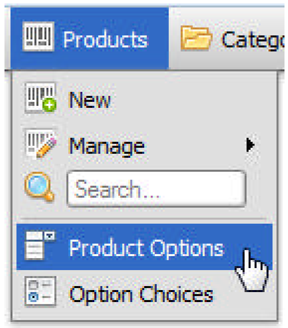
8.

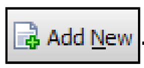
9.

10.

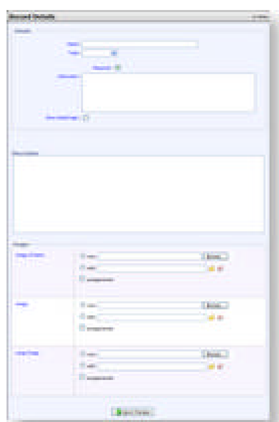
Step 2 - Create Option

1. Click the **Options** menu link



2. Click 

. You will see a form like this:



4. Enter a name for the option in the **Name** field. For this example, enter **size.**

5. Set the **Type** field to **Select**. You should notice some additional fields will appear that are specific to the Select option type. The **Add Blank Choice** field will appear below the **Type** field. In addition, a **Choices** section will appear below the **Details** section.

6. If you would like a blank choice to appear at the top of the list, check the **Add Blank Choice** field. This prevents the item from defaulting to the first choice in the list.

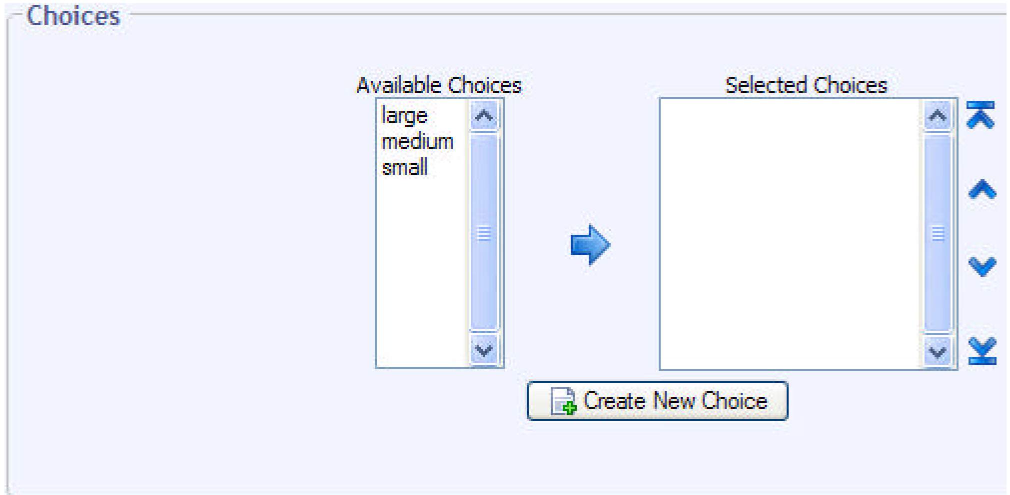
7. If you want to require the customer make a choice for this option before being allowed to purchase, check the **Required** field.

8. By default, the name of the option is shown before the select field as an instruction to the customer. If you would like to use something other than the name of the option as the instruction, enter it in the **Instruction** field.

9. If you want the detail page links to appear, check the **Detail Page** field. This feature is

explained in the **Detail Page (Section 7.1.13.14)** topic.

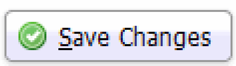
10. Locate the **Choices** section. It should look similar to below.



11. Click the **large** choice in the **Available Choices** box, and then click the  arrow to move it to the **Select Choices** box. Repeat this for each choice.

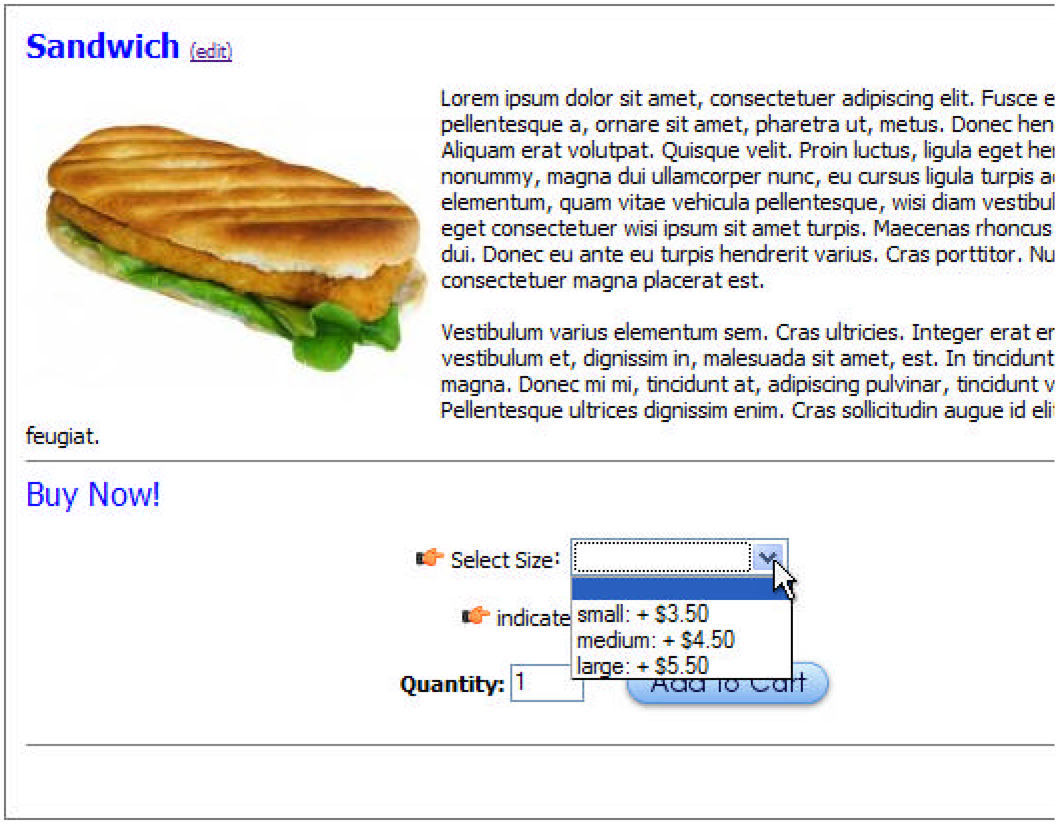
> You can move multiple choices at the same time by holding the CTRL key as you click on each choice.
> You can also move a choice to the opposite box by double clicking it.

12. The choices will appear in your storefront in the same order as they are in the **Selected Choices** box. You can rearrange them by clicking the blue arrows to the right of the **Selected Choices** box.

13. Click 

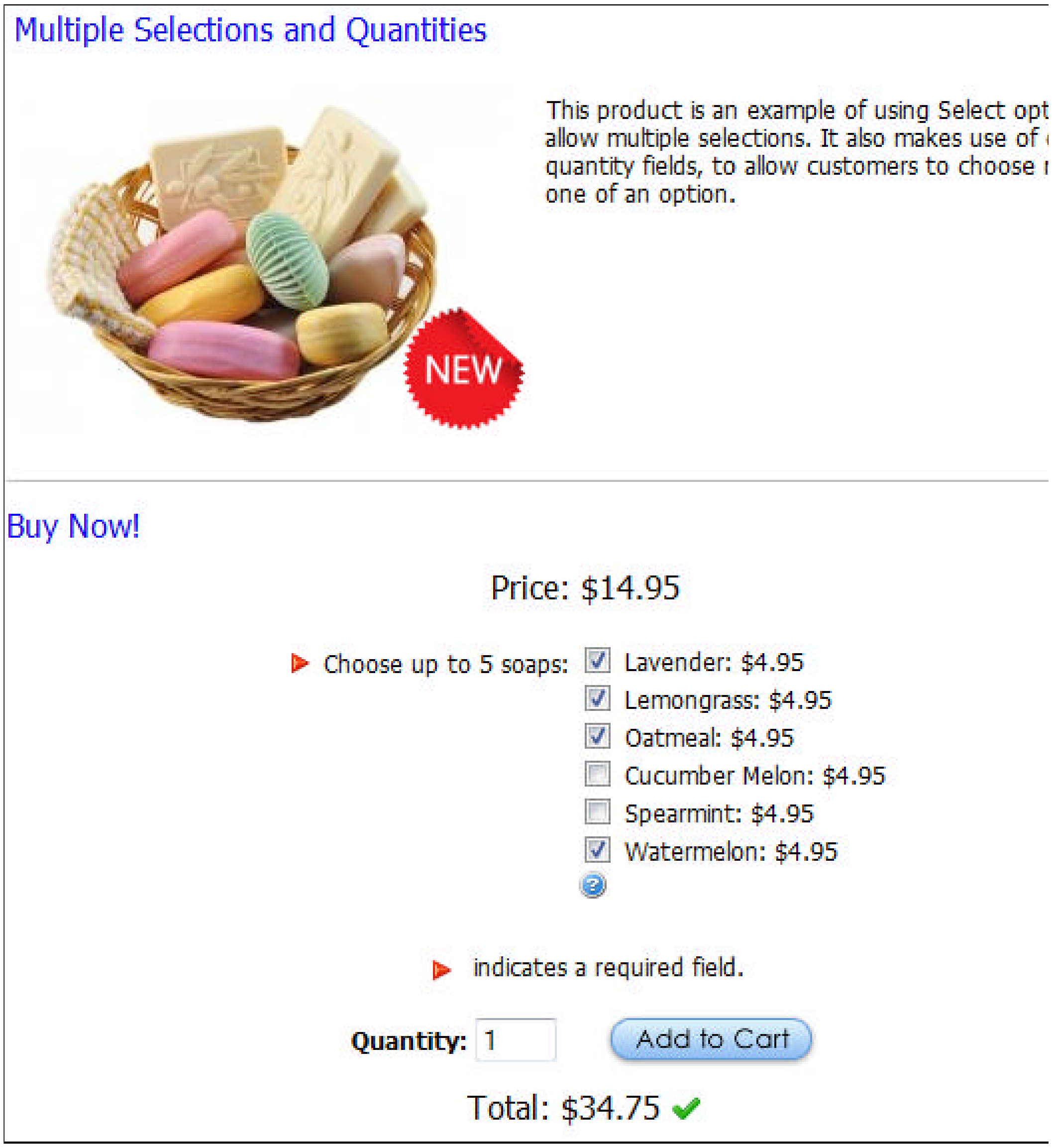
Step 3 - Assign Option to Product

The last step is to assign the option to a product. Because this step is the same for all product option types, we've explained it separately in the **Assigning to a Product (Section 7.1.13.10)** topic. The resulting option in your storefront should look something like this:



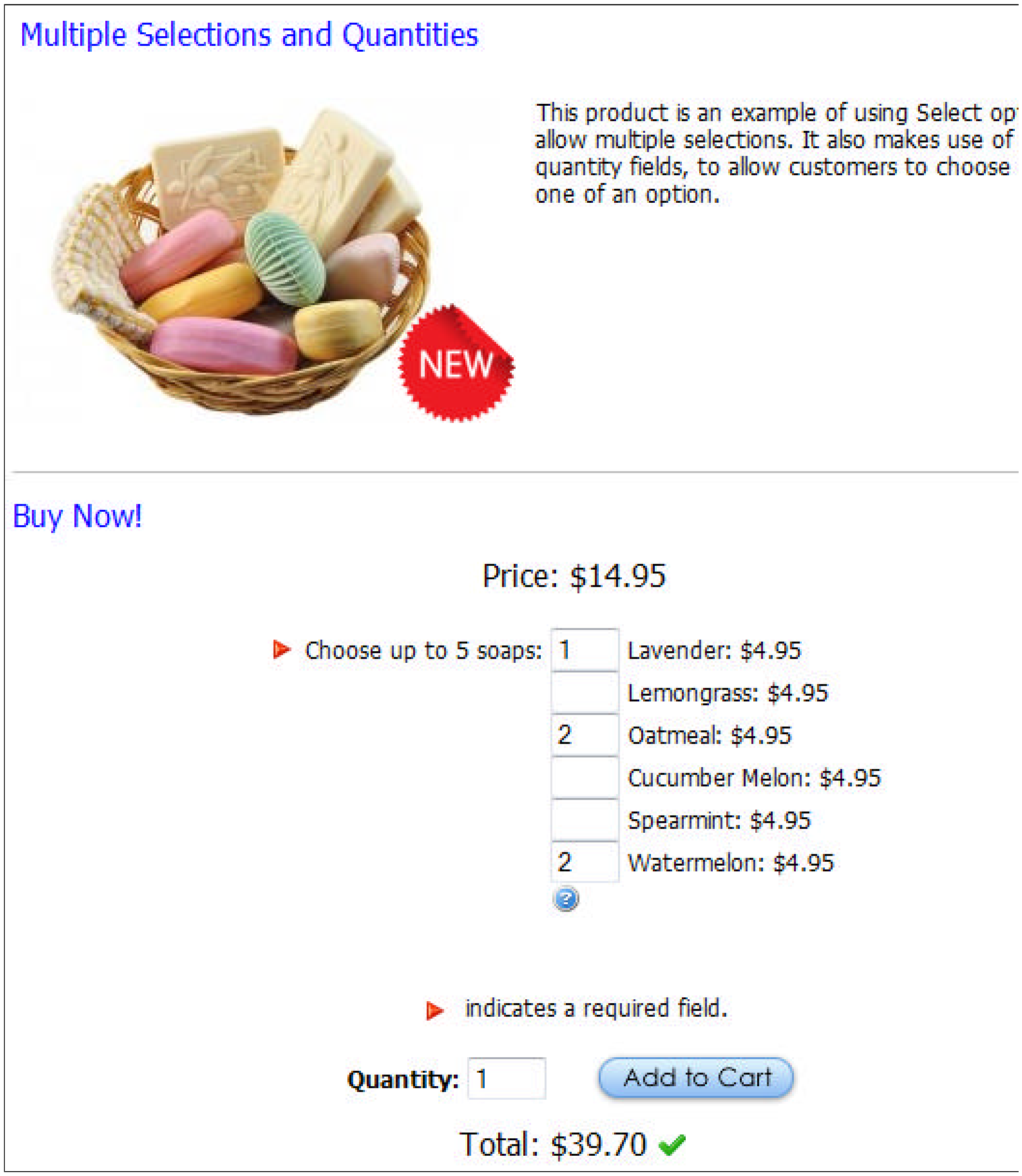
Allowing Multiple Selections

If you want your customer to be able to choose more than one choice, check the **Allow Multiple Selections** field on the product option record in the control panel. The option will then look something like this:



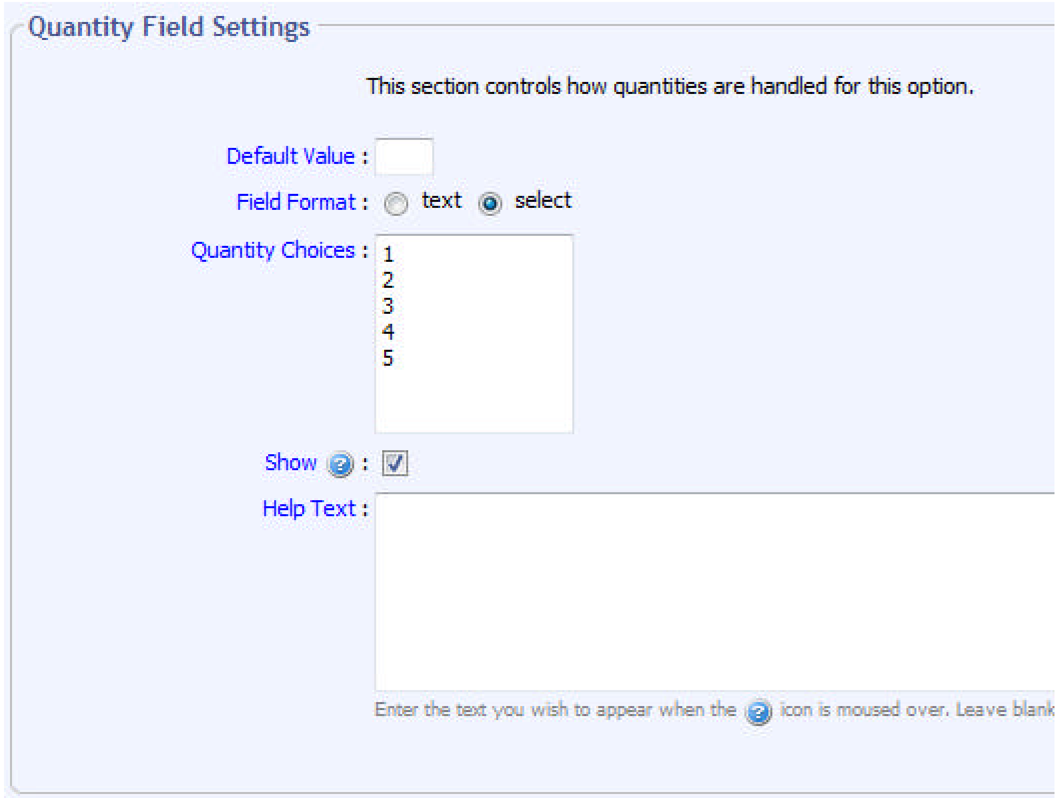
Allowing Multiple Selections with Quantity Fields

Squirrelcart has a feature to allow a customer to choose more than one of each choice via quantity fields:

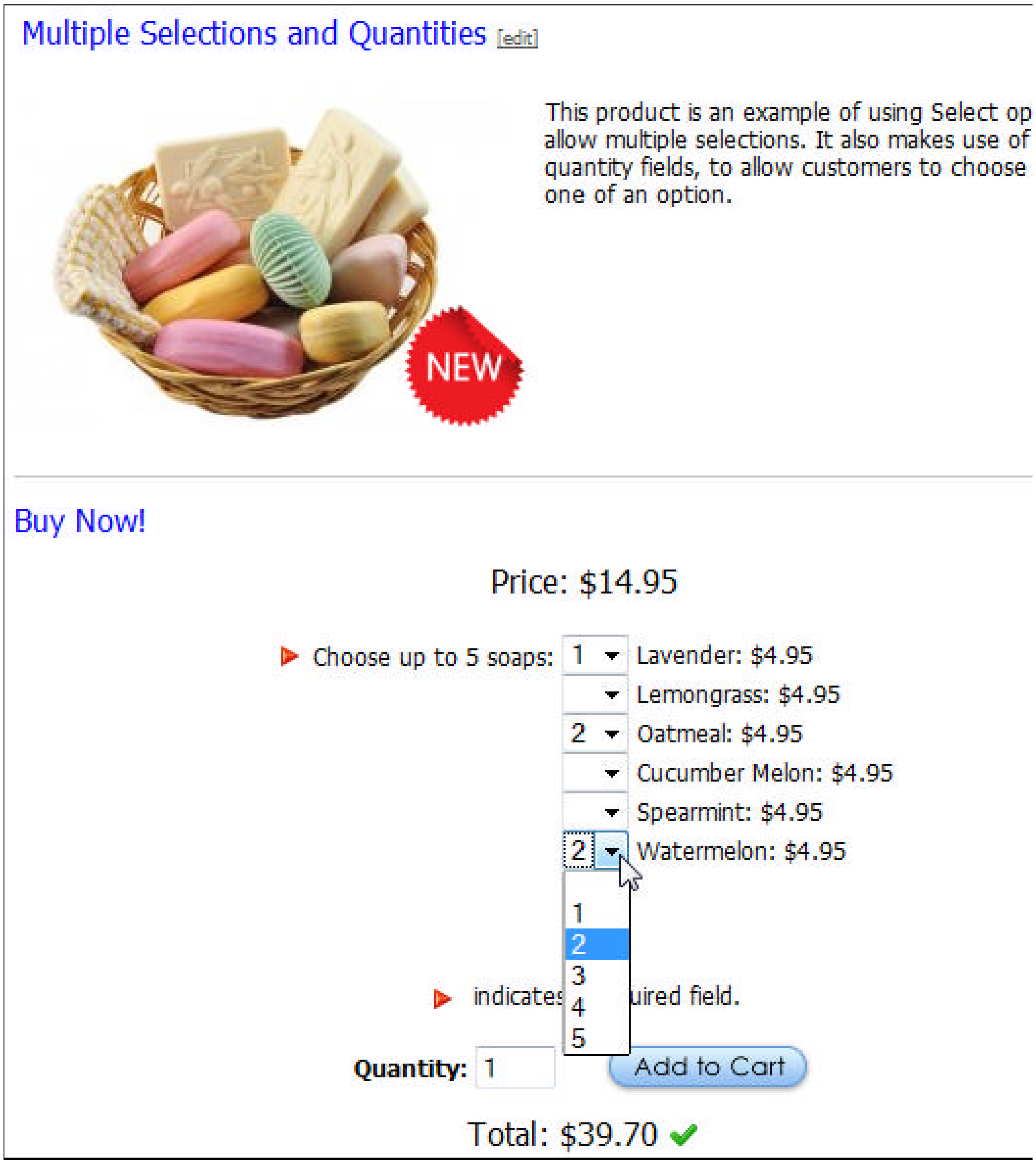


To enable this, check the **Allow Multiple Selections** field and the **Show Quantity Field** on the product option's record in the control panel**.**

If you would prefer that the customer choose a quantity from a drop down instead of entering it in a text field, change the **Field Format** field to **select** in the Quantiy Field Settings fieldset, and enter the choices you want to give the customer in the **Quantity Choices** field as shown below:



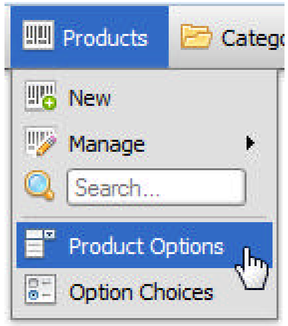
The option will then look like this:



7.1.13.3 Adding a Text Option

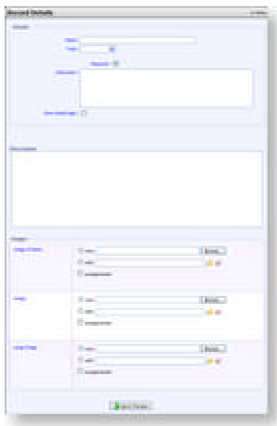
Step 1 - Create Option

1. Click the **Options** menu link



2. Click 

. You will see a form like this:



4. Enter a name for the option in the **Name** field. For this example, enter **Engraving.**

5. Set the **Type** field to **Text**

6. Enter the width of the field you would like (in pixels) in the **Width** field

7. If you wish to set a minimum or maximum allowed character limit, use the **Min Length** and **Max Length** fields. If you do not wish to set a limit, leave the fields blank.

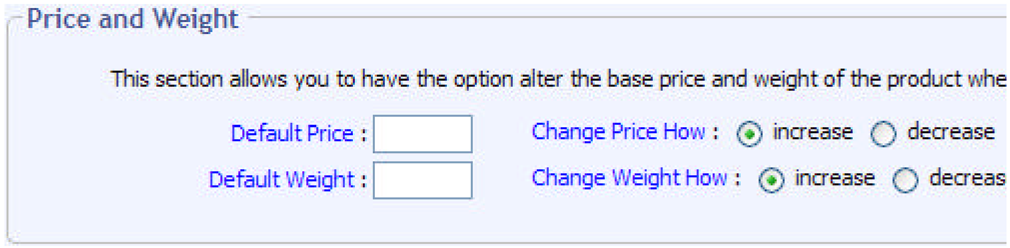
8. If you want to require the customer make a choice for this option before being allowed to purchase, check the **Required** field.

9. By default, the name of the option is shown before the field as an instruction to the customer. If you would like to use something other than the name of the option as the instruction, enter it in the **Instruction** field.

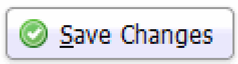
10. If you want the detail page links to appear, check the **Detail Page** field. This feature is explained in the **Detail Page (Section 7.1.13.14)** topic.

11. You can optionally associate a price and weight with a text option. When this is done, the price and weight are not added to the total unless the customer enters text in the field. This is useful for when you want to charge a fee ONLY when the customer fills out a text option. If you wish to add a price or weight for this option, due so in the **Price and Weight** section

seen below:



> The price and weight set here becomes the default whenever you assign this option to a product. It can be overridden on a per product (or category) basis. See the **Overriding Option/Choice Defaults (Section 7.1.13.11)** topic for details.

12. Click 

Step 2 - Assign Option to Product

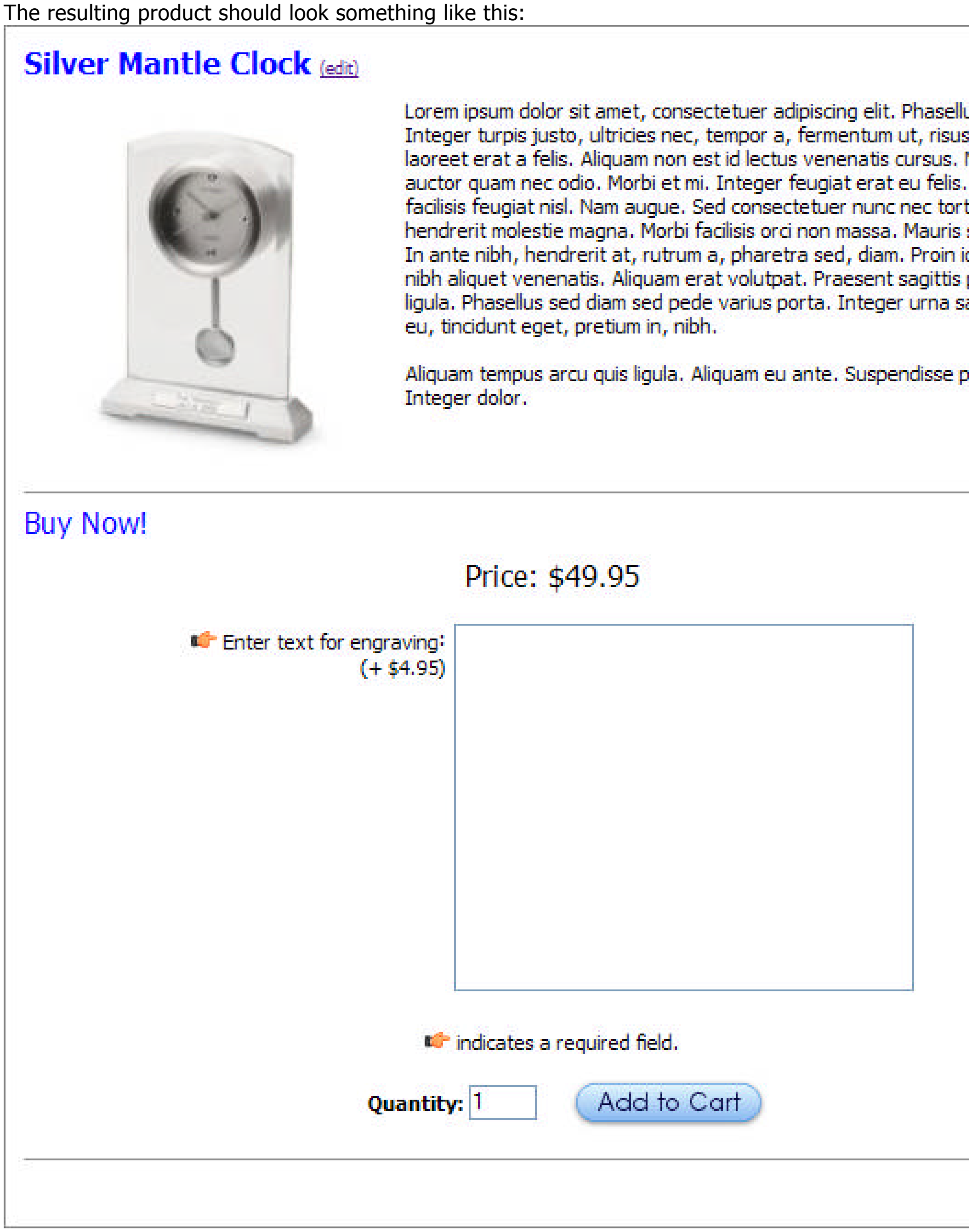
The last step is to assign the option to a product. Because this step is the same for all product option types, we've explained it separately in the **Assigning to a Product (Section 7.1.13.10)** topic. The resulting option in your storefront should look something like this:

7.1.13.4 Adding a Textarea Option

The process for adding a Textarea option is identical to adding a Text option. For this reason, please follow the **Adding a Text Option (Section 7.1.13.3)** topic, with one extra step:

After you specify the width of the field, you will also need to specify the height using the **Height** field.

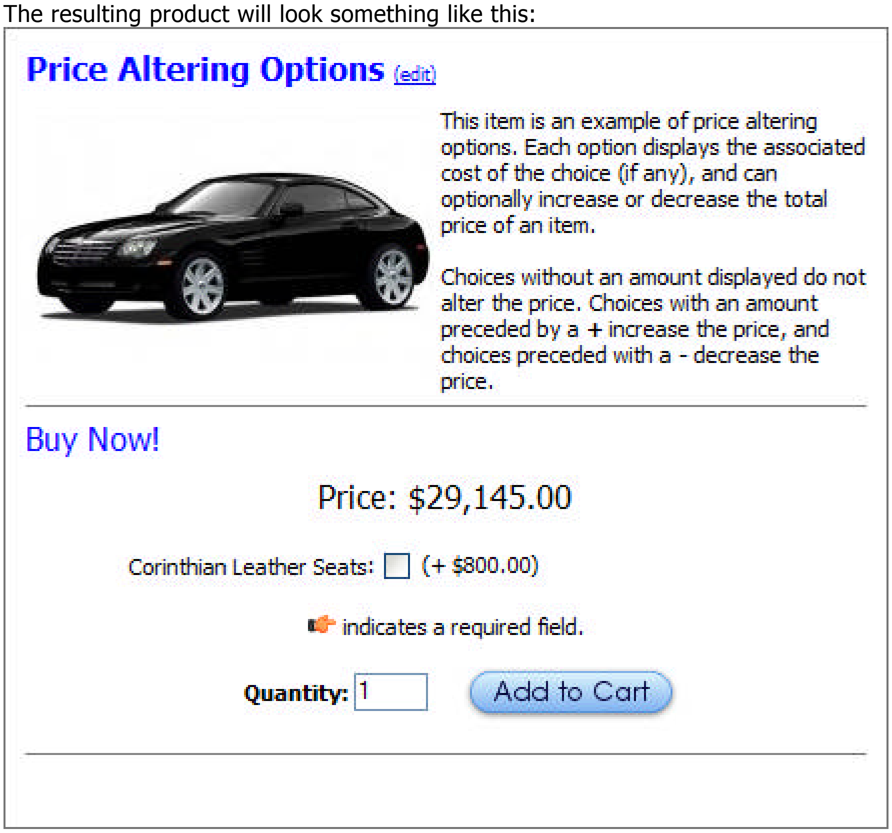
The resulting product should look something like this:



7.1.13.5 Adding a Checkbox Option

The process for adding a Checkbox option is identical to adding a text option. For that reason, you should use the **Adding a Text Option (Section 7.1.13.3)** topic as a guide. The only difference is that you will not see a **Width** field.

The resulting product will look something like this:



7.1.13.6 Adding a Radio Button Option

Radio Button and Select options are very similar, in that they both use Choices. The process for adding a radio button option is virtually identical to adding a Select option. For that reason, we recommend you use the **Adding a Select Option (Section 7.1.13.2)** topic as a guide, and make the following changes:

- When adding the Option record, set the **Type** field to **Radio**.
- The **Add Blank Choice** field will not appear. Instead, you will see a field named **Break After Choice.** If you want each choice on a separate line, check this field.

When following the Adding a Select Option topic to add a Radio option, the options will look like this in your storefront:

7.1.13.7 File Upload Options

Security

Incredibly Important!

Files uploaded by your customers are stored in your **sc_data/customer_uploads** folder. It is highly recommended that you place your **sc_data** folder in a location that is not web accessible. You can find out how to do this in the topic "**Security > sc_data directory (Section 8.2)**". If this is not done, you are open to potential hacking attempts. **If you cannot put your sc_data folder in a secure location, we recommend that you do not make use of this feature!**

Overview

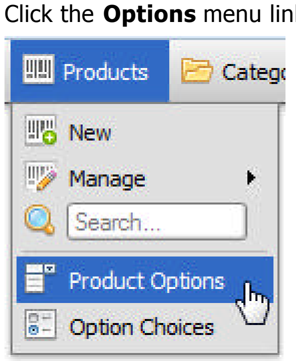
File Upload options allow your customers to associate one or more image files with a product. This can be used to accept customer provided images for items such as t-shirts, brochures, etc...

Adding a File Upload Option

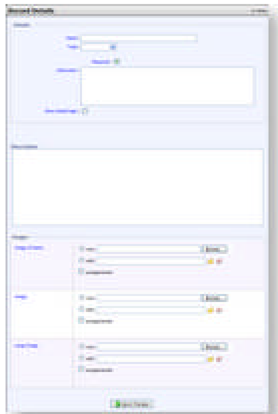
Follow the instructions below to add a file upload option.

Step 1 - Create the Option

1. Click the **Options** menu link



2. Click Add New. You will see a form like this:



4. Enter a name for the option in the **Name** field. For this example, enter **Your Image.**

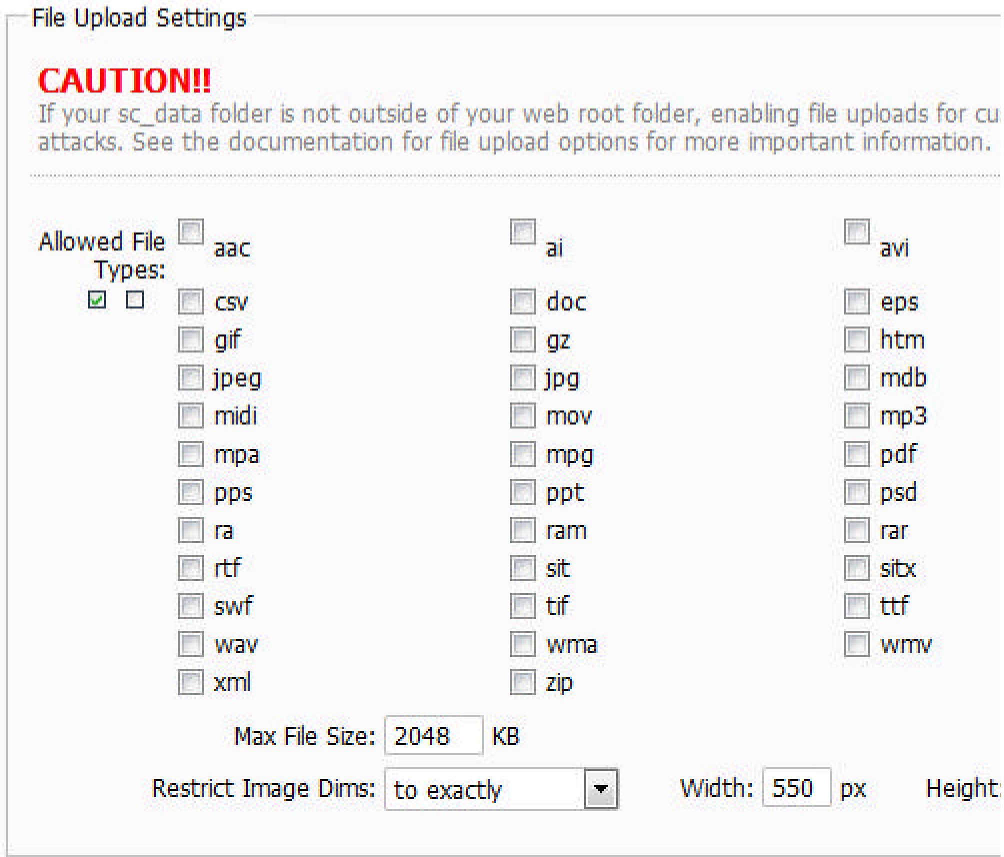
5. Set the **Type** field to **File Upload**

6. If you want to require the customer to upload a file for this option before being allowed to purchase, check the **Required** field.

7. By default, the name of the option is shown before the select field as an instruction to the customer. If you would like to use something other than the name of the option as the instruction, enter it in the **Instruction** field.

8. If you want the detail page links to appear, check the **Detail Page** field. This feature is explained in the **Detail Page (Section 7.1.13.14)** topic.

9. A **File Upload Settings** field section will appear, which looks like this:



These settings only affect this file upload. The fields are defined as follows:

Allowed File Types: This controls the file types that the customer will be allowed to upload. You can add additional file types by following the instructions in the **File Types (Section 6.10)** topic.

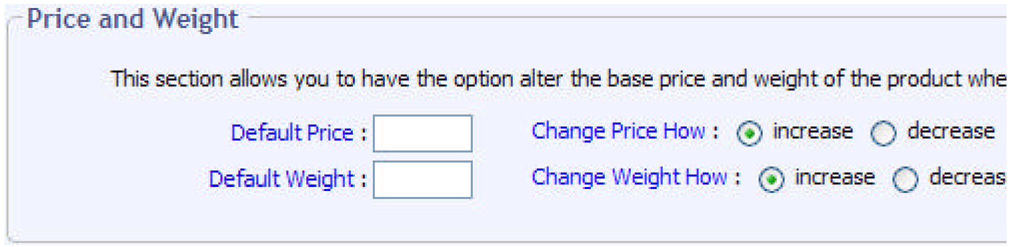
Max File Size: This is the maximum file size that the customer will be able to upload. If your customer's receive errors when trying to upload files that are smaller than this size, it may be due to server based restricions imposed by your web host that we have no control over. If you suspect that is the case, contact your web host for assistance.

Restrict Image Dims: If the file being uploaded is an image, this setting can be used to restrict the dimensions of the image provided by the customer.

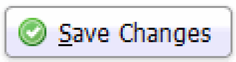
10. Check the boxes next to the file types you wish to allow for this option

11. If needed, adjust the **Max File Size** field.

12. You can optionally associate a price and weight with a file upload option. When this is done, the price and weight are not added to the total unless the customer uploads a file using the file upload field. This is useful for when you want to charge a fee ONLY when the customer adds their own file to a product. If you wish to add a price or weight for this option, due so in the **Price and Weight** section seen below:



The price and weight set here becomes the default whenever you assign this option to a product. It can be overridden on a per product (or category) basis. See the **Overriding Option/Choice Defaults (Section 7.1.13.11)** topic for details.

13. Click 

Step 2 - Assign Option to a Product

The last step is to assign the option to a product. Because this step is the same for all product option types, we've explained it separately in the **Assigning to a Product (Section 7.1.13.10)** topic.

Adding Additional File Types

You can add additional file types by following the instructions in the **File Types (Section 6.10)** topic

Downloading Files for an Order

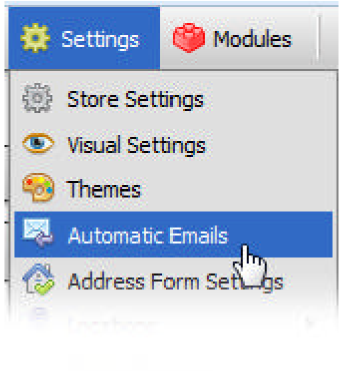
After a customer has placed an order that includes an uploaded file, you can obtain that file in 3 ways:

Method 1 - as Attachments to the Order Notification Email

When a user places an order, you will receive an **automatic email (Section 7.7)** notifying you of the order. By default, files uploaded by users will be delivered as attachments to that email, if the total size of those attachments does not exceed 10 MB.

To adjust the settings for this feature:

1. View your automatic email settings:

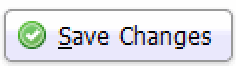


2. Open the record named **Order - Notification to Staff**

3. In the **Message Details** fieldset, you will find these settings:

To disable or enable this feature, uncheck or check the **Attach Customer Uploads** field.

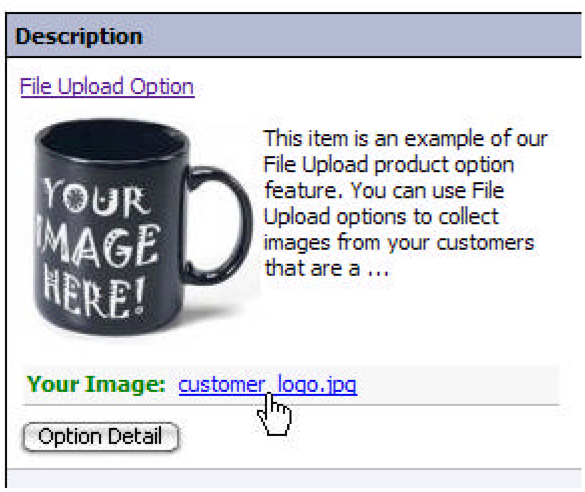
Use the **Total Size Limit** to control the total allowed size for all customer uploaded attachments. If this size is exceeded, the files will not be included as attachments but can still be downloaded using one of the other methods listed below.

4. Click 

Method 2 - via a Browser

1. Open the order in your control panel in invoice mode, or open the HTML formatted order email sent to you.

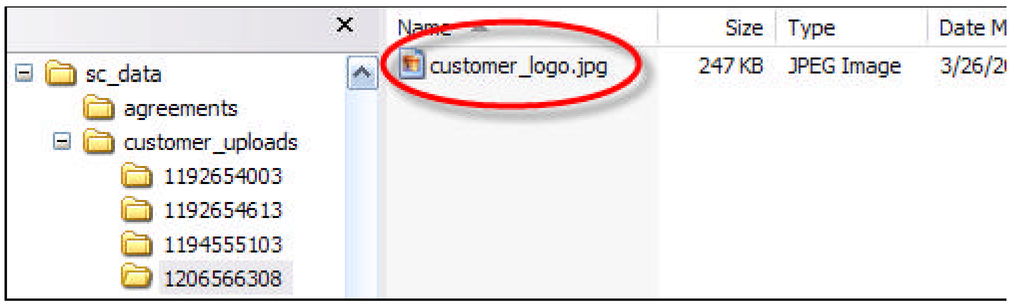
2. Click the link(s) that appear below each product:



3. Save the file

Method 3 - via *FTP*

1. Connect to your website using your *FTP* client
2. Navigate to your **sc_data folder (Section 8.2)**
3. Inside that folder you will see a folder named **customer_uploads**. Open that folder.
4. Open the folder corresponding to the customer's order number
5. Download the file(s) to your computer



File Cleanup

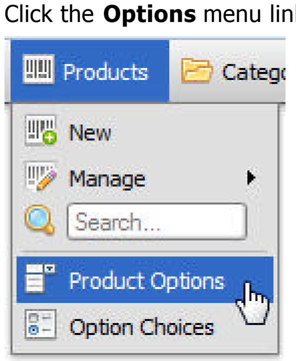
Files uploaded by your customer are not automatically deleted. If disk space is an issue for you, you may delete files uploaded by your customer after you have downloaded them using FTP. The recommend way to do this is to delete the entire folder corresponding to their order number inside your **sc_data/customer_uploads** folder.

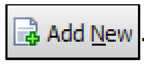
> ⚠ Do NOT delete the **customer_uploads** folder inside your **sc_data** folder. Doing so will cause your customer's uploads to fail.

7.1.13.8 Adding a Variable Price Option

Step 1 - Create Option

1. Click the **Options** menu link



2. Click 

.

3. Enter a name for the option in the **Name** field. For this example, enter **Donation.**

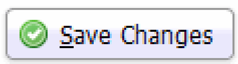
4. Set the **Type** field to **Variable Price**

5. If you wish to set a minimum or maximum allowed amount, use the **Min Amount** and **Max Amount** fields. If you do not wish to set limits, leave the fields blank.

6. If you want to require the customer make a choice for this option before being allowed to purchase, check the **Required** field.

7. By default, the name of the option is shown before the field as an instruction to the customer. If you would like to use something other than the name of the option as the instruction, enter it in the **Instruction** field.

8. If you want the detail page links to appear, check the **Detail Page** field. This feature is explained in the **Detail Page (Section 7.1.13.14)** topic.

9. Click 

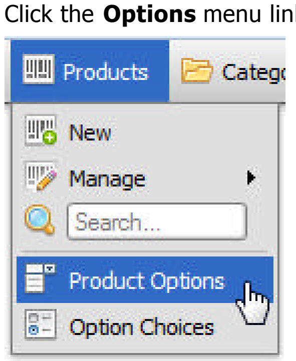
Step 2 - Assign Option to Product

The last step is to assign the option to a product. Because this step is the same for all product option types, we've explained it separately in the **Assigning to a Product (Section 7.1.13.10)** topic.

7.1.13.9 Adding a Date Option

Step 1 - Create Option

1. Click the **Options** menu link



2. Click 

.

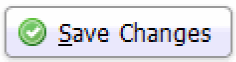
3. Enter a name for the option in the **Name** field. For this example, enter **Date.**

4. Set the **Type** field to **Date** to gather a date only. Set to **Date and Time** to gather both a date and time.

5. If you want to require the customer make a choice for this option before being allowed to purchase, check the **Required** field.

6. By default, the name of the option is shown before the field as an instruction to the customer. If you would like to use something other than the name of the option as the instruction, enter it in the **Instruction** field.

7. If you want the detail page links to appear, check the **Detail Page** field. This feature is explained in the **Detail Page (Section 7.1.13.14)** topic.

8. Click 

Step 2 - Assign Option to Product

The last step is to assign the option to a product. Because this step is the same for all product option types, we've explained it separately in the **Assigning to a Product (Section 7.1.13.10)** topic.

7.1.13.10 Options - Assigning to a Product

Overview

There are 2 ways to assign product options so that they will appear when viewing a product. You can assign the product options to the product's primary category, OR you can assign the product options to the product record itself. If you assign the options to a category, all products in that category will offer those options (by default). The process for both methods is almost identical, so we will explain them both at the same time below.

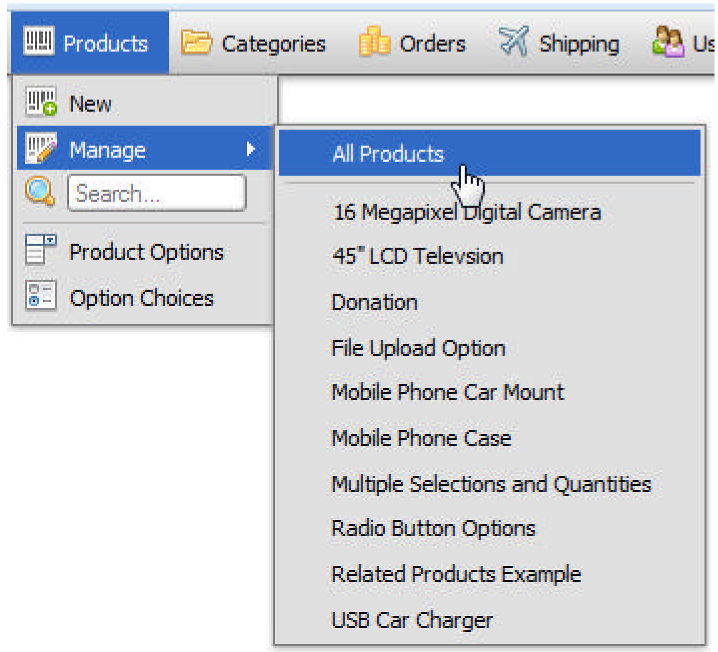
Steps

1. **Decide where to assign**

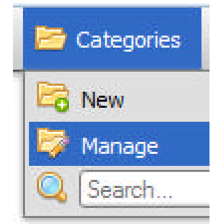
   Decide where you want to assign the options. If you have many similar items that all need the same options, you may want to assign them at the category level.

2. **Open table**

   Open the table corresponding to the record you wish to work with

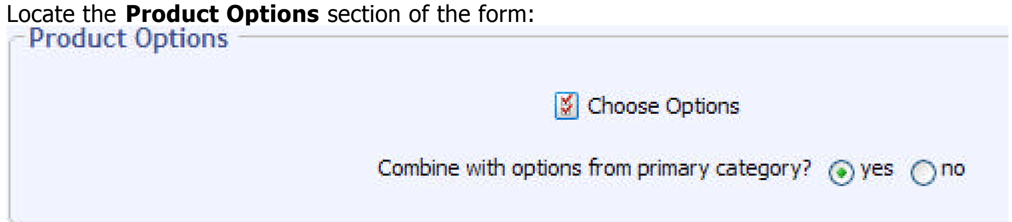


OR



3. **Find Product Options section**

Locate the **Product Options** section of the form:



The "Combine with options from..." field does not appear on the Category record.

4. **Combine options?**

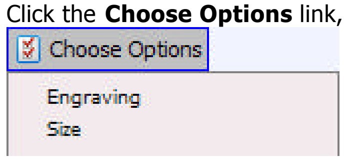
If you are assigning the options to a Category, skip this step. If you are assigning the option (s) at the Product level, you will see a field at the bottom of the **Product Options** section labeled "Combine with options from primary category?".

If you set this to **yes**, 2 things will happen:
- This product will inherit any options assigned to it's primary category
- Any options assigned to this product record will be offered along with the options assigned on it's primary category

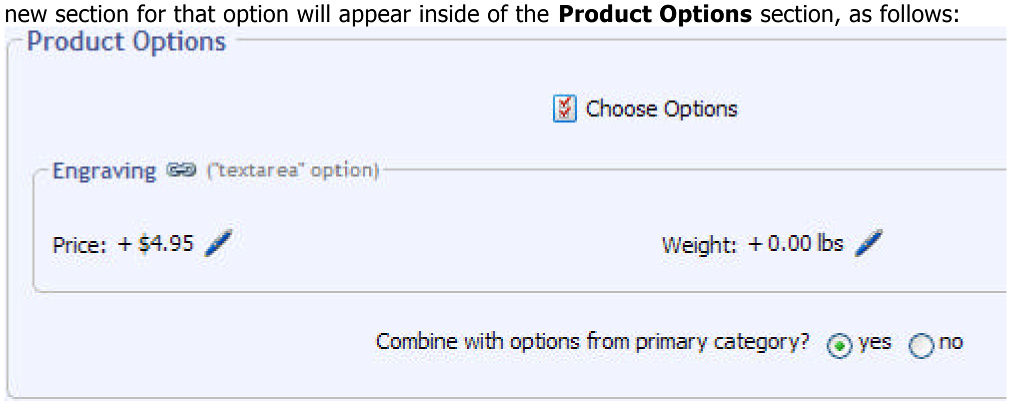
If you set this to **no**, any options added to this product's primary category will be ignored when this product is shown in your *storefront*.

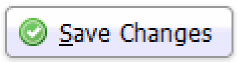
5. **Choose Options**

Click the **Choose Options** link, and a menu will appear:



Click on the option you wish to add. A check will appear to the left of that menu option, and a new section for that option will appear inside of the **Product Options** section, as follows:



6. **Click** 

> Some of the features you may notice within the box for each option are not discussed here. They are discussed in other topics in this section.

7.1.13.11 Overriding Default Price, Weight, and Choices

Overriding Default Price and Default Weight

Each of the topics in this section for adding options discusses the **Default Price** and **Default Weight** fields. These 2 fields are located in different places depending on the type of option used. For Select and Radio options, they appear on the Choice records for that option. Because the other option types (Text, Textarea, and Checkbox) do not have more than one choice, the **Default Price** and **Default Weight** fields appear on the Options themselves.

These fields can be altered from their defaults at the point **where you assign them to the product (Section 7.1.13.10)** (either on a Product or Category record).

1. Open the record where the choices are assigned (either Product or Category)

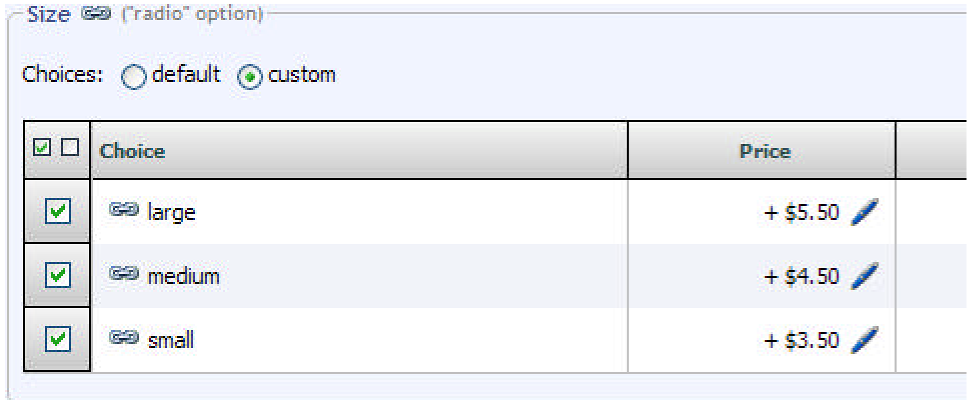
2. Alter fields

   The process to change the defaults is slightly different depending on the option type.

   For Select and Radio options

   The section for a select option inside the **Product Options** section looks like this:

   To custom the price or weight of any choice:
   a. Click the **custom** radio button. The following will appear:



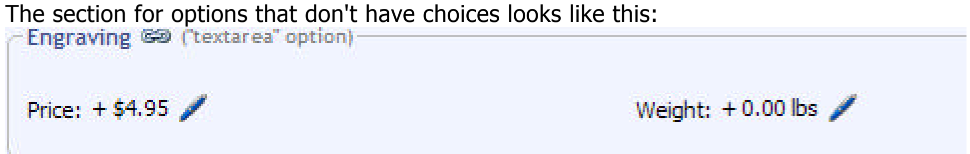
b. Click anywhere in side the Price or Weight column corresponding to the choice you wish to alter. You will see a field like this:

c. Enter the new value

d. If you wish to change the way the choice alters the product price, click the Operator. It will change from a + to a - as you click it.

For all other option types

The section for options that don't have choices looks like this:

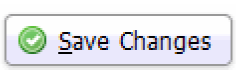


a. Click anywhere on the price or weight, OR click the pen icon. You will see a field like this:

b. Enter the new value

c. If you wish to change the way the choice alters the product price, click the Operator. It will change from a + to a - as you click it.

> If you wish to remove the customization, click the X, and the choice will revert back to defaults.

3. Click 

Overriding Default Choices

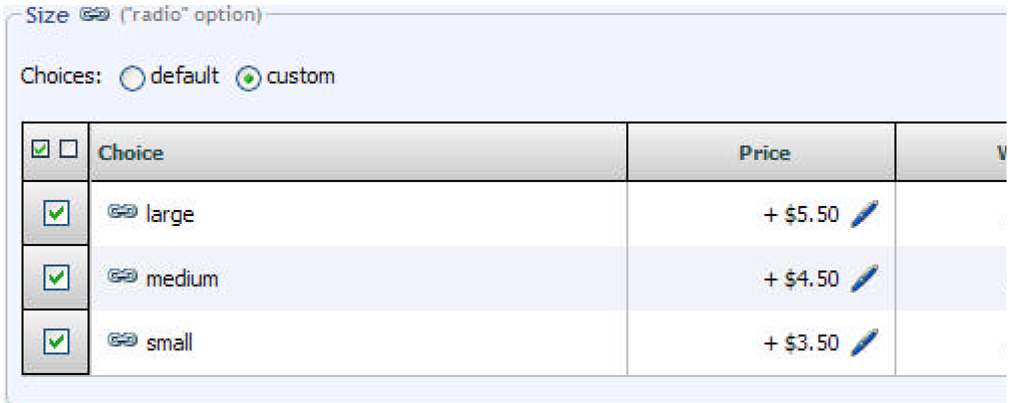
This only applies to Select and Radio options. Imagine this scenario:
Suppose you sell t-shirts, and most come in small, medium, and large. You created a "size" option for this, and added it to the t-shirts category. This option now appears for all t-shirts in the category. Now, if you have a particular t-shirt that is not available in small, you can override the

choices on this product's record as follows.

1. Open the product record

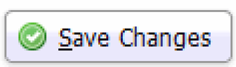
2. Add the "size" option to the product. Use the instructions in the **Assigning to a Product (Section 7.1.13.10)** topic as a guide.

3. Click the **custom** field to customize the options. You should see something like this:



4. Uncheck the checkbox for the **small** choice

5. For the "Combine with options from primary category?" field at the bottom of the **Product Options** section, select **no**.

6. Click 

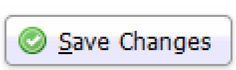
Overriding Choice Order

This only applies to Select and Radio options

1. Open the record were the option is assigned (product or category)

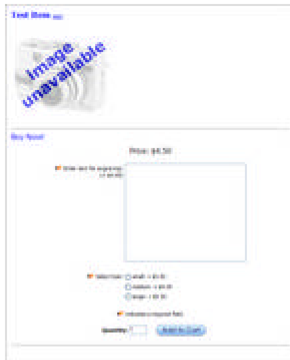
2. Click the **custom** radio button for the option you want to alter

3. Find the choice row you wish to reposition, and click one of the position arrows to move it up or down as needed.

4. Click 

7.1.13.12 Order of Appearance

Squirrelcart allows you to add as many product options as you like to a single product. This topic explains how to position those options so that they appear in the order that you would like them to. In this example, we will change the options on this product:



1.

2.

3.

4.

7.1.13.13 Product Options - Inventory Control

Squirrelcart allows you to track the number of each option/choice you have in stock. This is part of the **Inventory Control (Section 7.1.14)** feature, and is discussed in the **Modifying Stock Levels (Section 7.1.14.2)** topic in that section of the documentation.

7.1.13.14 Detail Page

Overview

Squirrelcart allows you to provide detailed information about options using a popup detail page. This allows the customer to see a description of the option, along with images of the choices.

Enabling the Detail Page

1. **Open the Option record (Section 7.1.13.1)** you wish to work with

2. Check the **Show Detail Page** field. A new section will appear:

3. Fill out the fields in this section, using the field explanations below as a guide.

Page Size
When set to **default**, the detail page will open in a full sized window. When set to **custom**, it will open using the dimensions you specify below.

Page Width
This only appears when **Page Size** is set to **custom.** It controls the width of the detail page window.

Page Height
This only appears when **Page Size** is set to **custom.** It controls the height of the detail page window.

Links
This controls how the link(s) to the detail page will appear. When **Instruction** is checked, the instruction for the option (i.e., Choose Size:) is shown as a link to the detail page. When the magnifying glass image is checked, that image will appear as a link to the detail page. When **custom** is checked, the text in the **Custom Link Text** field is shown as a link to the detail page.

Custom Link Text
If **custom** is checked for the **Links** field, the text in this field is used for that custom link.

Link Placement
This controls where the magnifying glass and custom link appear in relation to the instruction, or the option field itself.

Show Tooltip
This field only appears when **tooltips (Section 7.11)** are enabled on your **Visual Settings (Section 6.2)** page. When checked, a tooltip will be shown when the detail page link is

moused over.

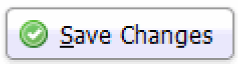
Tooltip Text
This field works in conjunction with the **Show Tooltip** field above it, and controls the text shown in the tooltip.

Page Content
This controls how the page content will be generated. If set to **autogenerate** Squirrelcart will generate the content based on information specified on the option (and choice) records. If set to **custom URL**, a field will appear to enter the URL of a page containing information about this option.

Choices Per Row
This field only appears when the option type supports choices (Select and Radio Button options). It controls how many choices will be shown before breaking to a new line.

4. Be sure to specify a description for this option. It will be shown on the detail page

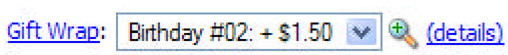
5. If you wish, specify images for the image fields. They will be shown on the detail page

6. Click 

7. If the option has choices (Select and Radio), provide as much info as you can on the Choice records. That information is also used on the detail page.

Appearance

The links to the detail page appear like this:



In the example above, all 3 Link types are shown.

By default, the detail page appears like this:

7.1.13.15 Option Tooltips

When the tooltip feature is enabled, Squirrelcart can be configured to display tooltips to assist your customers with product options. For detailed information, see the **Tooltips topic (Section 7.11)**.

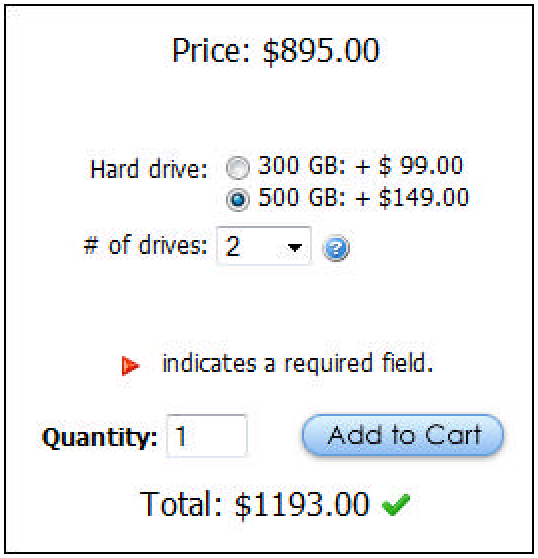
7.1.13.16 Option Quantities

Overview

Option quantity fields can be used to allow your customer to specify how many of a particular option they want to order. For example, suppose you have a product that is a computer. You may want to add options that allow them to specify how many hard drives they want, and of what size.

If you assign price(s) to an option and enable the quantity field for that option, the price of the option is multiplied by the quantity chosen, and multiplied again by the quantity specified for the product itself.

Example:

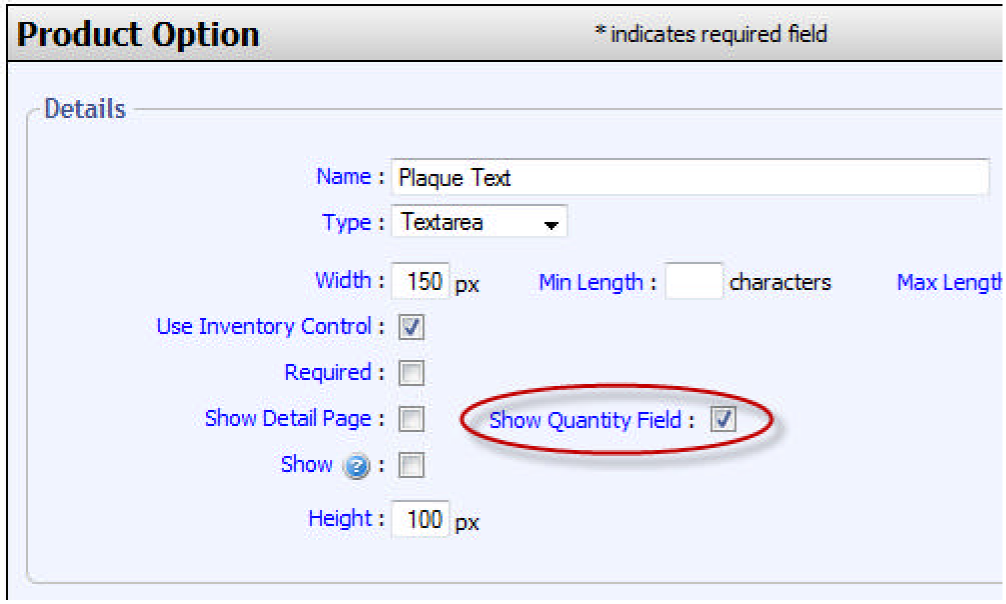


In the example above, the base price of the computer is $895. The option quantity field appears below the "500 GB" choice, with the label "# of drives". The customer chose (2) 500 GB hard drives at $149/each. That brings the total for this computer to $1193.00. If they then change the product's Quantity field to 2, the total for this product is going to be $2386.

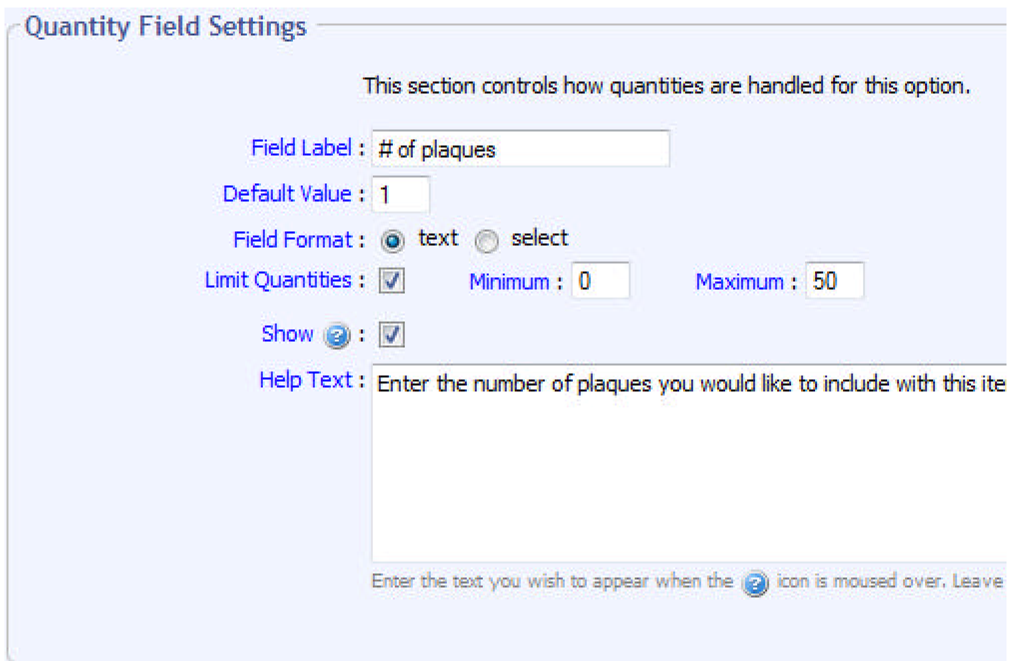
How to Enable Option Quantities

1. Open the **product option record (Section 7.1.13)** you wish to add a quantity field for

2. In the **Details** fieldset, check the **Show Quantity Field**:



3. A **Quantity Field Settings** fieldset will appear on the record:



4. The default label for option quantity fields is "Quantity". If you want to use the default label, leave the **Field Label** field blank. If you want to use a custom label, enter one in the optional **Field Label** field.

5. If you want a default value for the quantity field, enter it in the optional **Default Value** field

6. You can make the quantity field a text input, or a select input (drop down) via the **Field Format** field. If you choose **select**, another field named **Quantity Choices** will appear below. You will need to enter each quantity number you wish to offer on it's own line.

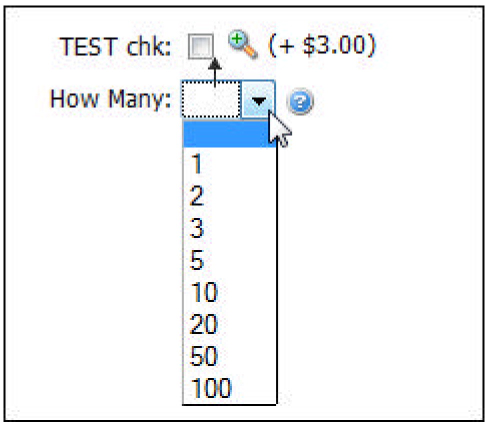
7. For text option quantity fields, you can optionally limit the quantities the customer can enter by checking **Limit Quantities** and setting a **Minimum** and/or **Maximum** quantity value.

8. The **Show ?** and **Help Text** fields only appear when **tooltips (Section 7.11)** are enabled. They allow you to have a help icon appear that when moused over will display a help tooltip to assist the customer in choosing a quantity for the option. You can read more about this on the **Tooltips (Section 7.11)** topic in this documentation.

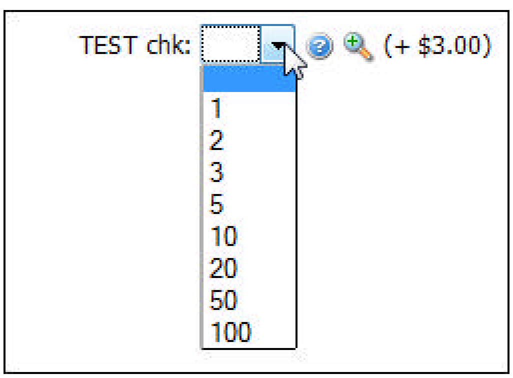
9. Save the record

Hiding Checkboxes

Checkbox options (Section 7.1.13.5) are unique in that they are the only ones that directly represent a ON/OFF or YES/NO choice. By default, if you enable the quantity field for a checkbox option, it will appear in the store like this:



In this instance, the checkbox is redundant. You can use the quantity field alone to indicate if the option is chosen or not. To do this, simply check the **Hide Checkbox** field on the option record and the checkbox field will be hidden from view:



7.1.14 Inventory Control - Overview

Overview

Squirrelcart's Inventory Control feature allows you to track the number of units you have in stock for your products and product options. It also allows you to control how you want Squirrelcart to handle out of stock items in your storefront.

How it Works

This is a general overview of how the inventory control process works when your customers order items. For this example, we will use a product named **Bowling Ball** that starts off with 3 units in stock.

10:23 am - Successful Order

1. Customer "Fred" adds 1 Bowling Ball to his cart.
2. Squirrelcart reduces the stock for the item from 3 to 2.
3. Fred successfully completes his order, and the stock for Bowling Ball product is now 2.

11:45 - Empty Cart

1. Customer "Barney" adds 1 Bowling Ball to his cart
2. Squirrelcart reduces the stock for the item from 2 to 1
3. Barney gets to the checkout, and realizes that his paycheck didn't clear at the bank. He decides to wait on the order, and clicks **Empty Cart**
4. Squirrelcart restocks the 1 item in Barney's cart, and the stock goes back up to 2.

12:30 - Inactive Order

1. Customer "Wilma" adds 1 **Bowling Ball** to her cart
2. Squirrelcart reduces the stock from 2 to 1
3. Wilma decides to check at the local store to see if the item is cheaper, and just closes her browser window without emptying her cart.

4. Wilma's cart becomes inactive after 3 hours (see **Cart Persistence topic (Section 6.13)**).

5. Squirrelcart restocks the items. The stock for the Bowling Ball is now back to 2.

4:00 - Reactivate Order

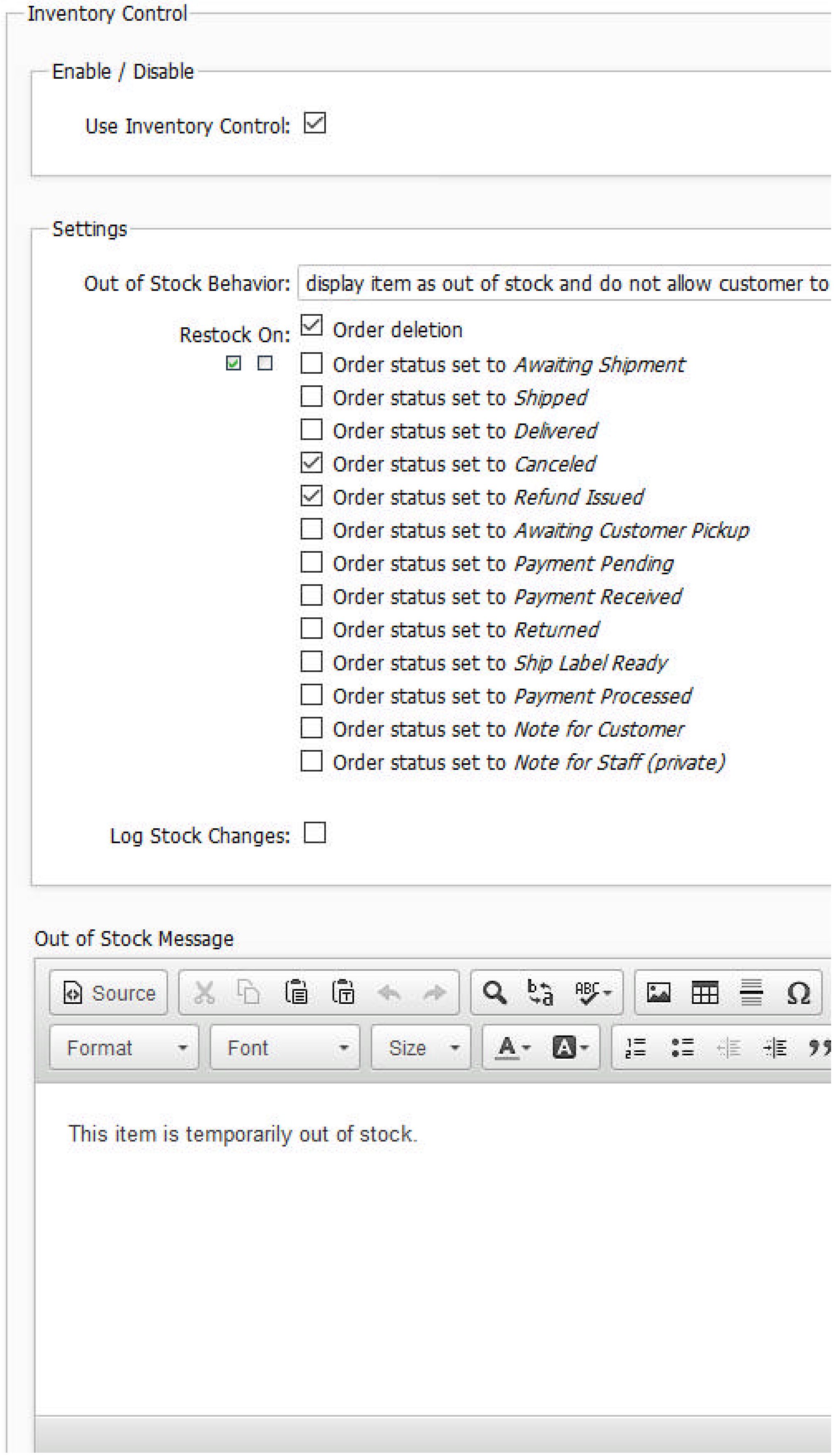
1. Continuing from the example directly above, customer "Wilma" returns to the store after her order has become inactive. Her return automatically causes the order to become active again.

2. Squirrelcart reduces the stock from 2 to 1.

7.1.14.1 Enabling Inventory Control

1. Open your **Store Settings (Section 6.1)** page

2. Find the **Inventory Control** section:

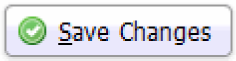

Inventory Control
Enable / Disable
Use Inventory Control:
Settings
Out of Stock Behavior:
display item as out of stock and do not allow customer to
Restock On:
Order deletion
Order status set to Awaiting Shipment
Order status set to Shipped
Order status set to Delivered
Order status set to Canceled
Order status set to Refund Issued
Order status set to Awaiting Customer Pickup
Order status set to Payment Pending
Order status set to Payment Received
Order status set to Returned
Order status set to Ship Label Ready
Order status set to Payment Processed
Order status set to Note for Customer
Order status set to Note for Staff (private)
Log Stock Changes:
Out of Stock Message
Source
Format
Font
Size
This item is temporarily out of stock.

3. Check the **Use Inventory Control** field

4. Set the **Out of Stock Behavior** field

5. Set the **Restock On Admin Operation** field. This field controls which operations in the control panel will trigger the restocking of items

6. If the **Out of Stock Message** field appears, change it if desired.

7. Click 

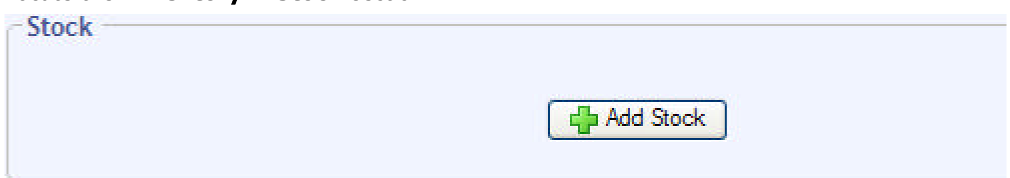
> Make sure you specify stock levels for all your products. This is explained in the next topic.

7.1.14.2 Modifying Stock Levels

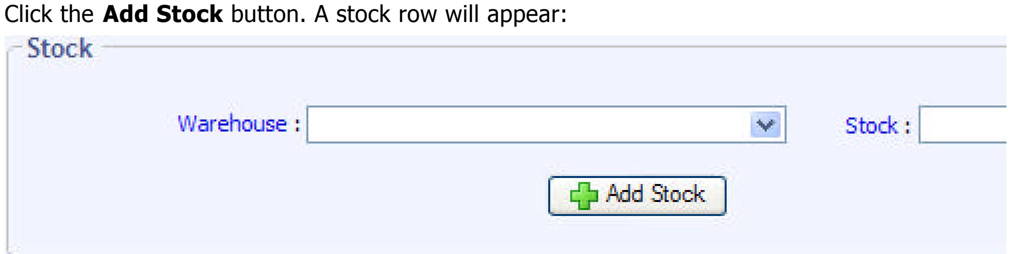
For Products

1. **Open the product record (Section 7.1.1)** you wish to work with

2. Locate the **Inventory > Stock** section:



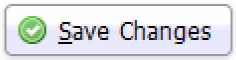
3. Click the **Add Stock** button. A stock row will appear:



4. Choose the Warehouse where the stock is located using the **Warehouse** field

5. Enter the number you have in stock in the **Stock** field

6. If you have this stock at more than one **warehouse (Section 6.9.3)**, you can repeat the process for each warehouse.

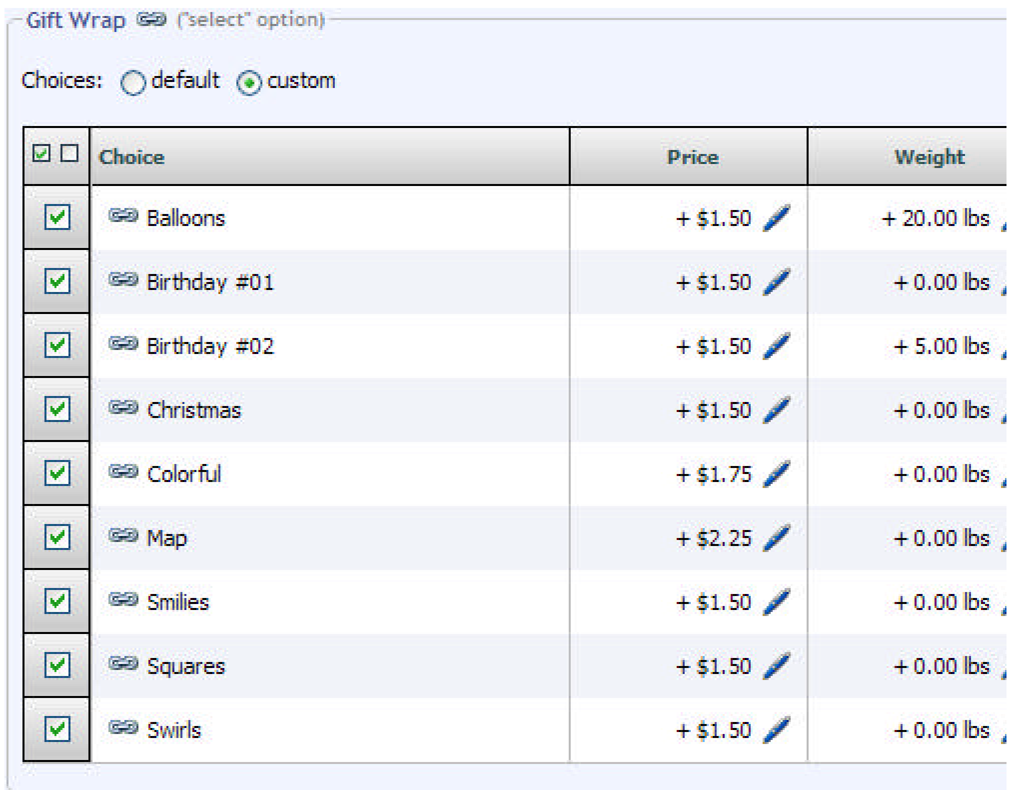
7. Click 

For Options With Choices (Select and Radio Button Options)

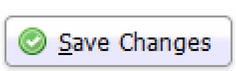
1. Open the record that the Option is assigned to (either Product or Category)

2. Locate the option you wish to work with within the **Product Options** section:

3. Click the **custom** radio button:



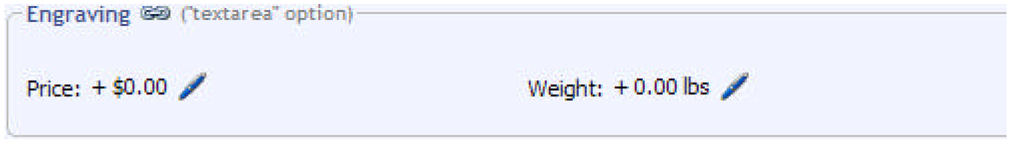
4. Specify your stock levels for each choice using the **# in Stock** column

5. Click 

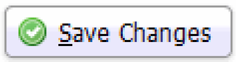
For Options Without Choices (Text, Textarea, Checkbox)

1. Open the record that the Option is assigned to (either Product or Category)

2. Locate the option you wish to work with within the **Product Options** section:



3. Specify your stock using the **# in Stock** field

4. Click 

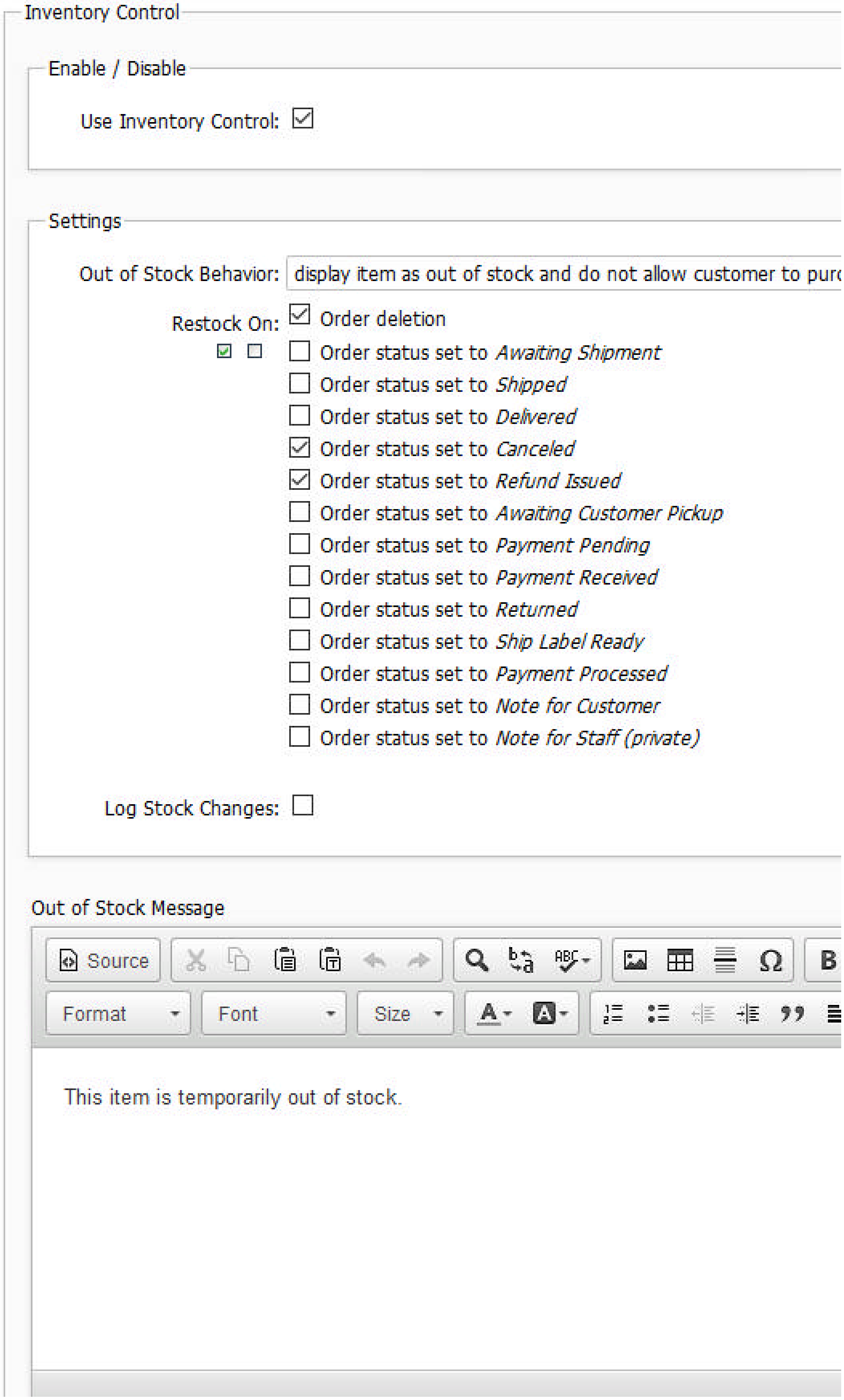
7.1.14.3 Controlling Out of Stock Message

Overview

When **inventory control is enabled (Section 7.1.14.1)** and you have the **Out of Stock Behavior** field on your **Store Settings page (Section 6.1)** set to display an out of stock message, Squirrelcart will let your customers know an item is out of stock. You can control that message storewide, and on a per product basis.

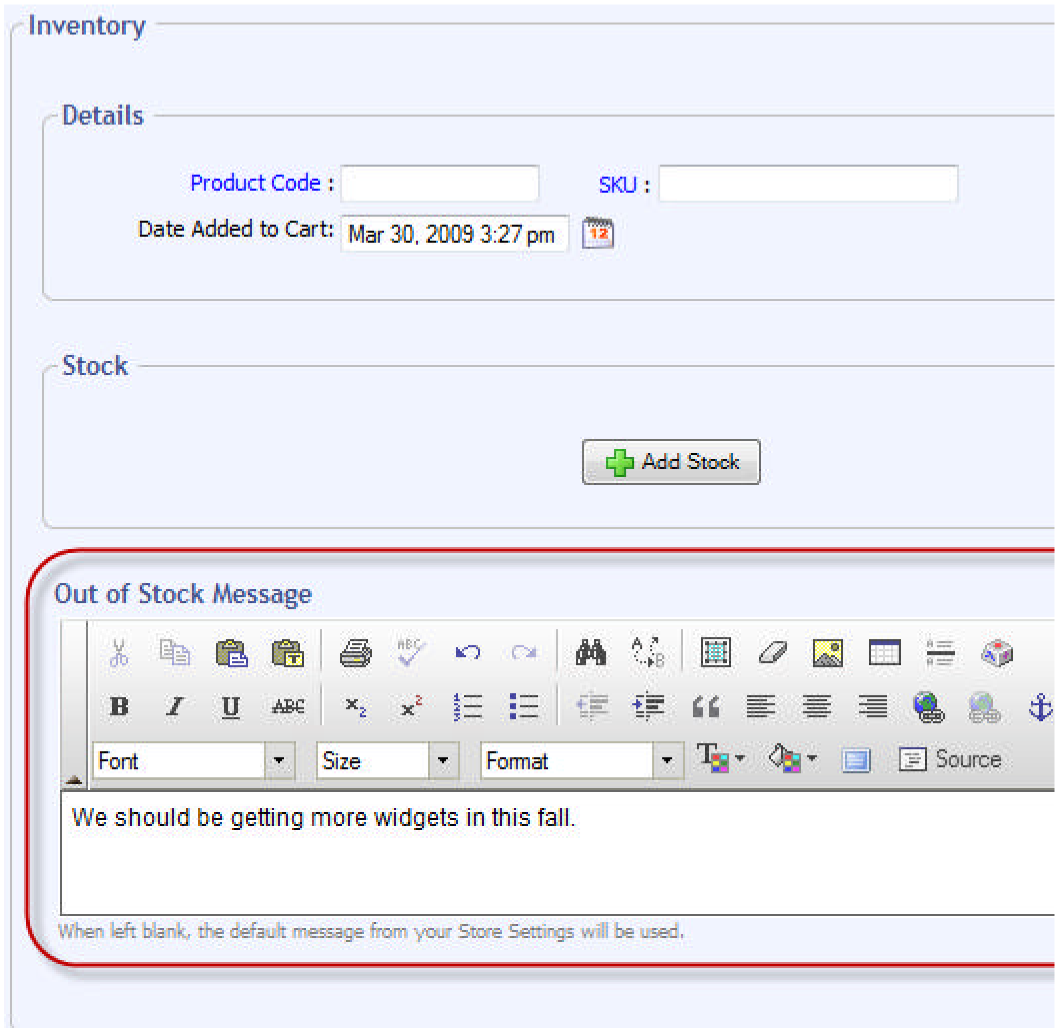
Controlling Out of Stock Message Storewide

To control the message seen for all out of stock products, enter a message in the **Out of Stock Message** field in the **Inventory Control** section of your Store Settings page:


Inventory Control
Enable / Disable
Use Inventory Control:
Settings
Out of Stock Behavior:
display item as out of stock and do not allow customer to pur
Restock On:
Order deletion
Order status set to *Awaiting Shipment*
Order status set to *Shipped*
Order status set to *Delivered*
Order status set to *Canceled*
Order status set to *Refund Issued*
Order status set to *Awaiting Customer Pickup*
Order status set to *Payment Pending*
Order status set to *Payment Received*
Order status set to *Returned*
Order status set to *Ship Label Ready*
Order status set to *Payment Processed*
Order status set to *Note for Customer*
Order status set to *Note for Staff (private)*
Log Stock Changes:
Out of Stock Message
Source
Format
Font
Size
This item is temporarily out of stock.

Controlling Out of Stock Message For Individual Products

To control the out of stock message seen for individual products, enter a message in the **Out of Stock Message** field in the **Inventory** section of that product's record:



If an Out of Stock Message is entered on a product, it overrides the default message set on the **Store Settings page (Section 6.1)**.

7.1.14.4 Restocking

Overview

With the Inventory Control feature enabled, if an order does not ship items need to be restocked in order for your inventory counts to be accurate. This process is automatic in Squirrelcart.

Restocking Inactive Carts

In a real store when a customer puts something in their cart, it is gone from the shelf. If they walk out and leave the cart in another aisle, an employee has to put those items back on the shelf.

In Squirrelcart, if a customer puts an item in their cart, the inventory count is reduced. If the customer's cart beomces inactive, Squirrelcart will automatically restock their items. A cart is deemed to be inactive based on settings you can control. See the **Cart Persistence topic (Section 6.13)** for more info.

Restocking Deleted, Refunded, or Canceled Orders

Squirrelcart (by default) automatically restocks items when:

- An order is deleted
- An order has its status set to "Refund Issued"
- An order has its status set to "Canceled"

  You can control when an order is restocked via the **Restock On Admin Operation** field in the **Inventory Control** section of the **Store Settings (Section 6.1)** page. See the **Enabling Inventory Control (Section 7.1.14.1)** topic in this section for more info.

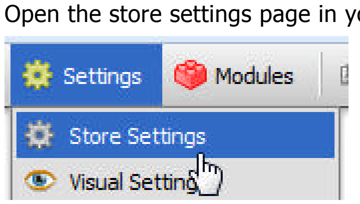
7.1.14.5 Troubleshooting

Overview

If you suspect your stock levels are not being tracked properly, you can enable stock logging. When enabled, every time stock for a product is changed, useful information will be logged to a **log-stock.csv** file inside your **sc_data** folder. Our support department can use that file to help determine if inventory control is working properly.

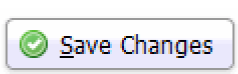
How to Enable Stock Logging

1. Open the store settings page in your control panel



2. Navigate to the **Inventory Control** fieldset

3. Check the **Log Stock Changes** checkbox in the **Settings** fieldset

4. Click 

7.2 Categories

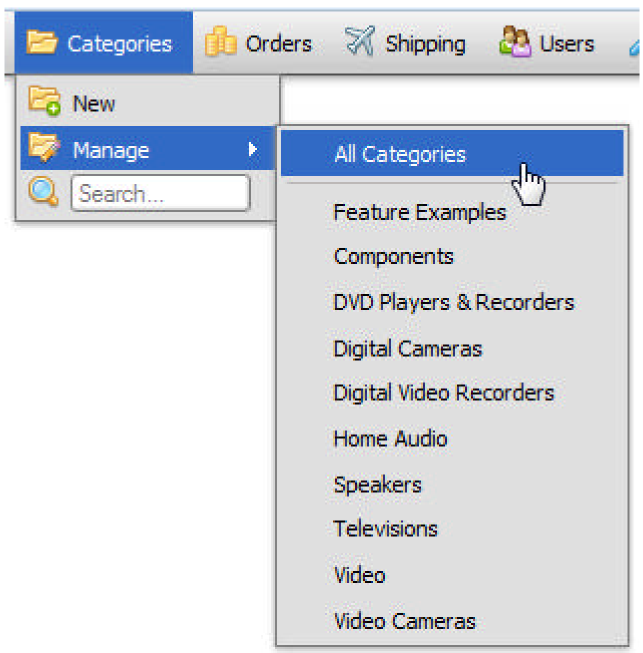
7.2.1 Categories - Overview

Squirrelcart supports an unlimited number of categories. You can control the way each category appears, and nest them inside each other to create sub categories.

7.2.2 Viewing

1. Open the **Control Panel (Section 3)**

2. Click the **Categories** menu link



You can click on any links shown above with a blue background:

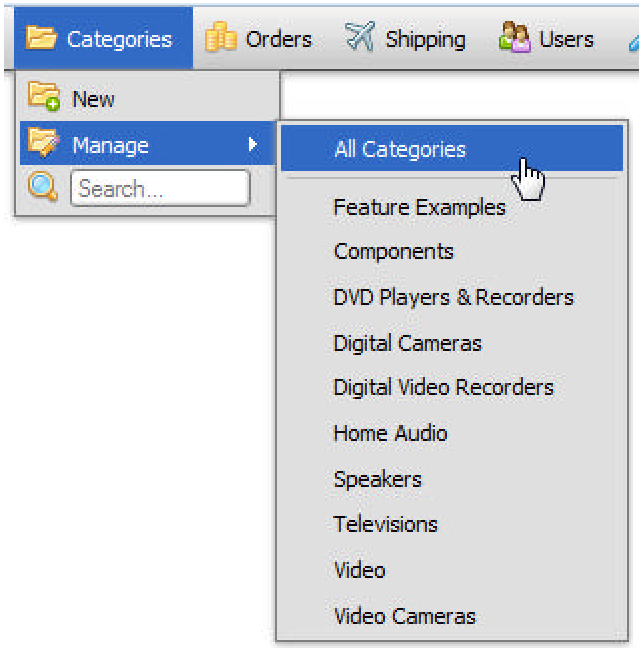
Categories
Categories > Manage
Categories > Manage > All Categories

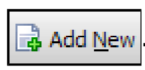
They will all take you to the Categories table.

7.2.3 Creating and Modifying

Instructions

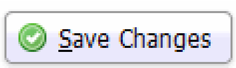
1. Click the **Categories > Manage** menu link



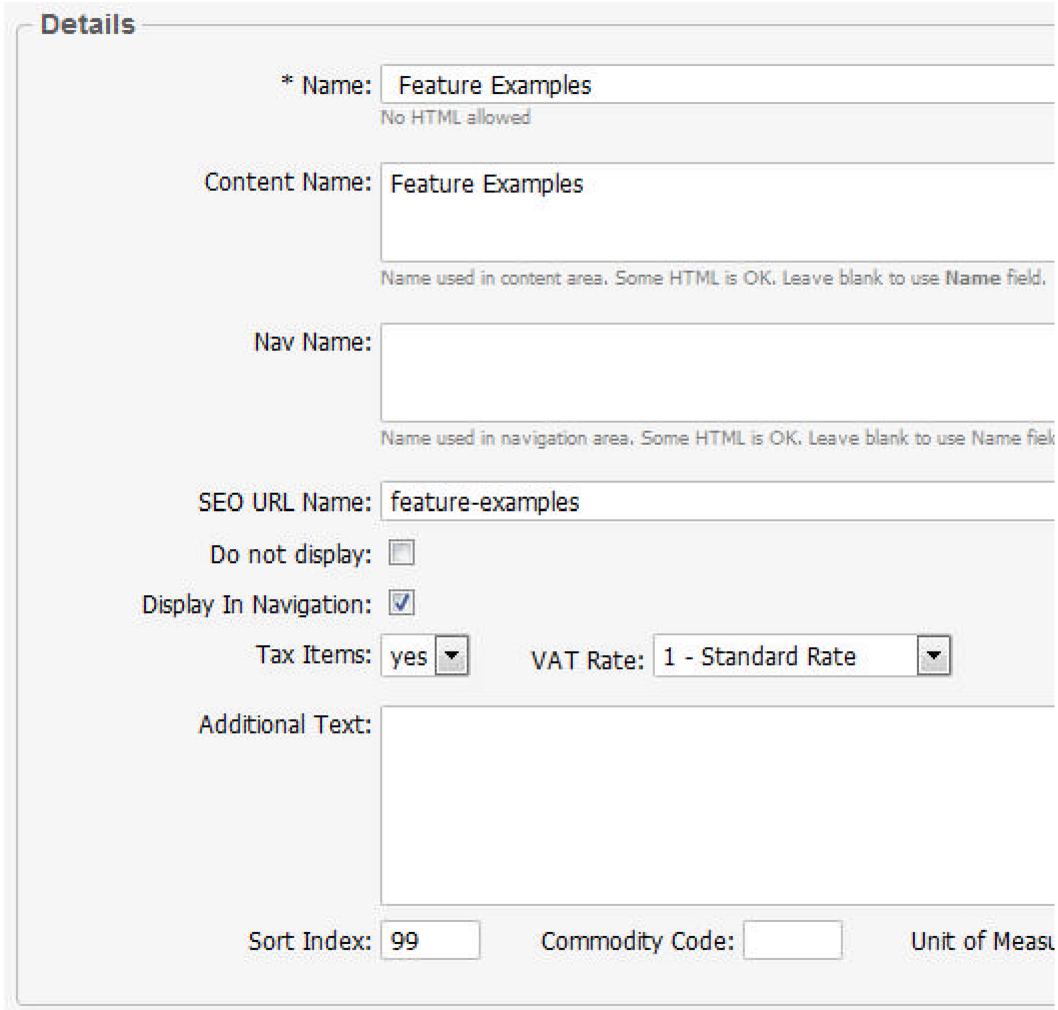
2. To add a new category, click 

. To modify an existing one, click the pen icon at the beginning of it's record row. (You can also click anywhere on the row to edit a record)

3. Fill out the form fields, using the field descriptions below as a guide.

4. Click 

Details



Name

Name of the category

Content Name

This field is optional. If you wish to use a different name for this category when it appears in the content area of your *storefront* page, put it in this field. HTML can be used if needed.

Nav Name

This field is optional. If you wish to use a different name for this category when it appears in the product catalog navigation block, put it in this field. HTML can be used if needed.

SEO URL Name

This field controls how this category's name will appear in URLs when the **SEO URLs feature (Section 6.12.3)** is enabled. Leave blank to take the default value, which is equal to this category's name with invalid characters removed.

Do not Display

Checking this field will hide the category from the *storefront*.

Display In Navigation

When checked, this category will appear in the Product Catalog navigation box

Tax Items

This field is discussed in the Sales Tax section.

VAT Rate

This field is discussed in the Sales Tax section.

Additional Text

This field is not used by default, but can be added to templates.

Sort Index

This field can be used to assist in sorting the categories for display.

Commodity Code

This is for the NIGP Commodity/Services Code, used by some payment gateways. This will apply to all products within this category, and can be overridden on your product records.

For more info, see NIGP.com.

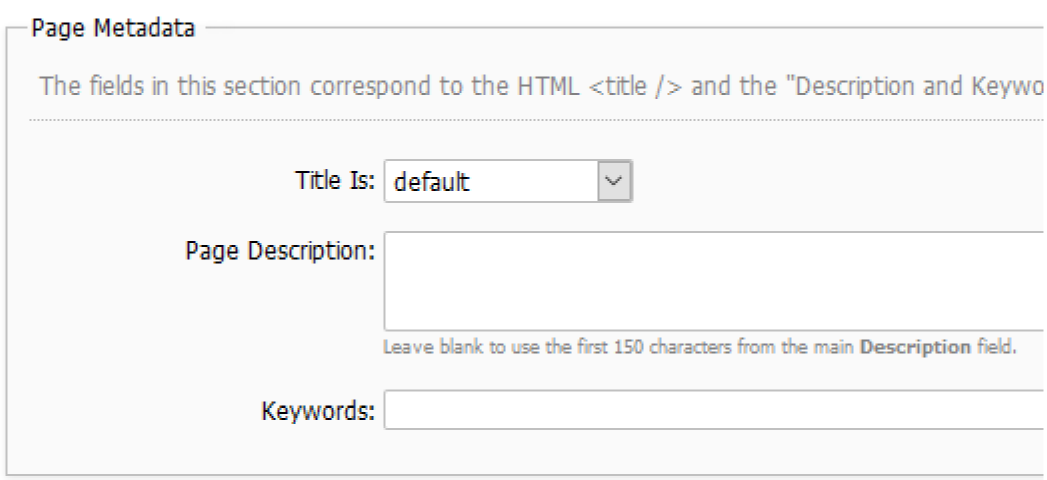
Unit of Measure

3 character code representing the unit of measure, as defined by the ECB Working party on Facilitation of International Trade Procedures in Recommendation No. 20 (March 1985).

This is used in some payment gateways like FirstData Global Gateway e4. A list of codes can be found here.

This can be specified at the category level, and overridden on a per product basis. It can be set store-wide using the same field on the All Products category record.

Page Metadata



Title Is

This field allows you to specify a custom page title that will be seen when this category is clicked on.

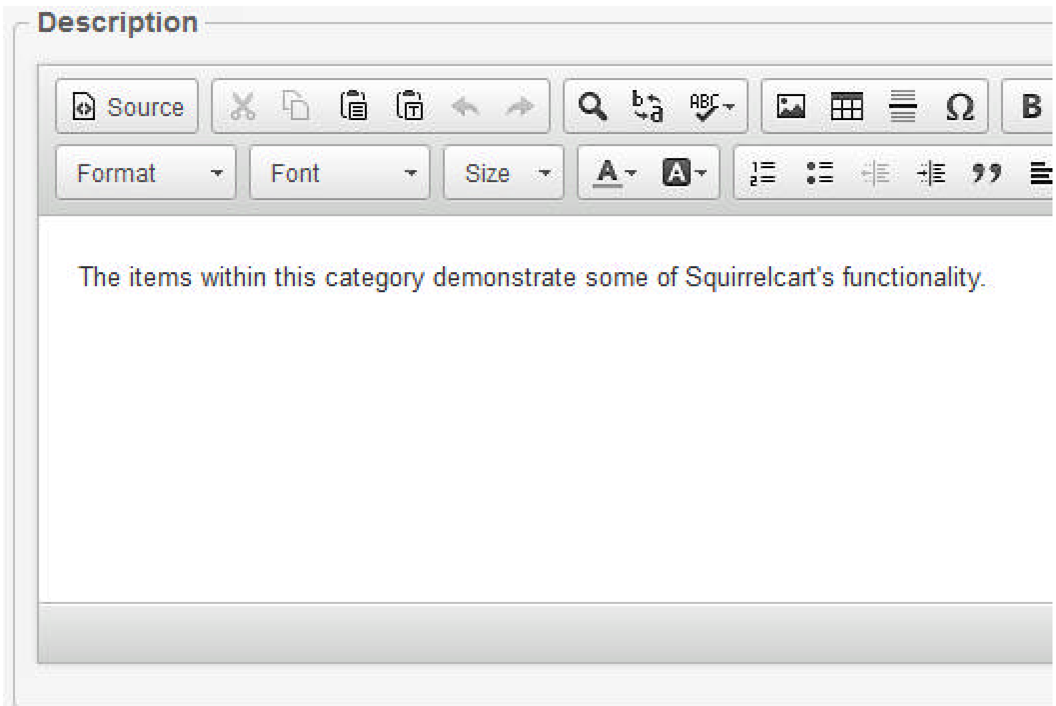
Page Description

This field is used to populate the **description meta tag** **({D9A9C711-5FA2-4C27-8404-F203B7D16118})**.

Keywords

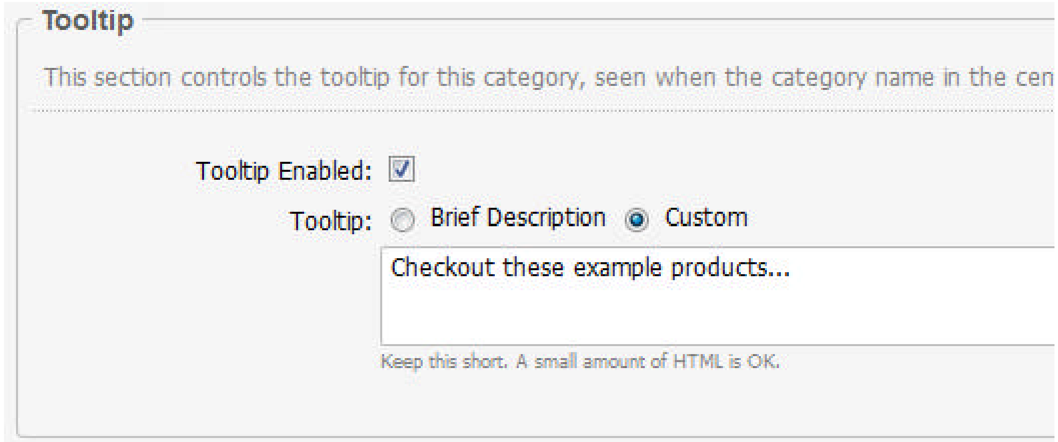
This field is used to populate the **keywords meta tag** **({D9A9C711-5FA2-4C27-8404-F203B7D16118})**, and to assist customers when searching for this product.

Description

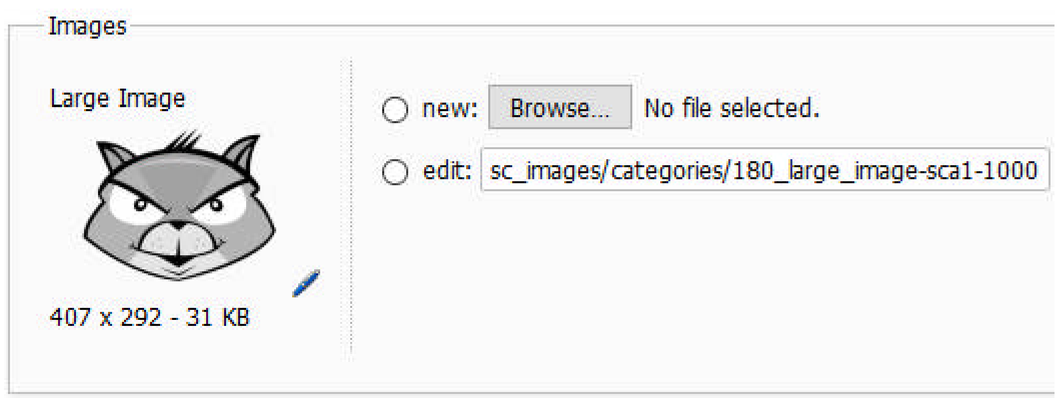


This is the main description of the category. HTML is allowed.

Tooltip



Images



Large Name

This is shown when the regular category image is clicked on. Recommended maximum dimension is 1000px.

Depending on your configuration, you may or may not see these additional fields:

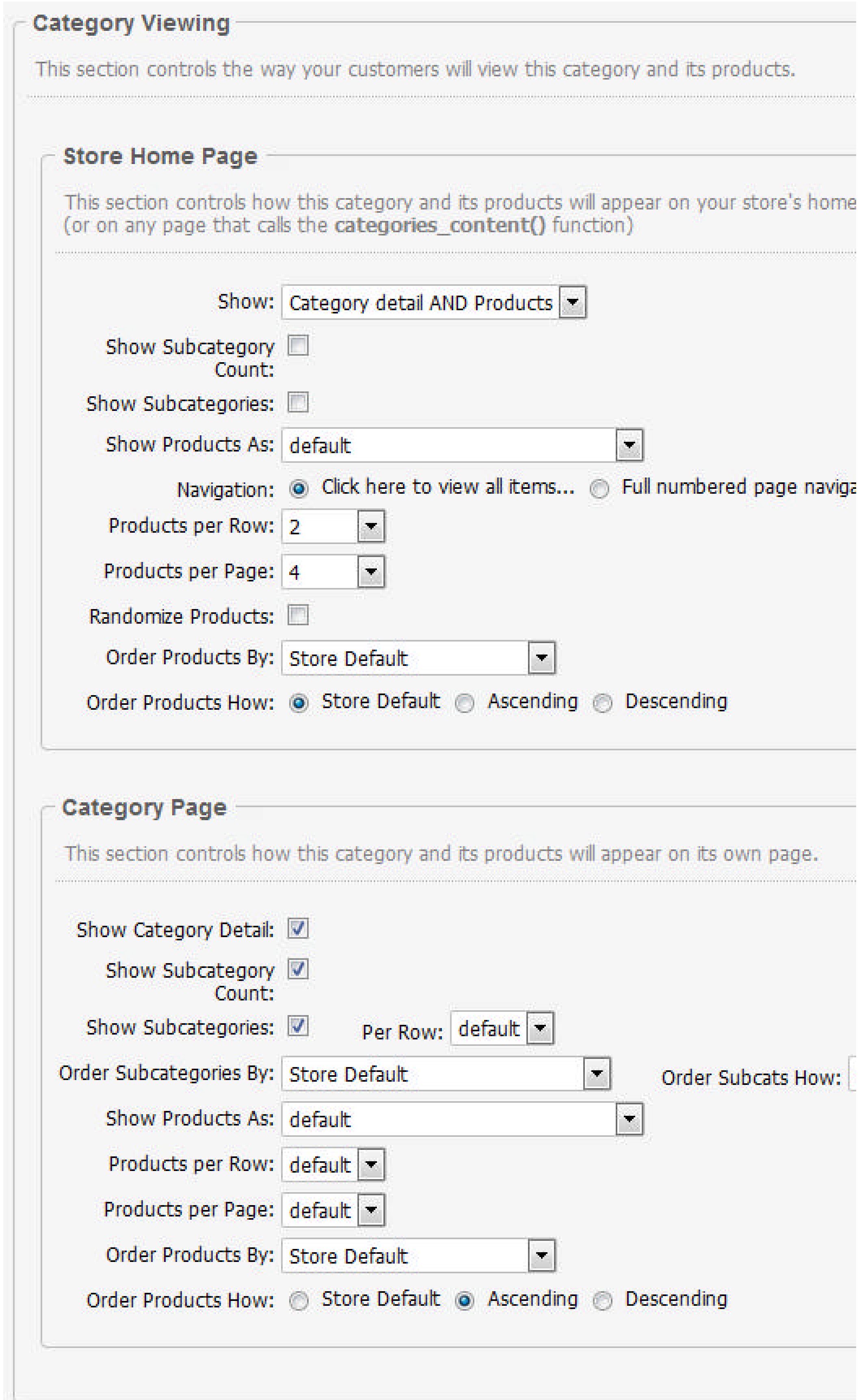
Image

This field is optional, and is the primary image of the category. By default, it appears to the left of the category name in the main content area.

Thumbnail Image

This field is not used by default, but can be added to template files to display an extra image.

Category Viewing


Category Viewing
This section controls the way your customers will view this category and its products.
Store Home Page
This section controls how this category and its products will appear on your store's home
(or on any page that calls the categories_content() function)
Show: Category detail AND Products
Show Subcategory Count:
Show Subcategories:
Show Products As: default
Navigation: Click here to view all items... Full numbered page naviga
Products per Row: 2
Products per Page: 4
Randomize Products:
Order Products By: Store Default
Order Products How: Store Default Ascending Descending
Category Page
This section controls how this category and its products will appear on its own page.
Show Category Detail:
Show Subcategory Count:
Show Subcategories: Per Row: default
Order Subcategories By: Store Default Order Subcats How:
Show Products As: default
Products per Row: default
Products per Page: default
Order Products By: Store Default
Order Products How: Store Default Ascending Descending

Store Home Page

This section controls how this category and its products will appear on your store's home page, in the content area.

Show

This controls what is shown for this category on the store's home page. Values are as follows:

Category detail AND Products - shows detailed info for the category (name, images, description), and product thumbnails

Category detail ONLY - shows detailed info for the category (name, images, description) and no products below it

Products ONLY - shows only product thumbnails, without the category's detail

Nothing - causes this category to not appear on the store's home page. It can still be viewed by clicking it's link in the Product Catalog navigation block.

Show Subcategory Count

This field controls whether or not a message is shown indicating how many subcategories this category contains.

Show Subcategories

This controls whether or not links to open this category's subcategories are shown

Subcategories per Row

Controls the number of subcategories shown per row, when Show Subcategories is checked.

Show Products As

This controls how products will appear when this category is being viewed on the store's home page (without being clicked on directly). Options are:

default - uses the default setting from the **Visual Settings page (Section 6.2)**

thumbnails - products shown in thumbnail view, with your smaller Thumbnail Image

thumbnails, with add to cart button - same as above, with an add to cart button below each thumbnail.

detail - products are shown just as they normally appear on their own pages, in full detail. We recommend you set **Products per Row** to 1 when using this setting.

Navigation

This field controls the type of navigation used when there are more products in the category that can be displayed on your store's home page

Products per Row

Controls how many products appear in a single row.

Products per Page

Controls how many products appear on the page.

Randomize Products

When checked, the products displayed will be a random selection from all the products assigned to this category

Order Products By

Field that will be used to sort the products in this category

Order Products How

Sort order for above

Category Page

This section controls how this category and its products appear on its own page.

Show Category Detail

When checked, shows detailed info for the category (name, images, description).

Show Subcategory Count

This field controls whether or not a message is shown indicating how many subcategories this category contains.

Show Subcategories

This controls whether or not links to open this category's subcategories are shown

Subcategories per Row

Controls the number of subcategories shown per row, when **Show Subcategories** is checked.

Order Subcategories By

Field used to sort subcategories

Order Subcats How

Sort order for above

Show Products As

This controls how products will appear when this category is clicked on. Options are:

default - uses the default setting from the **Visual Settings page (Section 6.2)**

thumbnails - products shown in thumbnail view, with your smaller Thumbnail Image

thumbnails, with add to cart button - same as above, with an add to cart button below each thumbnail.

detail - products are shown just as they normally appear on their own pages, in full detail. We recommend you set **Products per Row** to 1 when using this setting.

table - products appear in a table, with one product per row. Each item has its own **Add to Cart** button

table, multiple add to cart - same as above, with a single **Add Items to Cart** button at the bottom of the page. This allows customers to add multiple items to the cart with a single form submission.

Products per Row

Controls how many products appear in a single row.

Products per Page

Controls how many products appear on the page.

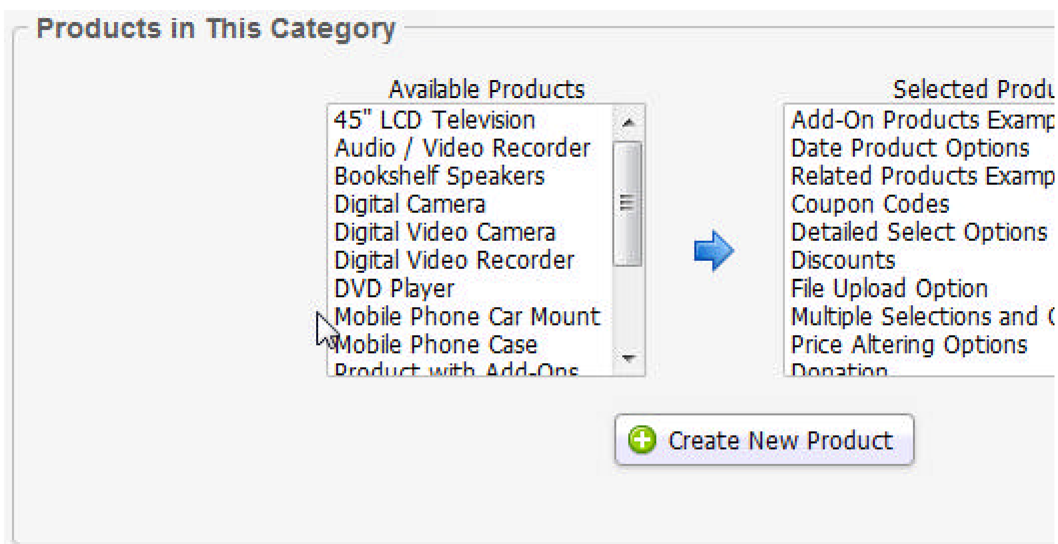
Order Products By

Controls the field products are sorted by

Order Products How

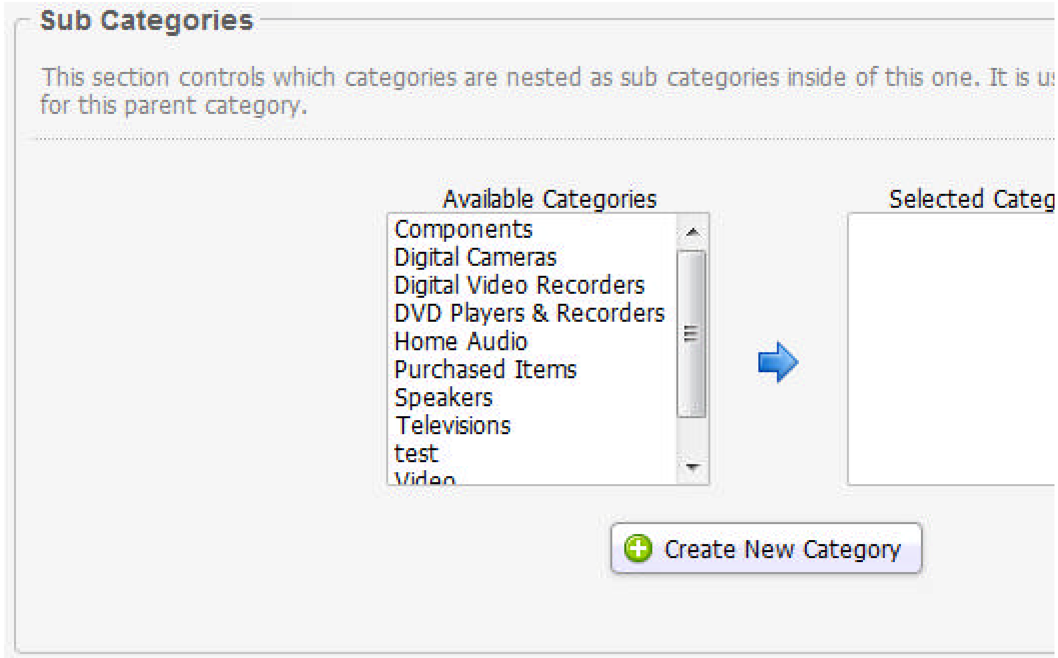
Controls the sort order of products - ascending or descending

Products in This Category



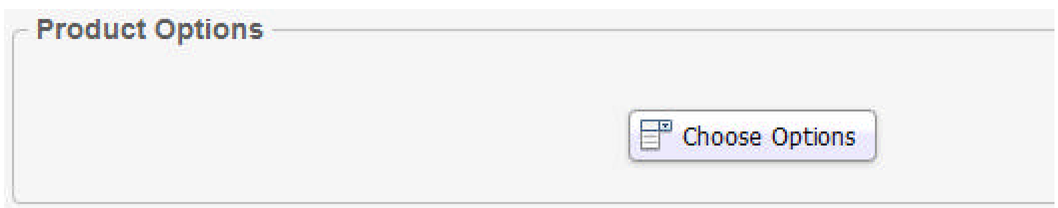
This section is used to assign a product to this category. It is explained in the **Adding a Product to a Category (Section 7.1.3)** topic.

Sub Categories



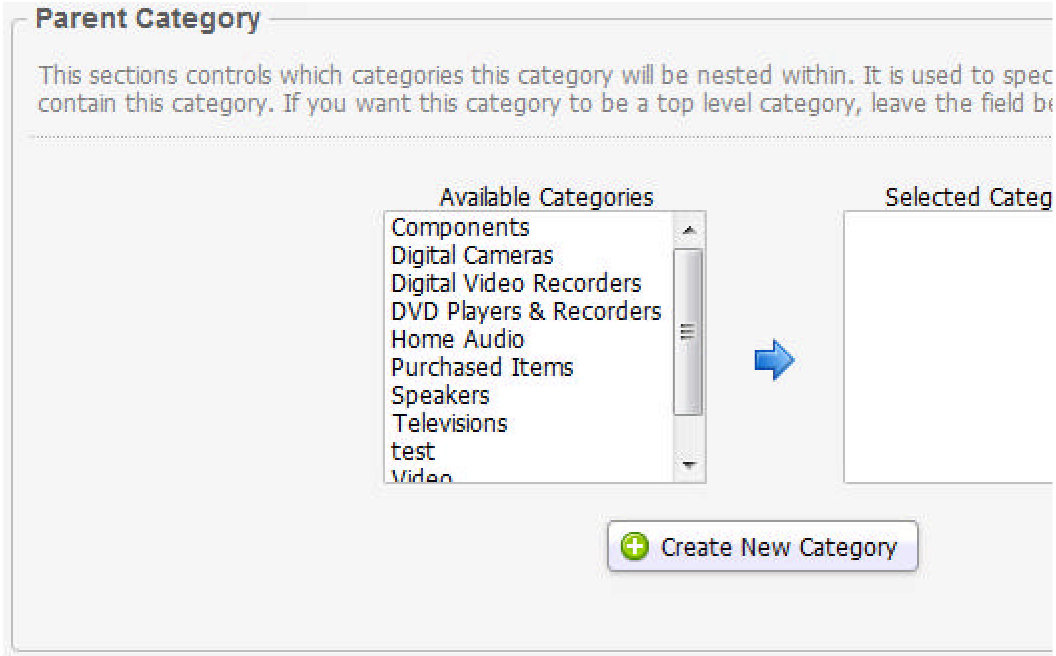
This section is used to nest categories inside this category.

Product Options



This section is used to assign **Product Options** to this category. It's explained in the **Product Options > Assigning to a Product (Section 7.1.13.10)** topic.

Parent Category



This section is used to specify which categories this category will be nested inside.

7.2.4 Brands

Overview

Brands are categories that are flagged as **Brands**. To assign a product to a brand, add it to the category corresponding to that brand.

If you specify a brand for a product:

- The product becomes searchable by brand in the storefront
- The brand info will be specified in your <head/> tag as Schema.org microdata (see Configuration > Search Engine Settings in this documentation for more info)
- The brand will appear in the **Additional Information** section of the product's page:

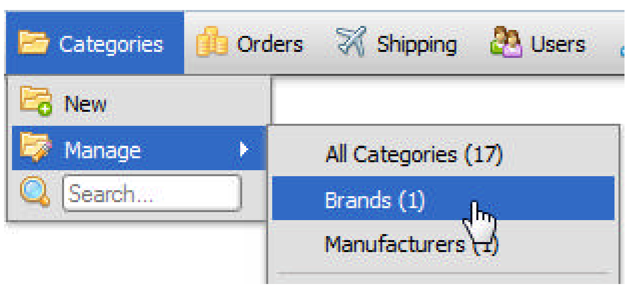
Additional Information

Product Data

Brand:	Levis
Condition:	new
Product Code:	L7-29VB2
SKU:	888271172
GTIN 13:	0004294967295
ISBN:	7820009187222
Model #:	47A-ULTRA
Manufacturer:	ACME
Mnf. Part #:	19KQ-2

Viewing Brands

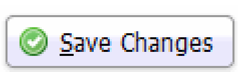
To view brand records, use this menu link:



Creating a Brand

1. **Create a Category record (Section 7.2.3)**

2. Check **Is Brand** on its form

3. Click 

Assigning a Product to a Brand

To assign a product to a particular brand, just **add the product to the brand's category (Section 7.1.3)**.

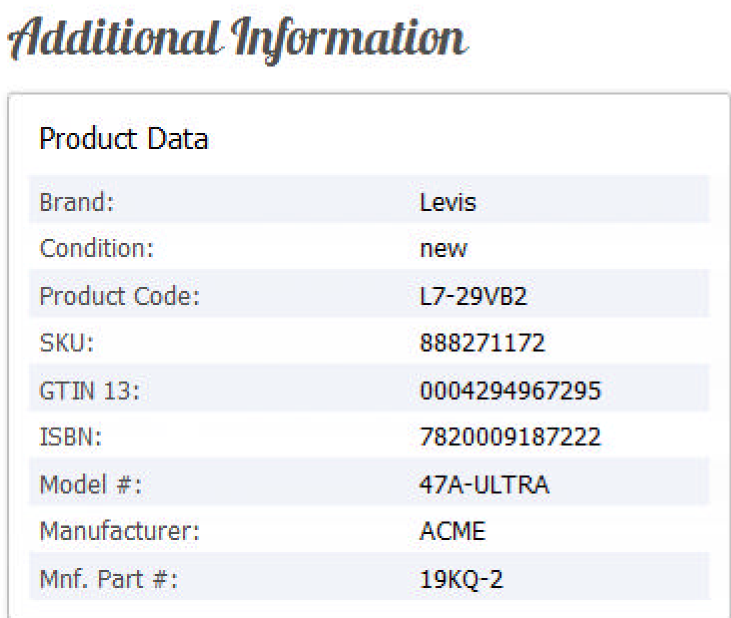
7.2.5 Manufacturers

Overview

Manufacturers are categories that are flagged as **Manufacturers**. To assign a product to a manufacturer, add it to the category corresponding to that manufacturer.

If you specify a manufacturer for a product:

- The product becomes searchable by manufacturer in the storefront
- The manufacturer info will be specified in your <head/> tag as Schema.org microdata (see Configuration > Search Engine Settings in this documentation for more info)
- The manufacturer will appear in the **Additional Information** section of the product's page:

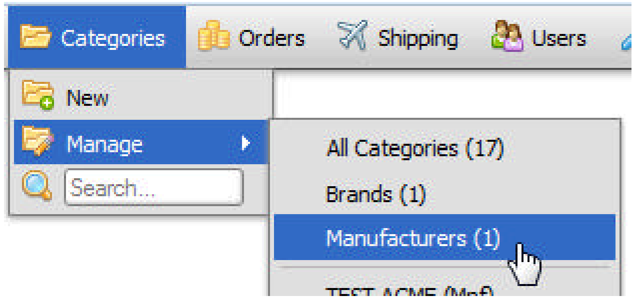

Additional Information

Product Data

Brand:	Levis
Condition:	new
Product Code:	L7-29VB2
SKU:	888271172
GTIN 13:	0004294967295
ISBN:	7820009187222
Model #:	47A-ULTRA
Manufacturer:	ACME
Mnf. Part #:	19KQ-2

Viewing Manufacturers

To view manufacturer records, use this menu link:



Creating a Manufacturer

1. **Create a Category record (Section 7.2.3)**

2. Check **Is Manufacturer** on its form

3. Click 

Assigning a Product to a Manufacturer

To assign a product to a particular manufacturer, just **add the product to the manufacturer's category (Section 7.1.3)**.

7.2.6 Categories - Changing Sort Order

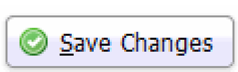
By default, categories are displayed in your storefront in alphabetical ascending order (A-Z). Squirrelcart allows you to change the order by specifying any field on the category record to sort by. You can also control the sort method (Ascending, or Descending).

Changing the sort order for your entire store is done on the Visual Settings page as follows.

1. Open the **Visual Settings (Section 6.2)** page

2. Choose the field you wish to sort by in the **Order Categories By** field. The fields listed represent the fields in the Categories table.

3. Choose the sort method (Ascending or Descending) using the **Order Categories How** field

4. Click 

7.2.7 Automatic Categories

Overview

Squirrelcart has 3 built in categories that you cannot add products to. These categories are automatic, in that they will show the products corresponding to the purpose of the category.

Automatic Categories

- New Products - this category will display all products that are considered "new". For more information, see the **New Products topic (Section 7.1.8)**.
- All Products - this category will display all of your products
- Best Sellers - this category will display your best selling products. For more information, see the **Best Sellers topic (Section 7.1.6)**.
- Purchased Items - this category will display your customers' purchased items that are still available for purchase in your store. This category only appears when the customer is logged in.

7.2.8 Purchased Items

Overview

The Purchased Items **automatic category (Section 7.2.7)** will automatically display products in your store that the customer has purchased in the past, for quick reordering. The customer must be logged in to see this category.

To make it easier for the customer to reorder frequently ordered items, the default view for products in this category is **table, multiple add to cart**. You can change the view setting on the category record. See the Category Viewing section of the **Creating and Modifying categories page (Section 7.2.3)** for more info.

7.3 Users

7.3.1 Users - Overview2

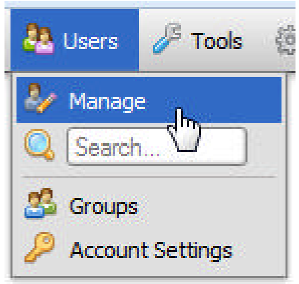
Squirrelcart allows your customers to create accounts. This makes it easier for them to order in the future, and allows them to track their orders on the Order History page. By default, customers are not required to create an account.

In Squirrelcart, "Customers" are also considered "Users". The two terms are interchangeable.

7.3.2 Viewing Users

1. Open the **Control Panel (Section 3)**

2. Click the **Users > Manage** menu link:



You can also click directly on the **Users** link in the toolbar.

7.3.3 Adding a User

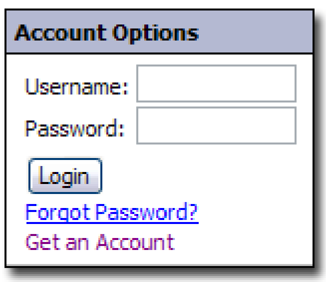
Overview

There are 2 ways to add a customer account.

Using the Storefront

This is the method your customers will use to create an account.

1. Click the **Get an Account** link in the **Account Options** navigation box



2. Fill out the form

3. Click **Continue**

Using the Control Panel

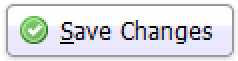
When logged in as a store admin, you can create customer accounts in the control panel.

1. Open the **control panel (Section 3)**

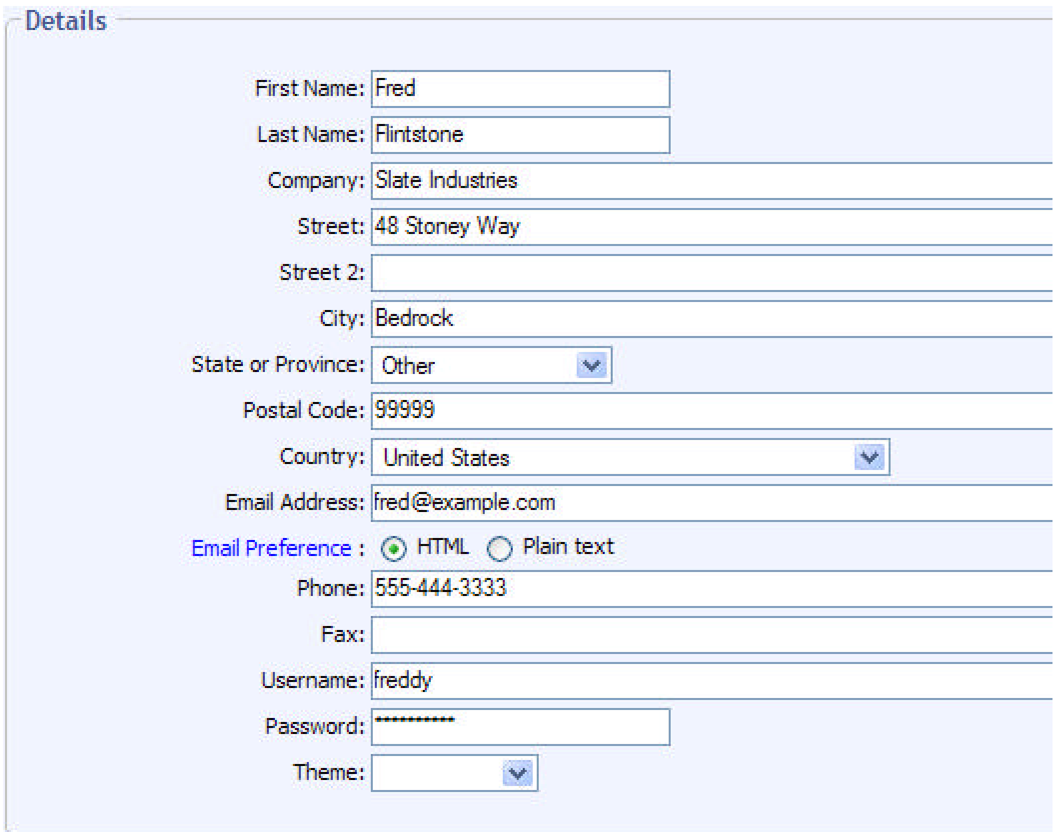
2. Click the  icon

3. Click 

4. Fill out the form, using the **Record Overview topic (Section 7.3.4)** in this section as a guide.

5. Click 

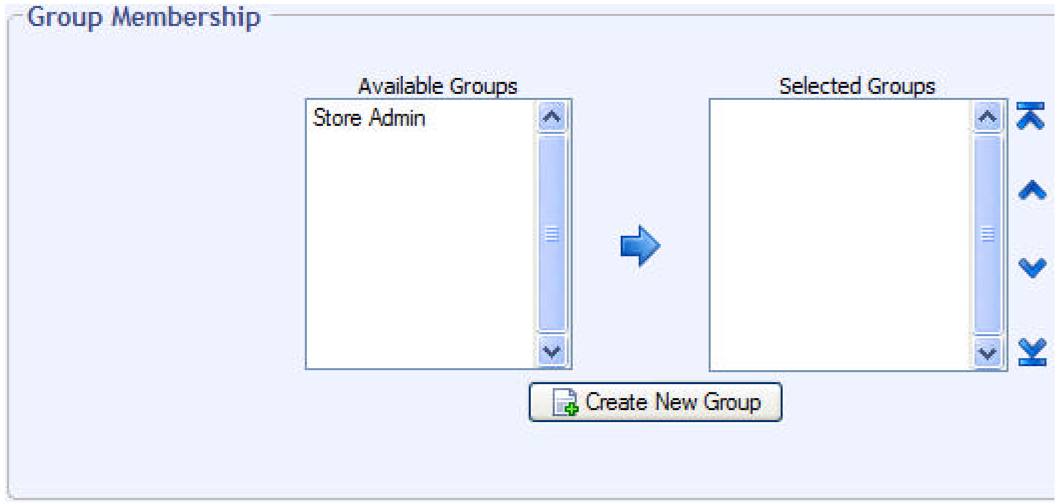
7.3.4 Customers - Record Overview



This section contains the address fields for the customer. They are self explanatory.

Email Preference
This field contains the customer's email preference. Squirrelcart uses this field to determine which format email to send to this customer.

Theme
This field is used to override the Default Theme setting for this customer.

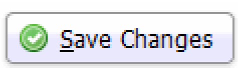


This section is used to add this customer to a group.

> If you have the Reviews module installed, you will see an extra set of fields in a section labeled **Reviewer Settings.** Those fields are discussed in the topic **Modules > Reviews > Control Panel > Editing a Reviewer (Section 10.10.2.6)**.

7.3.5 Forcing Account Creation

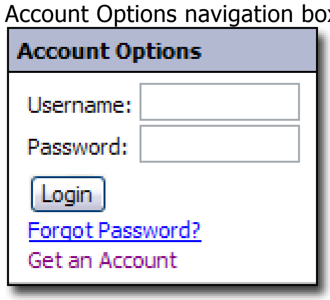
Account creation is optional by default. To make it required, follow the steps below.

1. Open the **Store Settings (Section 6.1)** page
2. Check the **Force Account Creation** field in the **General Settings** section
3. Click 

7.3.6 Changing Passwords

Resetting an Account via the Storefront

If a customer has forgotten their password, they should click the **Forgot Password** link in the Account Options navigation box:



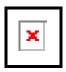
They will be presented with a form to fill out. Upon successful completion of the form, Squirrelcart will email them a link which can be used to login and update their account.

Changing the Username and Password in the Control Panel

If you need to change the password for one of your customers, you can do so by modifying their Customer record, and specifying a new password. You can also use the Forgot Password link explained above and enter your customer's email address. This will ensure that they verify they have access to that email account in order to reset their account.

Sending an Account Reset Email via the Control Panel

You can send the same account reset email explained int he **Resetting an Account via the Storefront** section above, via a record action in the control panel.

1. View you users:
   
2. Locate the user record corresponding to the one you want to send an account reset email for, and check the box in the selction column.
3. Set the record action field in the lower left corner of the status bar to **With selected orders**, and set the field to its right to **send account reset email**:
4. You will be prompted to send the message. To send the message to the same email address on the user record, leave the **Alternate Email Address** field blank. To send to a different address, enter that address in that field.
5. Click the **Send** button.

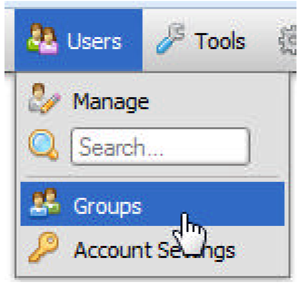
7.3.7 Groups

Overview

Squirrelcart allows you to assign your users to groups. Groups can be used with other features in the cart. For example, you can create **group based discounts (Discount Conditions - Group Membership.html)** that will only be offered to members of a particular group. By default, Squirrelcart comes with one built in group named **Store Admin**. Your admin account is a member of this group, which is what gives it access to the administrative functions of Squirrelcart.

Viewing Groups

1. Open the **control panel** **(Section 3)**
2. Click the **Groups** menu link

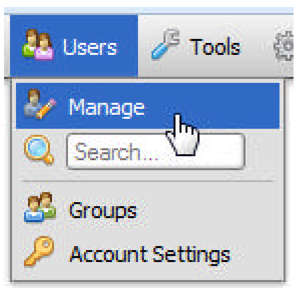


Checking or Changing Group Membership

To view or change the groups membership for a single user

1. Open the control panel

2. Click the **Users** menu link



3. Click the record for the user you wish to view

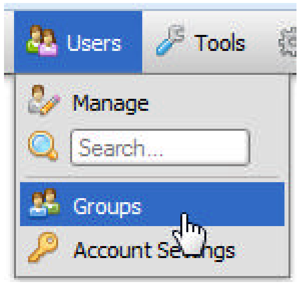
4. You will find the groups they belong to in the **Group Membership** fieldset, listed under **Selected Groups**

To change group membership, add or remove values from the **Selected Groups** field and save the record.

To view or change group membership for a single group

1. Open the **control panel** **(Section 3)**

2. Click the **Groups** menu link



3. Click on the group you want to view

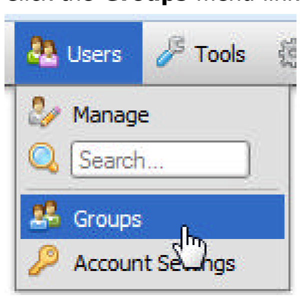
4. Click the **Manage Members** button, located in the **Group Membership** fieldset.

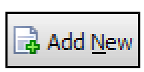
This will open the Users table, filtered to show only members of that group. To change group membership, add or remove values from the **Selected Users** field and save the record. To remove one or more members from the group, select the records you wish to remove and choose the **remove from group** record action in the lower left hand corner of the page.

Creating a New Group

1. Open the **control panel (Section 3)**

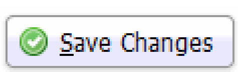
2. Click the **Groups** menu link



3. Click 

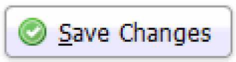
4. Enter a name for the group in the **Groups** field

5. Enter an optional description in the **Description** field

6. Click 

Automatically Adding Users to Groups

You can automatically add users to groups when rules you specify are met. For example, you could add users to a group when the user places an order for over $1,000.

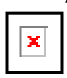
1. Open the group record you wish to configure
2. Check the **Auto Add** field in the **Detail** fieldset towards the top of the record
3. If you wish to also automatically remove users from this group when your rules are not met, check **Auto Remove**
4. When you check **Auto Add**, a new fieldset named **Auto-Add Rules** will appear on the record. Use this fieldset to specify rules that when met will result in a user being added to the group. See the **Managing Your Store > Rule System** section of this documentation for information on how to work with rules.
5. Click 

When **Auto Add** is enabled, users will be added to the group when they visit your store and your rules are met. The auto-add process only occurs when the user visits your store.

7.3.8 Login as User

How to Login as a User

If a customer calls you for assistance and they have a user account, you may want to login as that user to help them update their account, or to place an order on their behalf over the phone. With our **Login as User** feature, you can do just that:

1. View your users:


2. Locate the user record corresponding to the one you want to login as, and click anywhere on the record row to open the record in edit mode.

3. Click the **Login as User** button:

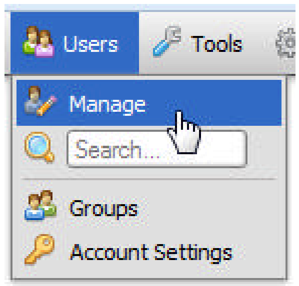

4. You will be taken to the storefront, and will be logged in as the user. When done, logout and you will automatically be logged back in with your admin account.

7.3.9 Sending a Welcome Email

How to Send a Welcome Email

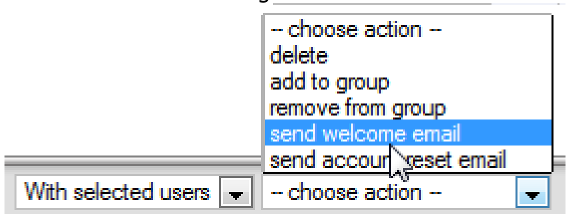
Squirrelcart will automatically email your customer a welcome email when they create a new account. If you need to send them another copy of that email, or send a copy to a different email address:

1. View your users:

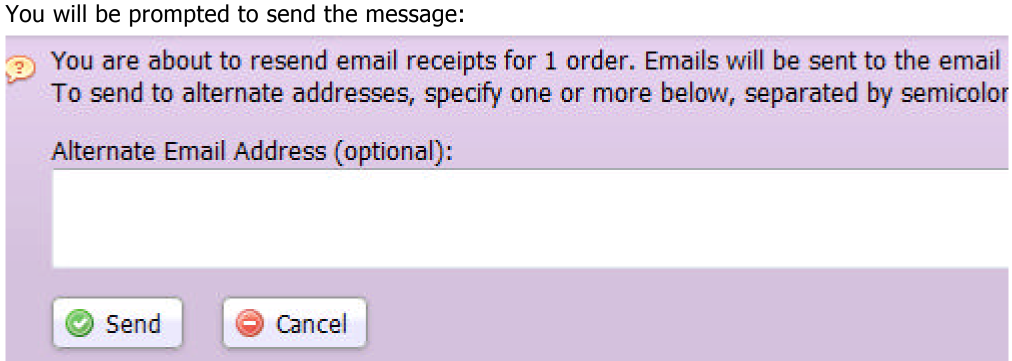


2. Locate the user record corresponding to the one you want to send an email for, and check the box in the selction column.

3. Set the record action field in the lower left corner of the status bar to **With selected orders**, and set the field to its right to **send welcome email**:



4. You will be prompted to send the message:



   To send the message to the same email address on the user record, leave the **Alternate Email Address** field blank. To send to a different address, enter that address in that field.

5. Click the **Send** button.

7.4 Orders

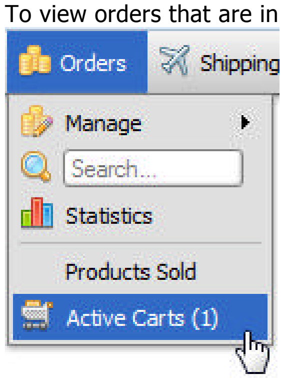
7.4.1 Viewing Orders

Overview

Orders in Squirrelcart are not stored in the database until they are completed by the customer. Pending orders not yet completed can be viewed in the control panel. Completed orders can be viewed via order emails sent to the merchant (see Store Settings page), and via the control panel.

Viewing Pending Orders (active carts)

To view orders that are in progress, click the Active Carts menu link:

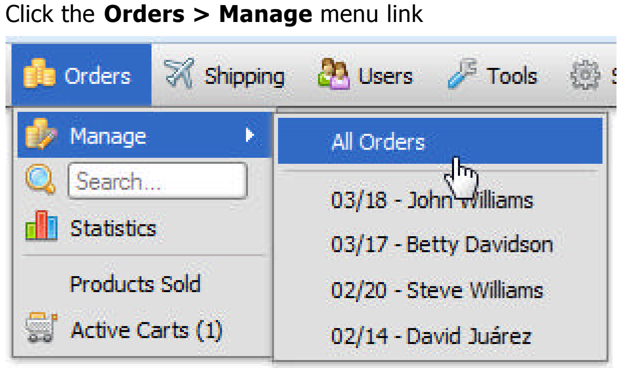


Viewing Orders After They are Placed

There are 2 ways to view an order in the Control Panel. "Invoice" mode allows you to print out an invoice similar to what the customer sees when they complete their order. Edit mode allows you to work with the order, to add shipments, order status, etc...

Viewing an Order in Invoice Mode

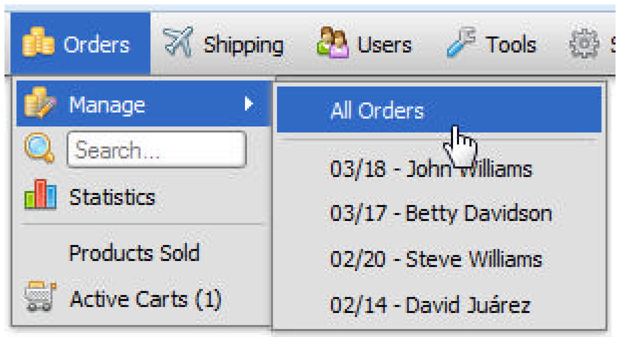
1. Click the **Orders > Manage** menu link



2. You will see a table showing your orders. Click anywhere on the row that contains the record you wish to open. The row will highlight yellow when your mouse is over it.

Viewing an Order in Edit Mode

1. Click the **Orders > Manage** menu link

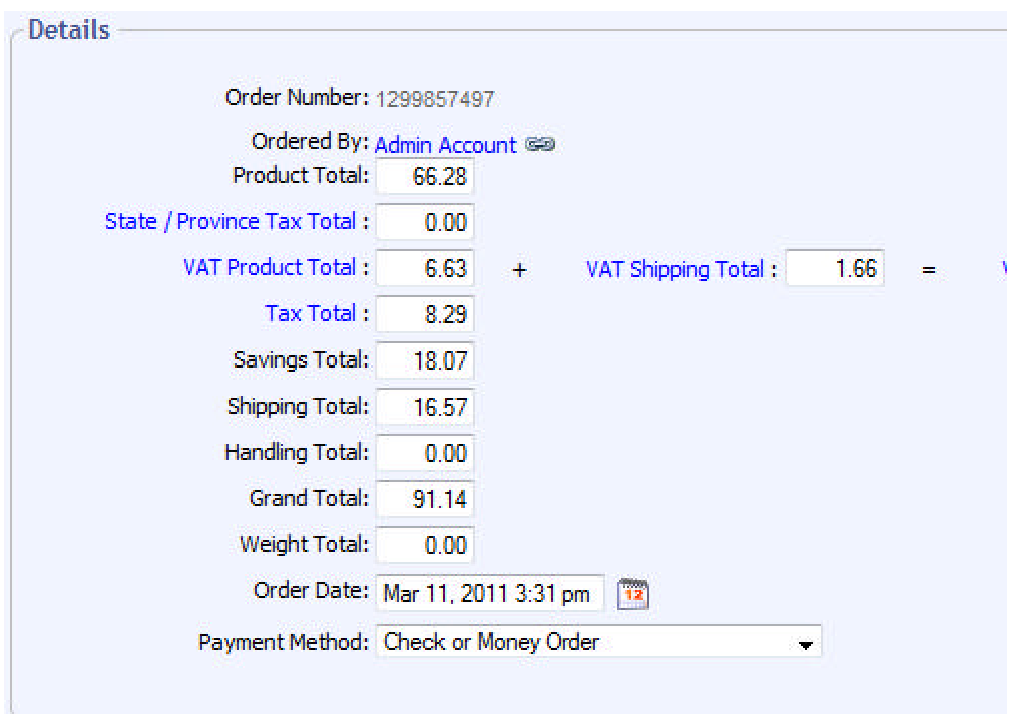


2. You will see a table showing your orders. Click the  link to the left of the order you wish to edit.

7.4.2 Orders - Record Overview

This page explains each section of the Order record. To open an order in edit mode, see the **Viewing Orders topic (Section 7.4.1)**.

1. **Details**



Order Number
Unique order number assigned when order was placed

Ordered By
If this order was placed by a logged in user, their name appears here, with a link to their customer record.

Product Total
Total cost of all products (and options) in the cart

State / Province Tax Total

VAT Product Total
Total **VAT (Section 6.11.2)** for all products. Only shown when VAT is enabled and present on the order.

VAT Shipping Total
Total **VAT (Section 6.11.2)** for shipping. Only shown when VAT is enabled and present on the order.

VAT Total
Total **VAT (Section 6.11.2)** for entire order. Only shown when VAT is enabled and present on the order.

Tax Total

Savings Total
Total savings amount from all discounts on this order

Shipping Total

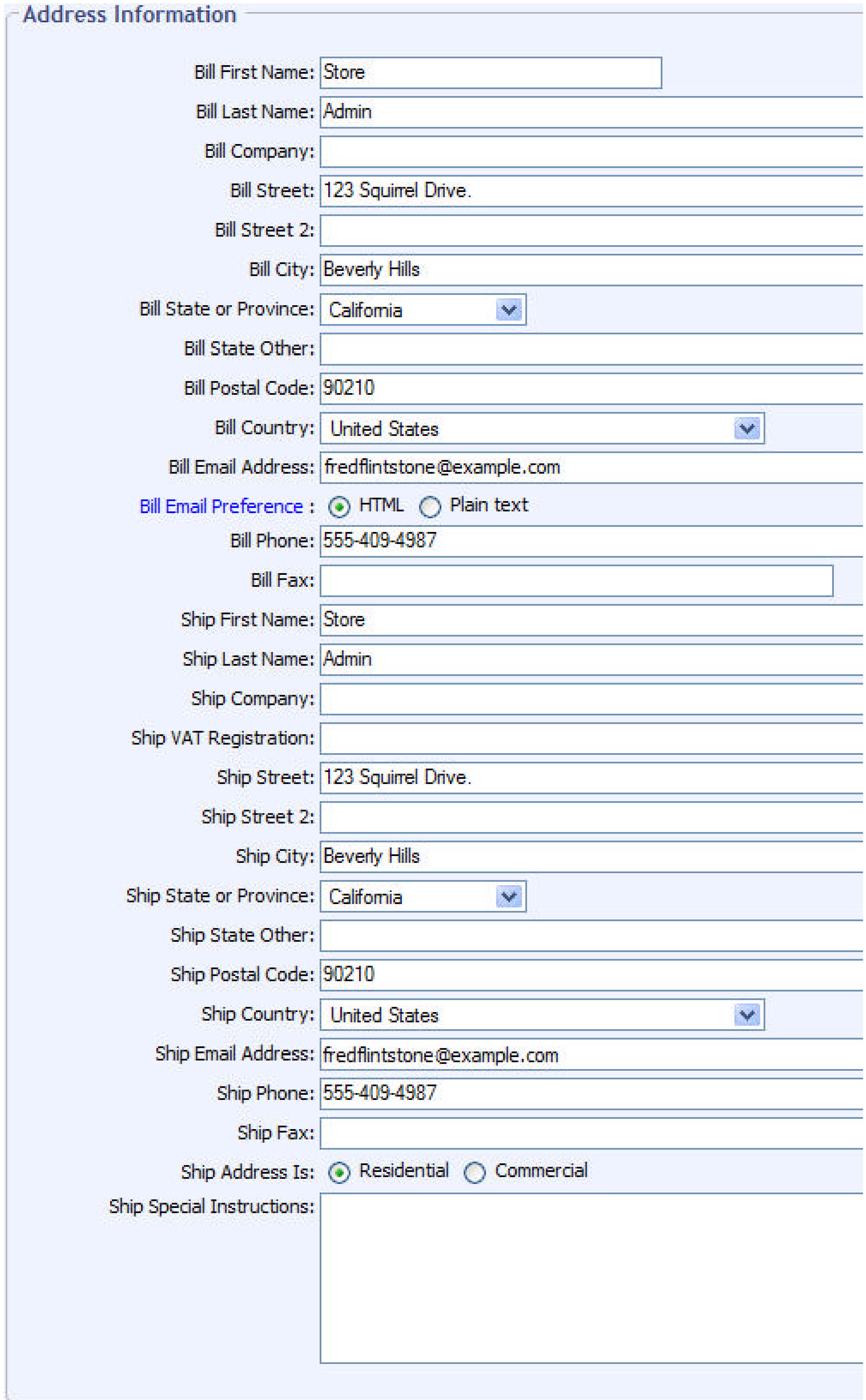
Handling Total

Grand Total
This is what the customer was charged

Order Date

Payment Method

2. **Address Information**



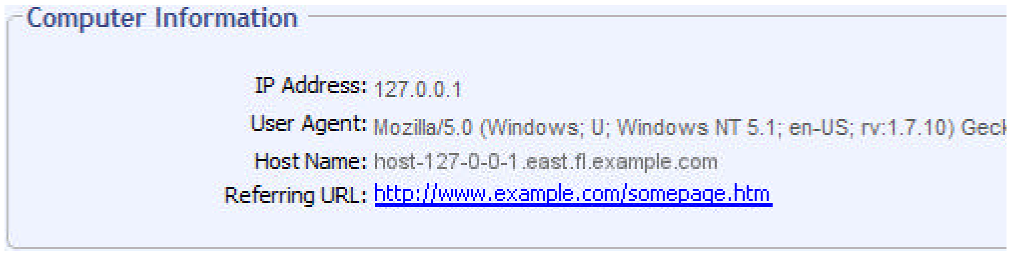
Most fields above are self explanatory. Below are explanations for a few that are not:

Bill Email Preference

This determines the format of the emails that the customer will receive

Ship Address Is
This determines whether the address the customer specified as their shipping address is a residence, or a business. This effects the rates returned from RTR for some of the couriers that support it.

3. **Computer Information**



This section is for information about the customer's computer.

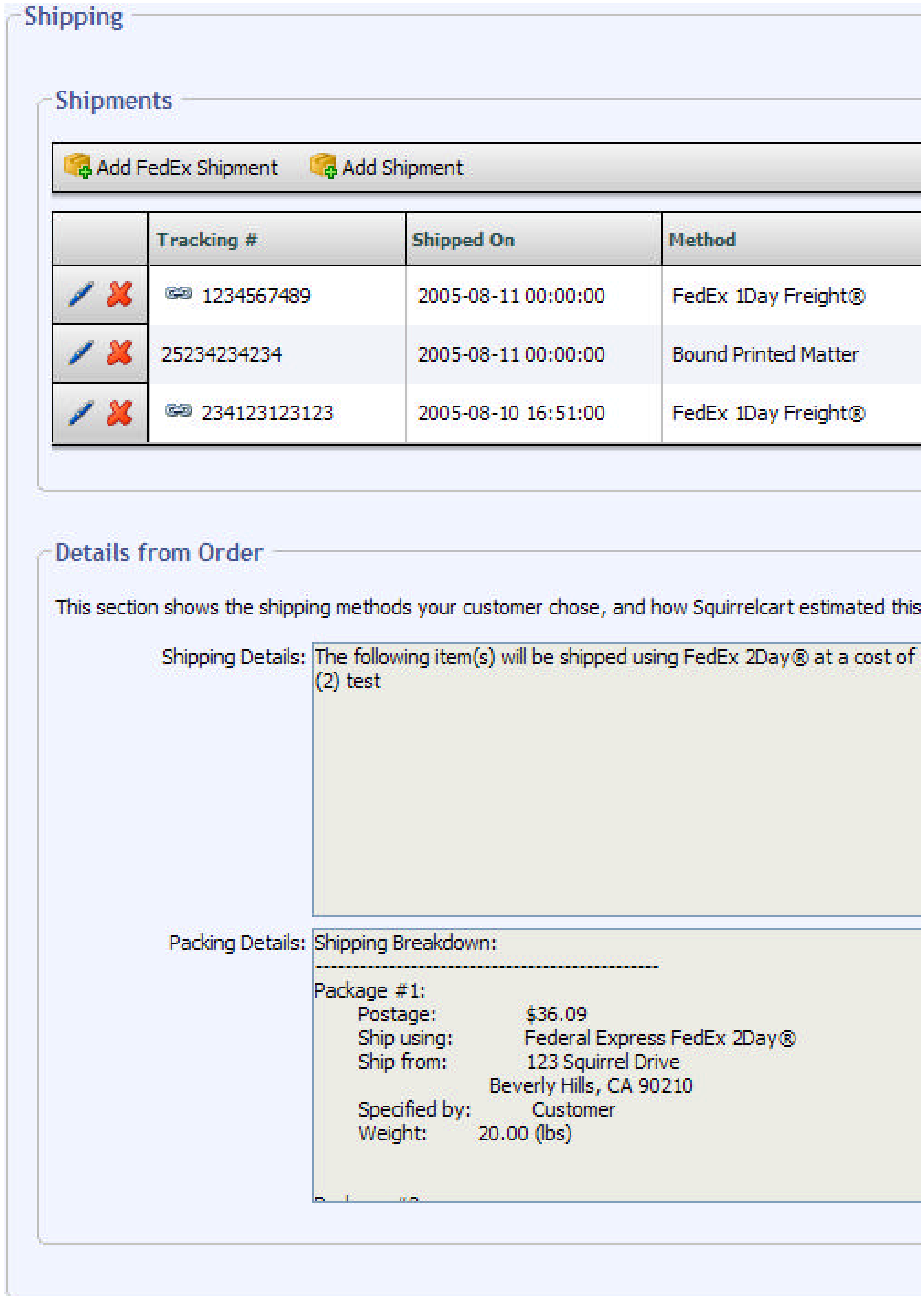
IP Address
Unique internet protocol address assigned to your customer's computer by their ISP

User Agent
This is a string returned from the customer's browser and contains information that can be used to identify their browser version and operating system.

Host Name
This is a unique DNS name assigned to your customer's computer by their ISP

Referring URL
This is the URL of the page that the customer was on before they entered your store

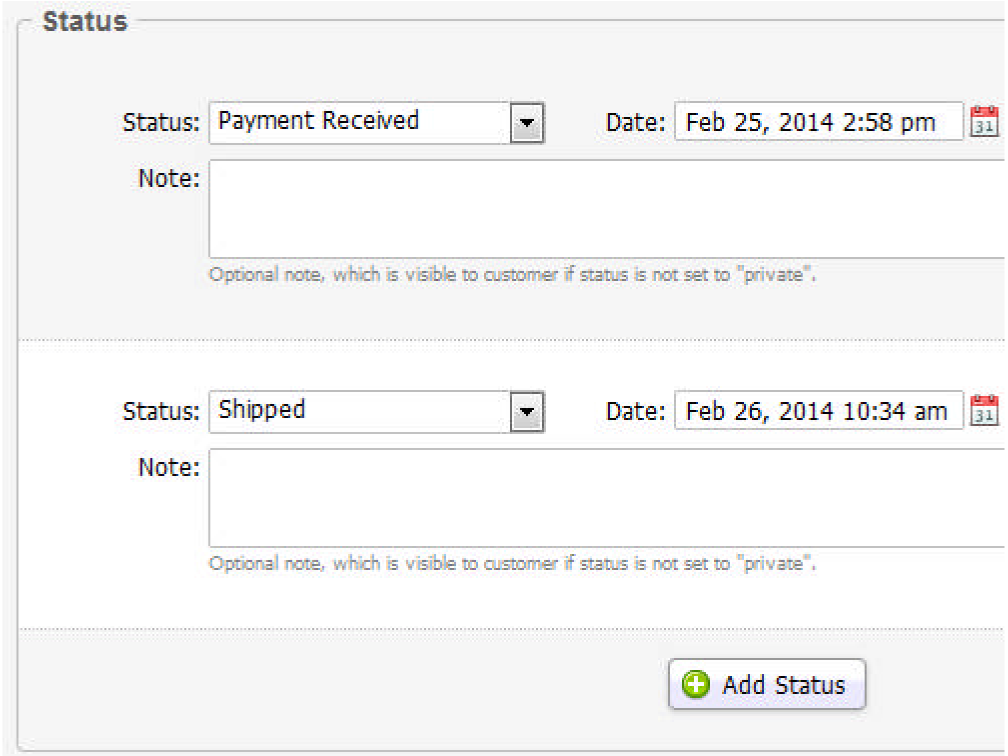
4. **Shipping**



Shipments
This is explained in detail in the **Configuration > Shipping > Shipments** section of the documentation

Details from Order
This shows an estimate of how Squirrelcart assumed you would pack this order. This is only for use when **real time rates (Section 6.6.3.2)** are enabled.

5. **Status**



This section is used to add one or more status options to an order for the purpose of tracking changes historically.

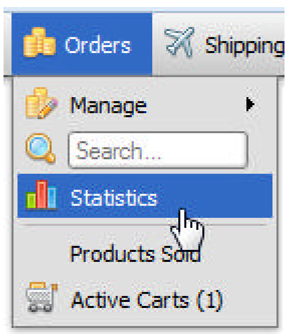
7.4.3 Orders - Statistics

Squirrelcart can display statistical information showing the number of orders and dollar total for each month, and for today.

Viewing Order Statistics

1. Open the **control panel (Section 3)**

2. Click the Order Statistics menu link



You should see a statistics like this:

Sales Statistics - Overview

Stats include all orders not marked as: *Canceled* , *Refund Issued* , *Returned*

To exclude an order status from these results, check the **Negates Order** field on the order status rec

Sales » 2016 » September » Days

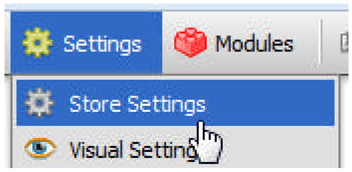
Date	Orders	Product	Shipping	Tax
09/04 - Sunday	2	**$979.70**	$39.13	$68.58
09/03 - Saturday	1	**$249.00**	$6.05	$17.43
09/02 - Friday	3	**$747.00**	$38.07	$52.29
09/01 - Thursday	1	**$249.00**	$6.05	$17.43

Sales » Last 12 Months

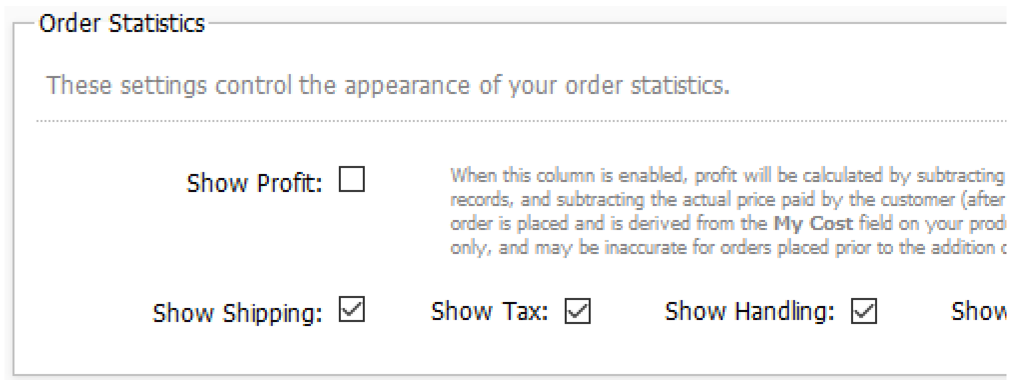
Month	Orders	Product	Shipping	Tax
2016 - September	7	**$2,224.70**	$89.30	$155.73
2016 - August	3	**$17,791.25**	$7,607.12	$1,211.93
2016 - July	1	**$249.00**	$99.16	$17.43
2016 - June	--	--	--	--
2016 - May	2	**$498.00**	$12.10	$34.86
2016 - April	1	**$249.00**	$50.00	$17.43
2016 - March	5	**$3,189.10**	$233.33	$223.17
2016 - February	1	**$979.70**	$31.97	$68.58
2016 - January	--	--	--	--
2015 - December	3	**$747.00**	$27.39	$52.29
2015 - November	7	**$14,265.74**	$829.93	--
2015 - October	9	**$3,266.13**	$622.67	--

Adding / Removing Columns

1. Click the Store Settings link in the toolbar:

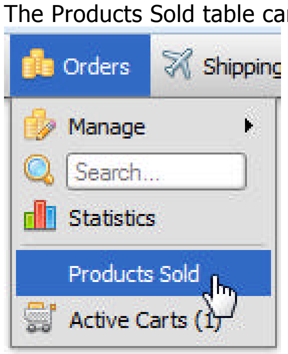


2. Adjust the settings in the **Control Panel > Order Statistics** fieldset:



7.4.4 Products Sold

The Products Sold table can be viewed using the menu link below:



The purpose of the Products Sold table is to control your **Best Seller (Section 7.1.6)** ranking. For more information, see the **Manually Altering Best Seller Ranking** section of the **Best Sellers (Section 7.1.6)** topic.

7.4.5 Order Status

7.4.5.1 Order Status - Overview

Overview

Squirrelcart allows you to add status information to orders to assist you in keeping track of where an order is in the fulfillment process. You can add as many statuses to an order as you like.

Each status assignment contains the date that the status was assigned, and can contain an optional note which is viewable by the customer. You can also add custom status options by following the instructions in the **Adding Custom Status (Section 7.4.5.5)** topic.

Built-in Order Statuses

Squirrelcart has several built-in order statuses:

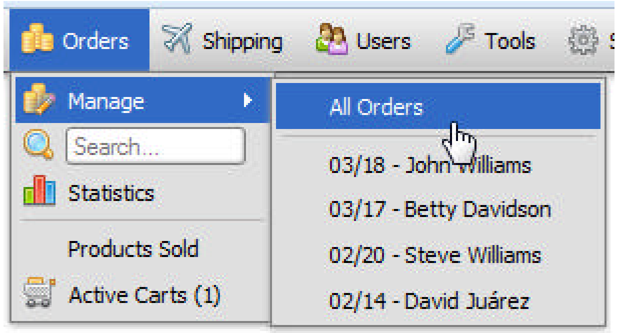
Status	Description
Awaiting Shipment	Package has not shipped yet.
Shipped	Order has been shipped.
Delivered	Order has been delivered.
Canceled	Order has been canceled.
Refund Issued	Refund has been issued for this order.
Awaiting Customer Pickup	Customer has opted to pickup shipment.
Payment Pending	Payment has not been received, or is still pending.
Payment Received	Payment has been received for this order.
Returned	Order has been (or is currently being) returned to you via a return shipment fro
Ship Label Ready	This status indicates that a shipping label has been automatically created during
Payment Processed	This status is used to indicate that the payment has actually been processed.
Note for Customer	This status is added when a general note is assigned to an order, for the custo
Note for Staff (private)	This status adds a private note to the order, viewable only by staff.

7.4.5.2 Checking Order Status

Checking Order Status in the Control Panel

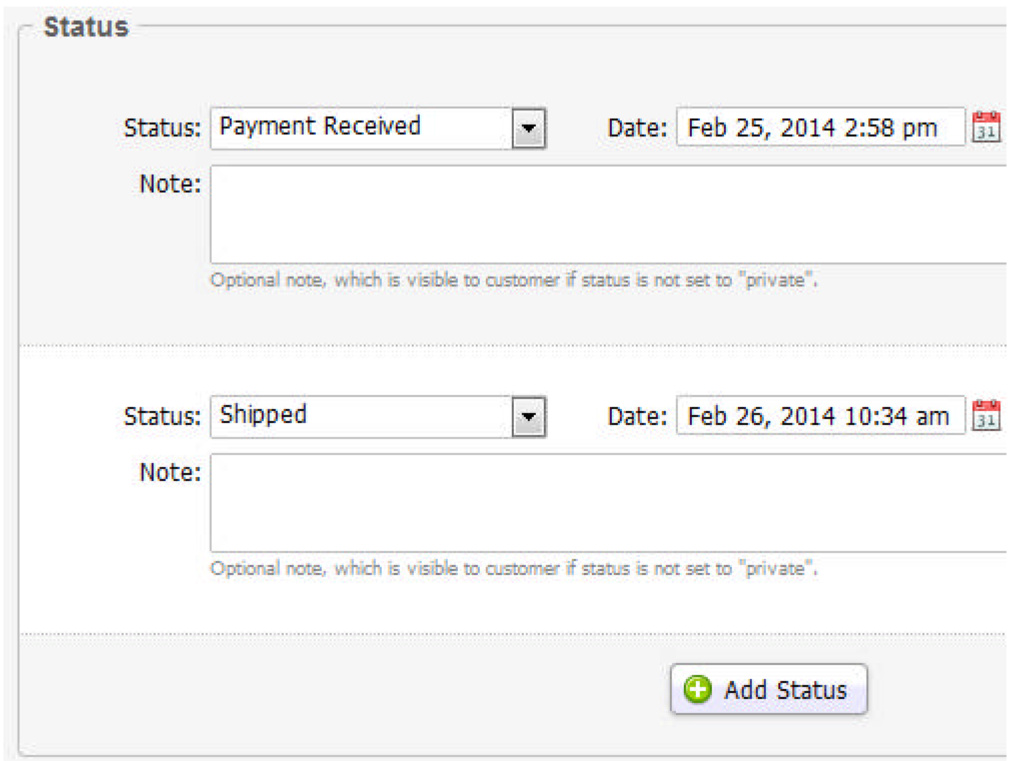
1. Open the **control panel (Section 3)**

2. Click the **Orders > Manage** menu link



3. Click the  button to open the order record

4. Locate the Status section



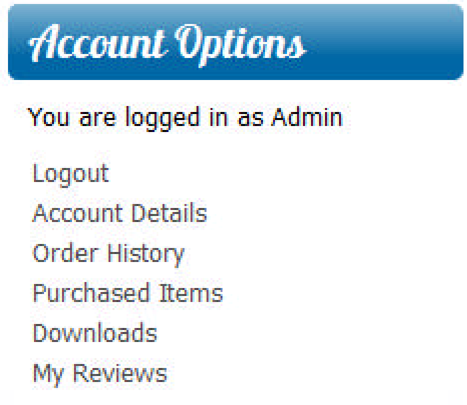
You can also view the order status on the order invoice. See the **Viewing Orders (Section 7.4.1)** topic for instructions on how to view an order in Invoice Mode.

Checking Order Status in the *Storefront*

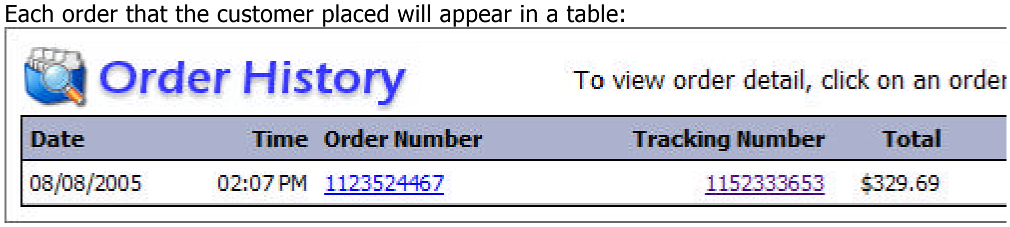
A customer can view the status of their order if they have an account. Here's how.

1. Login to the *storefront* page

2. Click the **Order History** link in the **Account Options** navigation box

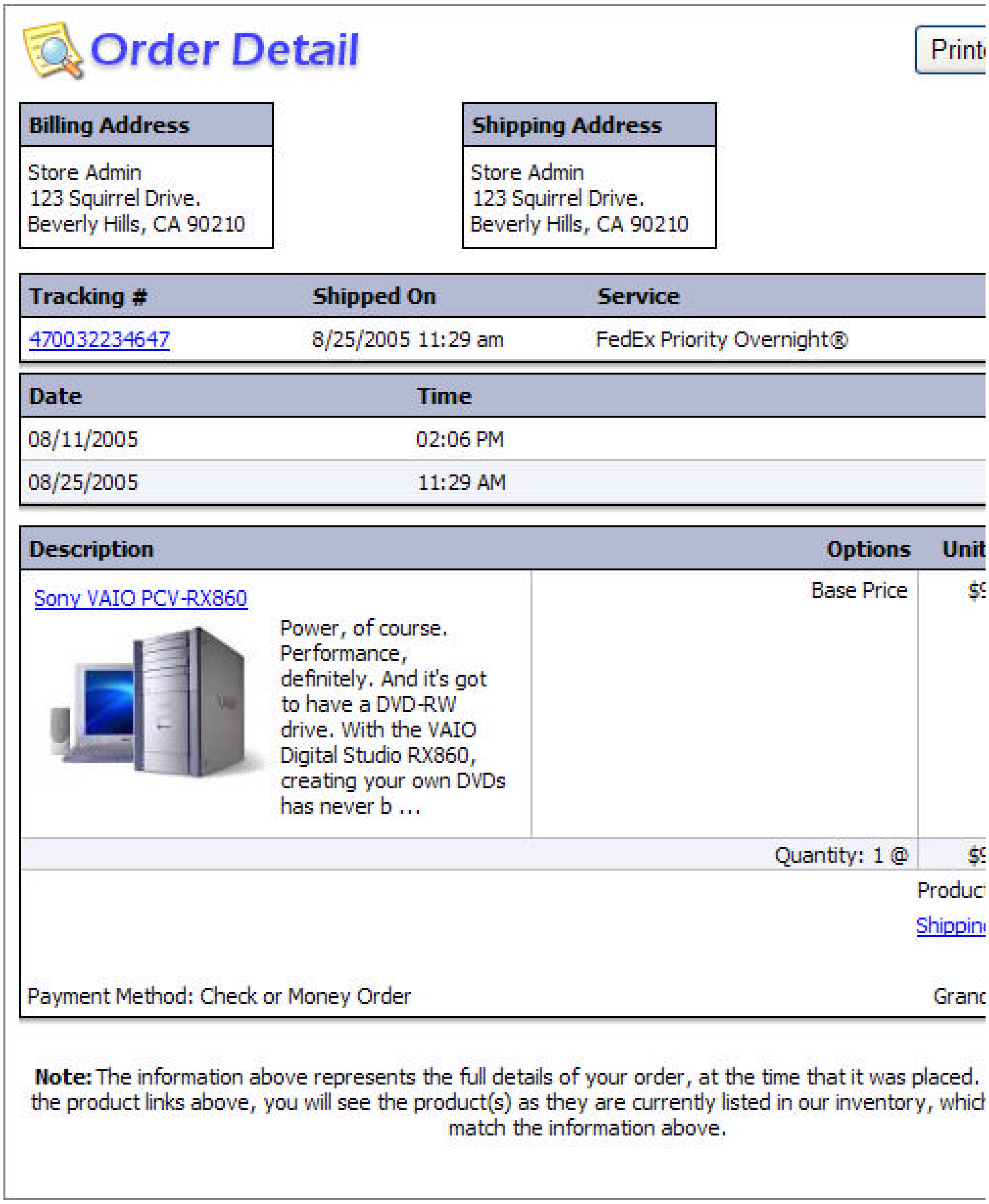


3. Each order that the customer placed will appear in a table:



Click the link in the **Order Number** column to open the order detail page

4. The order status can be seen above the items:



7.4.5.3 Adding a Status to an Order

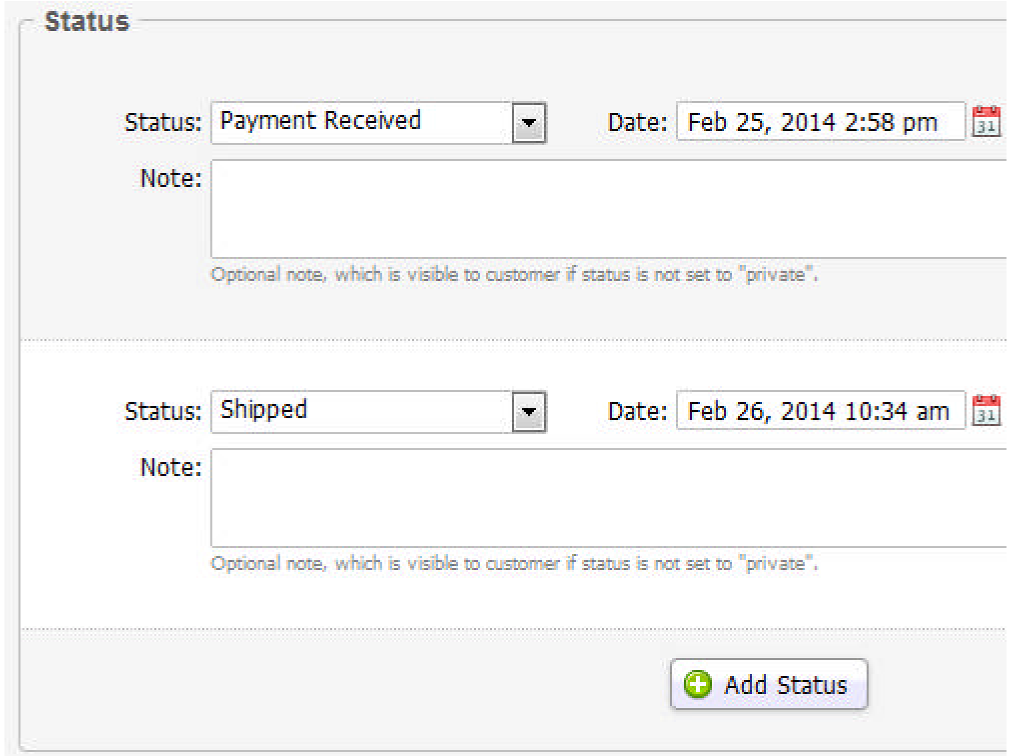
Overview

There are different ways to assign an order status to an order.

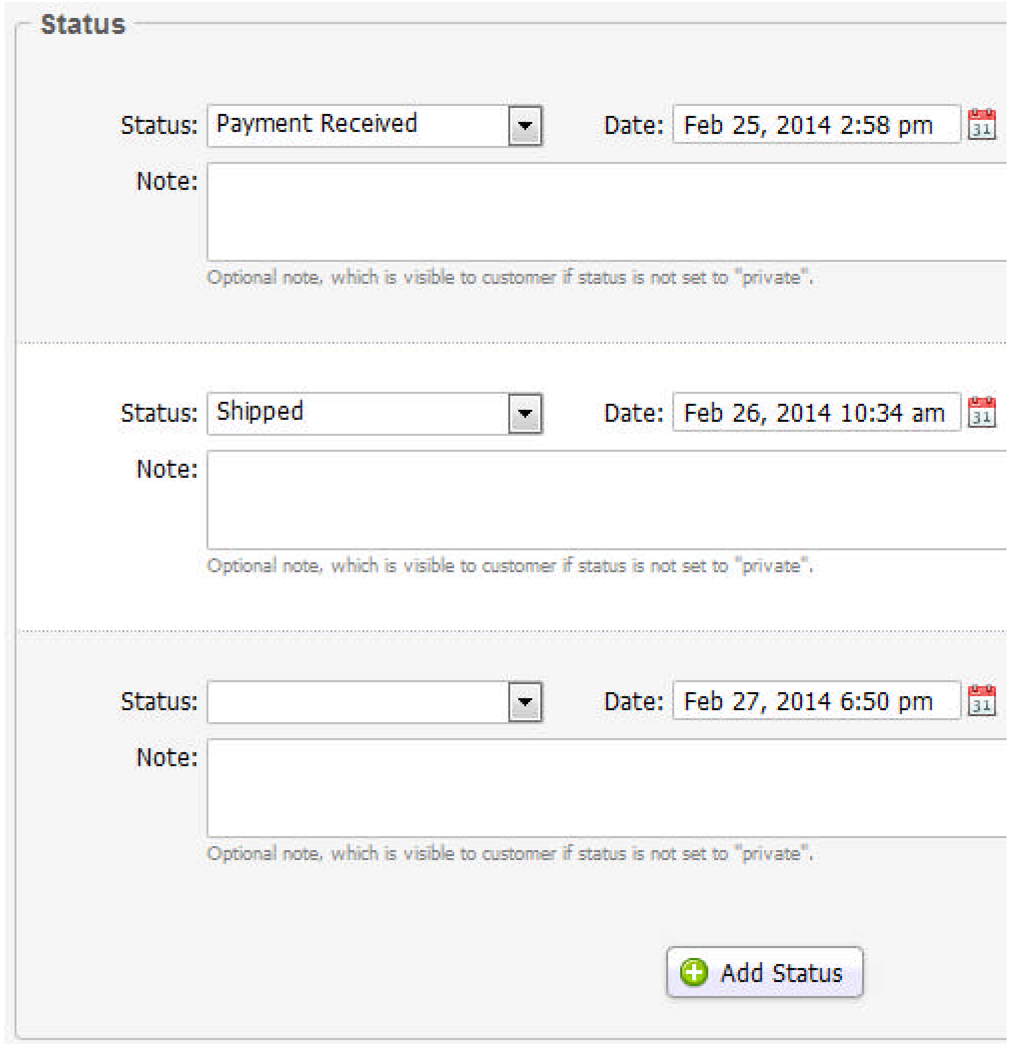
Assigning a status to a single order, on its record

1. **Open the order record (Section 7.4.1)** in edit mode

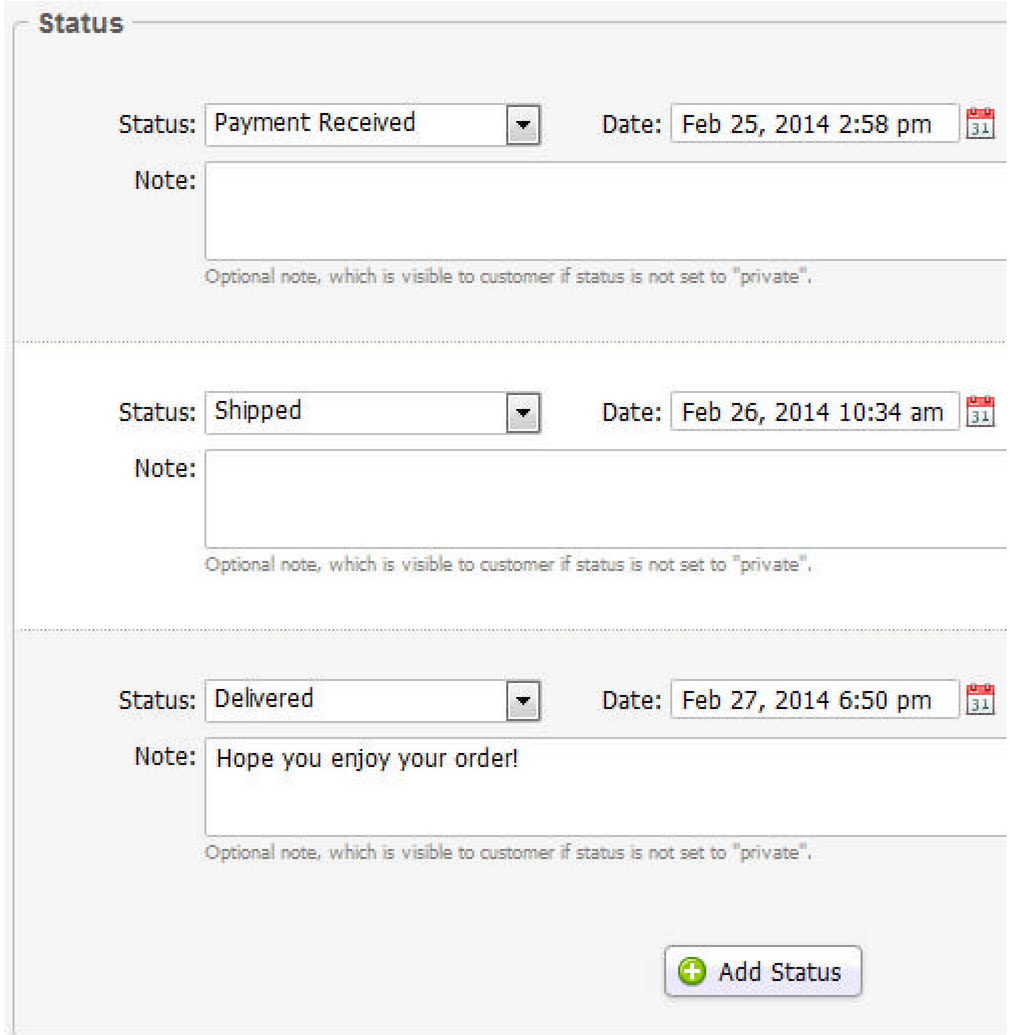
2. Locate the Status section of the record



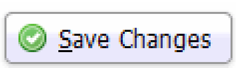
3. Click the **Add Status** button. A new blank status row will appear.



4. Select a status and the date



5. If you would like to add a short note (which is viewable by the user), enter it in the **Note** field.

6. Click 

> If you want to include a note on an order that does not match any particular built-in status, you can set the status to **Note for Customer**. The customer can see the note on their order history page, and can optionally receive the note via email. For a private "staff only" note, use the **Note for Staff (private)** status instead.

Assigning a status to one or more orders simultaneously

You can update the status of one or more orders in a single operation using record actions.

1. **View your orders (Section 7.4.1)**

2. Select the order records you wish to update by checking the box in the selection column

3. Set the record action field in the lower left corner of the status bar to **With selected records**

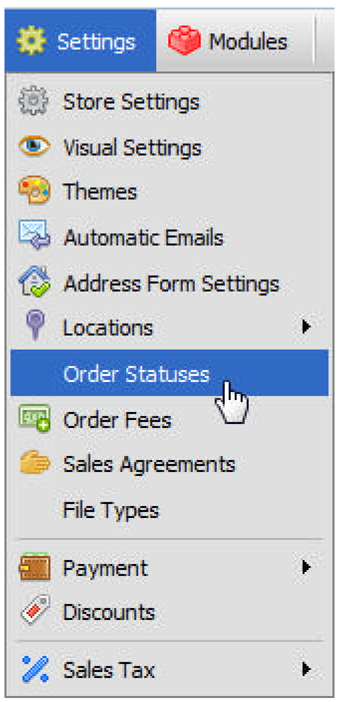
4. Set the field immediately to the right to **set status: STATUS** , where **STATUS** is the name of the status you wish to assign.

5. Specify an optional short note, and click **Yes, continue** to assign the status to the selected orders.

7.4.5.4 Hiding a Status from a Customer

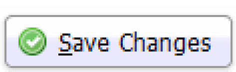
If you have order status options that you would like to use internally and hide from your customers, do the following:

1. Open the Order Status table:



2. Click the row for the record you wish to hide from customers

3. Check the **Private** field

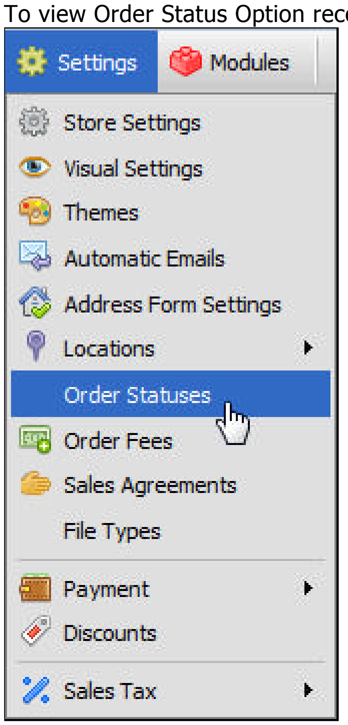
4. Click 

7.4.5.5 Adding Custom Status

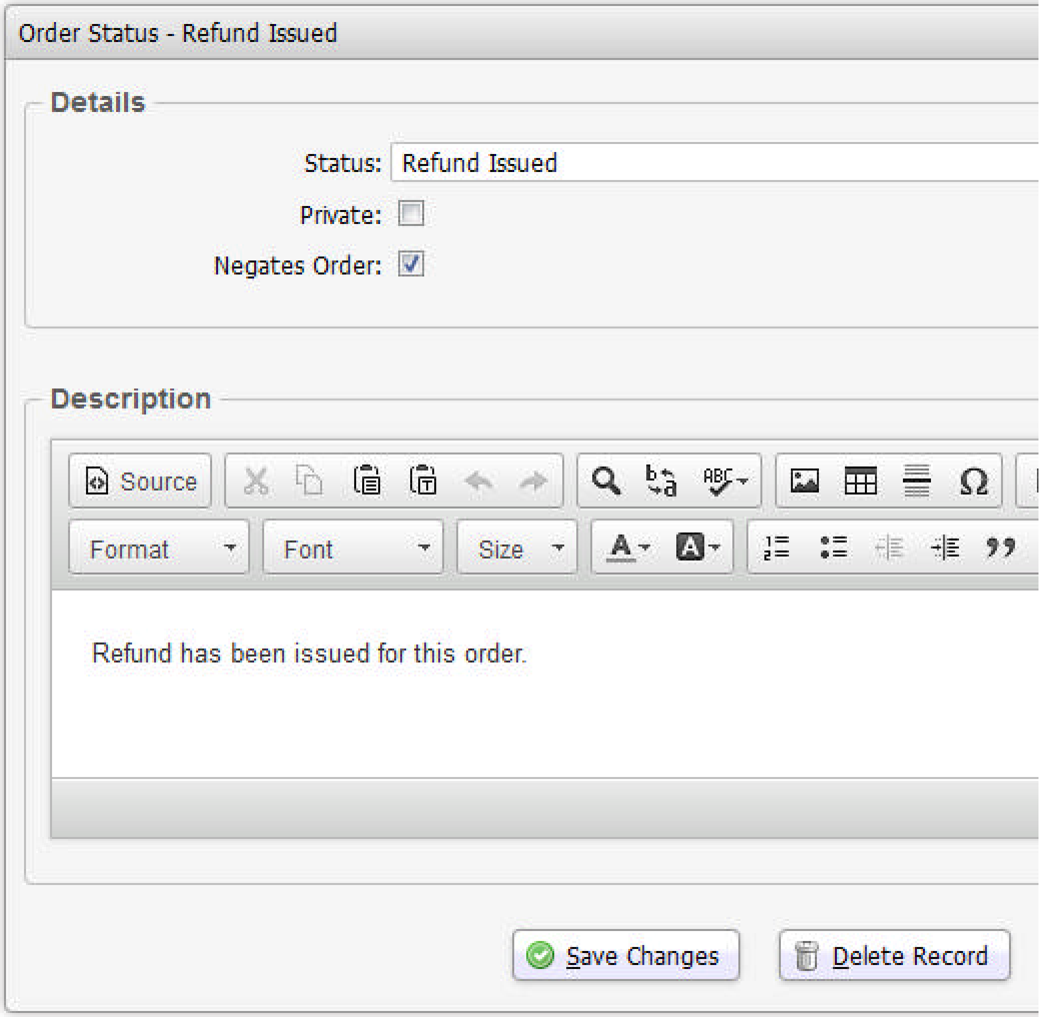
Overview

Squirrelcart allows you to assign one or more statuses to an order. This information is accessible to both the merchant and the customer. The different statuses that are available to you are controlled by the **Order Status Options** records. You can add custom statuses by adding records to this table.

To view Order Status Option records, use this menu option:



An overview of the Order Status Option record is below:



Status
The name of this status.

Private

When checked, the status will only be viewable by staff.

Negates Order

When checked, if an order is assigned this status it will no longer effect sales statistics.

Description
A description of the status.

Both of these fields are viewable by the customer when they view the status of their order.

7.4.5.6 Notifying Your Customers

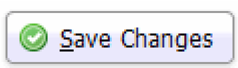
Overview

Customers can view the statuses you've assigned to their orders on their order history page in the store. If you would like to notify them via email when a status has been assigned to an order, see the **Managing Your Store > Automatic Emails** section of this documentation.

7.4.6 Order Number Format

By default, the format for your order numbers is based on the Unix timestamp, which is the number of seconds since the Unix Epoch (January 1 1970 00:00:00 GMT).

To change your order number format

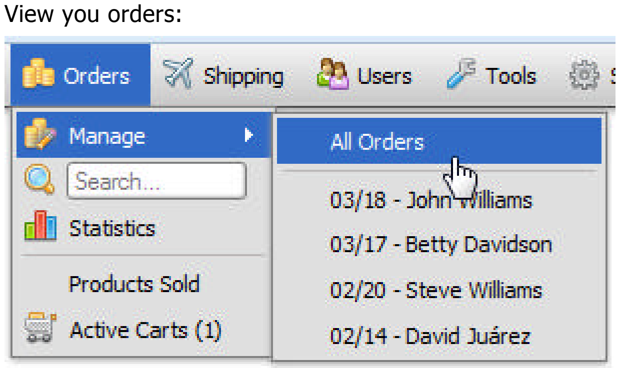
1. Open the **Store Settings (Section 6.1)** page
2. Change the **Order Number Format** field in the General Settings section to **Custom**
3. Enter the order number that you want Squirrelcart to use for the next order. This number must be numerical, and cannot contain any special characters.
4. Enter the amount that you would like to increment the order numbers by in the **Increment By** field.
5. Click 

7.4.7 Emailing an Order Receipt

How to Send an Order Email Receipt

Squirrelcart will automatically email your customer an order receipt email when they place their order. If you need to send them another one, or send one to a different email address:

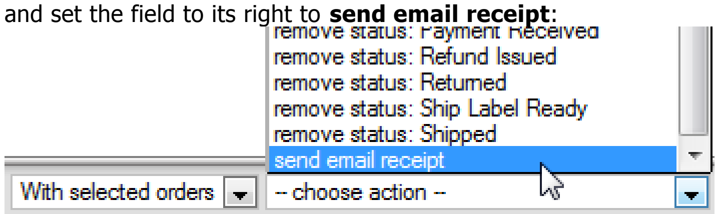
1. View you orders:



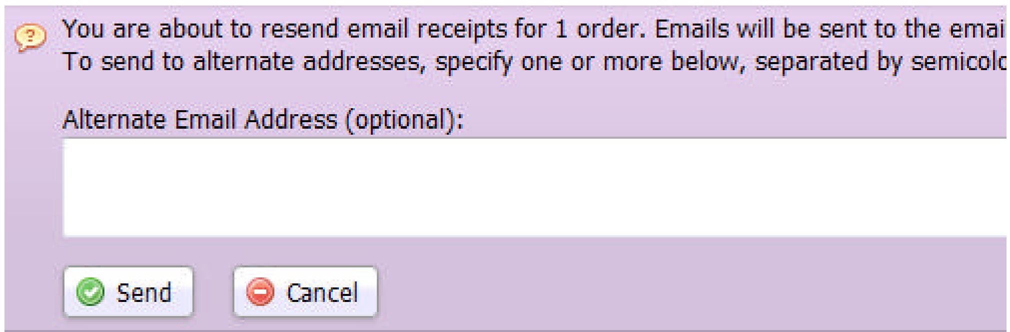
2. Locate the order corresponding to the one you want to send an email for, and check the box

in the selction column.

3. Set the record action field in the lower left corner of the status bar to **With selected orders**, and set the field to its right to **send email receipt**:



4. You will be prompted to send the message:



To send the order receipt to the same email address that was specified when the user ordered, leave the **Alternate Email Address** field blank. To send to a different address, enter that address in that field.

5. Click the **Send** button.

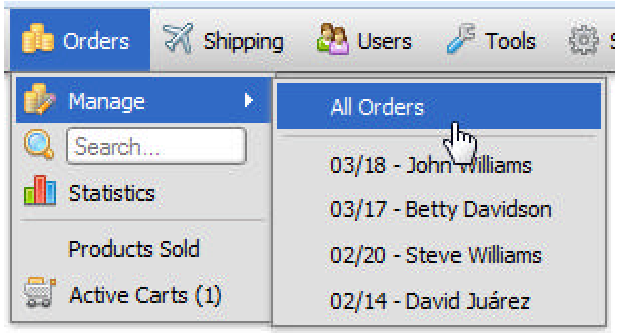
7.4.8 Bulk Printing Orders

Overview

Squirrelcart can be used to print more than one order at a time, in "printer friendly" format. When using this feature, selected orders will appear together on one page for printing. Page breaks will be added so each order starts on its own page.

How to Bulk Print Selected Orders

1. Open the Orders table in the control panel



2. Select the orders you would like to print, by checking their checkbox in the selection column.

3. In the lower left hand corner, select **With selected orders** for the first **Record Action (Section 4.4)** field (this may already be selected by default).

4. To the right of that field, select the **print** option. A new window/tab will open. If you are using a popup blocker, you may need to configure it to allow popups for your website.

5. The new page will contain all the selected orders, in print friendly format. Use your browser's print button to print them.

> If you would like to print all your orders, skip step #2 above. For step 3, choose **With all orders** instead. This feature is limited to 250 orders.

7.5 Discounts

7.5.1 Discounts - Overview

Overview

> In addition to the powerful discount features explained in this section, Squirrelcart supports easy to configure quantity based discounts which are discussed in the "Managing Your Store > Quantity Based Discounts" section of this documentation. This information is in a separate section of our documentation because it does not use discount records stored under "Settings > Discounts" to accomplish this.

Squirrelcart has a robust discount feature. It allows you to create just about every discount type you can think of. Discounts can be configured so that they are offered only when a certain set of conditions apply. These conditions allow you to offer discounts based on:

- coupon codes
- date
- number of products in the cart
- ship to country
- ship to state
- order total
- weight total
- group membership

There are 3 classifications of discounts:

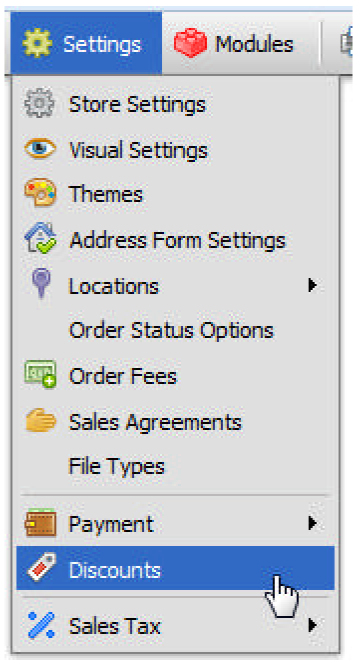
- Product Based - Discount on one or more products
- Category Based - Discounts on one or more categories (and all items in them)
- Order Based - Discount on the order as a whole

7.5.2 Viewing Discounts

Viewing All Discounts

1. Open the **control panel (Section 3)**

2. Click the **Discounts** menu link



7.5.3 Adding a Discount

Overview

In order to add a discount, you will need to know the following:

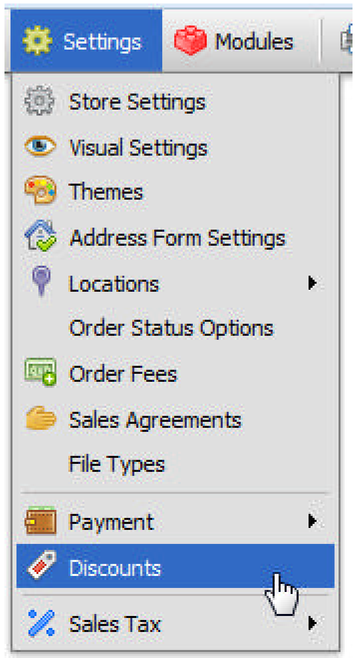
- what you want to discount (product(s), category(s), order as a whole)
- when you want the discount to be offered
- what amount will the discount be for (set amount, or percentage)

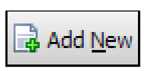
Adding a Discount

This is an example of how to add a discount to offer 20% off a product named "Apple iBook G3". The fields discussed in this example can be seen in the **Record Overview (Section 7.5.4)** topic.

1. Open the **control panel (Section 3)**

2. Click the **Discounts** menu link



3. Click 

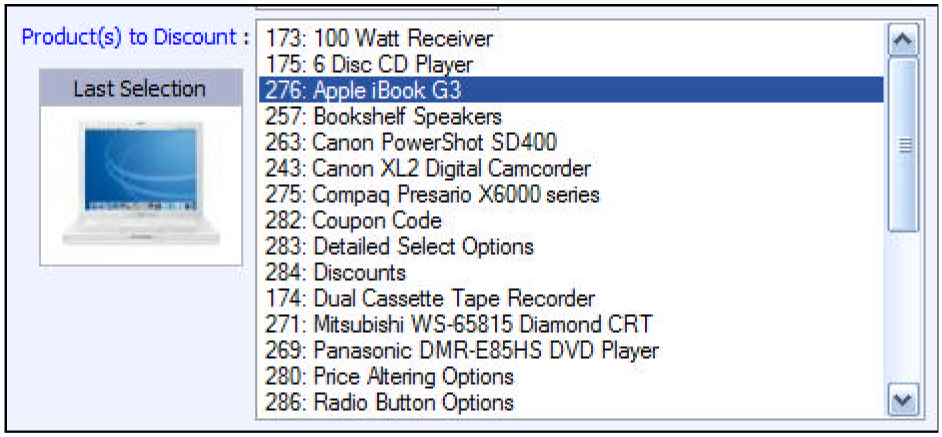
4. Enter a Name for the discount in the **Name** field. For this example, enter:

   `20% Off Sale`

5. Leave the **Advertise** and **Advertise Conditions** fields checked. They control whether this discount will be advertised in the storefront. This is explained in more detail in the **Advertising (Section 7.5.6)** topic.

6. Set the **Discount What** field to **Specific Product(s)**. Some new fields will appear

7. In the **Product(s) to Discount** field, scroll to the product you want to discount. Products are listed under their respective categories. When you find the product, select it. To select more than one product, hold down the CTRL key while clicking. The last item clicked on will appear in a box to the left of the field to aid you in selecting the correct items.



8. Leave the **Price Label** field set to **Sale Price:**. This controls what will appear in front of the price in the storefront when this discount is applicable.

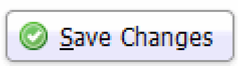
9. Set the **Display Products With** field to **discount product templates**.

10. Set the **Price Is** field to **reduced by**. A new **Price Reduction** field will appear below.

11. Enter 25.00 in the **Price Reduction** field. Because we are offering 25% off the base price of this item, set the select input to the right of the text field to **%**

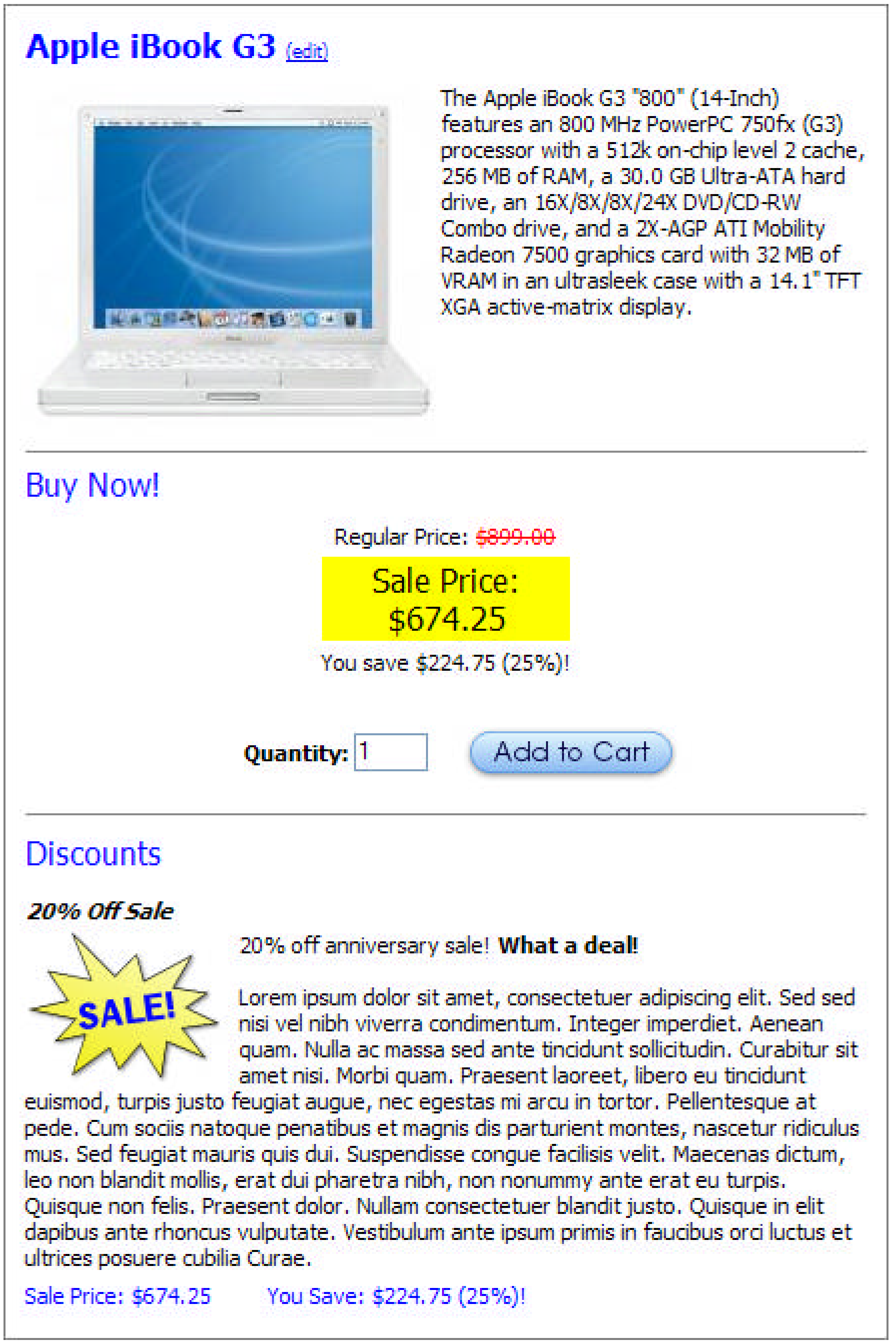
12. Enter a description in the **Description** field. Plain text and HTML are allowed.

13. In this example, we will add an image for this discount to the **Image** field. The image will be shown when advertising this discount. See the **Assigning Images to Records topic (Section 5.3)** for help.

14. Click 

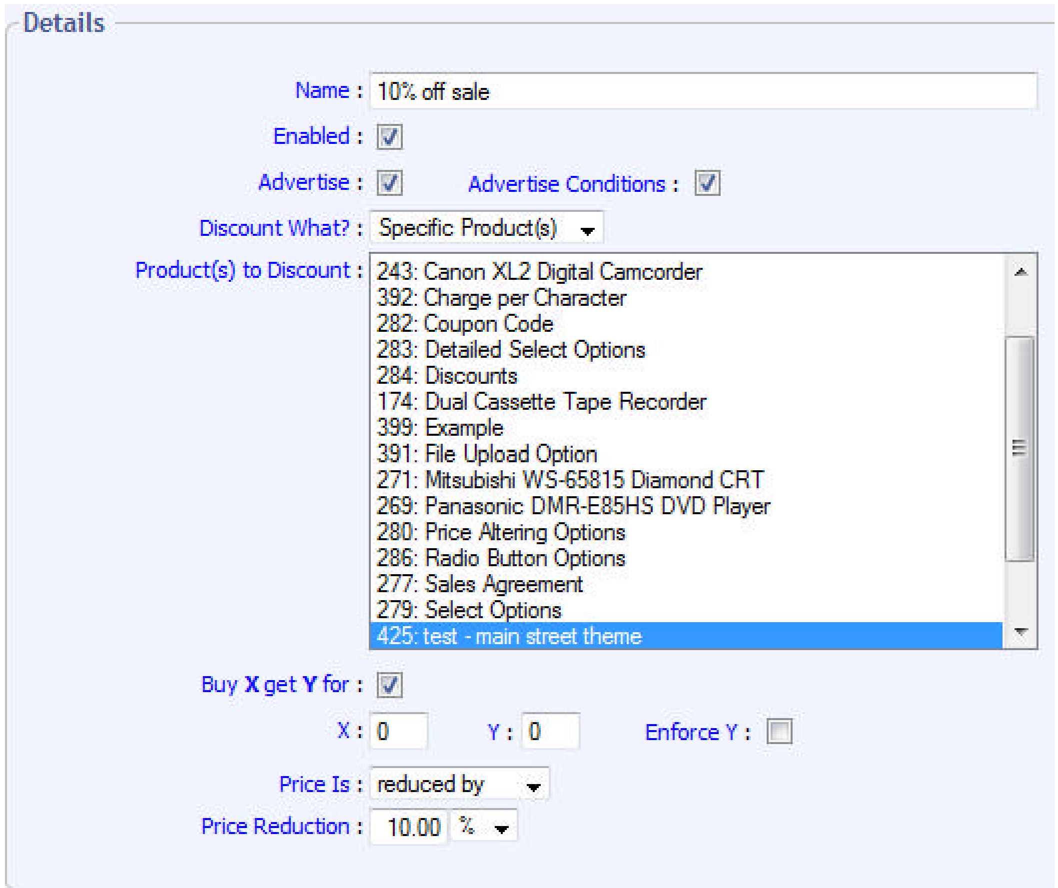
When viewing the product for this example discount in the storefront, it's thumbnail view looks like this:

When viewing the product in detail, it looks like this:



7.5.4 Discounts - Record Overview

Details



Name

Name of discount. This will appear to customers in the storefront if the discount is advertised.

Enabled

This field can be used to quickly enable and disable a discount without having to delete it's record.

Advertise

Determines whether the discount will be advertised below products in the *storefront*.

Advertise Conditions

When **Advertise** is checked, this determines whether the conditions added to the discount will be explained in the advertisement.

Discount What?

This determines what will be discounted. Options are:

- Entire Order
- Specific Products
- Specific Categories

Product(s) to Discount

This appears when **Discount What** is set to **Specific Product(s)**. It's used to select one or more products to discount.

Categories

This appears when **Discount What** is set to **Specific Categories**. It's used to select one or more categories to discount.

Buy X get Y for

This field is used to configure "Buy 2 get 1 free" and "3 for $10" types of discount.

X

This field is used to specify the X quantity in a Buy X get Y type of discount

Y

This field is used to specify the Y quantity in a Buy X get Y type of discount

Enforce Y

This field is used to force a customer to meet the quantity specified for **Y** in order to get the discount

Price Is

This field controls how the price will be altered/assigned. If set to **reduced by**, the price will be reduced by the amount you specify in the **Price Reduction** field. If set to **exact amount**, the price will be changed to the amount you specify in the **Exact Amount** field.

Exact Amount

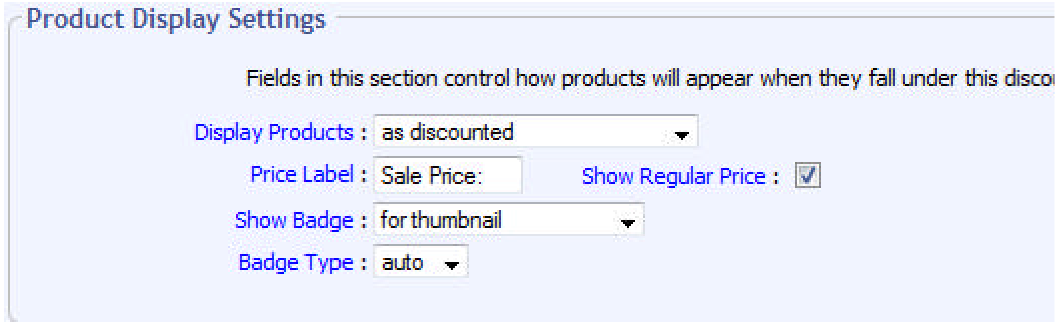
This field appears when **Price Is** is set to **Exact Amount**. It is used to set the price that will be offered for this discount.

Price Reduction

This field appears when **Price Is** is set to **Reduced By**. It is used to specify the amount or percentage to reduce the price by.

Product Display Settings

This fieldset appears when **Discount What** is set to **Specific Product(s)** or **Specific Categories**. It controls how products that are discounted via this discount appear in your storefront.



Display Products

This field controls how products will appear when discounted. Values for this field are:

as discounted - gives emphasis to the products so they stand out as "discounted"

like non discounted products - shows products the same way as they normally would appear when not discounted

> The rest of the fields below only appear when Display Products is set to as discounted

Price Label

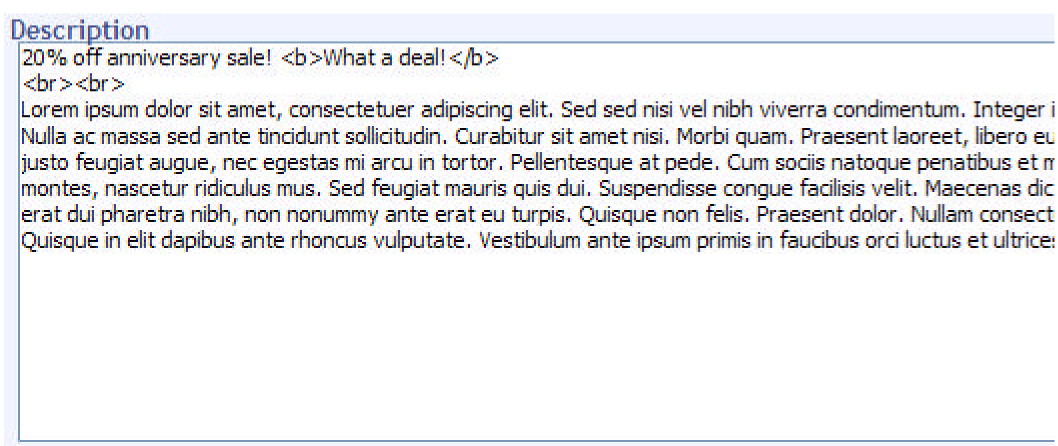
This controls what will appear before the price of the item in the storefront.

Show Regular Price

When checked, the regular price is shown above the discounted one. By default, it's crossed out and appears in red.

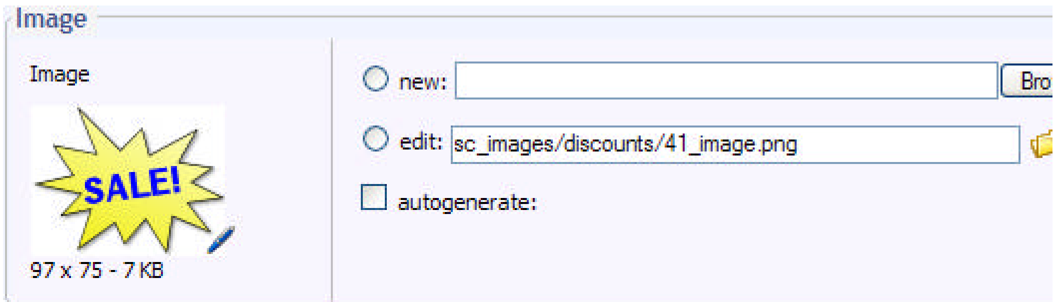
Show Badge - when enabled, a badge icon will appear to indicate the item is discounted. See the **Discount Badges topic (Section 7.5.5)** for more information.

Description



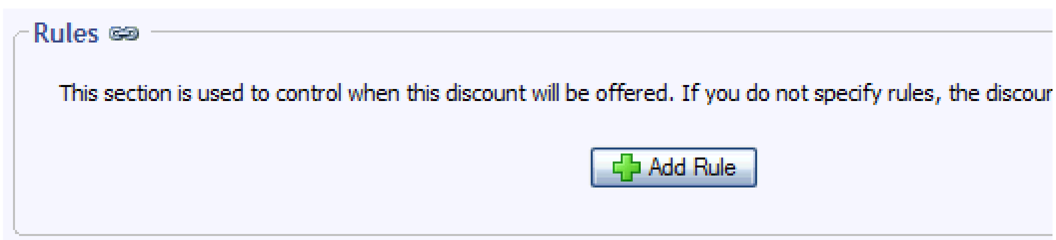
This field appears in the advertisement for this discount in the *storefront* when **Advertise** is checked.

Image



This image appears in the advertisement for this discount in the *storefront* when **Advertise** is checked.

Rules



The Rules section allows you to set restrictions on when a discount will be offered. Rules are explained in their own section of this documentation - **Managing Your Store > Rule System**.

7.5.5 Discount Badges

Overview

Discount badges are images that are overlayed on top of your product images to indicate they are on sale. They can be shown on product thumbnails:

They can also be shown when viewing a product's detail page:

Patriots Jersey [edit]

This particular item demonstrates the ability to use a Coupon Code to receive a discount on an item. Add this item to the cart, enter **PATSWIN** in one of the coupon code fields during checkout, and then click Update Cart.

This is it, the real McCoy from Reebok - official onfield brand of the NFL. Embroidered with your favorite player's name and number and built to tough NFL standards all the way.

- 100% heavy-duty mesh body
- Heavyweight nylon sleeves
- Reinforced v-neck
- Rugged double-needle construction
- Official NFL Equipment logo
- Woven Reebok logo locker tag

Enabling / Disabling Discount Badges Storewide

1. Open your **Store Settings (Section 6.1)** page

2. Locate the **Discount Settings** fieldset

3. To enable discount badges, check the **Discount Badges Enabled** field. To disable badges, uncheck the same field.

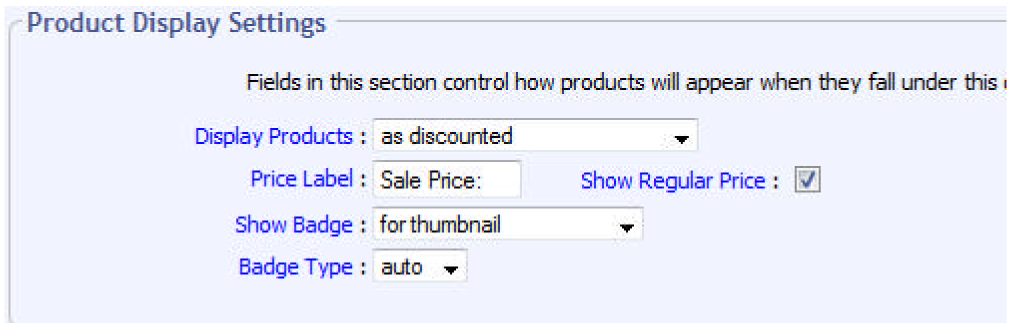
4. Click Save Changes

Enabling Badges for Discounts Assigned to Products

For discounts assigned to products or categories under **Settings > Discounts** in your control panel, use this section as a guide.

1. **Open the discount record (Section 7.5.2)** you wish to have badges appear for

2. Locate the **Product Display Settings** fieldset:



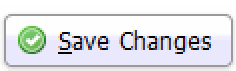
3. Set **Display Products** to **as discounted**

4. Set the **Show Badge** field, according to where you want badges to appear for products that are assigned this discount. To have them appear for only product thumbnails, set it to **for thumbnail**. To have them appear only on a product's detail page, set it to **for detail**. To have them appear for both views, set it to **for thumbnail and detail**.

5. Set the **Badge Type** field.
   auto - When set to **auto**, Squirrelcart will calculate the percentage of the discount and automatically use a badge matching that percentage provided it falls under one of the following values:
   5%, 10%, 15%, 20%, 25%, 30%, 33%, 35%, 40%, 45%, 50%, 55%, 60%, 65%, 70%, 75%, 80%, 85%, 90%, 95%, 100%.

   If the percentage does not match one in the above list, the default badge image used reads **Sale**.

   sale - When set to **sale**, the badge reads **Sale**

6. Click 

Enabling Badges for Quantity Based Discounts

Quantity Based Discounts are discussed in **this topic (Section 7.6)**.

For Quantity Based Discounts Assigned to a Group

Follow the instructions in the "Enabling Badges for Discounts Assigned to Products" above. Instead of opening a discount record in step 1, open the Group record for the group associated with the discount under **Settings > Groups**. You'll find fields corresponding to those mentioned in the remaining steps in the fieldset **Quantity Based Discount Settings > Details** on the group's record.

For Quantity Based Discounts NOT Assigned to a Group

Follow the instructions in the "Enabling Badges for Discounts Assigned to Products" above. Instead of opening a discount record in step 1, open the **Store Settings (Section 6.1)** page. You'll find fields corresponding to those mentioned in the remaining steps in the fieldset **Discount Settings** on the Store Settings page.

7.5.6 Advertising Discounts

Overview

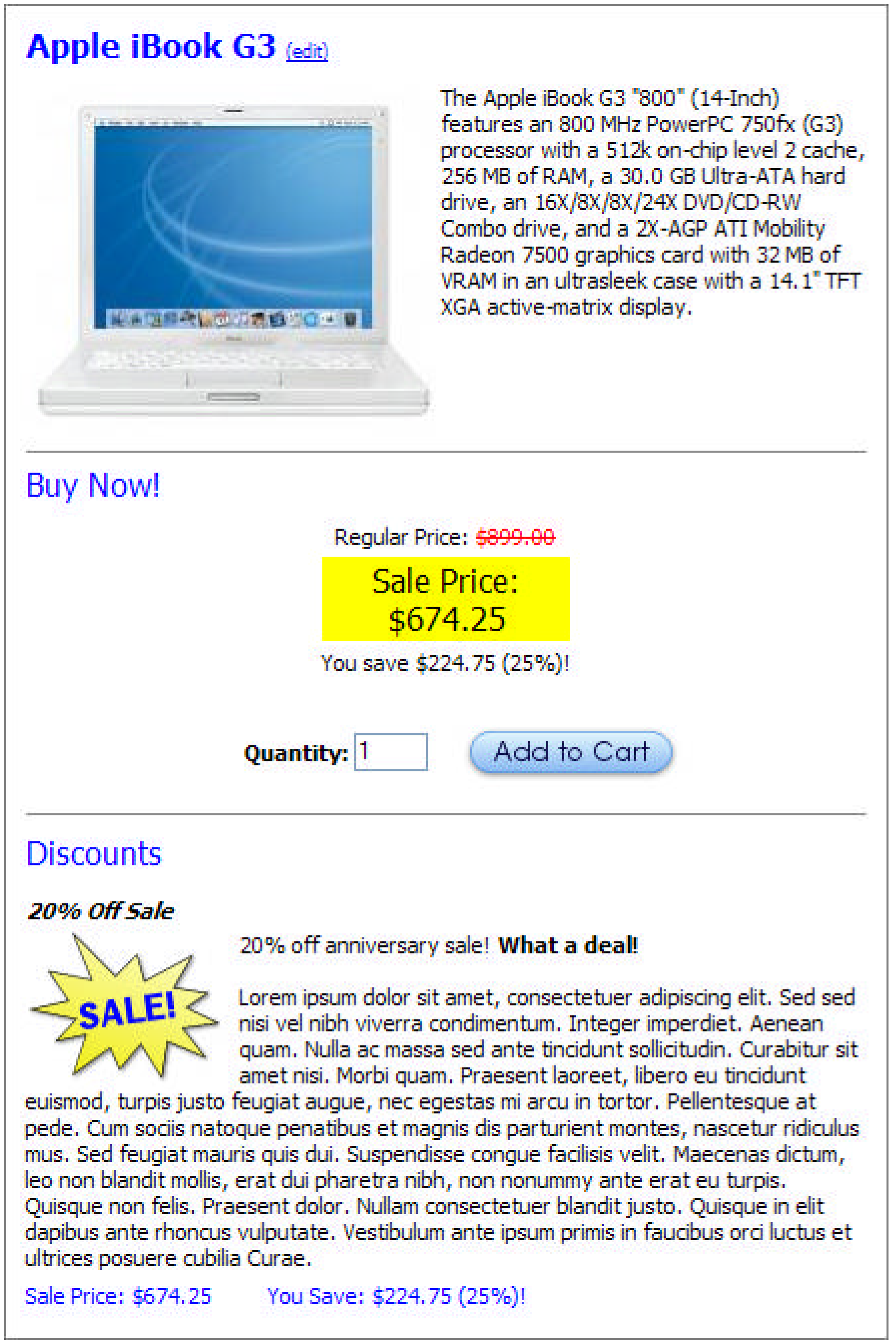
Discounts can be advertised in your storefront to attract customers, let them know more about the discount, and how to get it. They appear below products, and in the checkout.

Enabling Advertising

Advertising is enabled on the **discount's record (Section 7.5.4)**, by checking the **Advertise** field. If you would like the conditions of the discount (if any) to be explained in the advertisement, check the **Advertise Conditions** field as well.

Advertisements Below Products

If advertising is enabled for a discount, it will appear on the product's detail page in your storefront, as in this example:



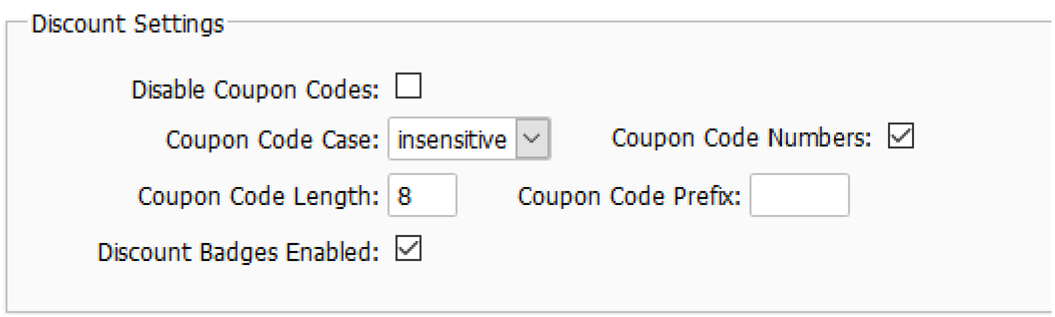
In the above example, the advertisement is in the section labeled **Discounts**.

The same discount section with **Advertise Conditions** enabled would look like this:

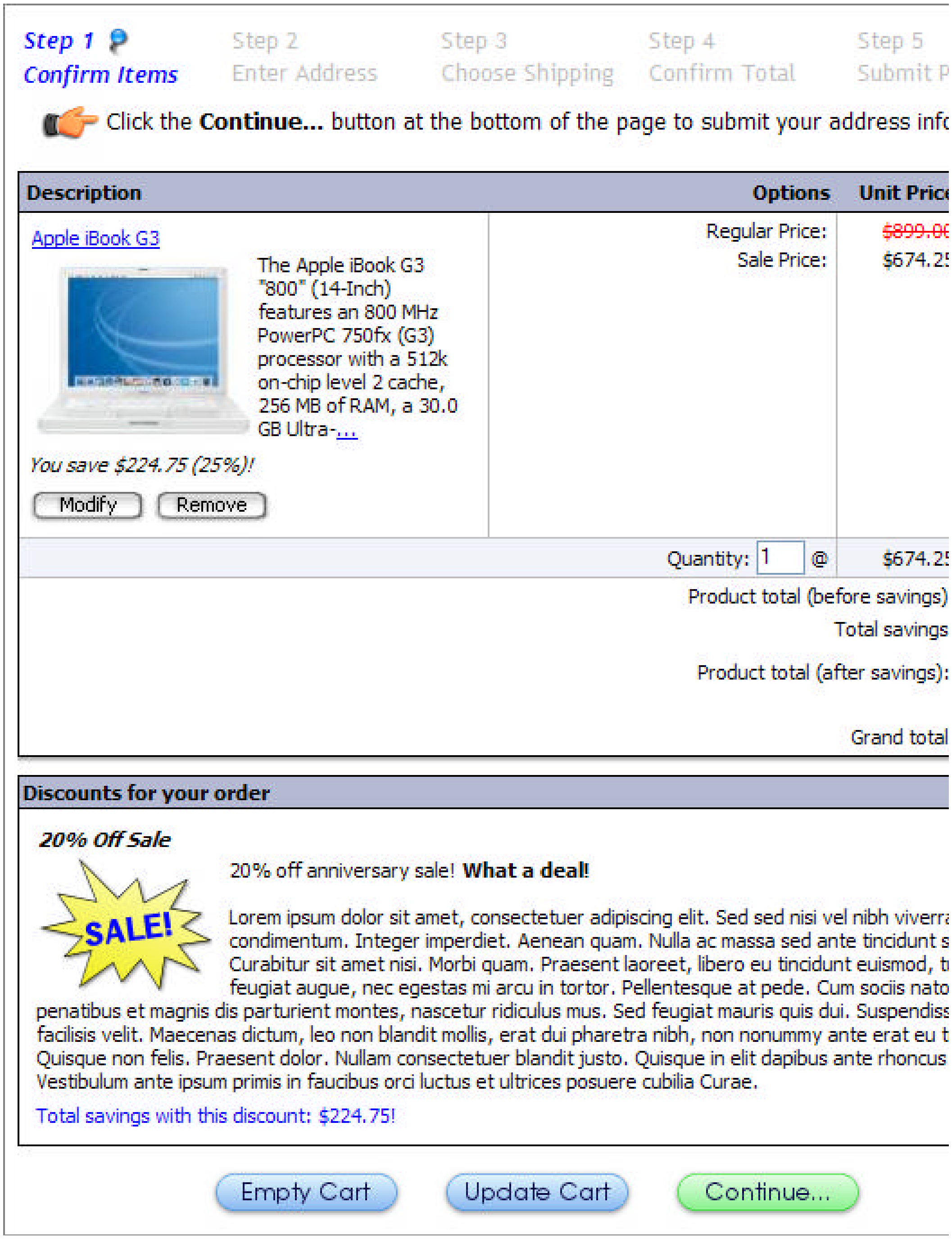
The conditions are shown in the **Qualifications for this discount** section.

Advertisements at Checkout

There are 2 ways to display advertisements during checkout. They can either appear below the checkout form, or they can appear in a popup when you click a link in the product's row. This is controlled by the **Discount Checkout Display** field in the **Discounts** section of the **Store Settings page (Section 6.1)**:

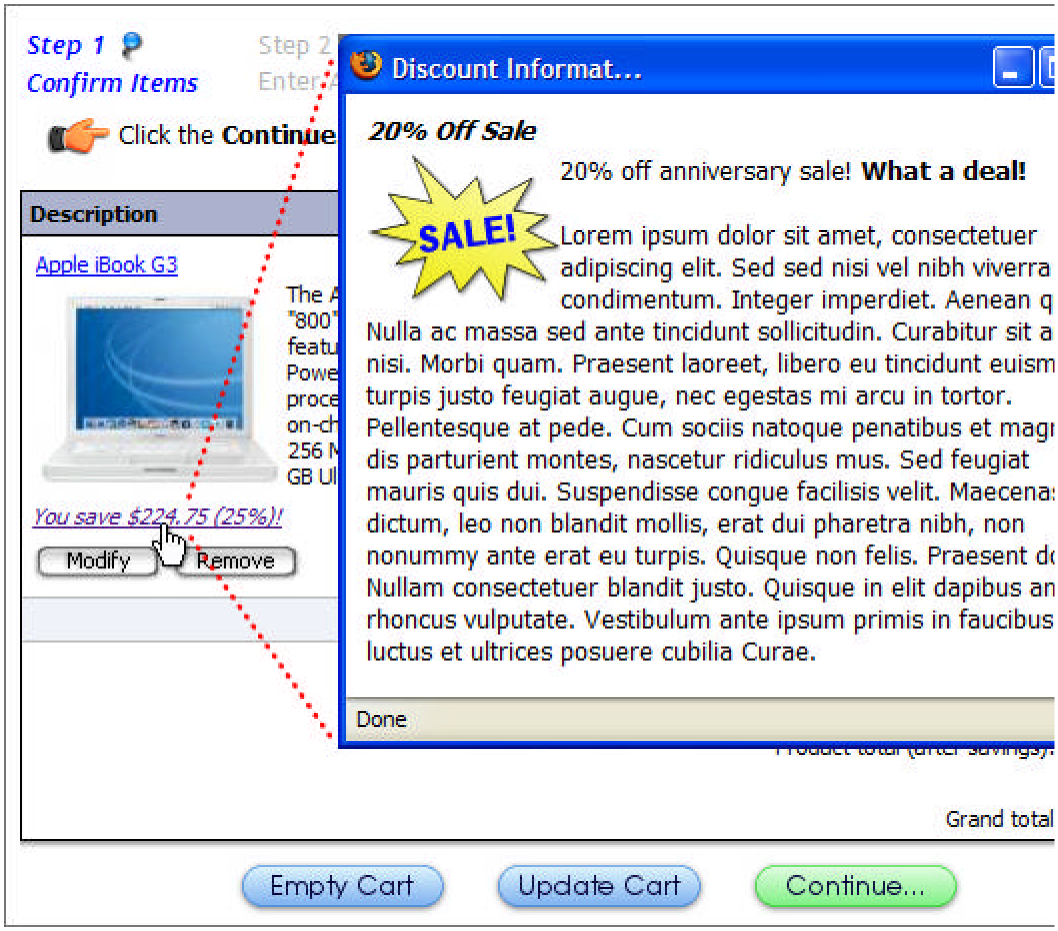


When **Discount Checkout Display** is set to **below checkout form**, the discounts appear like this:



In the above example, the advertisement appears in the **Discounts for your order** box.

If **Discount Checkout Display** is set to **popup window**, the advertisement appears when you click the link below the image of the product:



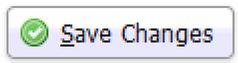
7.5.7 Coupon Codes

Overview

Coupon Codes are currently used for Discounts, but will also be supported for any record that supports rules. They can be used to require a coupon code be entered in order to obtain a discount.

Enabling

1. This condition requires that the coupon code form be visible at the bottom of the checkout. The coupon code form can be disabled, so the first step is to ensure that it is enabled. To do this, open the **Store Settings page (Section 6.1)**, and locate the Discounts section:

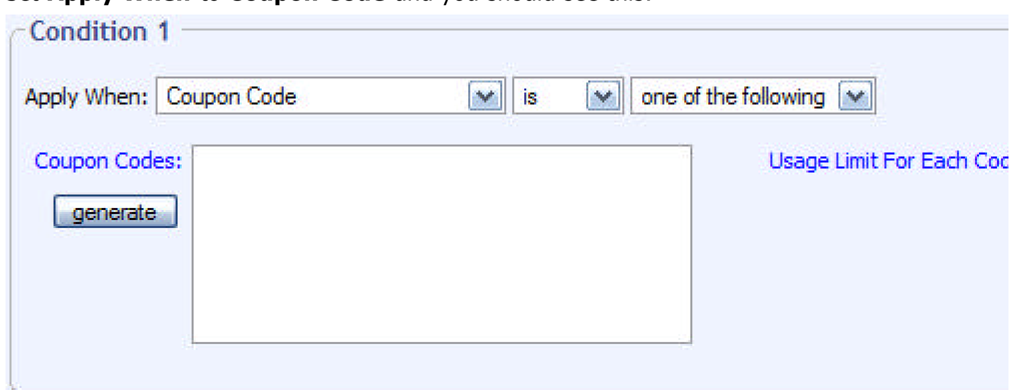
Confirm that the **Disable Coupon Codes** field is NOT checked. If it is checked, uncheck it and click 

2. Open the discount you wish to add the coupon code to

3. Click the **Add Rule** button and choose **Blank Rule**

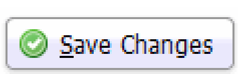
4. Change the **Type** field to **Order (in progress)**

5. Set **Apply When** to **Coupon Code** and you should see this:



6. If you already have one or more codes you wish to add, enter them in the **Coupon Codes** field. If you would like Squirrelcart to generate the codes for you, click the **Generate** button and follow the prompts.

7. If you wish to limit the number of times each code can be used, enter a value in the **Usage Limit For Each Code** field.

8. Click 

Obtaining Discount in Storefront

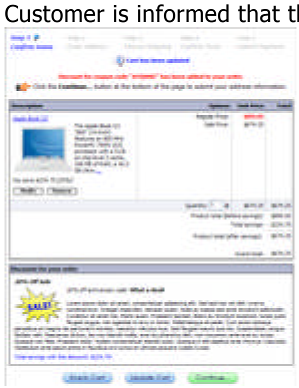
The customer does the following to obtain the discount:

1. Customer satisfies the **Discount What** setting by either adding the correct product to the cart, OR if an "Entire Order" discount is configured, the customer can add any item to the cart.

2. Customer enters the coupon code in the coupon code form found below the checkout table:

3. Customer clicks **Continue** or **Update Cart**

4. Customer is informed that the discount has been added.



7.6 Quantity Based Discounts

Overview

Squirrelcart's regular Discounts feature described in **Managing Your Store > Discounts** supports very complex discounts. While that feature does allow you to create quantity based discounts, it can be time consuming to use our regular Discounts feature to create quanity based discounts when you need to create a lot of them.

Our Quantity Based Discounts feature (new as of Squirrelcart v2.6.1) is designed to allow you to create quantity based discounts directly on your product records without needing to create a discount record.

With Quantity Based Discounts you can:

- Provide discounts to all customers using as many price levels as you like:

Regular Pricing:

Quantity	Price
1 - 10	$10.00
11 - 50	$ 9.00
51 or more	$ 8.00

- Provide those same types of discounts to designated groups, to restrict quantity based discounts to only members of a certain group

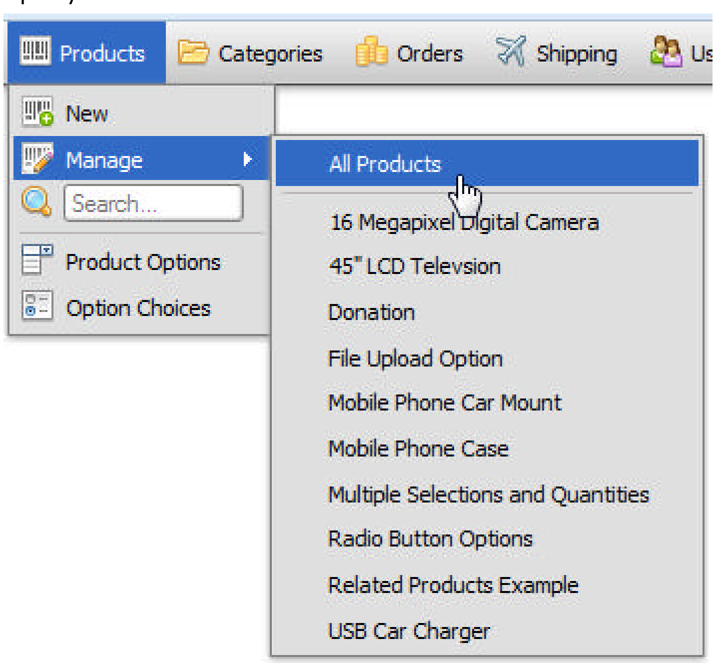
Wholesale Group Pricing:

Quantity	Price
1 - 10	$ 5.00
11 - 50	$ 4.50
51 or more	$ 4.00

Setting up Quantity Based Discounts for Regular Customers

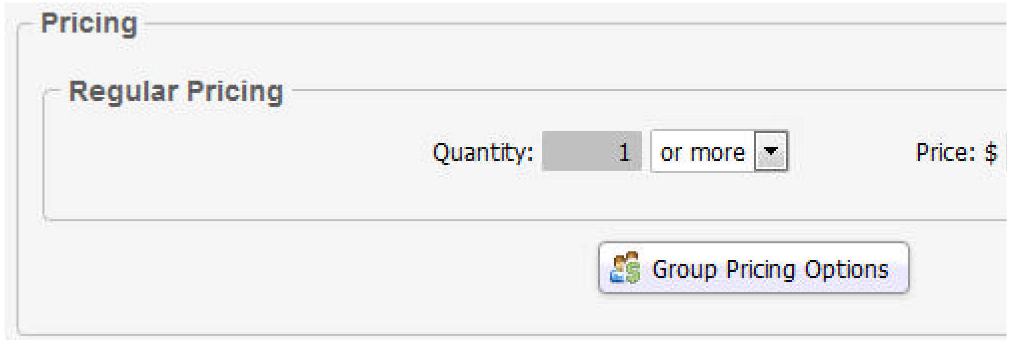
This example will explain how to setup quantity based discounts for your regular customers similar to the table shown above labeled **Regular Pricing.** This example assumes that the regular price for this product is $10.00.

1. Open your Products table:

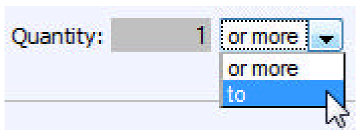


2. Click on the product you wish to edit

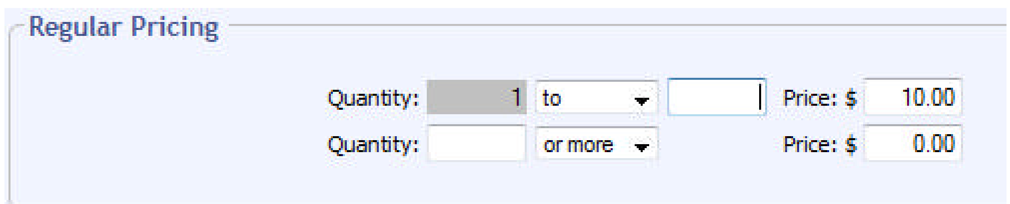
3. Locate the pricing section of the product's record:



4. Change the select (drop down) field from **or more** to **to:**



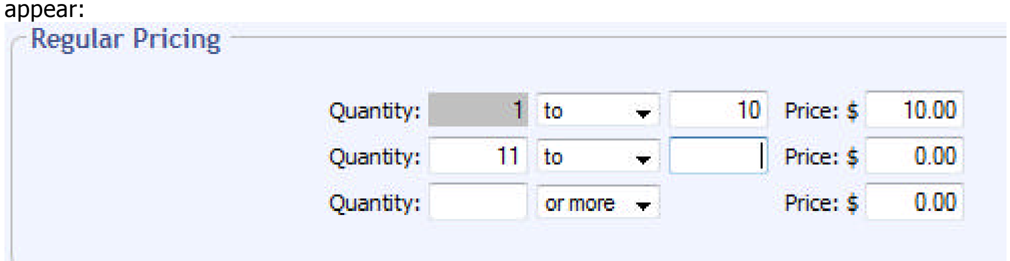
5. A new pricing row will appear:



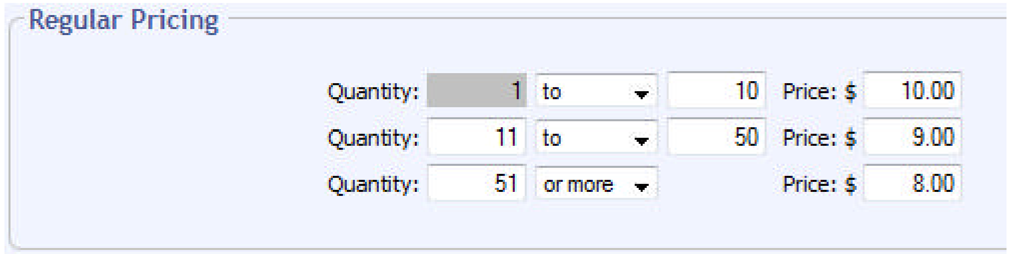
6. For this example, enter a value of 10 for the 2nd quantity field in the first pricing row (shown above with an insertion cursor inside the field)

7. Enter a value of 11 in the first quantity field in the second pricing row

8. Change the select drop down field in the second pricing row to **to**, and another new row will appear:



9. Continue to enter pricing in that fashion until you end up with the following:



Notice how this matches the example at the top of the page:

Regular Pricing:

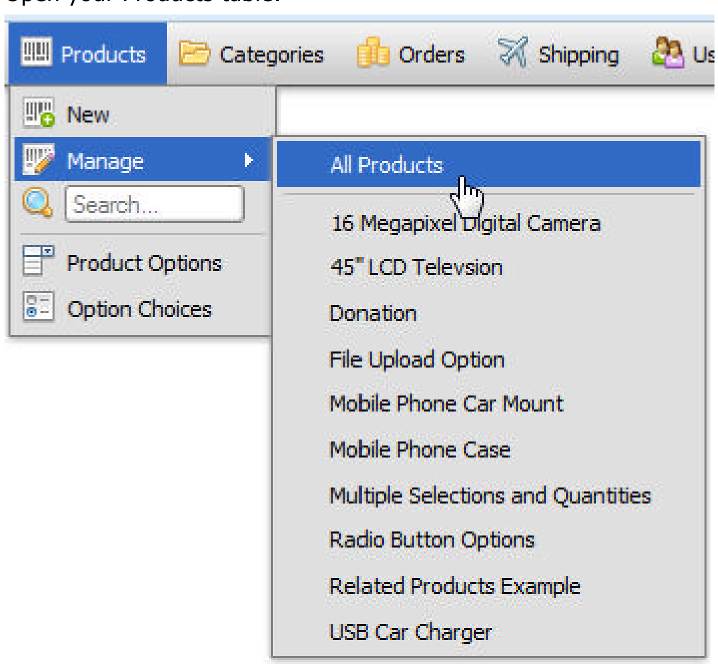
Quantity	Price
1 - 10	$10.00
11 - 50	$ 9.00
51 or more	$ 8.00

> If you make a mistake or need to remove quantity based pricing, just change the first drop down field in the price section you are working with back to **"or more"** and the pricing rows below it will be removed.

Setting up Quantity Based Discounts for Group Members

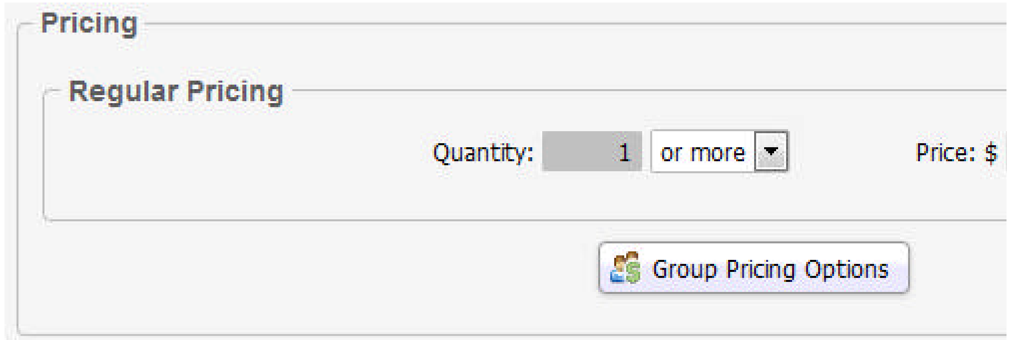
If you wish to give members of a group special pricing, the process is very similar to the one explained above:

1. Open your Products table:

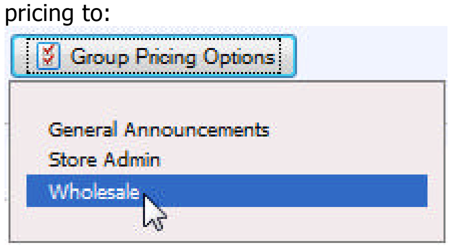


2. Click on the product you wish to edit

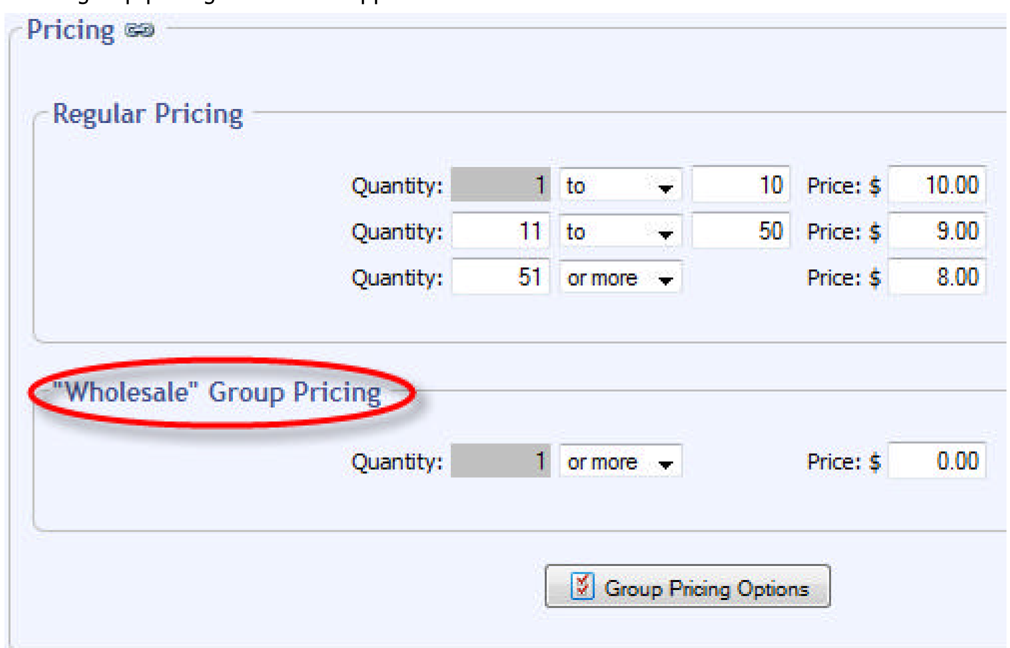
3. Locate the pricing section of the product's record:



4. Click the **Group Pricing Options** button, and select the group(s) you wish to offer special pricing to:



5. A new group pricing section will appear:



6. In the new section, follow the same process outlined above in **Setting up Quantity Based Discounts for Group Members**

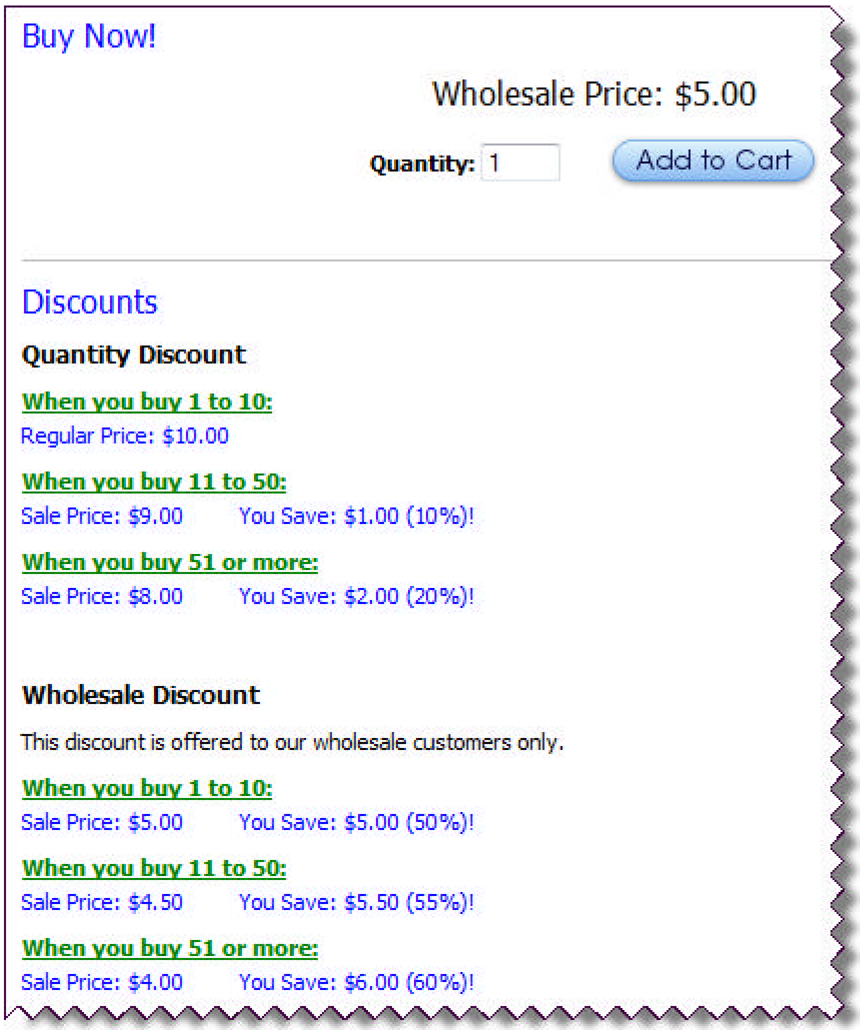
7. This process may be repeated for any number of groups you wish

To remove quantity based pricing for a group, click the red X icon in the uppper right hand corner of that group's pricing section.

Advertising

How it Works

By default, quantity based discounts are advertised to your customers on a product's detail page. Discounts as described in the two examples above would appear below the "add to cart" button as follows:



Specifics

- Only discounts potentially available to your customers are advertised. If the customer viewing this product was NOT a member of your **Wholesale** group, they would not see the **Wholesale Discount** advertisement.
- When there are more than one matching pricing levels, the customer will receive the lowest price. For example, if a customer in the **Wholesale** group adds 15 of this item to the cart, they will pay $4.50 for each unit - not $9.00.

- The price label above the **Add to Cart** button will display the corresponding price label for the discount that they will receive should they add this item to the cart
- The price above the **Add to Cart** button will display the price they will be charged if they add 1 of this item to the cart.

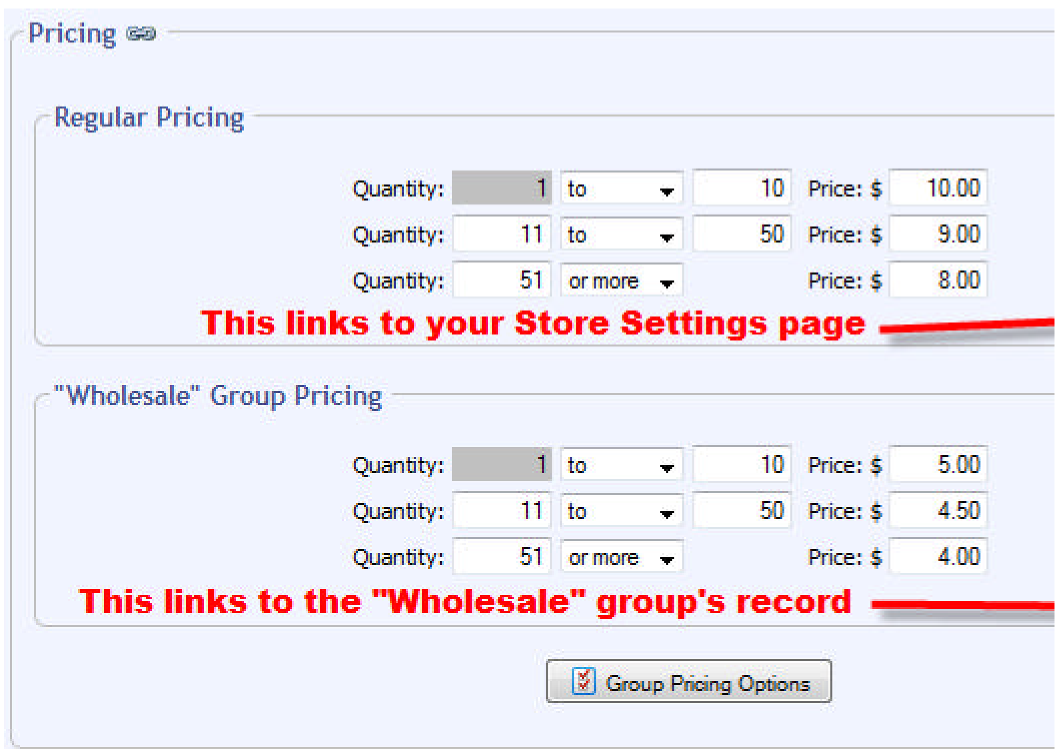
Advertising Settings

Settings for quantity based discount advertising are stored in different places depending on who the discount is assigned to.

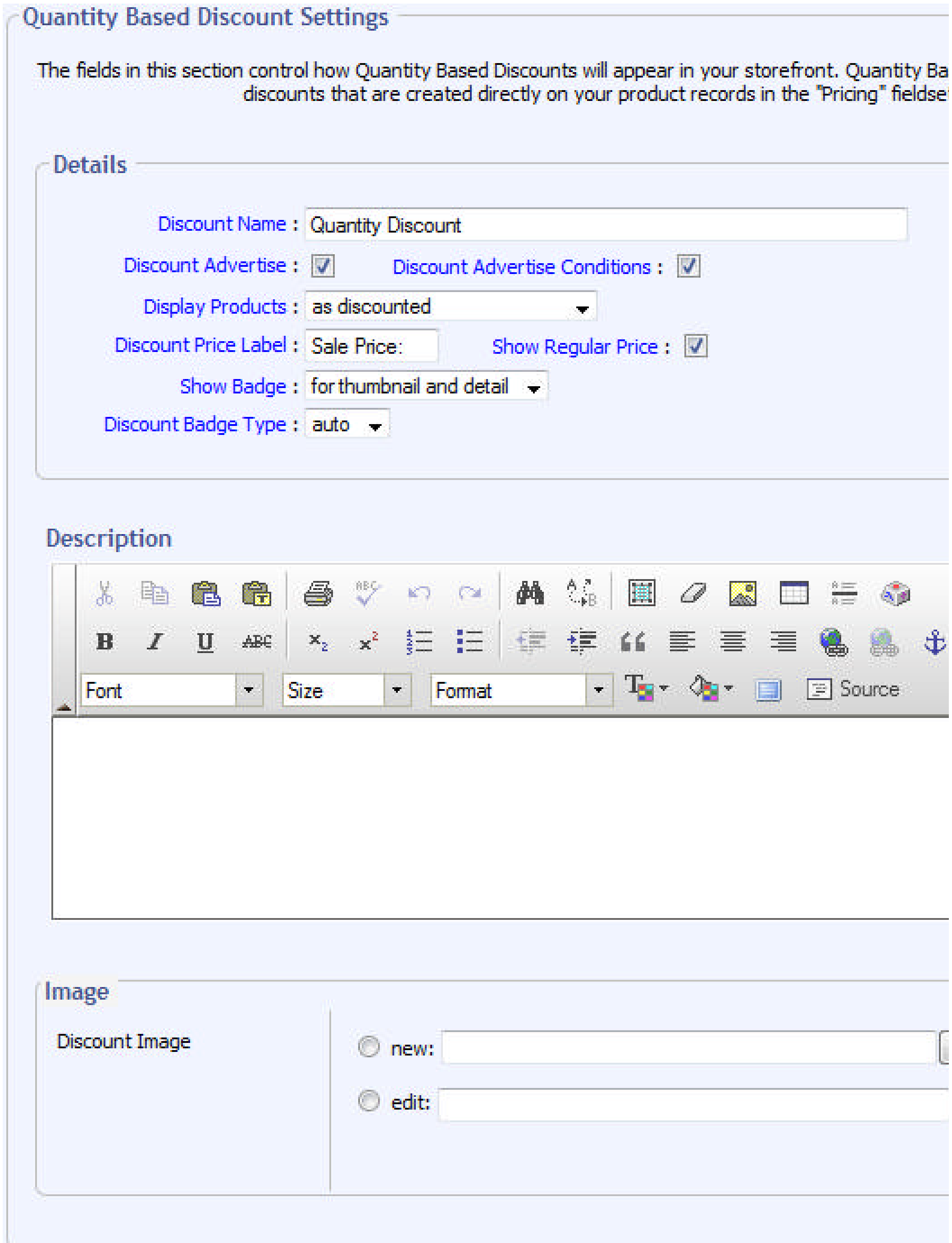
Advertising for discounts that apply to all customers (listed in the **Regular Pricing** section of a product's record) is controlled by the **Quantity Based Discount Settings** fieldset on your **Store Settings page (Section 6.1)**.

Advertising for discounts that apply to groups is controlled by the **Quantity Based Discount Settings** fieldset on that **group's record (Section 7.3.7)**.

You'll find a shorcut link to these fieldsets inside the quantity based discount pricing fieldsets labeled **discount settings:**



Clicking either of these links will bring you to a fieldset that looks like this:



These settings work exactly the same as they do on regular discount records. See **this page (Section 7.5.6)** for more information.

7.7 Automatic Emails - Overview

Overview

By default, Squirrelcart automatically sends emails when certain events occur in your store. We call these **Automatic Emails**. There are several built-in automatic emails.

They can include attachments, custom messages, and can be personalized.

You can also create custom automatic emails, and can control when they are sent using our rule system.

Built-in Automatic Emails

Squirrelcart has the following built-in automatic emails:

Cart - Reminder to Complete Order

This email is sent to customers that have not completed their order within a certain timeframe. It can be used as a reminder or to offer assistance and incentives to finish their order. This email is sent via Squirrelcart's **cron.php script (Section 6.14)**. If you would like Squirrelcart to automatically send this email to customers that have not completed their orders you will need to configure a Cron job to call Squirrelcart's cron script. See **this topic (Section 6.14)** for more information.

You can also manually send this email via a record action when viewing carts in the control panel (under **Orders > Carts**).

Forgot Password

This is used to send an email to a user that they can use to reset their account if they have forgotten their username or password. It is automatically sent when the user submits the **Forgot Password** form in the storefront. You can also send a user this email yourself via a record action when viewing the Users table.

New Account Notification to Staff

This is used to send an email to staff when a new user account is created, including information from the user record. It is automatically sent when the user creates a new account, and when you create a user account in the control panel.

New Account Welcome to Customer

This is used to send a welcome email to a customer, when they create a new user account. It is automatically sent when the user creates a new account, and when you create a user account in the control panel. You can also resend this email via a record action when viewing the Users table.

Order - Notification to Staff

This is used to send an email to staff notifying them of a new order. It includes the details from the order. It is automatically sent when the user places an order.

Order - Receipt to Customer

This is used to send an email receipt to a customer when they place an order. It includes the details from the order. It is automatically sent when the user places an order. You can also resend this email via a record action when viewing the Orders table.

Order - Refund Notification to Customer

This is used to send an email to a customer notifying them that a refund has been submitted for their order. It is automatically sent when you assign a status of **Refund Issued** to an order.

Order - Ship Notification to Customer

This is used to send an email to a customer notifying them that their order has shipped. It can also include a tracking number, and information on how to track their shipment.

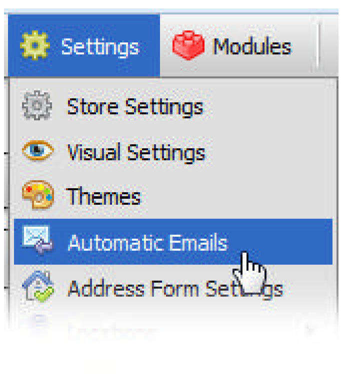
It is automatically sent when you assign a status of **Shipped** to an order. When you create a shipment in the control panel, a status of **Shipped** is automatically assigned to the order, and will also trigger this email.

Order - Status Note to Customer

This is used to send an email to a customer notifying them that a note has been added to their order. It is automatically sent when you assign a status of **Note for Customer** to an order.

Viewing Automatic Email Settings

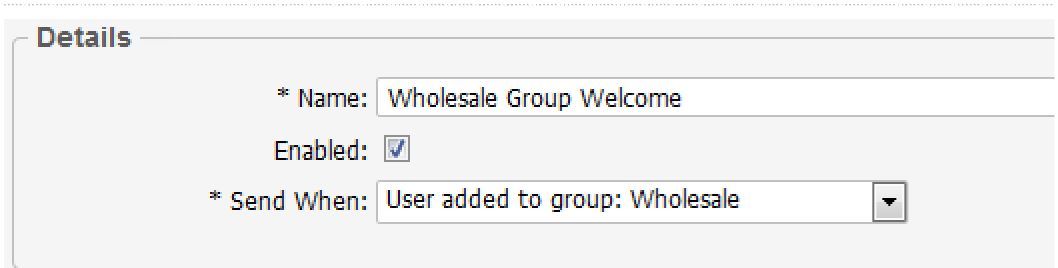
Each automatic email has a corresponding record in your control panel, used to control the email. You can view the settings by clicking the **Automatic Emails** menu link in the control panel:



Record Overview

Below you will find a list of the fields seen on your Automatic Email records. Please note that some built-in automatic emails do not include all of these fields.

Details



Name

This is for your use only, to help identify the automatic email.

Enabled

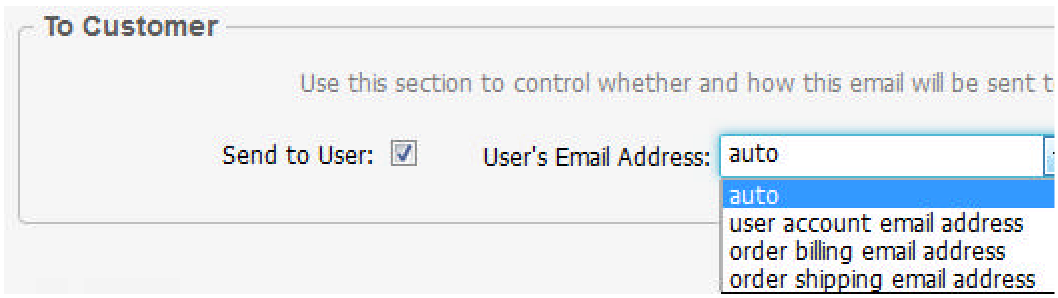
This can be used to turn the automatic email on and off without having to delete it.

Send When

This controls when the email is sent, and is like a trigger. Possible values are:

- *Order placed* - email is sent when an order is placed
- *Order status set: STATUS_NAME* - email is sent when a status is assigned to an order
- *User added to group: GROUP_NAME* - email is sent when a user is added to a group
- *User created* - email is sent when a new user is created

To Customer



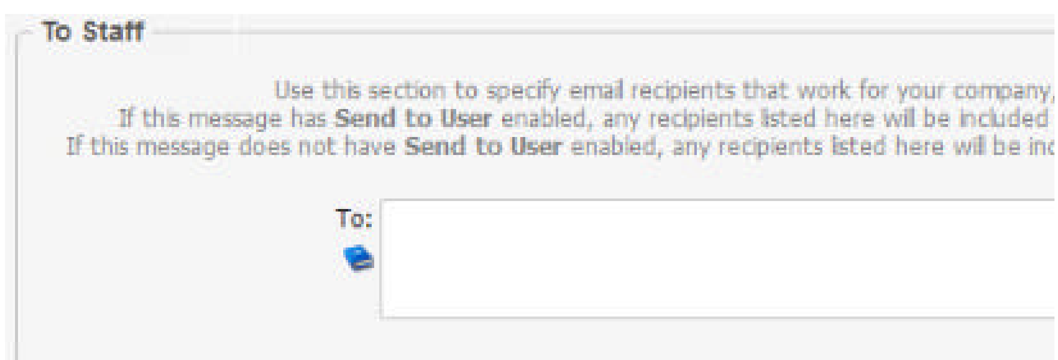
Send to User

When checked, the email will be sent to the associated user.

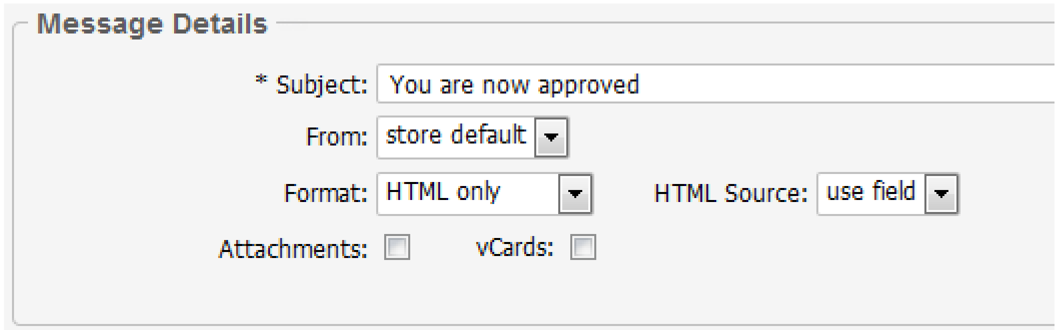
User's Email Address

This determines which email address to use when sending an email to a user. When set to **auto**, Squirrelcart will use the email address on the user account. If no user account exists, the billing email address from an order will be used, followed by the shipipng email address.

To Staff



Message Details



Subject

Subject of the email. Variables may be used in this field. See the variable guide in this section for more info.

From

This controls the email address (and name) that the email will appear to come from. When set to **store default**, the default from settings on the store settings will be used.

Format

This controls the format of the message content. Messages can be sent in HTML, Text, or multi-part (both HTML and text, in one message).

HTML Source

This tells Squirrelcart were to obtain the HTML for the message. You can specify either a field, or a file.

Text Source

This tells Squirrelcart were to obtain the text for the message. You can specify either a field, or a file.

Attachments

Checking this field will allow you to assign attachments to the email.

vCards

This option is only available when the Contact module is installed. See **this page (Section 10.5.3.1)** for more info.

HTML Message

This field is used to enter your HTML formatted message, when **HTML Source** is set to **use field**. Variables may be used in this field. See the variable guide in this section for more info.

HTML File

This field is used to select or upload your HTML file containing an HTML formatted message, when **HTML Source** is set to **use file**. Variables may be used in this file. See the variable guide in this section for more info.

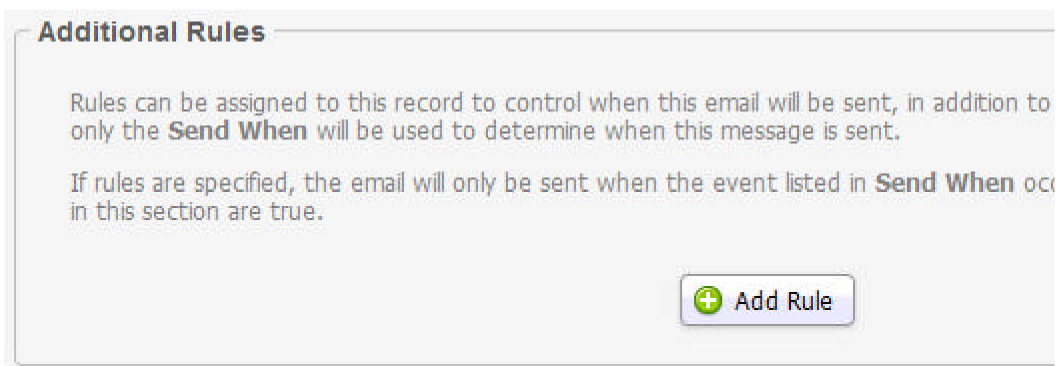
Text Message

This field is used to enter your plain text formatted message, when **Text Source** is set to **use field**. Variables may be used in this field. See the variable guide in this section for more info.

Text File

This field is used to select or upload your file containing a plain text formatted message, when **Text Source** is set to **use file**. Variables may be used in this file. See the variable guide in this section for more info.

Additional Rules



For more information on how rules work, see the **Managing Your Store > Rule System** section of this documentation.

Variable Guide

Automatic emails can be associated with an order, an order status, a user account, or a shipment. Variables can be used to include information from these records in the email message or subject. This can be used to include a user's first name in a greeting, or any other information you might want to include. Variables must be included inside a set of braces, as in this example:

```
Hi {Order_Bill_First_Name},
```

```
Thanks again for your order...
```

Squirrelcart will automatically replace the variable with the corresponding value.

Order Variables

Order_*

Any field from an order record can be used as a variable. For a list of fields, open any order in edit mode and view the field labels. Some examples: *Order_Grand_Total, Order_Ship_First_Name, Order_Bill_Email_Address,* etc...

Order_Detail_Customer_HTML

This variable contains HTML to display the entire order in detail, formatted specifically for the customer.

Order_Detail_Customer_Text

This variable contains plain text to display the entire order in detail, formatted specifically for the customer.

Order_Detail_Merchant_HTML

This variable contains HTML to display the entire order in detail, formatted specifically for the merchant.

Order_Detail_Merchant_Text

This variable contains plain text to display the entire order in detail, formatted specifically for the merchant.

Order_Status_Note_HTML

This contains a note (if you entered one) corresponding to the last order status assigned to an order. It is formatted for use in an HTML message.

Order_Status_Note_Text

This contains a note (if you entered one) corresponding to the last order status assigned to an order. It is formatted for use in an plain text message.

Order_Status

This contains the name of the last status assigned to an order, such as *Shipped,* or *Refund Issued***.**

Order_Status_Date

This contains the date the last status was assigned to an order**.**

User Account Variables

First_Name, Last_Name, etc...

Any field from a user record can be used as a variable. For a list of fields, open any user record in edit mode and view the field labels. Some examples: *First_name, Email_Address,* etc...

Account_Fields_HTML

This is a list of the fields assigned to the user account, formatted for use in an HTML message.

Account_Fields_Text

This is a list of the fields assigned to the user account, formatted for use in a plain text message.

Account_Admin_Opts_HTML

This includes some links to edit and view a user's account in the control panel, formatted for use in an HTML message. It should only be included in emails being sent to staff only.

Account_Admin_Opts_Text

This includes some links to edit and view a user's account in the control panel, formatted for use in a plain text message. It should only be included in emails being sent to staff only.

Shipment Variables

These variables are availalbe for use in the shipment notification email, sent when a status of "shipped" is assigned to an order.

Shipment_record_number

Record number of the shipment record

Shipment_Tracking_Number

Shipment_Method

Name of the shipment method, as in *FedEx Ground*

Shipment_Courier

Name of the courier, as in *UPS*

Shipment_Courier_rn

Record number of the shipping courier record

Shipment_Weight

Shipment_Cost

Shipment_Shipped_On

Date the shipment was created

Forgot Password (Account Reset) Variables

These variables are available for use in the built-in **Forgot Password** email, sent to reset a user's account.

PWD_Reset_URL_HTML

This contains the URL that will initiate an account reset, for use in an HTML formatted email.

PWD_Reset_URL_Text

This contains the URL that will initiate an account reset, for use in an plain text formatted email.

Security Info

These variables can be used to include information specific to the computer that initiated the email.

IP Address

Unique number identifying the computer.

Host Name

Unique name identifying the computer.

User Agent

Unique string identifying the browser

Referer

The URL that referred the user to your store

Referral Date

The date when the user was first referred to your store

Store Info

These variables include information about your store, from your **Store Settings page (Section 6.1)**.

Store_Company_Name

Company name of your store

Store_Street

First street address line

Store_Street_2

Second street address line

Store_City

Store_State_or_Province

Full name of state or province. Example: *California*

Store_State_Abbreviation

Abbreviation of state or province. Example: *CA*

Store_State_Other

Alternate state / province name

Store_Postal_Code

Store_Country

Full name of country. Example: *United States*

Store_Country_Alpha_2

2 letter ISO-3166 abbreviation of country. Example: *US*

Store_Country_Alpha_3

3 letter ISO-3166 abbreviation of country. Example: *USA*

Store_Customer_Service_Email

Store_URL

Other

View_Cart_URL

URL to view cart page

Constants

Squirrelcart uses constants to store information specific to your installation. The following constants can be used as variables in your emails.

Constants ending in **DYN** return a URL starting with either **http://** or **https://** depending on the protocol used in the current URL.

Constants ending in **HTTP** return a URL starting with **http://**

Constants ending in **HTTPS** return a URL starting with **https://**

SC_STORE_DIR_DYN http://www.example.com or https://www.example.com
SC_STORE_DIR_HTTPS https://www.example.com
SC_STORE_DIR_HTTP http://www.example.com

URL to the directory containing your storefront page.

SC_STORE_DIR_RELATIVE store

This is the relative path to the store folder, without the domain name and protocol. If the store dir URL is: *http://www.example.com/store* , this would be equal to **store**

SC_STORE_PAGE_DYN http://www.example.com/store.php or https://www.example.com/store.php

SC_STORE_PAGE_HTTPS https://www.example.com/store.php
SC_STORE_PAGE_HTTP http://www.example.com/store.php

SC_STORE_PAGE_NAME store.php

SC_CP_DIR_DYN http://www.example.com/squirrelcart or https://www.example.com/squirrelcart

URL to the control panel folder.

SC_CP_PAGE_DYN http://www.example.com/squirrelcart/index.php or https://www.example.com/squirrelcart/index.php
SC_CP_PAGE_HTTP http://www.example.com/squirrelcart/index.php

URL to the control panel page

SC_CURRENCY_PREFIX This matches the value specified in the control panel, and is typically a dollar sign or other currency symbol.

SC_CURRENCY_SUFFIX This matches the value specified in the control panel, and is typically a currency code, like USD or EUR

SC_DOMAIN_NAME example.com

SC_IMG_DIR_DYN http://www.example.com/sc_images or https://www.example.com/sc_images
SC_IMG_DIR_HTTPS https://www.example.com/sc_images
SC_IMG_DIR_HTTP **http://www.example.com/sc_images**

URL to the Squirrelcart image folder

SC_IMG_DIR_NAME sc_images

Name of the Squirrelcart image folder

SC_MASTER_THEME_DIR_DYN
https://www.example.com/squirrelcart/themes/squirrelcart or http://www.example.com/squirrelcart/themes/squirrelcart
SC_MASTER_THEME_DIR_HTTPS
https://www.example.com/squirrelcart/themes/squirrelcart
SC_MASTER_THEME_DIR_HTTP
http://www.example.com/squirrelcart/themes/squirrelcart

URL to the master Squirrelcart theme folder

SC_REQUEST_URL

Current URL being requested

SC_THEME_DIR_DYN http://www.example.com/squirrelcart/themes/your_theme or https://www.example.com/squirrelcart/themes/your_theme
SC_THEME_DIR_HTTPS https://www.example.com/squirrelcart/themes/your_theme
SC_THEME_DIR_HTTP http://www.example.com/squirrelcart/themes/your_theme

URL to your custom theme folder

SC_THEME_DIR_NAME your_theme

Name of your custom theme folder

7.8 Rule System - Overview

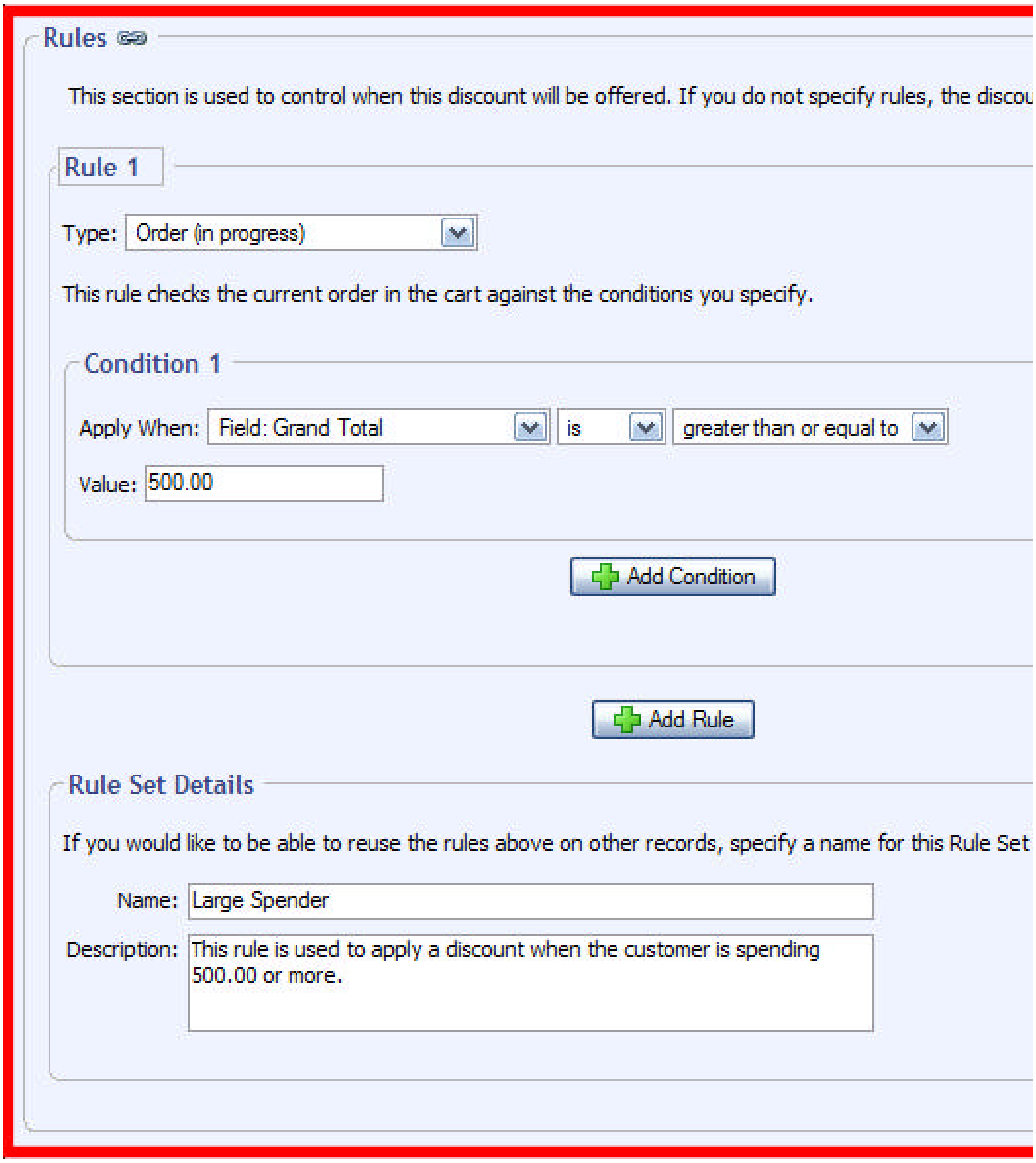
7.8.1 Rule System - Overview

Overview

Squirrelcart's rule system allows you to control when certain things will happen, based on criteria that you specify. They are used on Discount records to control when a discount will be offered, and on other records throughout Squirrelcart. Before working with the rule system, we recommend that you review this entire section of the documentation. There are 3 main components that comprise the rule system.

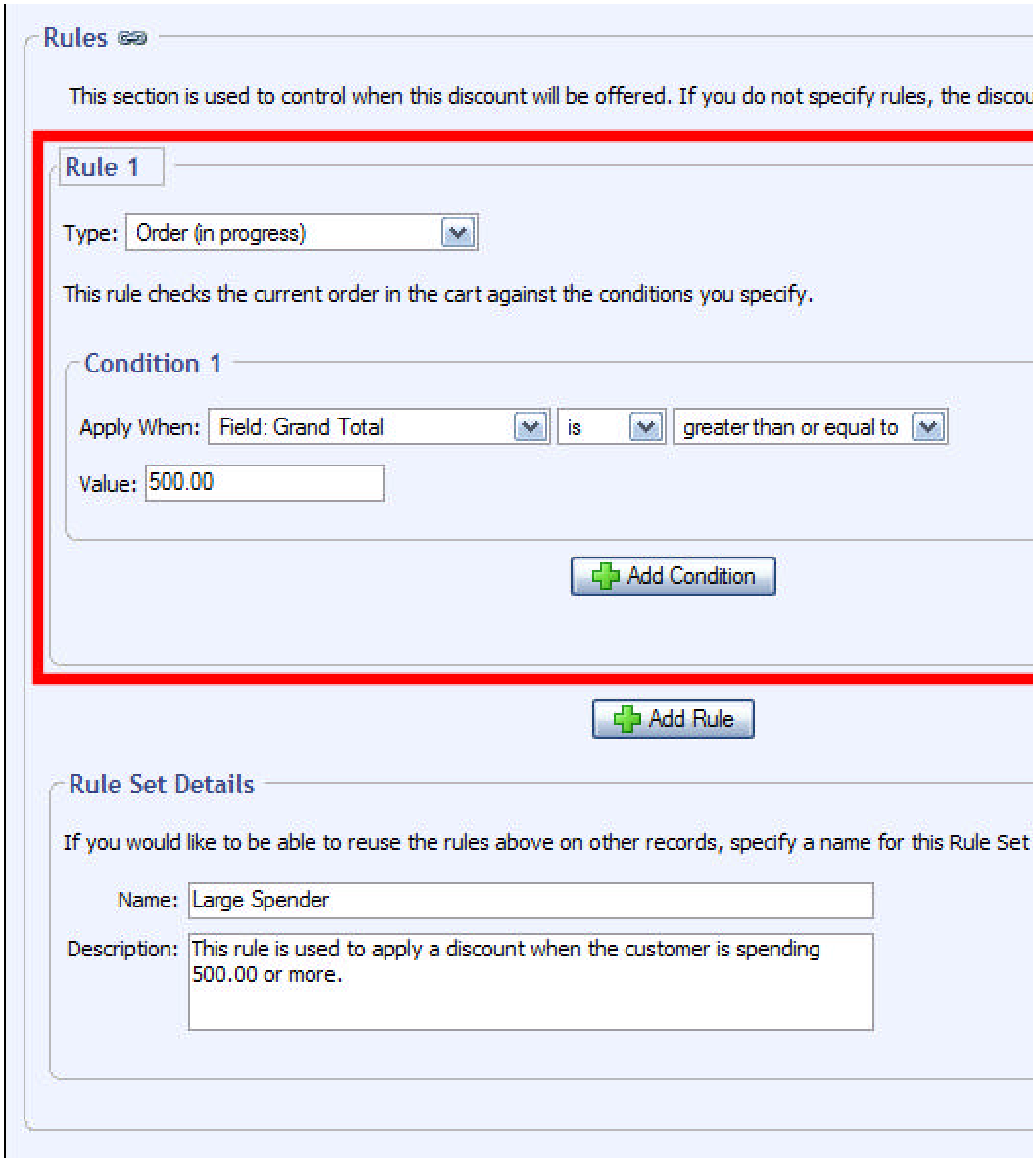
Rule Set

A Rule Set is a set of rules. You can think of it as a group that contains rules and overall information about the rules inside it. When you add 1 or more rules to a record in Squirrelcart, they are automatically added to a Rule Set. You can give a name to a particular Rule Set, a description, and a formula to describe how rules should be evaluated if there are more than 1 present. Only a single rule set can be assigned to a record in Squirrelcart. In the image below, the entire area surrounded in red is a Rule Set.



Rules

Rules are used to store similar conditions. You can think of them as a group used to store conditions that are similar in nature. There are several different type of rules, which are discussed in the **Rule** topic in this section. A Rule Set can have an unlimited number of Rules. In the image below, the entire area surrounded by red is a single Rule, named **Rule 1**.



Conditions

Conditions are used to match against criteria that you specify, specific to the Rule type you have selected. A Rule can have an unlimited number of conditions. In the image below, the entire area surrounded in red is a single Condition.

7.8.2 Rule Types

Overview

There are several different types of rules to check against specific types of information. Each rule type has different conditions available to it that fit with the type of rule chosen. They are used to designate the overall information the rule needs to look at. The type of rule is chosen using the **Type** field on the rule. Each rule type is described below, along with the conditions that are available for it.

Computer/Browser

This rule type allows you to match conditions against information specific to the customer's computer and browser. The available conditions include:

- Host Name
- IP Address
- Referring URL
- User Agent

Customer

This rule type allows you to match conditions against information specific to the customer's user account. The user must be logged in for this rule to be able to check conditions. If the customer is not logged in, conditions on this rule type will fail. The available conditions include every field in the Customers table.

Date

This rule type allows you to match conditions against information specific to the current date and time. There is only one single condition available to this rule type "Current Date and Time", which can be matched in many different ways.

Order (last completed)

This rule type allows you to match conditions against information specific to the last order a logged in user has placed. This rule will check the user's last order, and return true if that order matches the conditions specified. The available conditions include:

- Category: Quantity From - this allows you to choose one or more categories, and specify the number of items that should be from those categories.
- Field: * (every field in the Orders table)
- Product Quantity Total - this is the total number of units on an order. If they ordered 3 of Item A, and 2 of Item B on a single order, the "Product Quantity Total" for that order would be 5.
- Product: Quantity - this allows you to choose one or more products, and specify how many of those products must be in the order
- Status (anytime assigned) - this allows you to check an order for a particular order status, no matter when it was assigned
- Status (most recently assigned) - this allows you to check an order's most recently assigned status
- Status Date: *Status Name* - this allows you to check the date that a particular status was assigned.

Order (any completed)

This rule type allows you to match conditions against information specific to a single order previously placed. This rule will check all orders the logged in customer has placed, and return true if any single order matches all the conditions specified. The available conditions are exactly the same as shown above for the **Order (last completed)** rule type.

Order (in progress)

This rule type allows you to match conditions against information specific to the order currently in progress (in the cart). The available conditions include:

- Category: Quantity From - this allows you to choose one or more categories, and specify the number of items that should be from those categories.
- Coupon Code - this allows you to check coupon codes entered by the customer
- Field: * (every field in the Orders table)
- Product Quantity Total - this is the total number of units on an order. If they have 3 of Item A in the cart, and 2 of Item B, the "Product Quantity Total" would be 5.
- Product: Quantity - this allows you to choose one or more products, and specify how many of those products must be in the order

Orders (completed - cumulative)

This rule type allows you to match conditions against cumulative information from all prior orders for the logged in customer. For example, to check the total spent on all orders to date. The available conditions include:

- Category: Quantity From - this allows you to choose one or more categories, and specify the number of items that should be from those categories.
- Field: * (every field in the Orders table that can be added together)
- Number of Orders
- Number of Products
- Product: Quantity - this allows you to choose one or more products, and specify how many of those products must be in the order

> By default, the Orders (completed - cumulative) rule type will check against all prior orders for the logged in customer. If you wish to only check orders that match certain criteria, a Rule Filter may be used. See the **Rule Filter topic (Section 7.8.3.5)** in this section for more information.

7.8.3 Adding Rules

7.8.3.1 Adding Rules - Overview

Overview

This section contains information and examples explaining how to add rules and conditions. The topics in this section should be read in order.

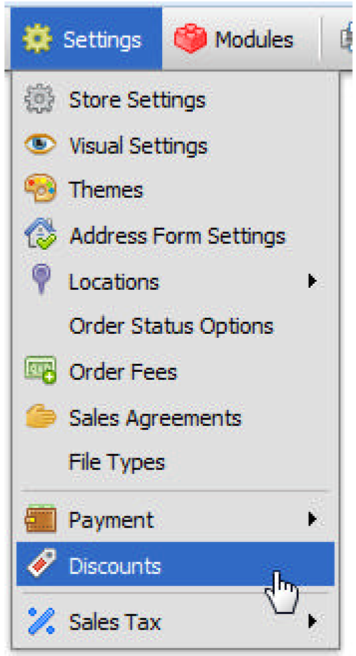
You can create rulesets on the record you are assigning them to (Discounts, Shipping Rules, etc...).

7.8.3.2 Adding a Rule with One Condition

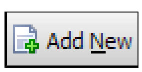
Adding a Single Rule with a Single Condition

In this example, we are adding a discount that will only be offered when the date is between March 20th 2006 and June 21st 2006.

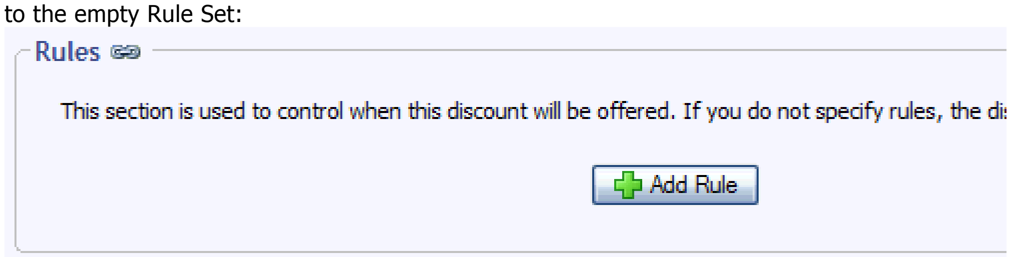
1. Open the record you wish to work with that supports rules. For this example, we are working with a new discount record. Click here:



2. Then click

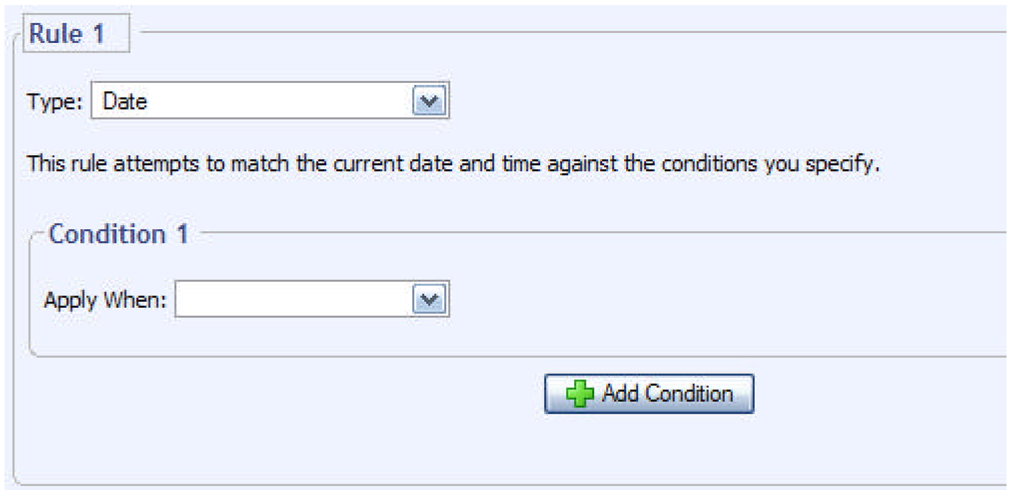


3. Fill out the top section of the record, using the Discounts section as a guide. Then scroll down to the empty Rule Set:



4. Click the **Add Rule** button and click **Blank Rule**

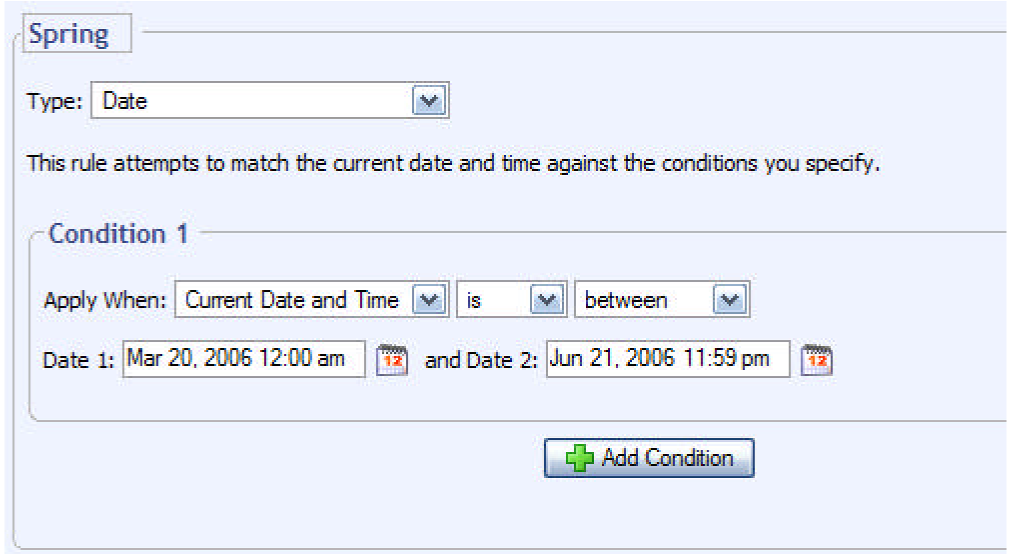
5. Change the Type field to **Date.** You should see a **Loading Rule** message, followed by a **Adding Condition** message. Wait for both to dissapear, and you are left with a blank Date rule with a single blank condition.

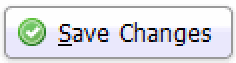


6. If it helps you to remember what this rule is supposed to be doing, you can change the name of the Rule by clicking on it. In this example, change the rule name to **Spring** by clicking on the **Rule 1** name and typing in the field.

7. Change the **Apply When** field to **Current Date and Time**. Then change the 3rd field (the Operator) to **Between**

8. Change the **Date 1** and **Date 2** fields to match the start and end date we are matching against. You should then see the following:



9. Click 

7.8.3.3 Adding Additional Conditions to a Rule

Adding Additional Conditions to Existing Rule

Using the same example as we started in the topic previous to this one, let's assume that you need to add another condition to your **Spring** rule, to offer this same discount for the Spring and the Winter (skipping over the summer). The rule will then match like this - "Current Date and Time is *in Spring*" OR "Current Date and Time is *in Winter*".

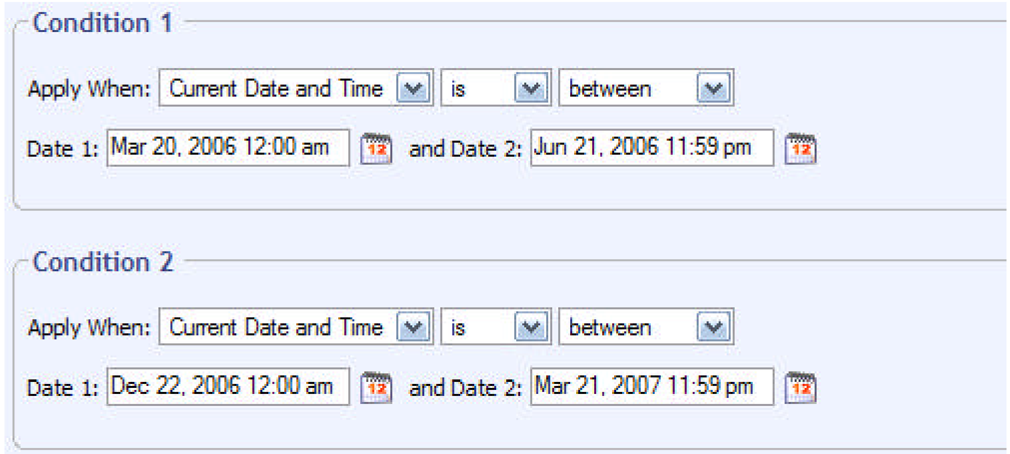
1. Open the record previously saved

2. Change the name of the Rule if you like, to something like **Spring and Winter**

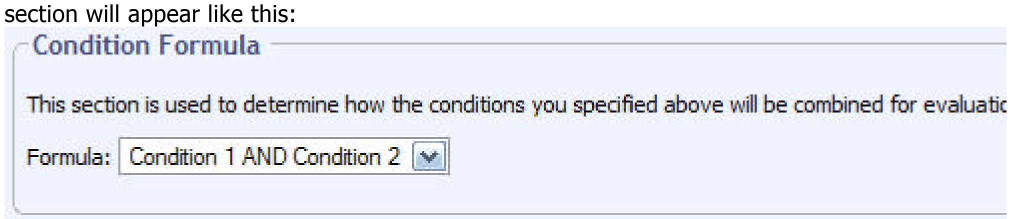
3. Click the **Add Condition** button. A new blank condition will be added below the first one.

4. Change the **Apply When** field to **Current Date and Time**. Then change the 3rd field (the Operator) to **Between**

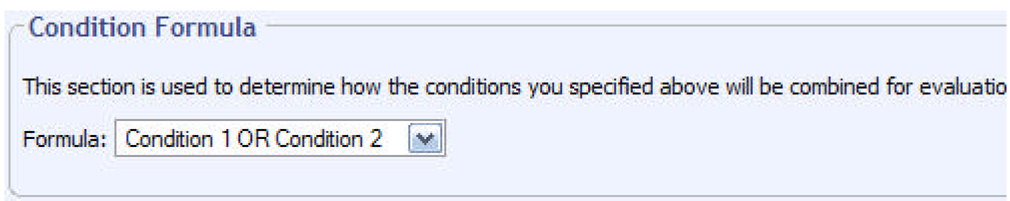
5. Change the **Date 1** and **Date 2** fields to match the start and end date we are matching against. Your conditions should then appear as follows:

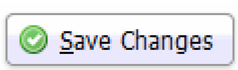


6. When there is more than one condition on a Rule, a **Condition Formula** section will appear below them to control how the conditions will be evaluated. By default, for this example that section will appear like this:

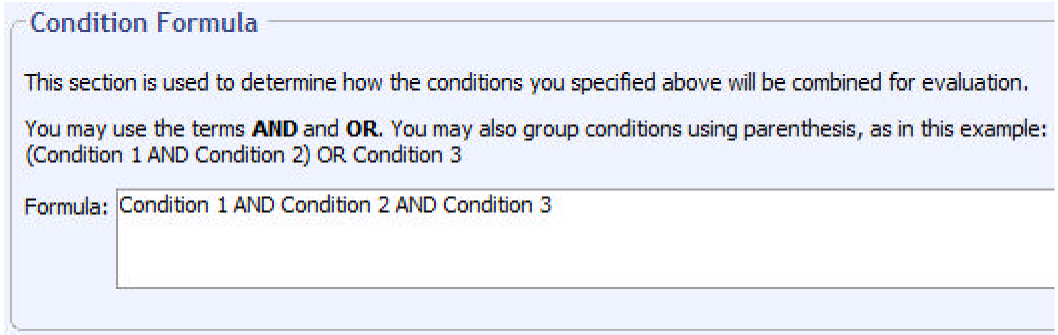


It is important to understand how this formula works. If left as it is, this Rule will never be true, because it in essence is saying "If today's date is in Spring AND today's date is in Winter". Because this is obviously not possible, the Rule will evalute to false. To change this rule to work the way we want it to, change the **Formula** field to **Condition 1 OR Condition 2**. You should then see this:



7. Click 

In the exampe above, if we had 3 or more conditions, the **Condition Formula** section would change to something like this:



7.8.3.4 Adding Additional Rules to a Rule Set

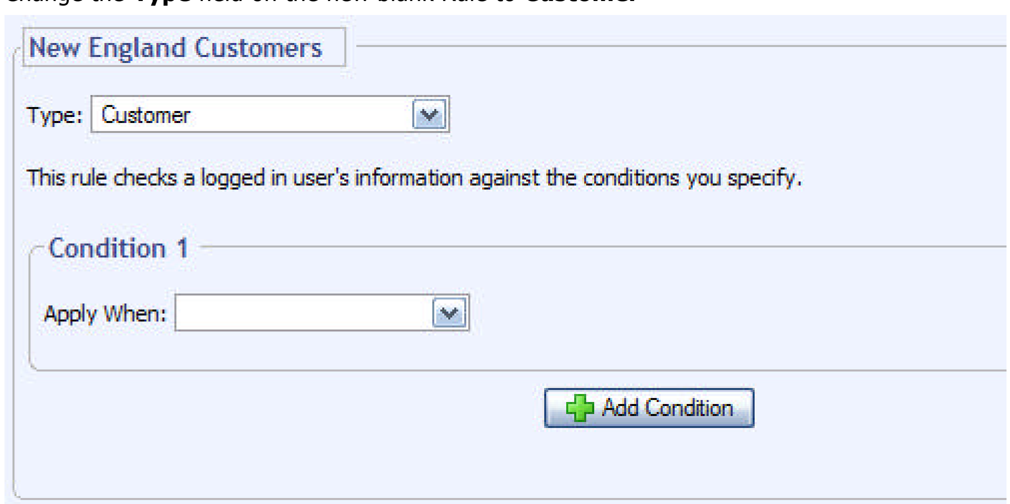
Adding Additional Rules to an Existing Rule Set

Continuing from the examples in the previous topics, let's assume that you want to offer the same "Spring and Winter" discount created above, but you only want to offer it to customers with accounts in the New England states (in the U.S.). You can't continue to add conditions to your **Date** Rule because they cannot match against a customer record. For this reason, you need to add a new Rule as follows.

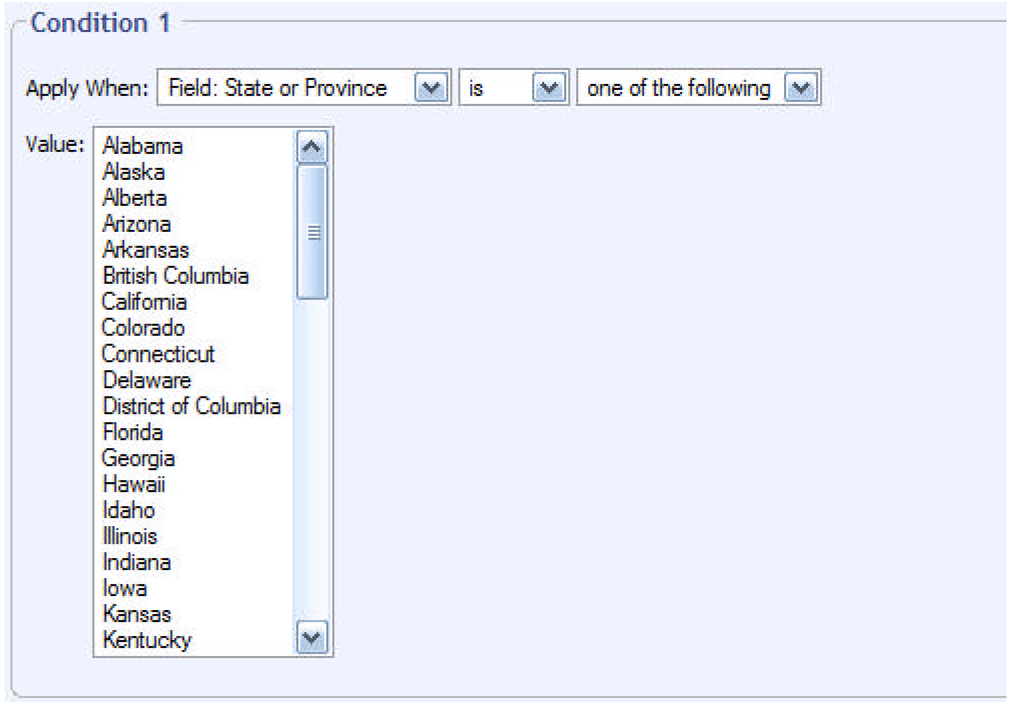
1. Click the **Add Rule** button and choose **Blank Rule**

2. Change the name of the rule if you wish, to something like **New England Customers**

3. Change the **Type** field on the new blank Rule to **Customer**



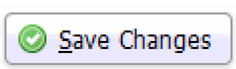
4. Change the **Apply When** field on the condition to **Field: State or Province**. Then change the 3rd field (the Operator) to **One of the Following**. Your condition should then look like this:



5. Hold down the CTRL key (or the Apple key on a Mac) while clicking the following states - Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island and Vermont.

6. Take a look at the **Rule Formula** section below at the bottom of the Rule Set:

This formula only appears when there are 2 or more rules in the Rule Set, and is used to tell Squirrelcart how to evaluate the rules. The default value shown above is fine for this example, as we only want to offer the discount when both Rules are true.

7. Click 

7.8.3.5 Adding a Rule Filter

Overview

This topic only applies to Rules of type "Orders (completed - cumulative)". See the **Rule Types topic (Section 7.8.2)** for an explanation of each Rule type.

Orders (completed - cumulative) type Rules match conditions against cumulative data from all orders that a customer has placed. A Rule filter can be added to this type of rule to narrow down the orders that are looked at.

Example

Take this example. You create an **Orders (completed - cumulative)** type Rule to offer a discount to all customers that have spent more than $1,000 total. Customer **Fredrick Flintstone**, has placed 3 orders in the past with the following Grand Totals:

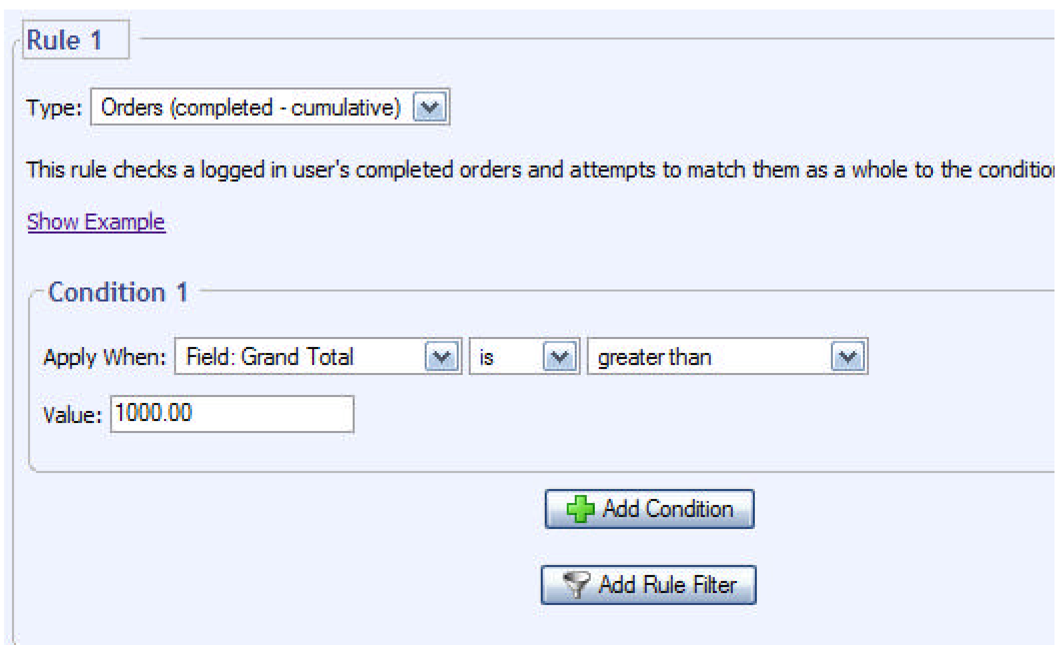
- Order 1: $250.00
- Order 2: $500.00
- Order 3: $300.00

The total spent is $1,050, so your Rule evaluates to true.

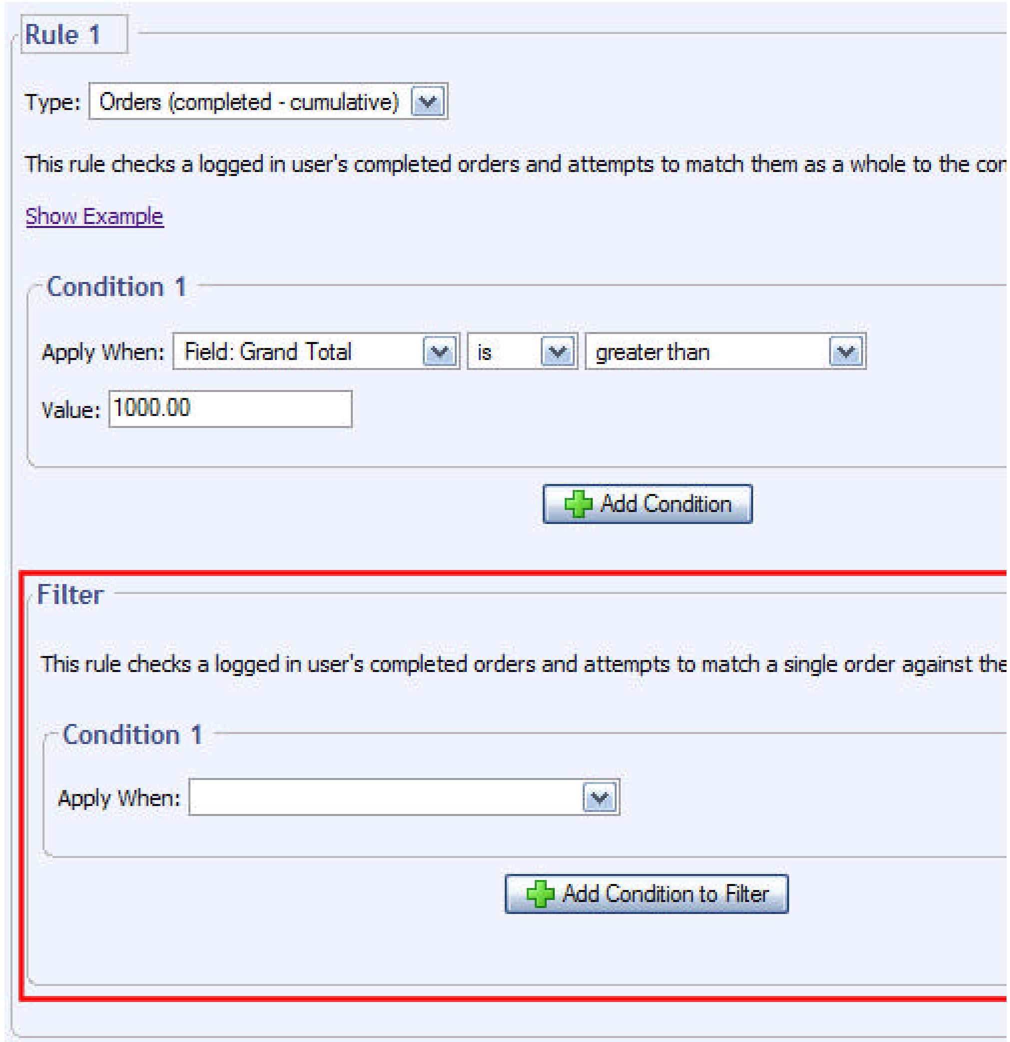
Now, assume that Order 3 was actually refunded to the customer. If we don't change anything about this Rule, the Rule will still apply because the sum of the Grand Totals still match our condition. In order to narrow down the orders to orders that are not refunded, we can add a Rule Filter. A Rule filter is basically a special **Order (completed)** type of Rule which is used only to limit the scope of the **Orders (completed - cumulative)** Rule that it is added to. Here is how to add a Rule Filter that matches this example.

Adding a Rule Filter

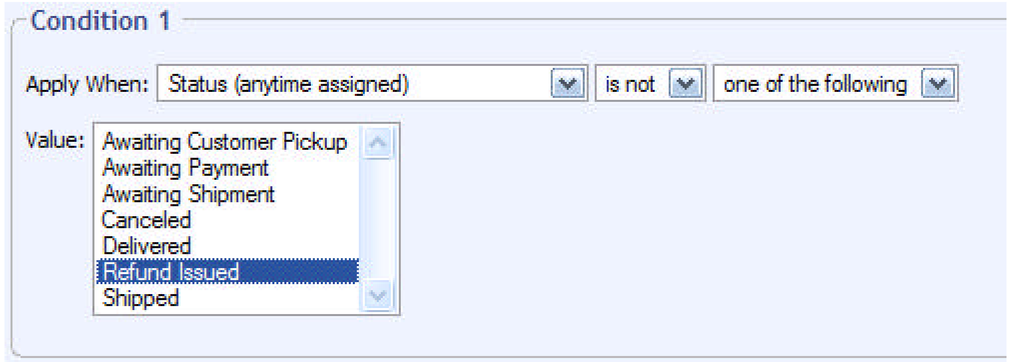
Using the example above, here is how to add a Rule Filter. The Rule looks like this when we start:

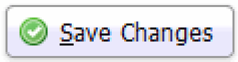


1. Click the **Add Rule Filter** button. A blank **Filter** section will appear inside your Rule, as seen below.



2. Change the **Apply When** field to **Status (anytime assigned)**
3. Change the 2nd field from **is** to **is not**
4. Leave the 3rd field (the Operator) set to **One of the Following**
5. Click on the **Refund Issued** option in the **Value** field. The Condition in the filter should now look like this:



6. Click 

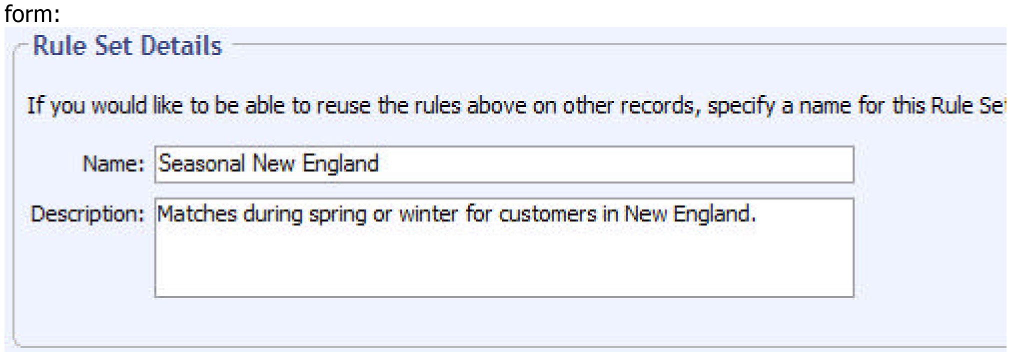
7.8.3.6 Reusing Rule Sets

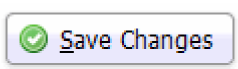
Overview

If you wish to assign a Rule Set that you have defined on one record to another, you can do so as follows.

1. Open the record where the Rule Set is already assigned

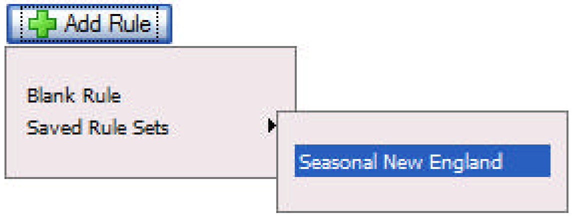
2. Enter values in the **Name** and **Description** fields in the **Rule Set Details** section of the form:



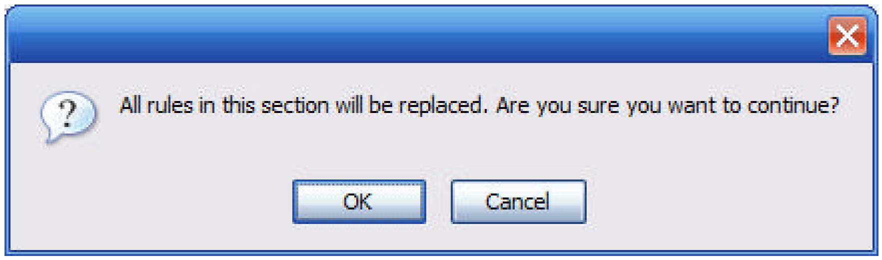
3. Click 

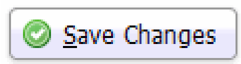
4. Open the new record that you wish to add the rule set to

5. Click the **Add Rule** button and move your mouse over the **Saved Rule Sets** sub menu. Click on the Rule Set you wish to add.



6. Click OK to confirm that you want to replace any existing rules.



7. Wait for the rules to be added, and then click 

When you add a saved Rule Set to another record, it is always linked to that original Rule Set. Changing something in the Rule Set on one record will also change it on all other records that the Rule Set was added to.

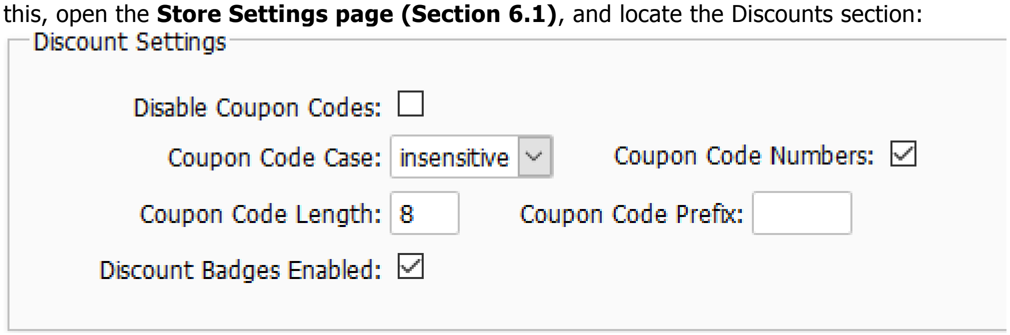
7.8.4 Coupon Codes

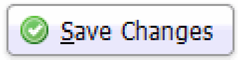
Overview

Coupon Codes are currently used for Discounts, but will also be supported for any record that supports rules. They can be used to require a coupon code be entered in order to obtain a discount.

Enabling

1. This condition requires that the coupon code form be visible at the bottom of the checkout. The coupon code form can be disabled, so the first step is to ensure that it is enabled. To do this, open the **Store Settings page (Section 6.1)**, and locate the Discounts section:



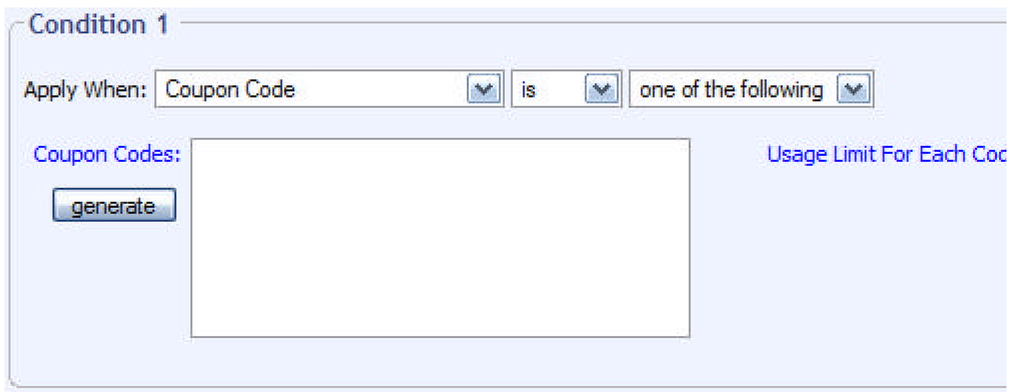
Confirm that the **Disable Coupon Codes** field is NOT checked. If it is checked, uncheck it and click 

2. Open the discount you wish to add the coupon code to

3. Click the **Add Rule** button and choose **Blank Rule**

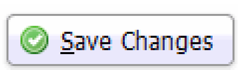
4. Change the **Type** field to **Order (in progress)**

5. Set **Apply When** to **Coupon Code** and you should see this:



6. If you already have one or more codes you wish to add, enter them in the **Coupon Codes** field. If you would like Squirrelcart to generate the codes for you, click the **Generate** button and follow the prompts.

7. If you wish to limit the number of times each code can be used, enter a value in the **Usage Limit For Each Code** field.

8. Click 

Obtaining Discount in Storefront

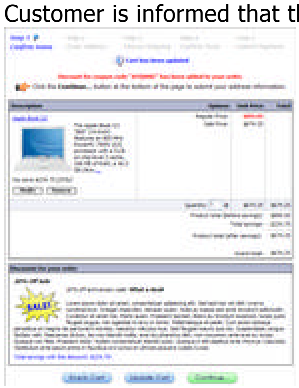
The customer does the following to obtain the discount:

1. Customer satisfies the **Discount What** setting by either adding the correct product to the cart, OR if an "Entire Order" discount is configured, the customer can add any item to the cart.

2. Customer enters the coupon code in the coupon code form found below the checkout table:

3. Customer clicks **Continue** or **Update Cart**

4. Customer is informed that the discount has been added.



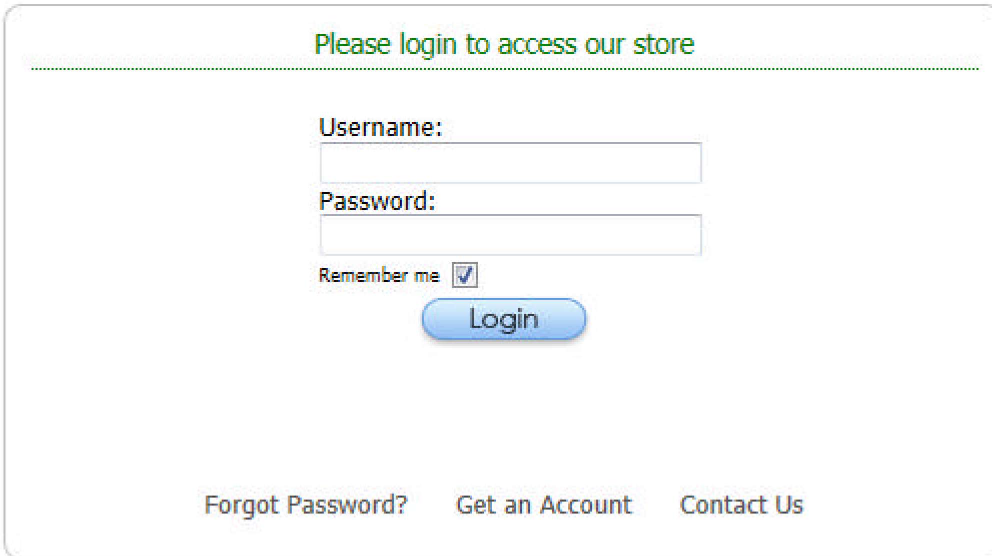
7.9 Access Restrictions

7.9.1 Restricting Store Access

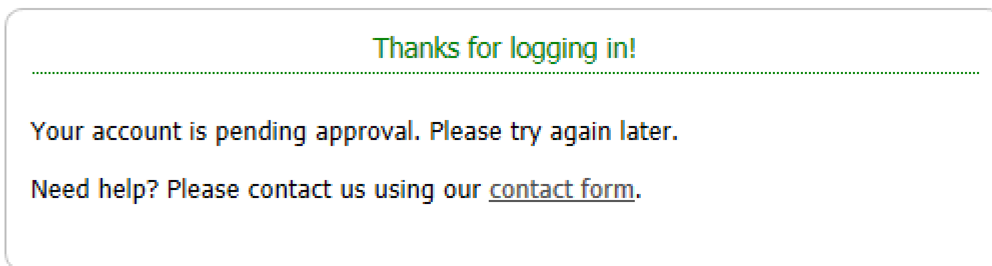
Overview

This feature can be used to restrict access to your entire store. When enabled, customers must be logged in and a member of a group that you designate to be able to access the store.

When not logged in, they will see your storefront without products, and with a login form:



If they login and are not yet approved, they will see this instead:



The contact form links will only appear by default if you have our Contact module installed.

Enabling Store Access Restrictions

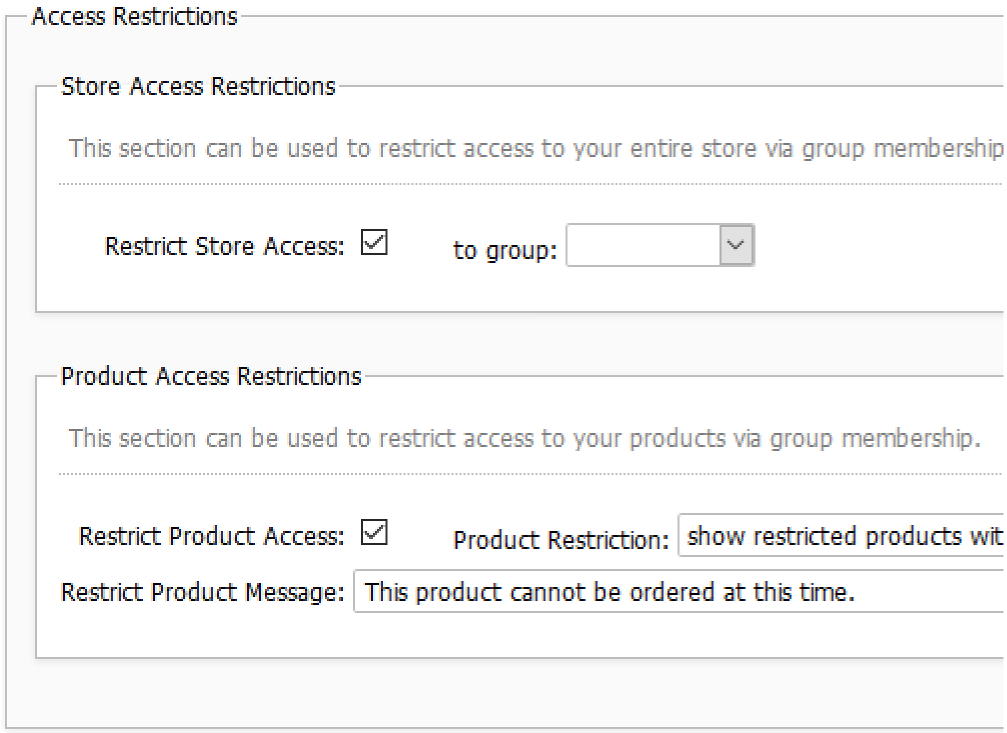
1. Open the **control panel (Section 3)**

2. Store access is restricted via group membership. You will need to create a group that you will put customers in that will be allowed access to the store. If you do not have a group setup that can be used for this, **create a group (Section 7.3.7)** before continuing. A good name for this group would be **Approved**.

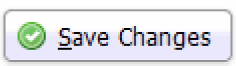
   > If you have the News module installed, you have the ability to create special groups called **News Groups (Section 10.7.3.1)**. Do not use a news group to restrict access to your store, as your customers will be able to join the group themselves on their account form by opting into the news group.

3. Open the **store settings page (Section 6.1)**

4. In the **Access Restrictions > Store Access Restrictions** fieldset, click **Restrict Store Access**



5. Select the group you wish to grant store access to using the **to group** field.

6. Click 

7.9.2 Restricting Product Access

Overview

This feature can be used to restrict access to your products to certain customers via **group membership (Section 7.3.7)**.

The purpose of restricting product access is to prevent customers from ordering restricted products. Restricted products cannot be ordered. In addition, you can control how (or if) restricted products appear by either hiding them entirely, showing them without pricing, or showing them with pricing.

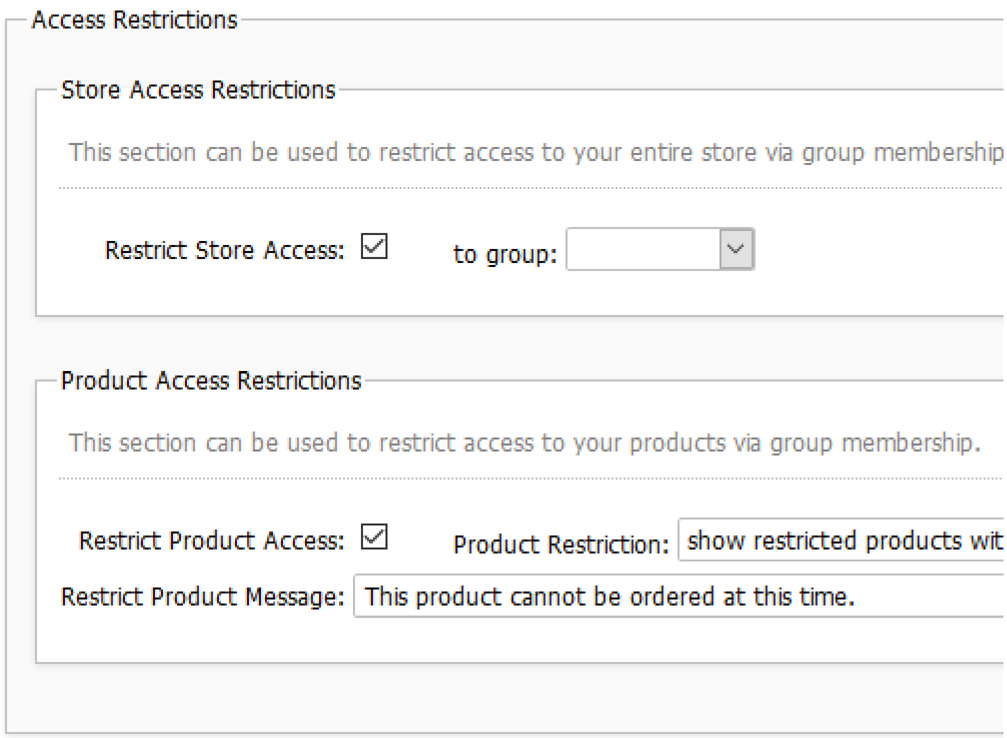
> With this feature enabled, by default customers will have access to all products that do not have restrictions assigned to them or their category.

Enabling Product Access Restrictions

Before you can restrict access to products, you must enable this feature. It is disabled by default.

1. Open the **store settings page (Section 6.1)**

2. In the **Access Restrictions > Product Access Restrictions** fieldset, check **Restrict Product Access**



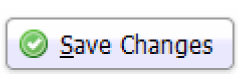
3. Choose how you want to handle restricted products using the **Product Restriction** field.

   Restricted products can't be purchased. This field controls whether or not they will be visible, and how they will appear if not hidden. Options for this field are:

   hide restricted products
   show restricted products without prices
   show restricted products with prices

   For SEO purposes, you are better off not hiding your products. If you are running a site where SEO is not as important, hiding products may be a good option. Products that are hidden won't be accessible. Should a product or category URL be followed that is restricted, the customer will get a 404 error from Squirrelcart.

4. If you are not hiding your restricted products, the text in the **Restrict Product Message** will appear as an info message at the top of the product page to let the customer know they can't order. Adjust this text as needed.

5. Click 

Assigning Restrictions

After enabling product access restrictions, you'll need to restrict your products via group membership. You will need to create at least one group that you will put customers in to restrict access. If you do not have a group setup that can be used for this, **create a group (Section 7.3.7)** before continuing. A good name for this group would be **Approved**.

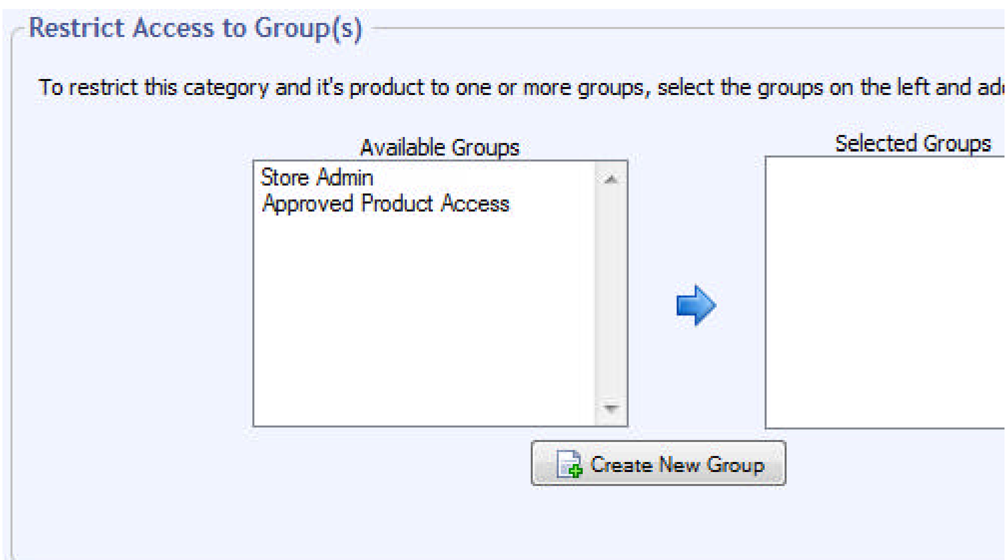
> If you have the News module installed, you have the ability to create special groups called **News Groups (Section 10.7.3.1)**. Do not use a news group to restrict access, as your customers will be able to join the group themselves on their account form by opting into the news group.

1. You can restrict a product in two ways - by restricting a category that it is in, and/or by restricting the product itself. If you need to restrict many products, it is faster to restrict them at the category level. Decide how you want to restrict (by category, or product) and continue.

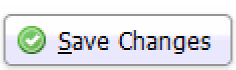
   > Category access restrictions will trickle down through all subcategories of the restricted category, and through multiple levels if present.

2. If you wish to restrict at the category level, open the category record you wish to assign the restriction to. If you wish to restrict at the product level, open a product record instead.

3. Locate the **Restrict Access to Group(s)** fieldset

4. Select the groups you wish to grant access to on the left and move them to the right with the blue arrow.

5. Click 

7.10 Sales Agreements

Overview

The Sales Agreement feature allows you to assign one or more sales agreements to your products, account form, address form, and the checkout.

The sales agreements on product pages look like this in the *storefront*:

You can create two types of agreements.

Type - customer must agree

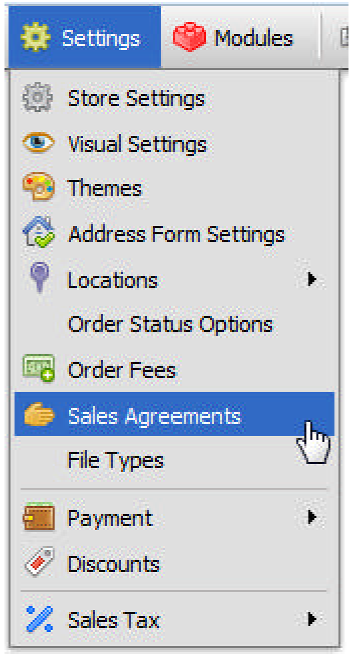
The customer must agree to the agreements or they are not permitted to place their order.

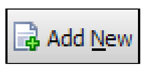
Type - informational only

These agreements are for display only, and do not require the customer actually agree to them.

Creating a Sales Agreement

1. Click the **Sales Agreements** menu link



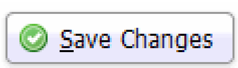
2. Click 

3. Enter a name for the Sales Agreement in the **Name** field

4. If you wish to have a different name appear in the storefront, enter it in the **Display Name** field.

5. Set the **Type** field (see Overview above for help)

6. Enter the text for the agreement in the **Agreement** field. HTML is permitted.

7. Click 

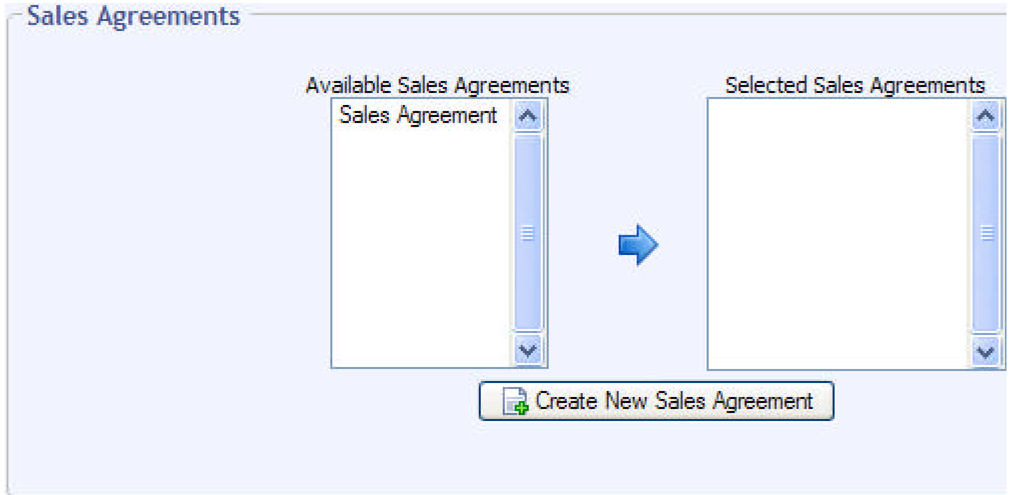
Sales Agreements for Products

Assigning a sales agreement to your products will cause those agreements to be shown to your customers when they purchase those products. They must agree to all agreements to complete their purchase.

How to Assign Sales Agreements to a Product

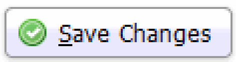
1. **Open the product record (Section 7.1.1)** you wish to assign the sales agreement to.

2. Locate the **Sales Agreements** section:



3. Click the Sales Agreement you created in the **Available Sales Agreements** box

4. Click the  button to move the Sales Agreement to the **Selected Sales Agreements** box

5. Click 

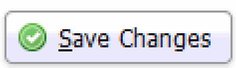
Controlling Where Product Sales Agreements Appear

Sales agreements assigned to products will appear on the last step of the checkout process by default. You can make them appear on your product pages instead as follows:

1. Open the **Visual Settings page (Section 6.2)** in your control panel

2. Locate the **General Settings** fieldset towards the top of the page

3. Change the value of the **Product Agreement Placement** field to **during checkout**

4. Click 

Sales Agreement on the Account Form

You can assign an agreement to the account form as follows:

1. Open the **Address Form Settings page (Section 6.4.1)** in the control panel

2. Locate the **Account Form** fieldset

3. Set the **Account Agreement** field to the agreement you would like to put on your account form

Sales Agreement on the Checkout Address Form

1. Open the **Address Form Settings page (Section 6.4.1)** in the control panel
2. Locate the **Address Form** fieldset
3. Locate the **Settings** fieldset inside
4. Set the **Address Agreement** field to the agreement you would like to put on the address form during checkout

Sales Agreement on the final checkout step

If you want to add sales agreement(s) to the final step of the checkout process that only appear for certain products, use the method described above under **Sales Agreements for Products**, and change the location where they appear using the info in that section.

If you would like to add a sales agreement to the final checkout step (usually the payment page), and you want that agreement to appear for all orders, follow these steps:

1. Open the **Store Settings page (Section 6.1)** in the control panel
2. Locate the **Checkout Settings** fieldset
3. Set the **Checkout Agreement** field to the agreement you would like to add to the last step of the checkout process

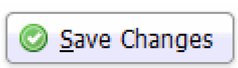
7.11 Tooltips

Overview

Squirrelcart has a tooltip feature to display information related to certain items when you move your mouse over them. We use the UniTip library by UnitInteractive.com for this feature.

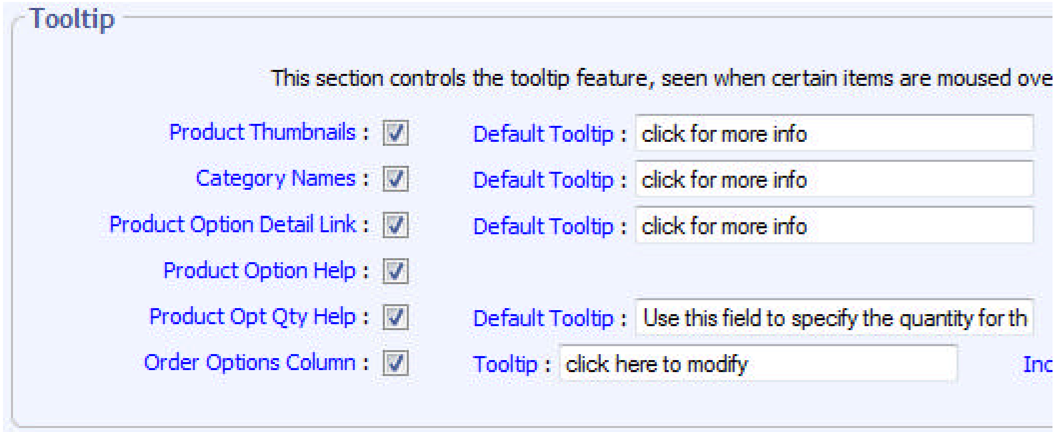
Tooltips can automatically be shown for product thumbnails, category names, and reviews. You can also add custom tooltips to your own HTML in Squirrelcart's template files.

Enabling and Disabling Tooltips

1. Open the **Store Settings (Section 6.1)** page
2. To enable tooltips, check the **UniTip Tooltip** field. To disable tooltips, uncheck the same field.
3. Click 

Configuration

There are settings on the **Visual Settings (Section 6.2)** page that control tooltips:



Product Thumbnails

Check this to display tooltips when mousing over product thumbnails

Category Names

Check this to display tooltips when mousing over category names in the content area of your storefront page

Product Options Detail Link

Check this to display a tooltip when mousing over **option detail page (Section 7.1.13.14)** links (if enabled on the option's record).

Product Option Help

When checked, this enables settings on your option records to show a help icon next to a product option field. When moused over, help text is shown via a tooltip.

Product Opt Qty Help

When checked, this enables settings on your option records to show a help icon next to product option quantity fields. When moused over, help text is shown via a tooltip.

Order Options Column

When checked, tooltips will appear for links in the Options column during the checkout process. When **Include Qty Info** is checked and an option has quantities enabled, the quantity break down will also appear in the tooltip.

Default Tooltip

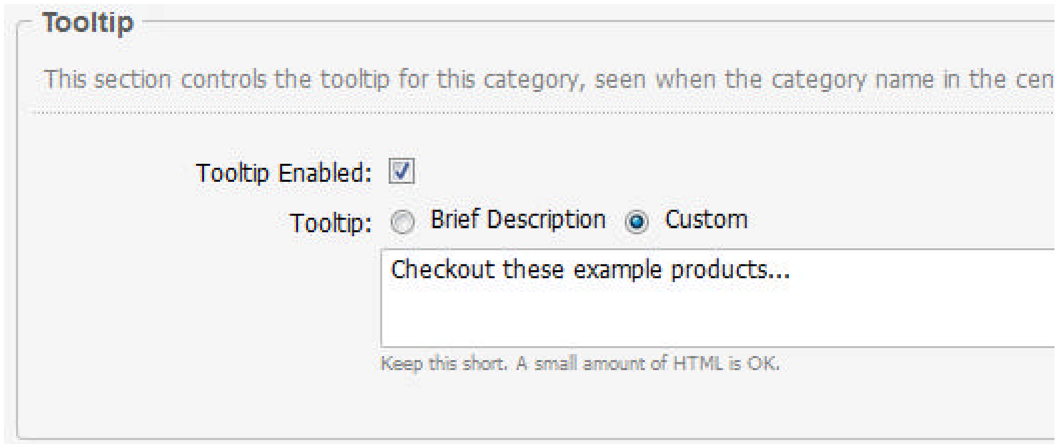
This controls the default text used for the tooltip when the tooltip field for the product or category is blank.

Append

When checked, the default tooltip shown to the left of this field will be added to the bottom of tooltip text obtained from products or categories, even when they are not blank.

Controlling Tooltips on a per Product/Category Basis

You can control whether or not tooltips are enabled for individual products and categories, and what text will be shown in their tooltips. Product and Categoy records have a Tooltip fieldset on them when tooltips are enabled:



Tooltip Enabled

This controls whether or not tooltips are enabled for this product or category

Tooltip

By default, the text for a tooltip is pulled from the Brief Description field on the same record. If you would prefer to use something different, set this field to **Custom**, and enter a custom tooltip message in the box below.

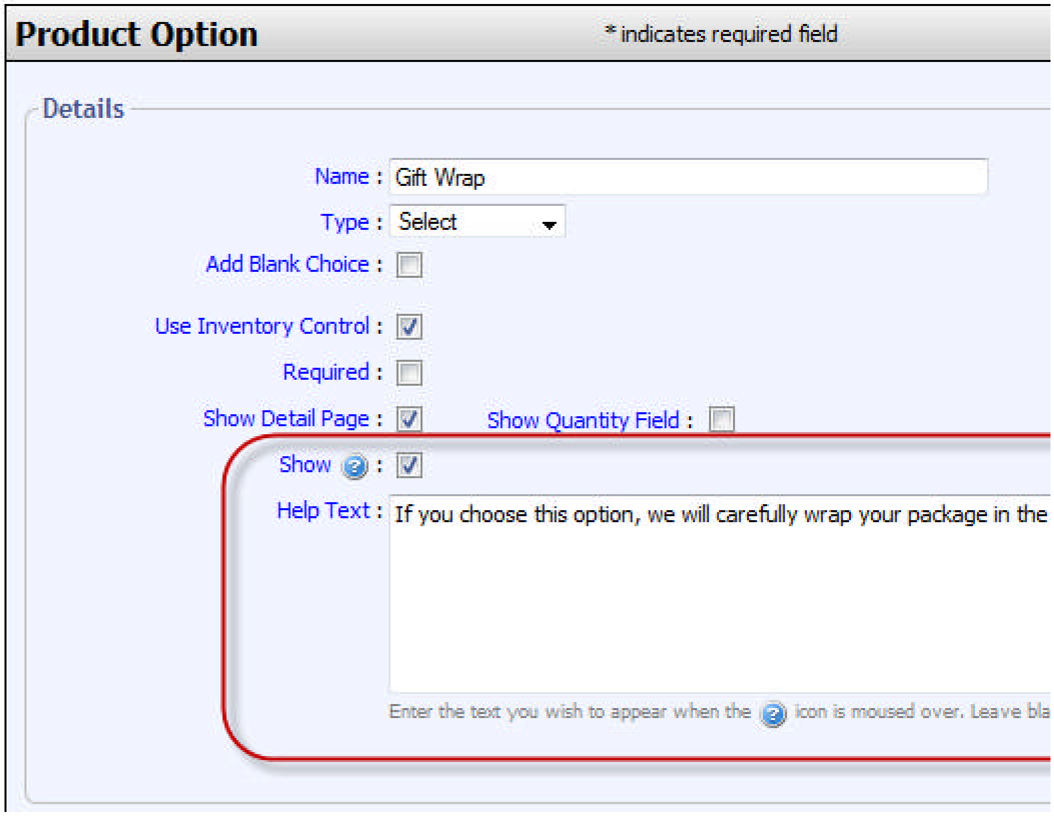
```
<a href="<?php print $Storefront_Home_URL ?>">
    <img src="<?php print $Logo_Image['dyn'] ?>" alt="<?php print $Logo_Image
['alt'] ?>" width="<?php print $Logo_Image['width'] ?>" height="<?php print
$Logo_Image['height'] ?>" />
</a>
```

Controlling Tooltips for Product Options

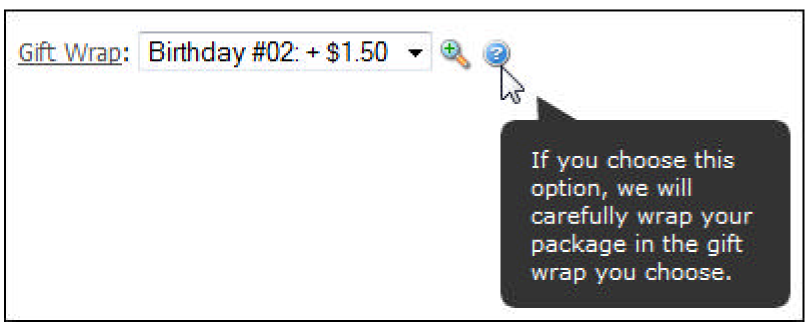
This section explains how tooltips work in conjunction with our Product Option features. For more information on product options, please see the **Managing Your Store > Products > Product Options** section of this documentation.

Option Field Help Tooltip

When tooltips are enabled (see settings above), product option records in your control panel have settings that control help tooltips for option fields as shown below.

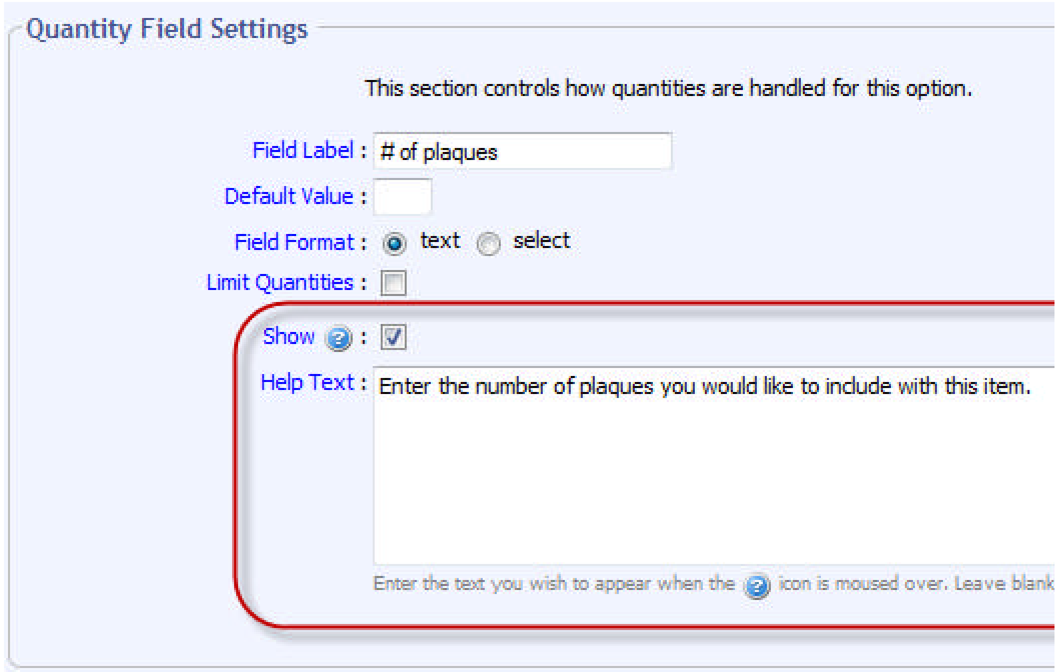


When **Show** is checked, a help icon will be shown near the option field. When the help icon is moused over in your store, a help tooltip will appear. The text in that tooltip is controlled by the **Help Text** field. The customer will see something like this based on the settings above:

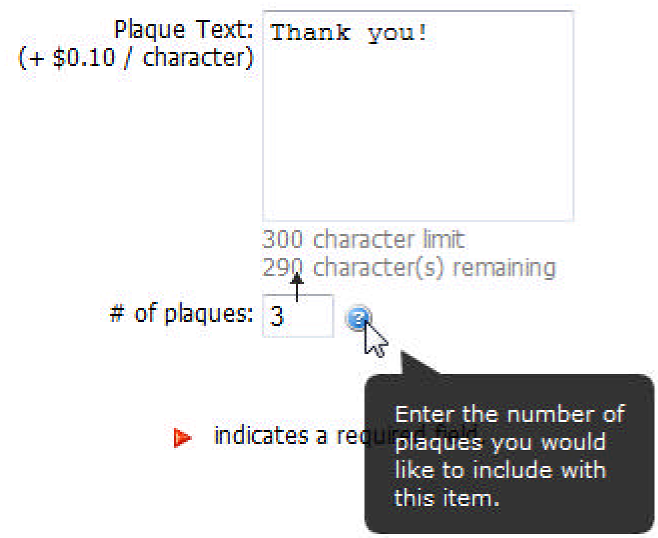


Option Quantity Field Help Tooltip

Squirrelcart has an optional feature that allows customers to specify **quantities for product options (Section 7.1.13.16)**. In the same fashion as the help tooltips described directly above, you can also enable help tooltips for option quantity fields. The settings appear in the **Quantity Field Settings** fieldset on your product option records, seen when the **Show Quantity Field** option is checked.



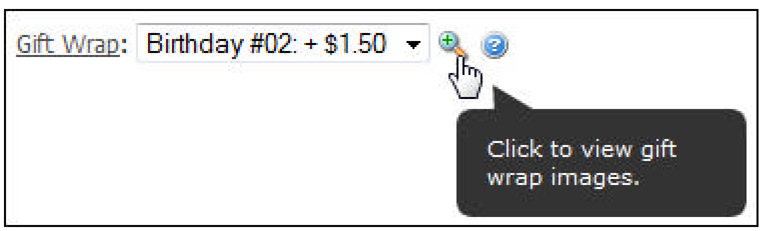
Based on the settings above, this tooltip would appear like this in the storefront:



Option Detail Page Link Tooltip

Squirrelcart supports displaying an **Option Detail page (Section 7.1.13.14)** via a link near an option field. This page is used to show more detailed information about an option. You can enable a tooltip for the link to the option detail page via the option record settings shown below:

Based on the above settings, the tooltip shown when the detail link is moused over looks like this:



Adding Tooltips to Other Elements

If you know HTML, you can add a tooltip to any DIV, SPAN, or A tag. For this example, we will add a tooltip to the logo at the top of the storefront page.

1. Open the file or record containing the HTML you wish to add a tooltip to. In this case we will be adding the tooltip to the store logo, so open the template file **store_main.tpl.php**. (see **this page (Section 9.3.17.2)** for instructions on modifying templates)

2. Locate the DIV or A tag you wish to add the tooltip to:

```
<a href="<?php print $Storefront_Home_URL ?>">
     <img src="<?php print $Logo_Image['dyn'] ?>" alt="<?
php print $Logo_Image['alt'] ?>" width="<?php print
$Logo_Image['width'] ?>" height="<?php print $Logo_Image
['height'] ?>" />
```

```
</a>
```

3. Add a class attribute set to **tip.** (If the tag already has a class attribute, add **tip** to it after the existing value: *class="custom tip"*)

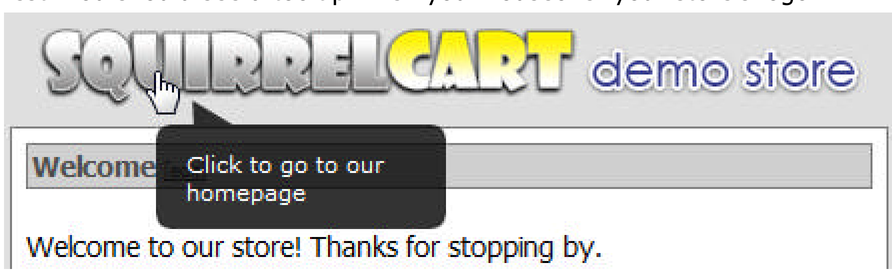
```
<a href="<?php print $Storefront_Home_URL ?>" class="tip">
     <img src="<?php print $Logo_Image['dyn'] ?>" alt="<?
php print $Logo_Image['alt'] ?>" width="<?php print
$Logo_Image['width'] ?>" height="<?php print $Logo_Image
['height'] ?>" />
</a>
```

4. Add a title attribute to the same tag, and put your tooltip text inside it:

```
<a href="<?php print $Storefront_Home_URL ?>" class="tip"
title="Click to go to our homepage">
     <img src="<?php print $Logo_Image['dyn'] ?>" alt="<?
php print $Logo_Image['alt'] ?>" width="<?php print
$Logo_Image['width'] ?>" height="<?php print $Logo_Image
['height'] ?>" />
</a>
```

5. Save the file

6. Test. You should see a tooltip when you mouseover your store's logo:



7.12 Badges

Overview

Squirrelcart has a Badges feature that is used to emphasize certain products. Badges can be used to emphasize a product as "New", "25% off", "Sale" , etc...

For information on "New" badges, see the **New Products topi (Section 7.1.8)**c. For information on discount badges, see the **Discount Badges topic (Section 7.5.5)**.

8 Security

8.1 Store Admin Accounts

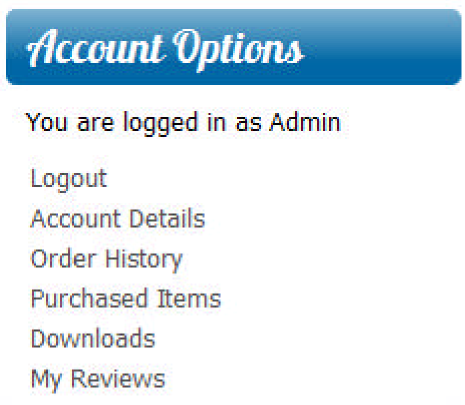
Overview

When Squirrelcart is first installed, a single customer account is created with the default username of **admin.** This account is just like any other customer, but because it is a member of the built in **Store Admin group ('Special Groups' in the on-line documentation)**, it has full access to manage your store. For this reason, you should make every effort to protect the username and password of this account by changing both the username and password to something secure.

How to Change Your Admin Account Credentials

1. Login with your store admin account on your storefront page

2. Click the **Account Details** link in the **Account Options** nav block:



3. Change your Username and Password, and click the **Continue** button.

> Your username and password should be as unique as possible. Avoid using words that occur in the dictionary. Try to use random combinations of letters, numbers, and special characters.

8.2 sc data folder

Overview

The sc_data folder is used to store files that do not need to be (and should not be) web accessible, including:

- database backup files created by the backup utility
- files uploaded by customers for "file" type product options
- files you upload for use with the Download module

Ideally, the sc_data folder should be located outside your web accessible root folder to prevent others from accessing it via the web. It is highly recommended that you move your sc_data folder from it's default location to one folder above the web accessible root folder.

Web Accessible - not secure :(

```
home
    |__www
          |__index.html
          |__store.php
          |__sc_data
          |__squirrelcart
          |__etc... (all other web accessible files)
```

Not Web Accessible - secure :)

```
home
    |__sc_data
    |__www
          |__index.html
          |__store.php
          |__squirrelcart
          |__etc... (all other web accessible files)
```

After making that change via FTP, you'll also need to update the $sc_data_path variable in your **squirrelcart/config.php** file. For the "Not web accessible" example above, you would set it as follows:

```
$sc_data_path = '../sc_data';
```

If you do not have access to move the folder, contact your web host for assistance. Please note that not all hosting companies allow you to store files outside of your web root folder.

Important!

If you are unable to move your sc_data folder, use great caution when configuring Squirrelcart. If you create database backups, download them and then delete them. If you use file upload options for your products, make sure you do not allow any script files to be uploaded by your customers (.php,.asp,.pl,.cgi,.jsp,.js, etc...).

8.3 Security Patches

Overview

We take security very seriously. Any vulnerabilities that may arise in Squirrelcart are patched as quickly as possible (usually the same day they are reported to us). If you suspect that a problem in Squirrelcart may have been used to cause a problem on your site, or to gain unauthorized access, **notify our support department (http://www.squirrelcart.com/support.php)** as soon as possible.

Obtaining Security Patches

All security patches are available on our Downloads page to all users regardless of their download status:

http://www.squirrelcart.com/downloads.php

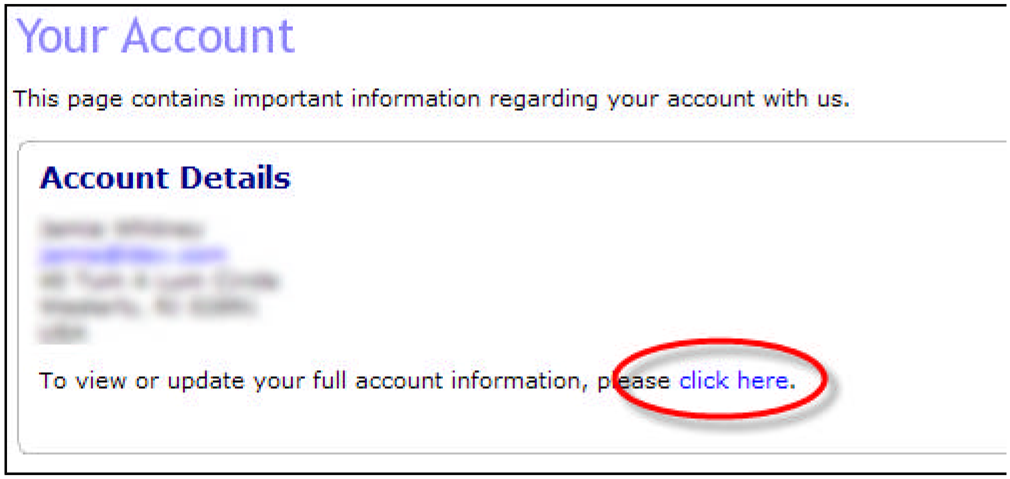
They are located in the section labeled **Security Patches**:

The newest patches are always on top. Patches should be applied in the order they are released. To determine if a patch listed is applicable to your version of Squirrelcart, read that patches description.

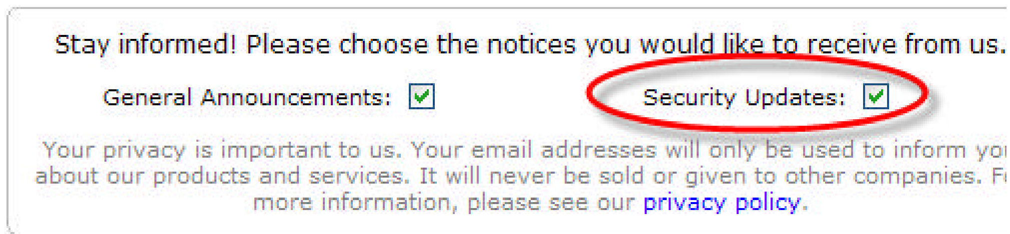
Staying Up to Date

When a vulnerability is discovered and we issue a patch for it, it's important that you apply that patch as quickly as possible. To receive notices regarding security patches as we release them, you can join our **Security Updates** mailing list as follows:

1. Go to our website: **http://www.squirrelcart.com (http://www.squirrelcart.com/)**
2. Login at the top of the page, using the username you created when you purchased Squirrelcart
3. Click the **Account Details** link at the top of the page.
4. Click the link labeled **Click Here:**



5. Check the **Security Updates** field to opt into the Security Updates mailing list



6. Click the **Continue** button to save your changes

8.4 Human Verification

Overview

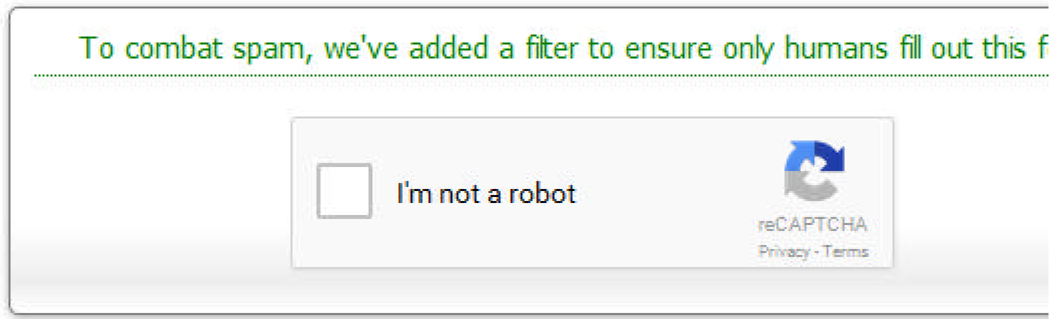
Human verification is a feature that is used to ensure only humans fill out your forms. When enabled, it helps to reduce the number of submissions made by spam bots.

Squirrelcart offers two methods of human verification, both of which are free services provided by other websites:

- reCAPTCHA - Learn about **reCAPTCHA (https://www.google.com/recaptcha)**.
- TextCaptcha.com - Learn about **TextCaptcha.com (http://textcaptcha.com/)**.

How it Works With reCAPTCHA

When reCAPTCHA is enabled for a particular form in Squirrelcart, your customer will see a reCAPTCHA field at the bottom of the form:



They need to click the **I'm not a robot** checkbox on the form. They will be presented with a dialog box to verify they are a human. The contents of the dialog box may vary. Depending on the situation, if Google has already verified the user the dialog box may be skipped altogether making it even easier to fill out.

With reCAPTCHA enabled, Squirrelcart won't allow the form to be submitted until verification has been completed.

How it Works With TextCaptcha

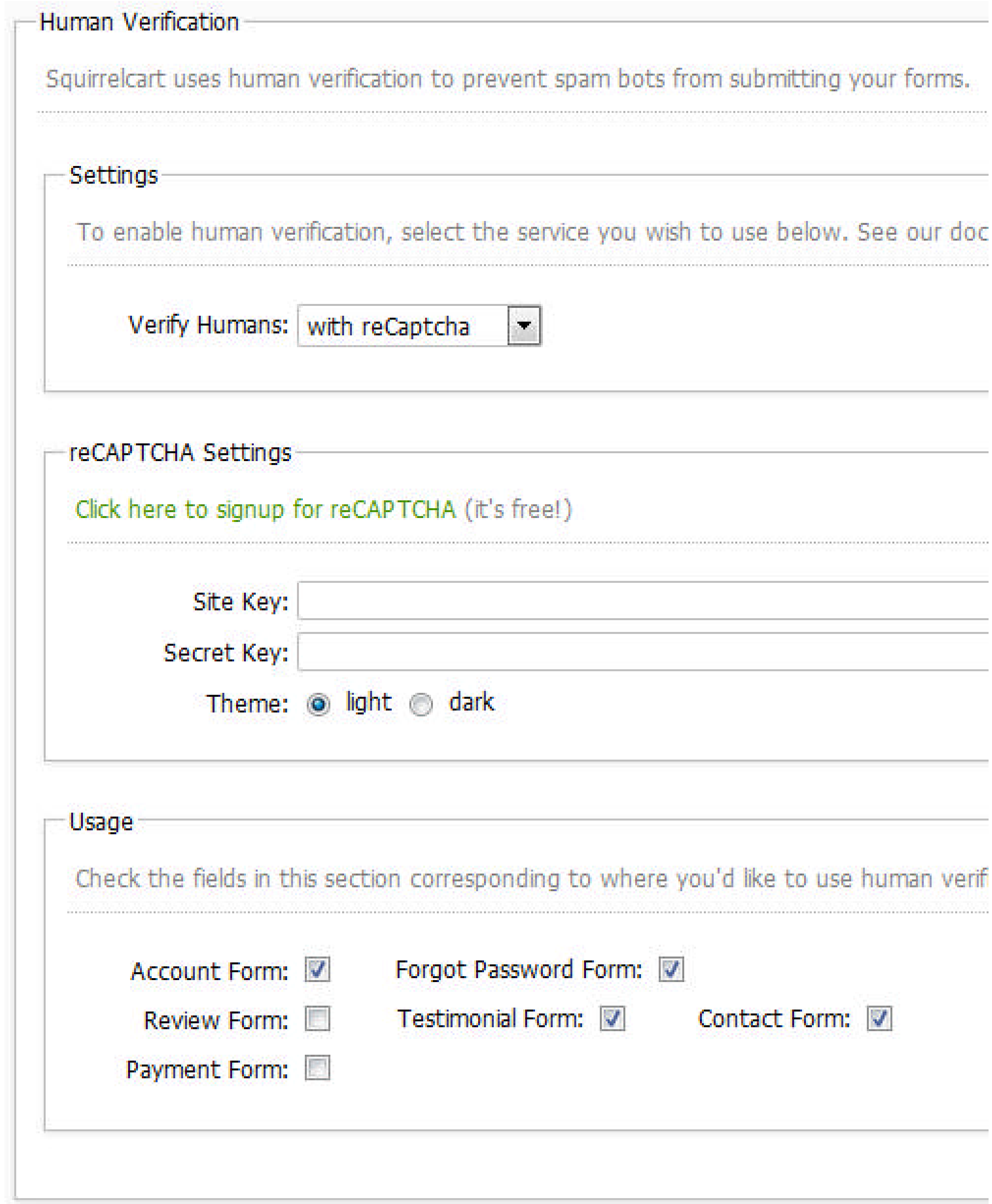
When TextCaptcha is enabled for a particular form in Squirrelcart, your customer will see a randomly generated question, with an "Answer" field immediately below it. They must type the correct answer to submit the form successfully.

Requirements

- *CURL*

Setup Instructions

1. Choose the service you'd like to use for human verification
2. Open your **store settings page (Section 6.1)**
3. Scroll to the **Human Verification** field set:



4. Set the **Verify Humans** field to the service you would like to use.

5. *If you chose reCAPTCHA:*

a. Click the link labeled **Click here to signup for reCAPTCHA**
b. This will take you to reCAPTCHA's website in a new window. Click the link to signup, and follow the instructions to generate a public and private key.
c. Copy your public and private keys from reCAPTCHA's website into the corresponding **reCAPTCHA Public Key** and **reCAPTCHA Private Key** fields on your Store Settings page.
d. Change the **reCAPTCHA Theme** field if you wish, which controls the appearance of the reCAPTCHA field on your forms.

If you chose TextCaptcha:

You won't need to specify any credentials to use TextCaptcha. Continue to the next step.

6. Now that you've enabled human verifcation, you need to tell Squirrelcart where you would like to use it. You can do so by checking the fields in the **Usage** section corresponding to the forms you wish to protect. The recommended settings for that section are what is shown in the image above.

8.5 Fraud Detection and Geolocation APIs

Overview

Squirrelcart integrates with some popular fraud detection and geolocation APIs, which can be used to help prevent fraudulent orders and to give you a better idea of where the customer is in the world based on their IP address.

> Geolocation by IP address is not perfect. It will give you an approximate location of the user. That location can sometimes be inaccurate.
>
> Assessing orders to determine if they are fraudulent is up to you. While these tools can help, there is no guarantee they will help you to reduce all of your fraudulent orders.

APIs supported

- MinFraud (by MaxMind.com) - This service is very inexpensive ($.005 per query as of this writing). It provides more information then you will get from FreeGeoIP.net, and includes a risk score to help you asses the likelihood that the order might be fraudulent. We recommend using this API. To use this service you will need to sign up on their website and obtain a license key.

  More information about MinFraud can be found **here (https://www.maxmind.com/en/minfraud-services)**.
- FreeGeoIP.net - This option is completely free but returns less detail than the MinFraud API.

  More information about FreeGeoIP.net can be found **here (http://www.freegeoip.net/)**.

How it works

At the time of order completion Squirrelcart will send a request behind the scenes to the API that you have enabled. Information received in that response is included in your order notification emails, and is also visible when viewing orders in edit mode in the control panel.

The information shown will vary depending on the API that you've enabled. Here is an example of the results returned by **MinFraud**:

MinFraud Results (help)	
riskScore:	0.14 (out of 100)
distance:	3,952 KM
countryMatch:	Yes
anonymousProxy:	No
highRiskCountry:	No
cityPostalMatch:	Yes
countryCode:	US
freeMail:	No
score:	1.97
proxyScore:	0.00
ip_region:	NY
ip_city:	New York
ip_latitude:	40.7143
ip_longitude:	-74.0060
ip_isp:	AT&T Wireless
ip_org:	AT&T Wireless
custPhoneInBillingLoc:	NotFound
queriesRemaining:	910
shipCityPostalMatch:	Yes
maxmindID:	PO20WFKZ
carderEmail:	No
shipForward:	No

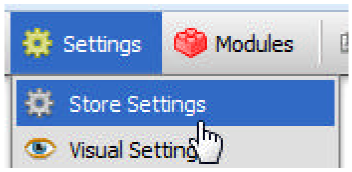
Requirements

- *CURL* PHP Extension, with SSL support
- PHP 5.2 or newer

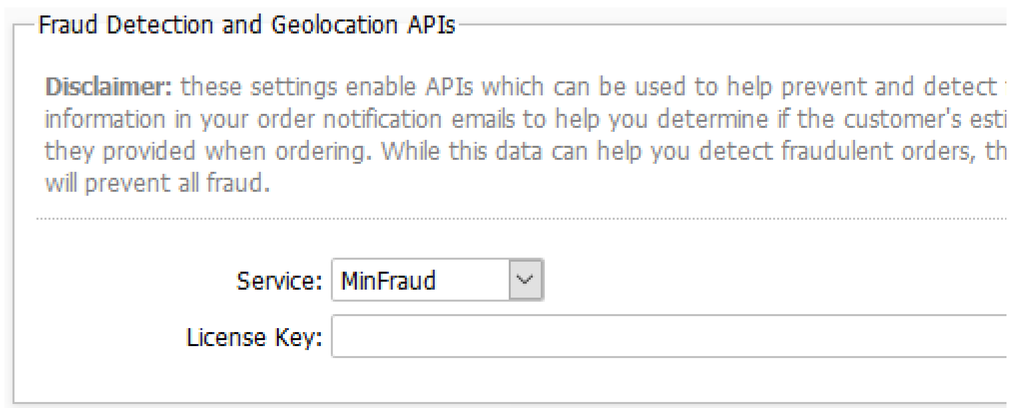
Enabling an API

1. Open the **control panel (Section 3)**

2. Click the Store Settings link in the toolbar:



3. Locate the **Fraud Detection and Geolocation APIs** fieldset:



4. Set the **Service** field to the API you wish to use. If using **MinFraud**, enter your license key in the field of the same name.
   If using FreeGeoIP.net, no license key is required.

5. Click the **Save Changes** button.

6. To test, complete an order in your store and view the resulting order notification email.

9 Customizing

9.1 How to Customize Guide

Overview

One of the most frequently asked questions we receive goes something like this:
"How do I fit Squirrelcart into my existing design?"
Because every site design varies, it's not possible to provide step by step instructions for making Squirrelcart fit into your design. This page explains a few approaches you can take.

> Before continuing, Squirrelcart should be fully installed and working. You should then read the entire **Customizing** section of the documentation before beginning your customization. This is extremely important!

The level of customization you can achieve is going to be directly proportionate to your experience with HTML and *CSS*. If you want to make major changes yourself to the appearance of your storefront and do not know HTML and CSS, we recommend that you get a good book on both subjects.
We will explain 3 approaches, which vary based on your goals and skill level:

Approach	Recommended When
Basic	you don't know HTML, or have very limited knowledge of it
Advanced - Link to Storefront	you are familiar with HTML but prefer to not make many changes to your existing homepage
Advanced - Shop From Homepage	you are familiar with HTML and would like customers to shop right from your homepage

The examples below all assume that you have an existing homepage named **index.htm** or **index.html.** We will refer to that page as your homepage. We will refer to Squirrelcart's main page as the *storefront* page.

> Don't want to make design changes yourself? We sell themes for Squirrelcart that can be used to dramatically change the appearance of your store. See **our website (http://www.squirrelcart.com/)** for details.

Basic

This approach will explain how to link to Squirrelcart's storefront page from your homepage, and change some basic aspects of the appearance of the storefront.

Step 1 - link to your storefront page

1. Open your homepage in an HTML editor
2. Locate the area where you wish to place the link to your storefront page
3. Add the following code at that location, replacing the word "Shop" with the text you wish the customer to click on:
```
<a href="store.php">Shop</a>
```

4. Save the file

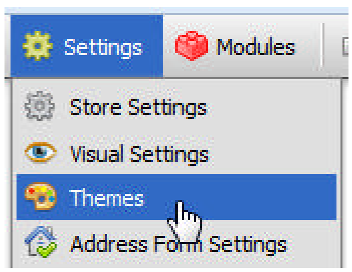
5. Test the link. Clicking on the link should take you to Squirrelcart's storefront page.

Step 2 - change store logo

Squirrelcart comes with an example store logo at the top of the page. The logo is there for example purposes only. We recommend you change it to your own logo.

To replace this image with your own logo image, do the following:

1. Click the themes menu link in your control panel:



2. Look at the selected values inside the **Default Theme** box at the top of the table. This is the theme your store is using by default. Every user that has not changed their theme setting on their account page will see your store using this theme. You must be using a custom theme (any theme other than the default **squirrelcart** master theme) in order to change your logo. If **Default Theme** is set to **Squirrelcart**, you will need to change it to a custom theme by changing the **Theme** field inside the **Default Theme** box. If no custom theme choices are available, **create a new custom theme (Section 9.3.6)** and then select it as the default theme by changing the **Theme** field, and clicking the **Save** button. For the examples below, let's assume you are using a custom theme called **YOUR_THEME.**

3. You will need an image file on your computer that you want to use as your logo. The filename will need to end in **.png**, **.gif**, or **.jpg**.

4. Rename your logo file to **store_logo.*** , keeping the file extension the same. For example, if your logo image on your computer is named my-logo.jpg, rename it to **store_logo.jpg.**

5. You will need to upload this file to the theme's image folder. If you are familiar with FTP, you can just upload the file to **squirrelcart/themes/YOUR_THEME/images/** and it will automatically appear in your storefront. Alternatively, you can upload the image using the control panel using the steps below.

6. Move your mouse over the link titled **Images**:

If the tooltip that appears reads **Images for 'Squirrelcart' theme**, you need to **change your theme (Section 9.3.5)**. You can't modify images for the master Squirrelcart theme. If it reads **Images for 'YOUR_THEME'...**, click the link.

7. Locate the image named **store_logo** in the record table. You might need to click through the page links to locate it.

8. Click the icon to the left of the record row for the **store_logo** image to open that record. You can also click anywhere on the record's row to open it.

9. Click the **Browse...** button and locate the image file on your computer

10. Click Save Changes to upload your image

Your web server must have permission to write to the **squirrelcart/themes/YOUR_THEME/images** folder in order to upload an image. If you receive a permission error, you may need to set permissions on that folder so PHP on your server can write to it. Permissions are set using an *FTP* client. For some web servers, permissions of 755 or 775 are sufficient. On most web servers, permissions of 777 are required. If you are unsure of how to set permissions so that your server can write to this folder, contact your web host for assistance. If you need assistance from us, you can find more information on obtaining support on **our support page (http://www.squirrelcart.com/support.php)**.

Your store logo is a Theme Image. For more information on working with theme images, see **this topic (Section 9.3.9)**.

Advanced - Link to Storefront

This method requires knowledge of HTML and *CSS*, and is the best approach when you want to customize the appearance of your store but do not want to make many changes to your homepage. You will be linking to your storefront page, and customizing Squirrelcart to match the look of your existing pages.

1. Add a link on your homepage to the storefront page (store.php by default)

2. Create a custom theme as described in the **Creating a Custom Theme (Section 9.3.6)** topic

3. Set that theme as the default theme for your store as described in the **Changing the Default Theme (Section 9.3.4)** topic. If your current theme differs from that theme, you should also **set your current theme (Section 9.3.5)** to default.

4. If you haven't already, read the topic on **Modifying Templates (Section 9.3.17.2)**.

5. Make changes to **your stylesheet(s) (Section 9.3.14)** if needed.

6. Make changes to your **storefront's main template file (Section 9.3.17.3.2)** as needed.

7. You may also want to alter the template that controls the appearance of your **storefront's home page (Section 9.3.17.3.3)**.

8. After you have most of the storefront page looking the way you want, work on modifying code in other template files as needed, using the **Customizing > Templates > Template Guide** section of this documentation. If you are unsure of which template to modify, view the source of the page you are trying to alter. Locate the section of code you wish to alter, and look above it for a comment. All template files contain a comment at the top which will display the template name, like this example:

   ```
   <!-- Template: product_detail.tpl.php -->
   ```

   If you have difficulty locating the correct template, please contact our **support department (http://www.squirrelcart.com/support.php)** for assistance.

Advanced - Shop From Homepage

This method requires knowledge of HTML and CSS, and should be used when you wish to add Squirrelcart components directly to your existing homepage. You will be preparing your homepage to support PHP code by moving it into a Squirrelcart template file, and placing Squirrelcart's PHP code from the default storefront page template into your homepage. Once completed, you will then customize further using CSS and templates.

> ⚠ **Important:** Before starting, **read this page (Section 9.3.17.2)** for important information on how to properly modify template files. You can't complete the steps below without first reading that page.

Step 1 - create and enable a custom theme

In order to customize Squirrelcart's template files, you need to have a custom theme created and enabled. If you don't already have a custom theme created and enabled, follow the instructions in this section below.

1. **Create a custom theme (Section 9.3.6)**

2. Set that theme as your **store's default theme (Section 9.3.4)**, which is used for all users that do not have a theme chosen

Step 2 - make Squirrelcart's storefront page your index page (homepage)

1. Rename your existing homepage to index_OLD.htm or similar, to disable it.

2. Rename your storefront page (store.php) to index.php so it will open as your homepage.

3. Update the **$cart_page** variable in Squirrelcart's config file (squirrelcart/config.php) so it

knows you've changed your storefront page file name. **See this page for instructions (Section 9.2)**.

4. Test your site to make sure Squirrelcart's storefront page loads when you visit your homepage without specifying a file name: **http://www.example.com (http://www.example.com/)**

5. If you have any links on other pages that linked to your old homepage file name directly (index.htm or index.html), you must update those links to reflect the new file name "index.php" - OR change the URL in those links to only use your domain name without a file name after it.

Step 3 - Turn your old homepage HTML into Squirrelcart's main storefront template

Squirrelcart's main storefront template is explained in detail **on this page (Section 9.3.17.3.2)**. To make Squirrelcart's storefront page (which is now your homepage) appear as your old homepage did, follow the instructions below.

1. Put a copy of your old index page (which you renamed to index_OLD.htm) inside your custom theme folder **squirrelcart/themes/YOUR_THEME**

2. Rename that file to **store_main.tpl.php.** If a file with that name already exists, rename it to **store_mail_OLD.tpl.php**

3. Load your homepage in your browser. It should now appear as it used to, with no Squirrelcart content.

4. To allow Squirrelcart to function on your homepage, you'll need to add it's PHP code to your main storefront template - the file you just named **store_main.tpl.php**. You can view the master theme version of this file to see the PHP code you will need to add to your custom version of this template. The location of the master version of this template is **squirrelcart/themes/squirrelcart/store_main.tpl.php.** Each piece of code is explained in detail in the **Storefront - Main Template topic (Section 9.3.17.3.2)**. You will need to read through that topic carefully, and cut and paste the code from **squirrelcart/themes/squirrelcart/store_main.tpl.php** into your custom version of that theme - **squirrelcart/themes/YOUR_THEME/store_main.tpl.php**. When finished, your store should be functional, but may not yet meet your design needs.

Step 4 - Customization via CSS and templates

1. Make changes to **your stylesheet(s) (Section 9.3.14)** if needed.

2. Make changes to your **storefront's main template file (Section 9.3.17.3.2)** if needed.

3. You may also want to alter the template that controls the appearance of your **storefront's home page (Section 9.3.17.3.3)**.

4. After you have most of the storefront page looking the way you want, work on modifying code in other template files as needed, using the **Customizing > Templates > Template Guide** section of this documentation. If you are unsure of which template to modify, view the source of the page you are trying to alter. Locate the section of code you wish to alter, and

look above it for a comment. All template files contain a comment at the top which will display the template name, like this example:

```
<!-- Template: product_detail.tpl.php -->
```

If you have difficulty locating the correct template, please contact our **support department (http://www.squirrelcart.com/support.php)** for assistance.

9.2 Storefront Page - store.php

Overview

Store.php is the default *storefront* file for Squirrelcart. This is the page that your customers will see in their browser's URL field when shopping on your site. When your customers navigate your store, they never leave this page. Squirrelcart dynamically changes the content that the customer sees, based on the links and buttons that they click.

Customizing

You should never have to modify the contents of this file, as it is just a placeholder Squirrelcart uses to generate your storefront page HTML. To customize the appearance of your storefront, see the **How to Customize Guide (Section 9.1)**.

Renaming store.php

Although your storefront page is named **store.php** by default, it can be renamed. Here's how:

1. **Rename File**

   Rename the actual store.php file to your new name. The file must still end in **.php**. If you name it **index.php**, it can take the place of your main index file, and become your homepage.

2. **Update config.php file**

   You will need to tell Squirrelcart the new name of your storefront page. This is done by changing the **$cart_page** variable in your **squirrelcart/config.php** file. Open it in an editor, and change it from **store.php** to your new file name.

9.3 Themes

9.3.1 Themes - Overview

About this Page

This page is an overview to help you get acquanted with some of the terminology and concepts associated with themes. There is much more detailed information regarding specific theme features throughout this section of the documentation.

Important: If you are feeling adventurous and plan on skipping this section and going straight to modifying your templates, it's extremely important that you read the **Modifying Templates (Section 9.3.17.2)** topic first.

What is a theme?

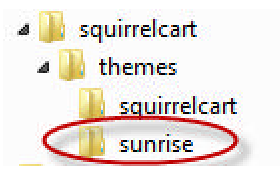
In Squirrelcart, a set of design elements put together to achieve a certain appearance is considered a **theme**. Each theme has a unique name that is used to reference it. By changing the theme setting, you can dramatically alter the appearance of your storefront. Themes are comprised of files and database records.

Where to Find Themes

If you prefer to purchase a complete theme instead of designing your own, you can find themes for purchase on **our website (http://www.squirrelcart.com/)**. If you would like a price quote to have a custom theme created to match the look of your website or of a template you've purchased, **please contact us (mailto:sales@ldev.com)**.

Theme Folder

Theme files are stored in your **squirrelcart/themes** folder, inside a folder corresponding to the name of your theme. For example, if you have a theme named **sunrise**, the folder for that theme would be **squirrelcart/themes/sunrise**:



Theme Files

When Squirrelcart needs a theme file, it looks for it inside your current theme's folder. Example:

```
squirrelcart/themes/sunrise/
```

If the file is found there, that file is used. If the file is not found in your current theme's folder, Squirrelcart will then use the file found in the master Squirrelcart theme folder:

```
squirrelcart/themes/squirrelcart/
```

Squirrelcart is intentionally designed so that you do not need to keep a copy of every theme file inside your current theme's folder. You should only put files in your current theme's folder that differ from the master Squirrelcart theme. This makes upgrading much easier.

Some of the files that make up a theme are:

Templates

Template files are used to control pieces of HTML used to generate a page. They are stored directly inside a theme's folder:

```
squirrelcart/themes/sunrise/product_detail.tpl.php
```

For more information, see the **Templates** area in this section of the documentation for more information

CSS Stylesheets

Stylesheets control many visual aspects of your store, including fonts, colors, borders, margins, padding, etc... They are stored directly inside a theme's folder:

```
squirrelcart/themes/style_main.css.php
```

For more information, see the **CSS Stylesheets** area in this section of the documentation for more information

Images

Theme images can be in jpg, gif, or png format. Image files are stored in a folder named **images** inside your theme's folder:

```
squirrelcart/themes/sunrise/images/example.jpg
squirrelcart/themes/sunrise/images/example.gif
squirrelcart/themes/sunrise/images/example.png
```

For more information, see the **Images** area in this section of the documentation for more information

Theme Database Records

Some of the elements that make up a theme are stored in your database. Those database records are:

Navigation Blocks

Navigation Blocks are areas (boxes by default) that contain links and other HTML specific to navigating particular areas of your store:

For more information, see the **Navigation Blocks** area in this section of the documentation or more information

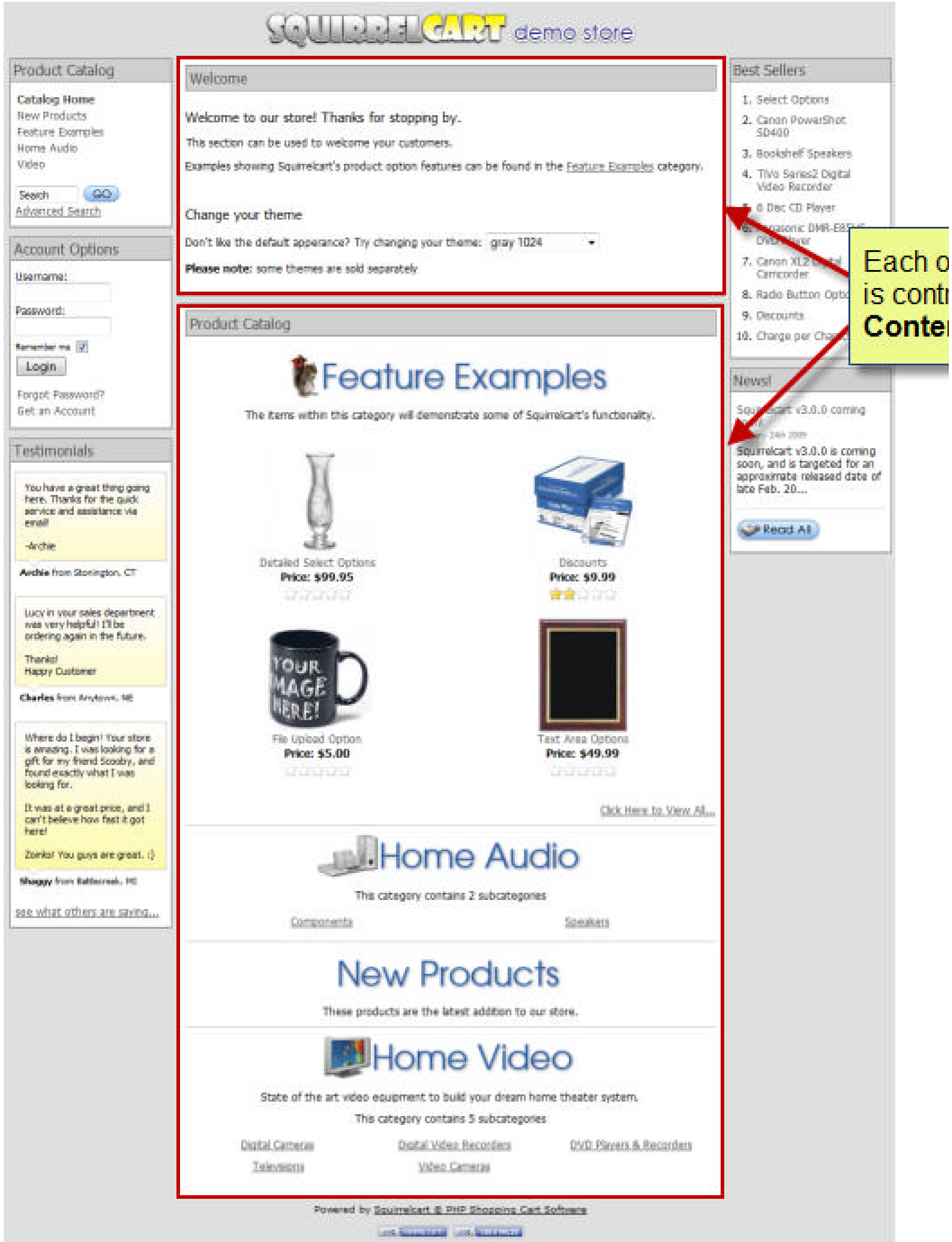
Links

Links can be created to navigate to different pages. Those pages can be a part of Squirrelcart, custom pages you've created, or links to other websites on the internet. Links can be grouped together by purpose, and shown via some PHP code in your template files. They are a good way to display links that aren't already handled by one of your Navigation Blocks, such as links in a header or footer. You can also create links that will appear inside a Navigation Block with a little custom PHP code inserted inside the Navigation Block's Content field.

For more information, see the **Links** area in this section of the documentation or more information.

Content

Content records are used to display specific pieces of content in your storefront:



Squirrelcart comes with some built in content records, and you can easily create your own to add any information you like.

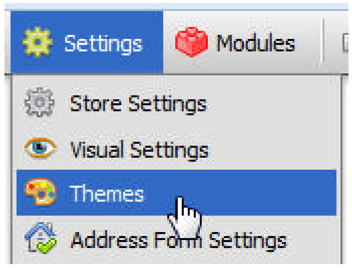
For more information, see the **Content** area in this section of the documentation or more information.

9.3.2 Viewing Theme Records

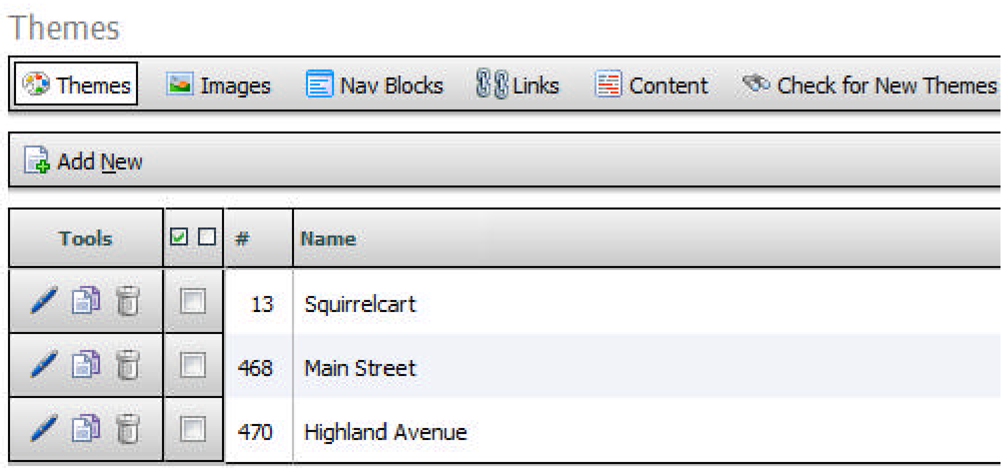
To view theme records

1. Open the **control panel (Section 3)**

2. Click the **Themes** menu link



3. You will see a table showing your themes:

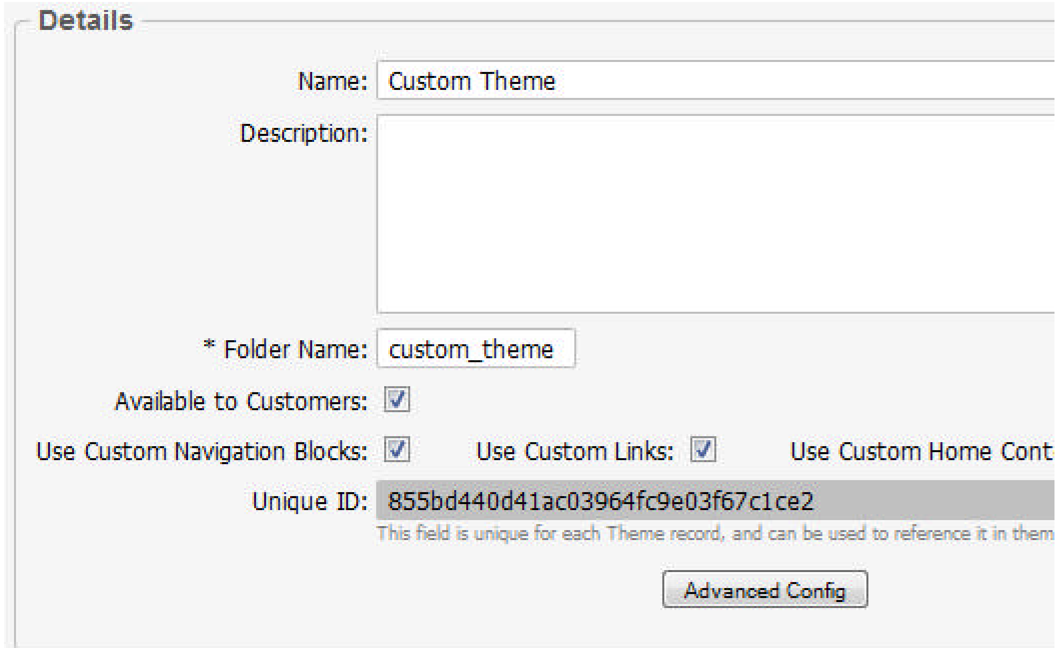


4. To open a theme record, click anywhere on it's row OR on the pen icon at the beginning of the theme's row.

Theme Record Overview

Each theme has a corresponding record in your database which can be used to control certain aspects of that theme. This section explains some of the aspects of that record. More specific information can be found in other topics in this section.

Details



Name

The name of the theme

Description

Description of theme, for your information only

Folder Name

This corresponds to the theme's folder in your `squirrelcart/themes/` folder on your web server.

Available to Customers

When checked, this theme is available to all customers. When unchecked, it is hidden from all customers EXCEPT for users that are members of the Store Admin group.

Use Custom Navigation Blocks

Checking this will allow this theme to have Navigation Blocks that differ from the master **squirrelcart** theme. Navigation blocks are discussed in more detail in the Navigation Blocks topic in this section of the documentation.

Use Custom Links

Checking this will allow this theme to have Links that differ from the master **squirrelcart** theme. Links are discussed in more detail in the Links topic in this section of the documentation.

Use Custom Home Content

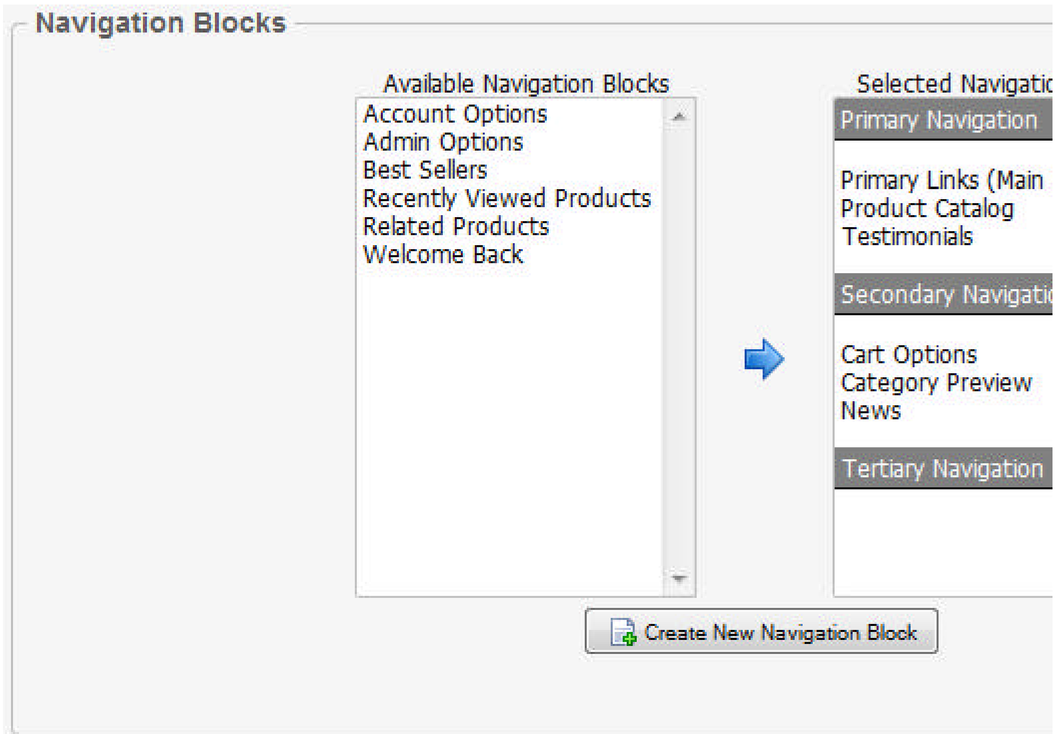
Checking this will allow this theme to have Content on the store's home page that differs from the master **squirrelcart** theme. Content is discussed in more detail in the Content topic in this section of the documentation.

Unique ID

This is automatically generated by Squirrelcart to uniquely identify this theme. You shouldn't need this under normal circumstances.

Navigation Blocks

This section only appears when the **Use Custom Navigation Blocks** field in the **Details** field set is checked. It is used to designate specific navigation blocks for this theme. You can read more about this in the Navigation Blocks topic in this section of the documentation.



Available Navigation Blocks

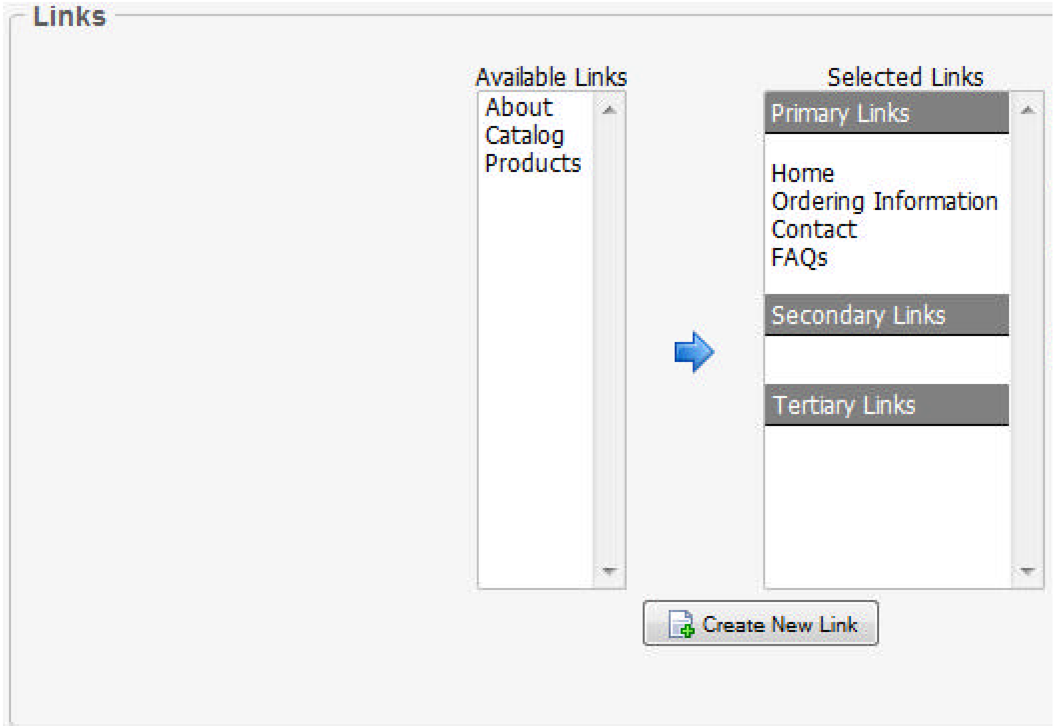
This shows Navigation Blocks that are not being used for this theme

Selected Navigation Blocks

This shows Navigation Blocks that are enabled for this theme, along with the navigation section they are being used for (Primary, Secondary, or Tertiary), and the order of appearance.

Links

This section only appears when the **Use Custom Links** field in the **Details** field set is checked. It is used to designate specific Links for this theme. You can read more about this in the Links topic in this section of the documentation.



Available Links

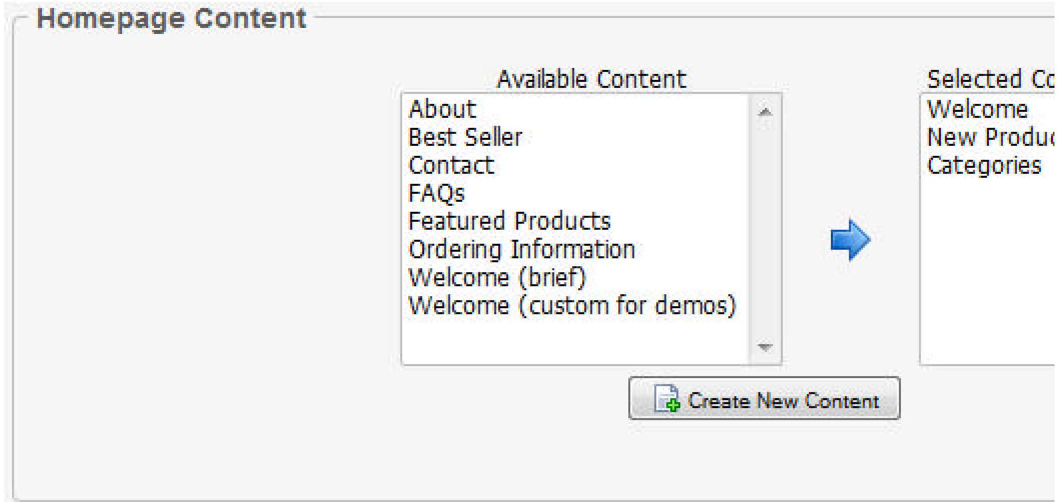
This shows Links that are not being used for this theme

Selected Links

This shows Links that are enabled for this theme, along with a grouping (Primary, Secondary, or Tertiary), and the order of appearance.

Homepage Content

This section only appears when the **Use Custom Home Content** field in the **Details** field set is checked. It is used to designate specific Content for your store's home page for this theme. You can read more about this in the Content topic in this section of the documentation.



Available Content

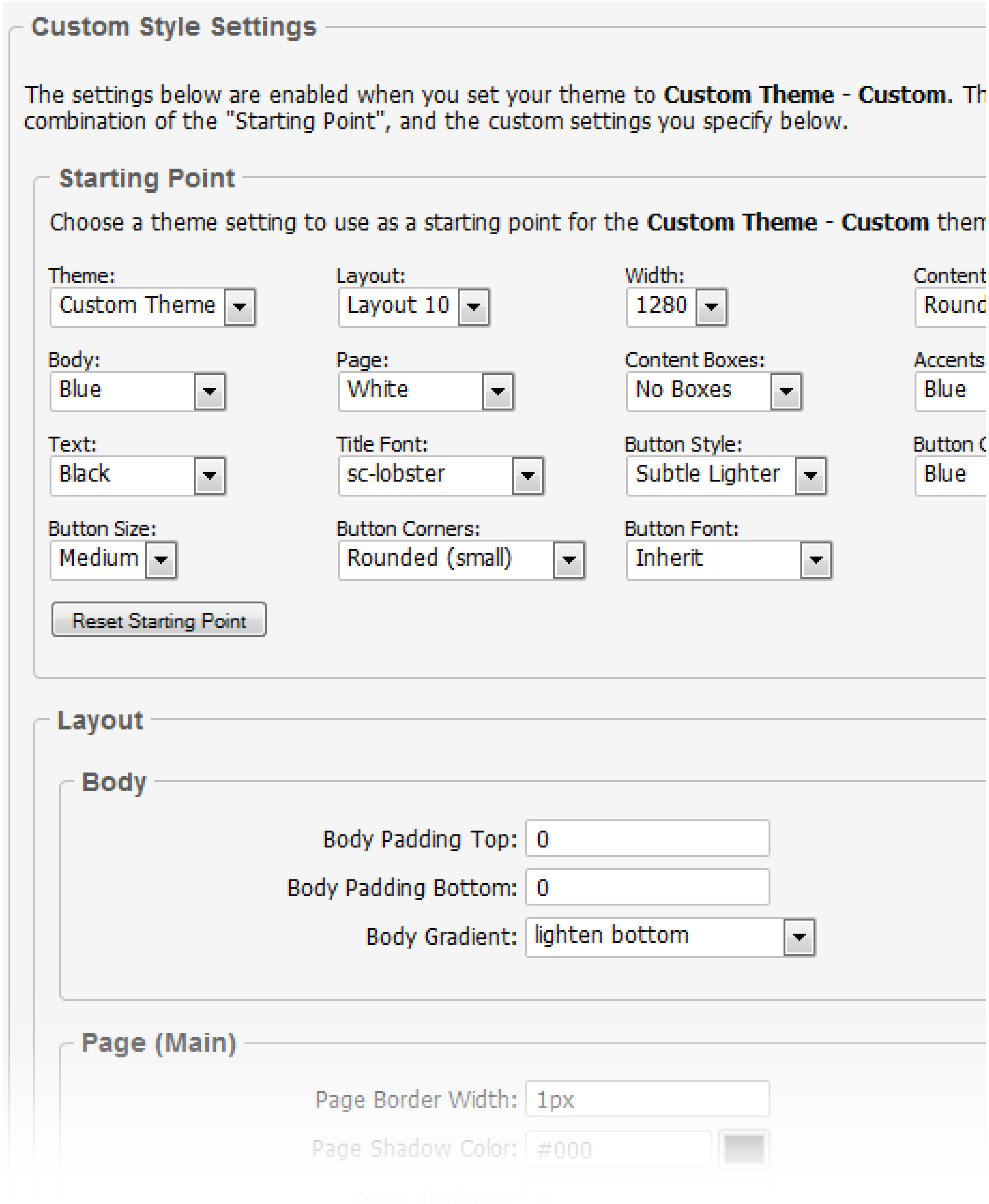
This shows Content records that are not being used for this theme

Selected Content

This shows Content records that are enabled for this theme.

Custom Style Settings

This section will only appear when you are viewing the Squirrelcart master theme record, any theme that is using the Squirrelcart theme's stylesheets, or a special theme that was created using INI config files.



This section is discussed in more detail in the **Custom Style Settings topic (Section 9.3.16)**.

9.3.3 Enabling or Disabling Ability for Customers to Change Theme

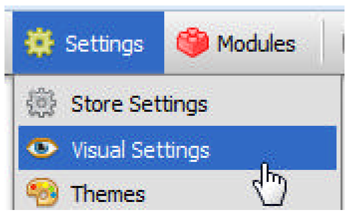
Overview

Your store has a **default theme setting (Section 9.3.4)**, which controls what theme is used by default for all customers. Optionally, **customers can also change the theme (Section 9.3.5)** they are using for their own account when logged in. That is done on the account details page in the storefront.

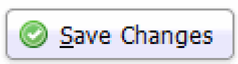
Enabling or Disabling Ability for Customers to Change Their Theme

1. Open the **control panel (Section 3)**

2. Click the **Visual Settings (Section 6.2)** menu link



3. Check or uncheck the **Allow Theme Change** field as needed

4. Click 

> Any user that is a store admin will have the ability to change their theme on the account details page in the storefront, even if **Allow Theme Change** is checked.

9.3.4 Changing the Default Theme

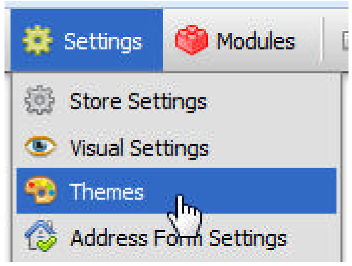
Overview

The default theme is used whenever a new user visits your store. **The default theme can be overridden (Section 9.3.5)** on a per user basis if the **Allow Theme Change** field is checked on your **Visual Settings (Section 6.2)** page.

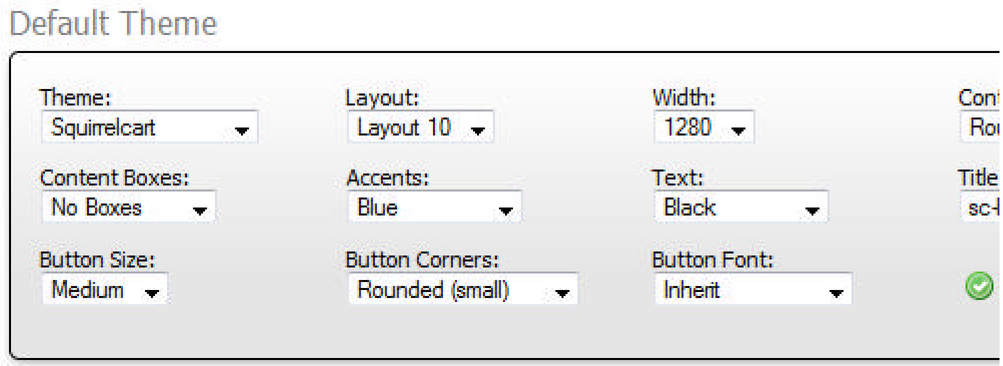
Changing the Default Theme

1. Open the **control panel (Section 3)**

2. Click the **Themes** menu link



3. Change the fields inside the **Default Theme** box:



4. Click the **Save** button

When you change the default theme, if you were **using a different theme yourself for your own admin account (Section 9.3.5)**, your current theme will automatically be changed to match the default theme.

9.3.5 Changing Your Current Theme

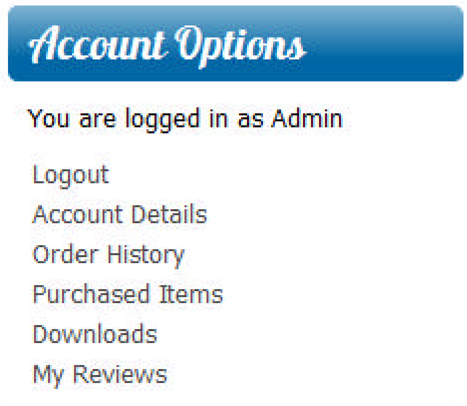
Overview

This topic explains how to switch the theme that is being used for the logged in user. This does not alter the default theme that a customer will see when they first visit your site. If you are trying to change the theme used by default for all visitors, see the **Changing the Default Theme topic (Section 9.3.4)** in this section.

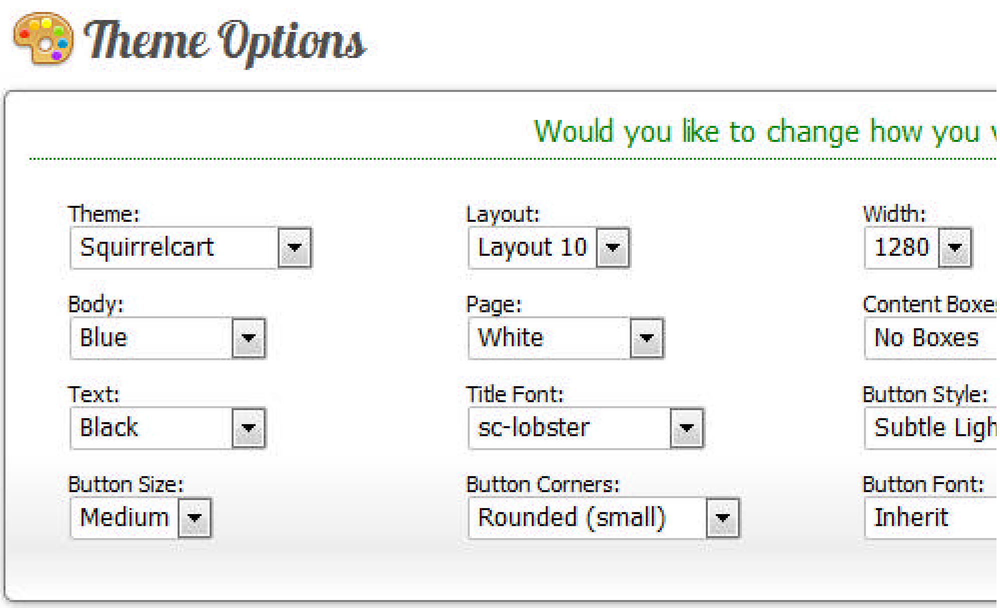
Changing Themes in the Storefront

1. **Login (Section 2.7)** on your *storefront* page

2. Click the **Account Details** link inside the **Account Options** navigation block:



3. Change the theme settings at the bottom of the page, under **Theme Options**:

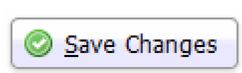


As you change the fields, the page will reload with those new theme settings in place.

> If you prefer to not allow your customers to change their theme, see the **Enabling / Disabling Customer Theme Change topic (Section 9.3.3)** in this section.

Changing Themes in the Control Panel

Method 1

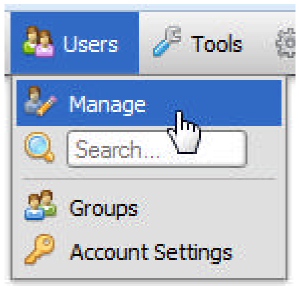
Open the theme record under **Settings > Themes** and click 

. The theme will automatically be set as your current theme without changing the default theme for other users.

Method 2

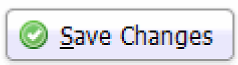
1. Open the **control panel (Section 3)**

2. Click the **Users > Manage** link



3. Open your user account record by clicking anywhere on it's row

4. Change the settings inside the **Theme** fieldset

5. Click 

6. Logout, and log back in for changes to take affect.

9.3.6 Creating a Custom Theme

Overview

In order to customize any of the design elements that make up a theme, you will need to create your own custom theme. This topic explains how to create a new theme. The advanced section of the documentation explains how to modify template and image files for your custom theme.

Creating a Custom Theme

1. **Choose a Name**

   Choose a name for your theme. This will be the name used in the **Theme** drop down box in the **Account Options** section of your storefront. For this example, we will use the name **sunrise**

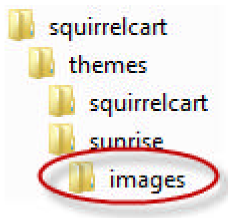
2. **Create Theme Folder**

   You will need to create a folder within the **squirrelcart/themes** folder to contain the theme elements that you will customize. We recommend that you name it similar to the name you chose, but using all lowercase characters. Also, be sure to avoid spaces and special characters. Use your *FTP* client to create your custom theme folder, and leave it open for the next step.

> As of version 5, there is an sc_custom theme folder you can use for this. If you'd like to use this folder just rename it to something unique.

3. **Create Theme Images Folder**

   Inside the folder you just created, create a folder named **images**, which will be used to store any images specific to this theme:



4. **Assign Permissions**

   In order for Squirrelcart to be able to work with your theme's **images** folder, you *may* need to assign it permissions. PHP is going to need access to write to the folder you created in step #3 in order for you to upload theme images via the control panel. Your web host can tell you for sure whether or not setting permissions is needed. If it is, you will need to use your *FTP* client, and assign the **images** folder you created in setp 3 above permissions of 777 (or 775, or 755 depending on your server). Use the "**Installation : Setting File Permissions (Section 2.9.2)**" topic as a guide.

   > DO NOT alter the default permissions that are associated with the custom theme folder you created in step #2 (shown in the example above as sunrise).

5. **Upload Logo**

   Create a file named store_logo.png (or store_logo.gif, or store_logo.png). Upload that file to the images folder you just created in step 3, using your FTP client.

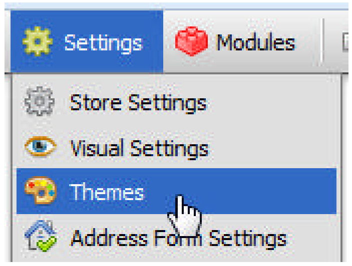
6. **Create Stylesheet (optional)**

   If you want to be able to add your own CSS to customize the appearance of the store, create a blank text file named **style_custom.css.php** and upload it to the theme folder you created in step 2. If this file is present, Squirrelcart will automatically include it after including the default stylesheets from the master Squirrelcart theme folder. If you need to customize our CSS, you can add any CSS you like to this file. See the **CSS Stylesheets topic (Section 9.3.14)** for more info.

7. **Create Javascript File (optional)**

   If you need to add any Javascript to your theme, you can create a file named **theme.js** and upload it to the theme folder you created in step 2. If this file is present, Squirrelcart will automatically include it after including the default JavaScript from the master Squirrelcart theme folder.

8. View Themes in Control Panel

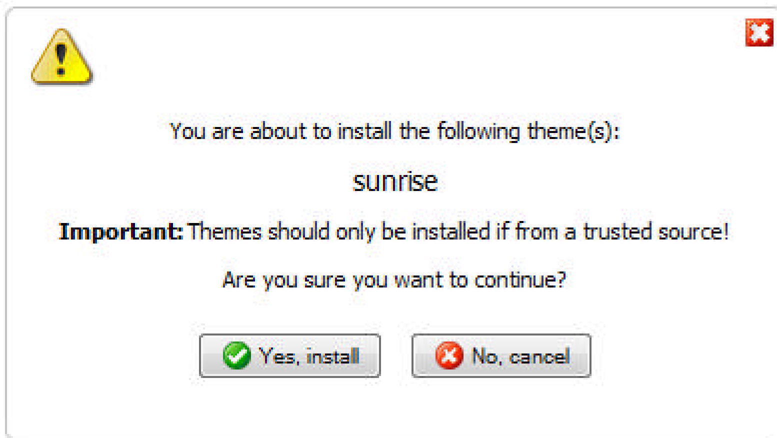


9. Check for new themes

Click 

10. Confirm Theme Install

Your theme folder will be detected. Click the button to confirm theme installation.



11. Complete

You should see a message similar to this, showing that theme was installed:

12. Change theme to your custom theme

In order to see the changes you will be making to your custom theme, you will need to change to it. If you wish to use your new theme as the default theme, you will need to set it as default by following the "**Changing the Default Theme (Section 9.3.4)**" topic.
If you want to use the theme only while logged in as store admin, follow the instructions in the "**Changing Your Current Theme (Section 9.3.5)**" topic of the documentation.

Please keep in mind that you will see no changes in the appearance of your store when you first create your new theme, with the exception of your logo appearing.

9.3.7 Installing a Theme

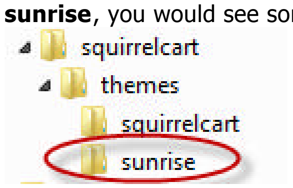
Overview

This topic explains how to install a theme that has already been created. This includes themes purchased at **Squirrelcart.com (http://www.squirrelcart.com/)**, or obtained from other Squirrelcart theme designers.

If you wish to create your own theme, see the **Creating a Custom Theme topic (Section 9.3.6)**.

Steps

1. Upload the theme's folder to your **squirrelcart/themes** folder. If your theme's name is **sunrise**, you would see something like this after uploading its folder:

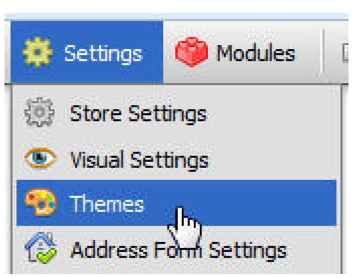


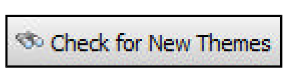
2. **Assign Permissions**

   This is only necessary if you want to use our control panel to upload new theme images or other theme files. If you prefer uploading your images and other theme files using FTP, you can skip this step.

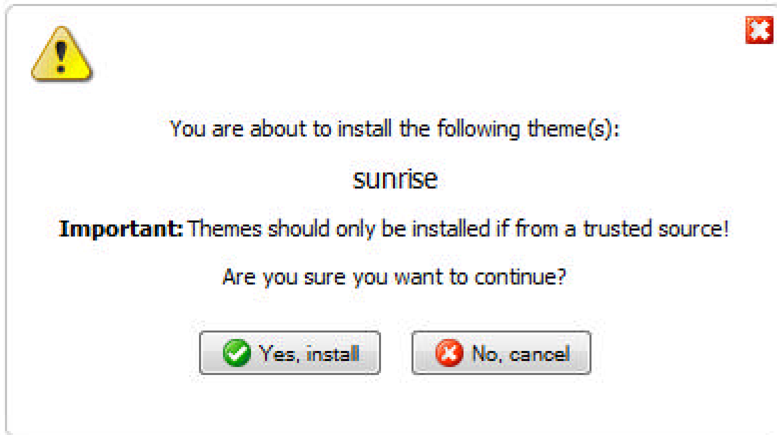
   In order for Squirrelcart to be able to work with your theme folder, you must assign it permissions. On most servers, you will need to use your *FTP* client, and assign the theme's folder (squirrelcart/themes/THEME_NAME) and its image folder (squirrelcart/themes/THEME_NAME/images) permissions of 777. Use the "**Installation : Setting File Permissions (Section 2.9.2)**" topic as a guide.

3. View Themes in Control Panel

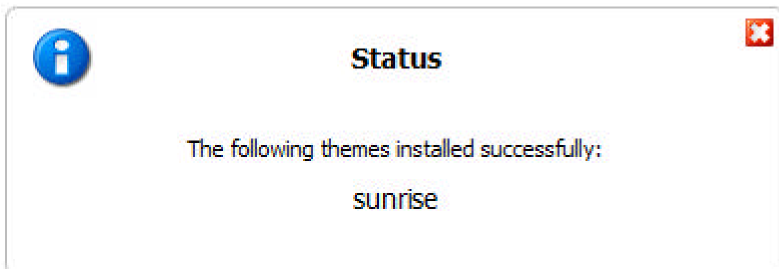


4. Click 

5. Your theme folder will be detected. Click the button to confirm theme installation.



6. You should see a message similar to this, showing that theme was installed:



7. **Change theme to your new theme**

   In order for the new theme to be used, you will need to change to it. If you wish to use your new theme as the default theme, you will need to set it as default by following the "**Changing the Default Theme (Section 9.3.4)**" topic.

   If you want to use the theme only while logged in as store admin, follow the instructions in the "**Changing Your Current Theme (Section 9.3.5)**" topic of the documentation.

9.3.8 Copying a Theme for Testing

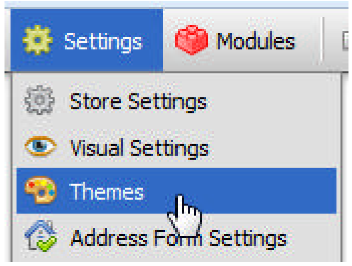
Overview

If you wish to make changes to a custom theme without negatively impacting your store, you can create a copy of your theme for testing. By setting your current theme to this new copy, only you will see the changes you make.

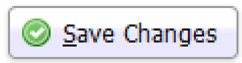
You can then safely work with this theme until you are happy with the changes. To make it live, you just need to make the copy your store's default theme.

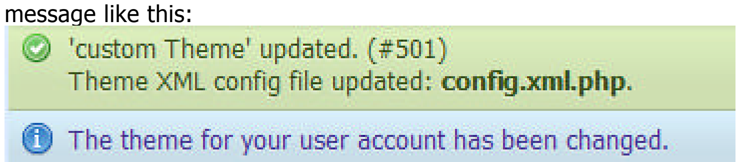
How to create a copy of a theme

1. Open the themes table:



2. Locate the theme you wish to copy and click on it's record to open it. For this example, we will be copying a theme named **custom**.

3. Without changing the record, click  . This will ensure that the theme information is saved to an XML config file inside the theme's config folder. You should see a message like this:

   If you do not see the green message above indicating the config.xml.php file has been updated, set permissions on the theme's config folder so it is writable by your server. That usually requires 0777 permissions. The location of this folder is:
   squirrelcart/themes/YOUR_CUSTOM_THEME/config

   After changing permissions, open and save the record again. Do not continue until you see the success message similar to the one above.

4. Download a copy of this themes corresponding folder from the **squirrelcart/themes** folder via FTP

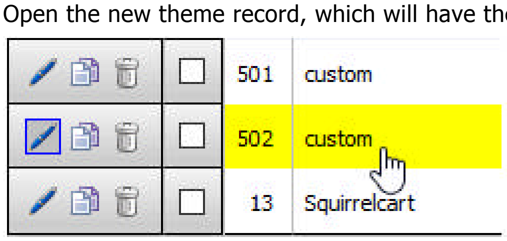
5. Rename the folder you downloaded. Any name will do. We recommend adding a "-v5" suffix as in:
   custom-v5

6. Upload the renamed folder to **squirrelcart/themes**

7. **Install the theme (Section 9.3.7)**

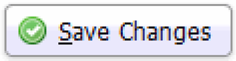
8. Theme will show up in the themes table with same name, but with a higher record number.

9. Open the new theme record, which will have the largest # in the table:

10. Change the Name field to something different so you can tell them apart, such as:

custom v5

11. Click 

. The theme will automatically be set as your current theme, without changing the theme for your customers.

You can work on the theme now without negatively impacting your store. When you are ready to make this theme live, **set it as your store's default theme (Section 9.3.4)**.

9.3.9 Theme Images

Overview

Theme images are used for buttons, headers, etc... Product and Category images are not considered theme images, and are stored in a different place.
In order to use your own theme images, you must have a **custom theme (Section 9.3.6)** and it must be set as the store's **default theme (Section 9.3.4)** (or **set as your theme (Section 9.3.5)**). You can find out what theme you are currently using by what is selected in the **Theme Options** section of the Account Details page in your storefront.
You can use gif, png or jpg files for any of your theme images.

How Squirrelcart Determines Which Image to Use

When Squirrelcart needs a theme image, it looks for it inside your current theme's **images** folder. Example:

```
squirrelcart/themes/sunrise/images
```

If the image is found there (in gif, png, or jpg format), that image is served to the customer's browser. If the image is not found in your current theme's images folder, Squirrelcart will then pull the image from the master Squirrelcart theme's images folder:

```
squirrelcart/themes/squirrelcart/images
```

> Squirrelcart is intentionally designed so that you do not need to keep a copy of every theme image file inside your current theme's **images** folder. You should only put images in your current theme's **images** folder that differ from the master Squirrelcart theme.

Changing Theme Images

By default, all theme images are pulled from the master Squirrelcart theme as explained in the section above. If you would like to change a theme image to an image file you've created (gif, png, or jpg), follow the instructions in this section.

Preparation

1. In order to change a theme image, you must have a theme other than **squirrelcart** selected. If you don't have a custom theme installed and selected, you will first need to

create a custom theme (Section 9.3.6).

2. After creating a custom theme, you need to switch to it. If you want all customers that visit your store to see that theme, **set it as your store's default theme (Section 9.3.4)**. Alternatively, if you only want the theme to take effect when you are logged in, **set it as your current theme (Section 9.3.5)**.

3. Your theme needs to have a folder named **images** inside it:
   `squirrelcart/themes/your_theme/images`

   If that folder is not present, you will need to create it using *FTP* or your web hosting control panel's file manager.

4. Determine which image you want to change. You can do this in most browsers by finding the image on your storefront page, and right clicking to view properties. You'll need to know the name of the image currently being used. You might want to keep a copy of Squirrelcart's "squirrelcart/themes/squirrelcart/images" folder on your computer. You can then easily view the image names in that folder on your computer to find the one you are looking to modify.

There are 2 ways you can change a theme image. If you are familiar with using FTP, the recommend approach is explained below under "Changing a Theme Image Using FTP". If you are not familiar with FTP, the recommended approach is explained below under "Changing a Theme Image Using Squirrelcart's Control Panel".

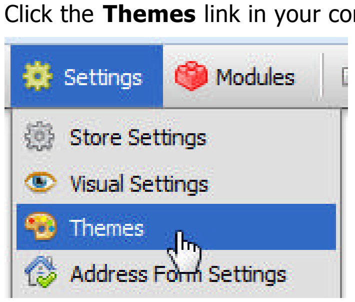
Changing a Theme Image Using Squirrelcart's Control Panel

In order for this to work, Squirrelcart must be able to write to the **images** folder described in the Preparation section above. If you receive a permission error when attempting the steps below, it is because Squirrelcart cannot write to your theme's **images** folder. On most servers, that requires setting permissions on that folder to 777 using an *FTP* client. Some servers only require permissions of 755 or 775. Some Windows servers will automatically be able to write to your theme's **images** folder. If you are not familiar with setting permissions, your web host should be able to set them for you. We may be able to set permissions for you as well if you open a helpdesk ticket. You can find more information on requesting support on our support page:

http://www.squirrelcart.com/support.php

1. Determine which image you want to change. (See **Preparation** above)

2. Click the **Themes** link in your control panel:

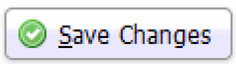


3. Click the link labeled **Images**. For this example, the theme name is **YOUR THEME**:

> If when you hover over the link it reads **Images for 'Squirrelcart' theme**, you need to **change your theme (Section 9.3.5)**. You can't modify images for the master Squirrelcart theme.

4. Locate the row for the image you wish to change, and click anywhere on that row to open the image's record

5. Select the image using the **Image** field - your image must have the same name as the original image, with any valid image extension. For example, if you are replacing "store_logo.png", your image must be named "store_logo.png", "store_logo.jpg", or "store_logo.gif".

6. Click 

Changing a Theme Image Using FTP

1. Create a file with the same name as the image you want to replace. You can save it in gif, png, or jpg format. For example, if you want to replace the theme image **btn_add_to_cart.png** with a GIF that you created, save your file as **btn_add_to_cart.gif**

2. Upload your image to your custom theme's images folder:
`squirrelcart/themes/your_theme/images`

> Your image must have the same name as the original image, with any valid image extension. For example, if you are replacing "store_logo.png", your image must be named "store_logo.png", "store_logo.jpg", or "store_logo.gif".

3. Check your storefront page to make sure the image changed. Squirrelcart should automatically use your image if it is named properly.

9.3.10 Navigation Blocks

9.3.10.1 Navigation Blocks - Overview

Overview

Navigation Blocks are areas (boxes by default) that contain links and other HTML specific to navigating particular areas of your store:

Each theme can be configured to display it's own navigation blocks.

Navigation Blocks are used to control many important functions in your *storefront*. For this reason, you should be very careful editing them, as a mistake can have a significant negative impact on your store.

Displaying Navigation Blocks

By default, navigation blocks are designed to be displayed when the navigation area they are assigned to is shown, via PHP code in your **main storefront page template (Section 9.3.17.3.2)**:

```
<?php
	// Left Navigation section
	print sc_nav('Primary');
?>
```

The default **Squirrelcart** theme displays navigation blocks assigned to Primary navigation on the left side of the page, and navigation blocks assigned to Secondary navigation on the right.

You can optionally add code to display an individual navigation block in your *storefront* without it being nested inside a navigation area. The code to do this is as follows:

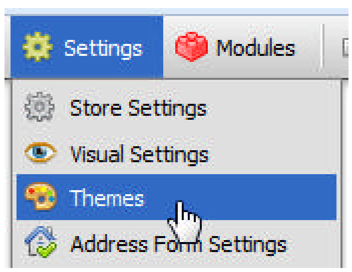
```
<?php
     // Print navigation block having record number "123"
     print sc_nav_block(123);
?>
```

That code can be placed in any Squirrelcart template you wish.

9.3.10.2 Navigation Blocks - Viewing All

Viewing All Navigation Blocks

1. Open your control panel
2. Click the **Themes** menu link



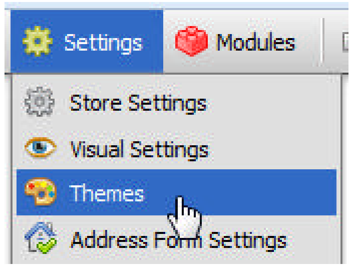
3. Click the **Navigation Blocks** link. A table will appear showing all the Navigation Block records in your database. To view one, click it's row.

9.3.10.3 Navigation Blocks - Adding to Storefront

Overview

This topic explains how to add a navigation block to a theme so that it appears in your storefront when that theme is enabled.

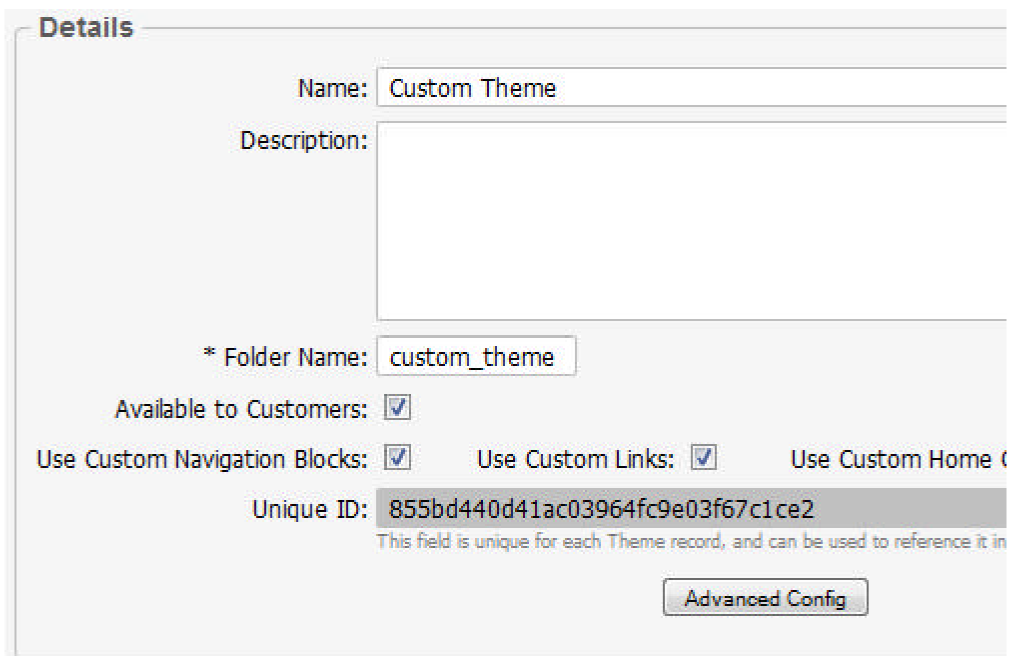
1. Open your **control panel (Section 3)**
2. Click the **Themes** menu link



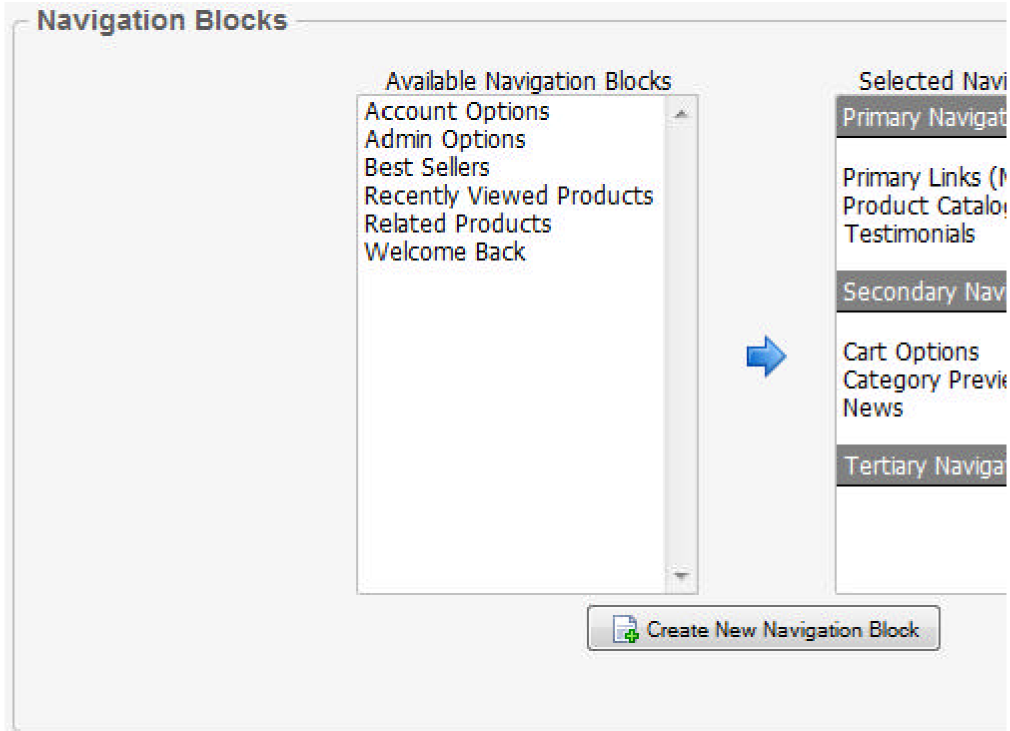
3. Click the record row for the theme you wish to modify. You can view your current theme and your store's default theme settings at the top of the table.

4. If you are viewing the record for the built in **Squirrelcart** theme, skip to step #6. If you are on any other theme record, continue below.

5. If the **Use Custom Navigation Blocks** field shown in the image below is not checked, the theme is using the default navigation block configuration from the master **squirrelcart** theme. Check the **Use Custom Navigation Blocks** field, which will allow this theme to use it's own navigation blocks. If this field is already checked, continue to the next step.



6. Locate the **Navigation Blocks** field set:



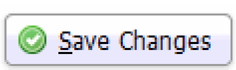
The **Available Navigation Blocks** field on the left shows navigation blocks that are not assigned to this theme. The **Selected Navigation Blocks** shows navigation blocks that are already assigned to this theme. They are grouped by purpose. The order they appear in in this field is the order that they will be shown in on your storefront page.

7. Click the name of the navigation block you want to add under **Available Navigation Blocks** to select it

8. Click the right arrow button between the 2 fields to add the navigation block to the **Selected Navigation Blocks** field

9. If you wish to change the position of the navigation block, click on it and then click the arrows to the right side of **Selected Navigation Blocks** to position it whereever you like.

10. Repeat this process for each navigation block you wish to add

11. Click 

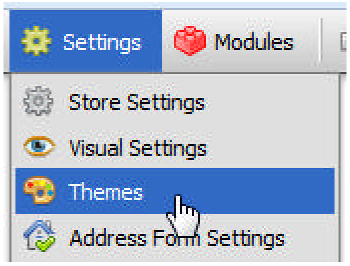
9.3.10.4 Navigation Blocks - Removing From Storefront

Overview

This topic explains how to remove a navigation block from a theme so that it no longer appears in your storefront when that theme is enabled. In order to alter which navigation blocks appear in your storefront, **your theme must be set (Section 9.3.5)** to something other than the default **squirrelcart** theme.

1. Open your **control panel (Section 3)**

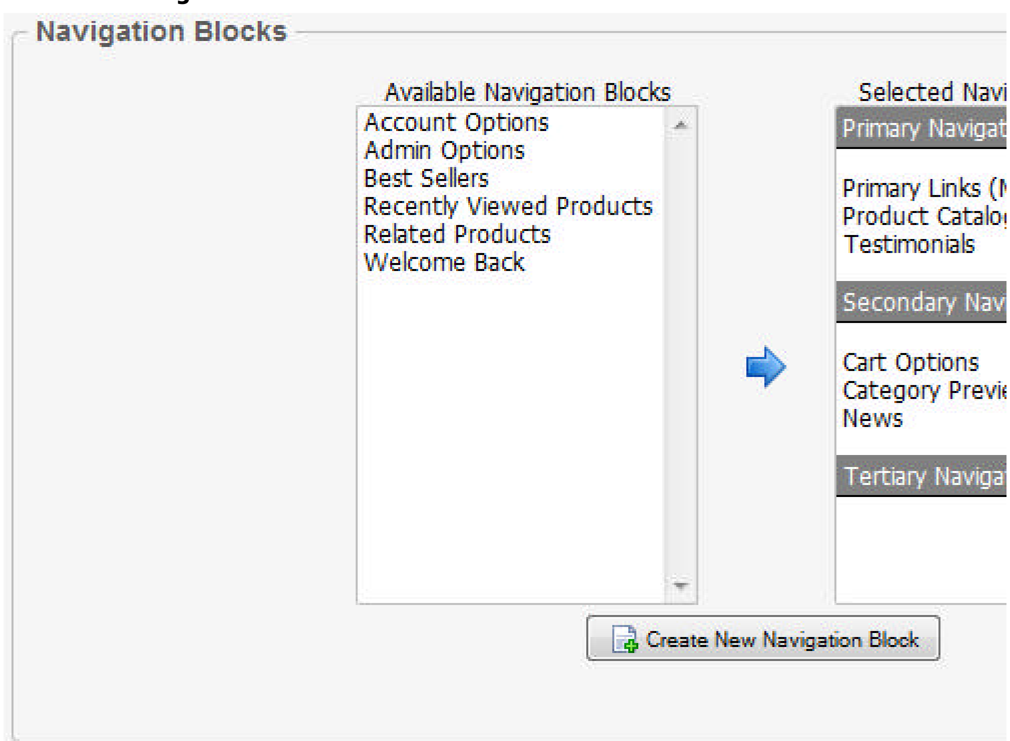
2. Click the **Themes** menu link



3. Click the record row for the theme you wish to modify. DO NOT click the **Squirrelcart** theme record as you cannot customize the navigation blocks on the master theme. You can view your current theme and your store's default theme settings at the top of the table.

> If the theme does not have **Use Custom Navigation Blocks** checked, the theme is using the default navigation block configuration from the master **squirrelcart** theme. If you wish to customize the navigation blocks used for this theme, check **Use Custom Navigation Blocks,** follow the instructions in the **Adding to Storefront (Section 9.3.10.3)** topic in this section, and skip the rest of the steps below.

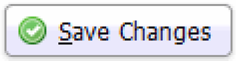
4. Locate the **Navigation Blocks** field set:



The **Selected Navigation Blocks** field on the right shows which navigation blocks are enabled. They are grouped by purpose. The order they appear in in this field is the order that they will be shown in on your storefront page.

5. Click the name of the navigation block you want to remove under **Selected Navigation Blocks** to select it

6. Click the  button between the 2 fields to remove the navigation block from **Selected Navigation Blocks**

7. Click 

9.3.10.5 Navigation Blocks - Changing Position

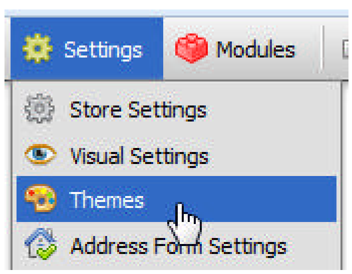
Overview

Squirrelcart allows you to group navigation blocks in up to (3) different navigation areas - Primary, Secondary, and Tertiary. By default, Squirrelcart's **Primary** navigation is on the left side of the page. **Secondary** navigation is on the right side of the page. **Tertiary** navigation is not used by default.

Changing a Navigation Block's Position

This explains how to change the position of a navigation block for any theme.

1. Click the **Themes** menu link

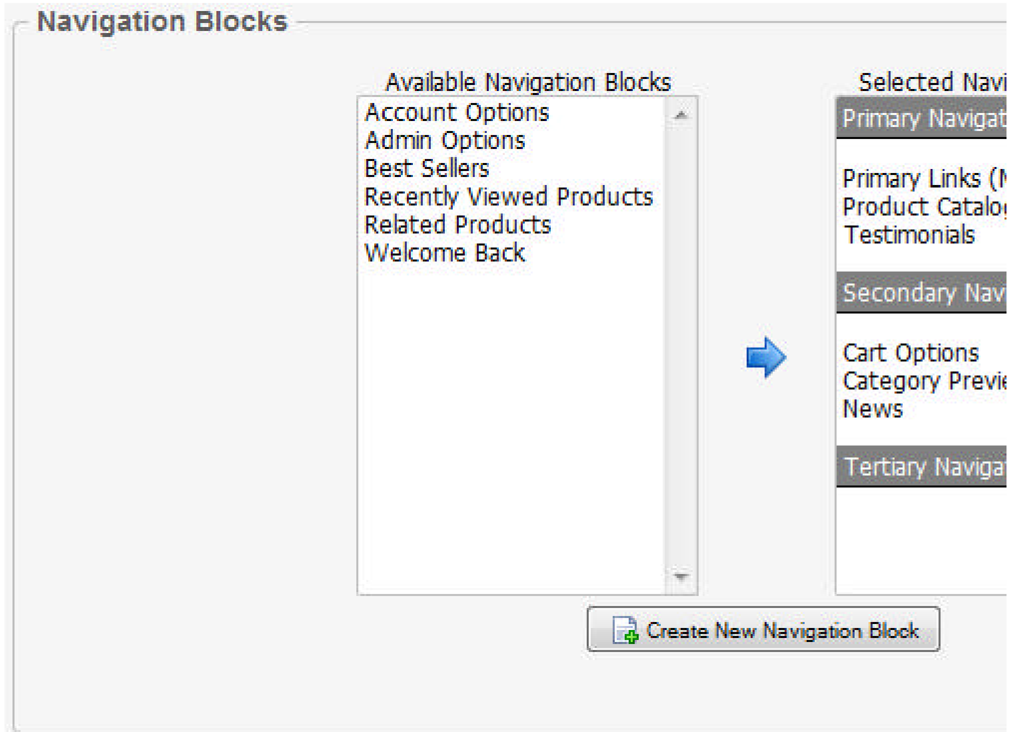


2. Click on the record row for the theme you wish to alter.

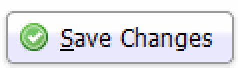
3. If you are editing the theme record for the built in **Squirrelcart** theme, skip to step #5. For all other themes, continue below.

4. If the theme you are editing does not have the **Custom Navigation Blocks** field checked, you will need to check it and **add navigation blocks (Section 9.3.10.3)** to this theme. If it is already checked, continue below.

5. Click on the navigation block you wish to reposition in the **Selected Navigation Blocks** box.



6. Click one of the blue positioning arrows on the right side of the **Selected Navigation Blocks** box to move the nav block to the desired position. If you wish to move it to a different navigation area, position it under the heading for that navigation area.

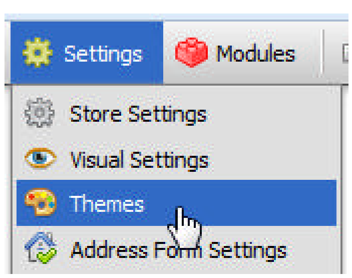
7. Click 

9.3.10.6 Creating/Modifying a Nav Block

Creating / Modifying a Nav Block

1. Open the **control panel (Section 3)**

2. Click the **Themes** menu link

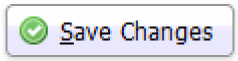


3. Click the **Navigation Blocks** link

4. To create a new navigation block, click 

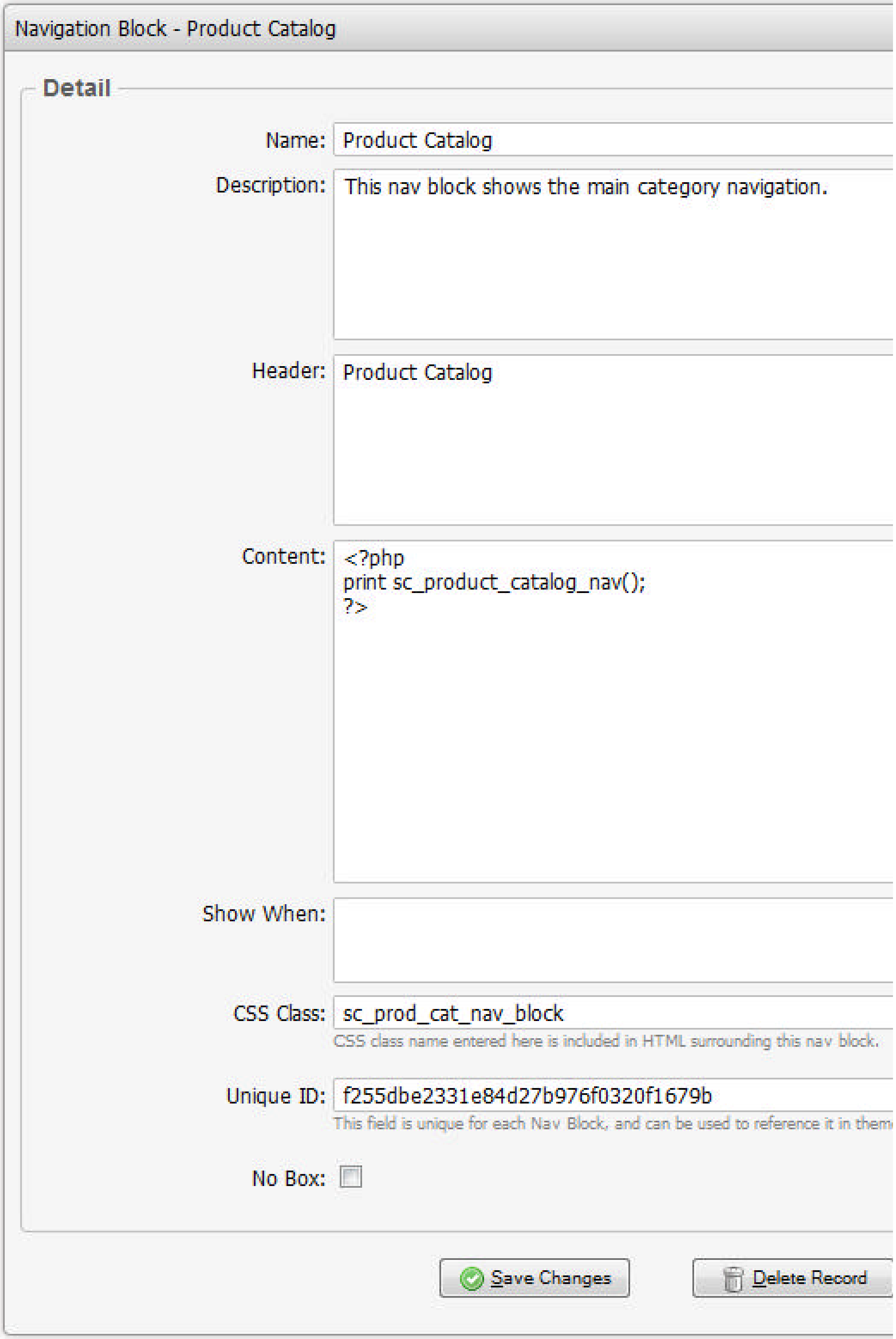
. To modify an existing navigation block, click anywhere on it's record row.

5. Fill out the form, using the record overview below as a guide.

6. Click 

7. When creating a new navigation block, you will most likely want to add it to your theme so it appears on your storefront page. Follow the instructions in the **Adding to Storefront (Section 9.3.10.3)** topic in this section.

Record Overview



Name
This is the name of this nav block. It is never shown in your storefront.

Description
For your reference only

Header
This is what will appear in the top of the nav block, as a title. You can use both plain text and HTML here. If you leave this blank, the nav block will have no title.

Content
This is what will appear inside the nav block, below the header. HTML, plain text, and PHP are all accepted.

Show When
This field controls when the nav block will appear. It is an advanced field and should not be modified unless you are experienced with PHP. The format for this field should be PHP code that will evaluate to **true** when you want the nav block to appear. PHP tags are not needed.

CSS Class

Any class name entered here is included in the <div/> tag surrounding the navigation block. This is useful for targeting individual navigation blocks in your *CSS*.

Unique ID

This field is unique for each Nav Block, and can be used to reference it in the theme configuration files. This field is read only, and is genereated automatically by Squirrelcart. You should not need this information under normal circumstances.

No Box

If you want to create a navigation block that does not appear to be inside a box (no border, no box shadow, etc...), check this box. This is useful when you want most of your nav blocks to appear as boxes, but need one or two that appear along with those nav blocks without looking like one.

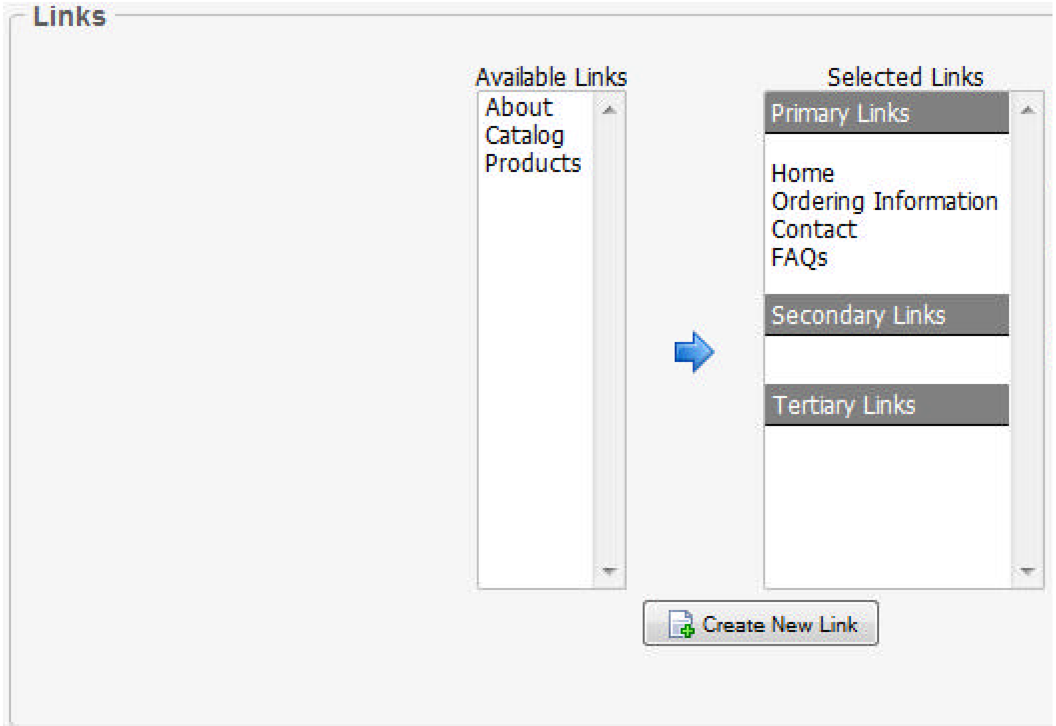
> If you want all your nav blocks to not have borders, do not check **No Box.** Instead, use the built-in "No Boxes" content box style variant that comes with the built-in Squirrelcart theme.

9.3.11 Links

9.3.11.1 Links - Overview

Overview

Links can be added to your storefront to link to products, categories, external URLs, content (for custom pages), and more. They are controlled by records in your Links table, and can be grouped into Primary, Secondary, or Tertiary link sections:



Each theme can be configured to display it's own Links.

Displaying Links

Links in Squirrelcart were designed as an easy way to group links that have a common purpose, and do not necesarrily need to be inside a Navigation Block. A good example of this are links that appear in a header or footer area.

Displaying All Primary Links Using the Built in Main Menu Navigation Block

Squirrelcart has a special built in **Primary Links (Main Menu)** navigation block, which by deafult will display links assigned as Primary Links. It appears by default as the first navigation block on the left in the master Squirrelcart theme. If you started off with an older version of Squirrelcart and upgraded, this navigation block may not be assigned to your theme. If you **add links (Section 9.3.11.3)** as **Primary Links** and they are not appearing on your storefront, you can easily add them by adding this special navigation block to your theme. See the **Navigation Blocks > Adding to Storefront (Section 9.3.10.3)** topic for instructions on how to do this.

Displaying All Primary Links inside a Custom Navigation Block

The default master **squirrelcart** theme will automatically display any links assigned as Primary Links. It does so via a built in Navigation Block named **Primary Links (Main Menu)** which by default appears in the upper left hand corner of your storefront page. If you started using Squirrelcart with version 3.0.3 or newer all you need to do to add Primary Links to your storefront page is to **add them to the Primary Links section (Section 9.3.11.3)** inside the Links fieldset on your custom theme record (or on the Squirrelcart theme record).

If you do not have this navigation block in your installation, you can add it as follows:

1. Add a new Navigation Block named **Main Menu** (or modify the existing one) and past the following code in the **Content** field:

```
<?php $Links = sc_links('Primary'); ?>
<?php if(!empty($Links)): ?>
     <div class="nav_link_container">
          <ul class="nav_links">
               <?php foreach($Links as $Link): ?>
                    <li><a id="<?php print $Link['id'] ?>"
class="<?php print $Link['CSS_Class'] ?>" href="<?php print
$Link['URL'] ?>" target="<?php print $Link['Target'] ?>"><?
php print $Link['Label'] ?></a></li>
               <?php endforeach; ?>
          </ul>
     </div>
<?php endif; ?>
```

2. If the Navigation Block is not appearing on your storefront page make sure **it's been added (Section 9.3.10.3)**.

The navigation block mentioned above will NOT display unless you've added at least one link as a Primary Link.

Displaying All Links Assigned to a Link Section

The recommended code to display all links assigned to the "Primary" links section is as follows:

```
<?php $Links = sc_links('Primary'); ?>
<?php foreach($Links as $Link): ?>
     <a id="<?php print $Link['id'] ?>" class="<?php print
$Link['CSS_Class'] ?>" href="<?php print $Link['URL'] ?>"
target="<?php print $Link['Target'] ?>"><?php print $Link
['Label'] ?></a><br/>
<?php endforeach; ?>
```

That code can be placed in any Squirrelcart template file, Content record, or Navigation Block record.

If you'd like to display Secondary or Tertiary links instead, use the same code but change 'Primary' to 'Secondary' or 'Tertiary'

If you wish to have the links appear on all pages, the best template to place this code in is your **main storefront page template (Section 9.3.17.3.2)**.

Sample HTML output resulting from the code above:

```
<a id="sc-link-1" class="home_link"
href="http://www.example.com">Home</a><br/>
<a id="sc-link-2" class="products_link"
href="http://www.example.com/categories/">Products</a><br/>
<a id="sc-link-3" class="about_link"
href="http://www.example.com/content/about">About</a><br/>
<a id="sc-link-4" class="contact_link"
```

```
href="http://www.example.com/contact.htm">Contact</a><br/>
<a id="sc-link-5" class="news_link"
href="http://www.example.com/news/">News</a><br/>
<a id="sc-link-6" class="faqs_link"
href="http://www.example.com/faqs.htm">FAQs</a><br/>
```

Displaying a Single Link

If you would like to display a single link in your *storefront* without it being nested inside a link section, you can do so by adding code to your **main storefront page template (Section 9.3.17.3.2)** as follows:

```
<?php
     // display link with record number "123"
     print sc_link(123,'tag');
?>
```

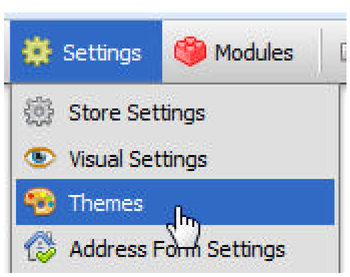
That code can be placed in any Squirrelcart template, Content record, or Navigation Block. It will output a single anchor tag corresponding to the settings for the Link record numbered **123**:

```
<a id="sc-link-1"
class="home_link" href="http://www.example.com">Home</a>
```

9.3.11.2 Links - Viewing All

Viewing All Links

1. Open your control panel
2. Click the **Themes** menu link



3. Click the **Links** link. A table will appear showing all the Link records in your database. To view one, click it's row.

9.3.11.3 Links - Adding to Storefront

Overview

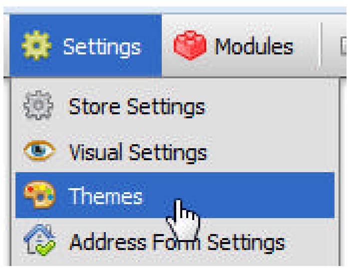
This topic explains how to add an existing Link record to a theme so that it appears in your storefront along with other Links assigned to the same link section. As of verson 3.1.0, links assigned as "Primary Links" will automatically appear on your storefront page in a built in "Main Menu" Navigation Block.

> For instructions on creating a link, see the **Creating and Modifying (Section 9.3.11.6)** topic in this section.
>
> If your links aren't appearing on your storefront page, see the instructions for adding the code necessary to display links in your *storefront*, see the Displaying Links section of the **Links - Overview topic ({2194726D-B11E-4007-9917-0E2C1AB839A7})**.

Instructions

1. Open your control panel

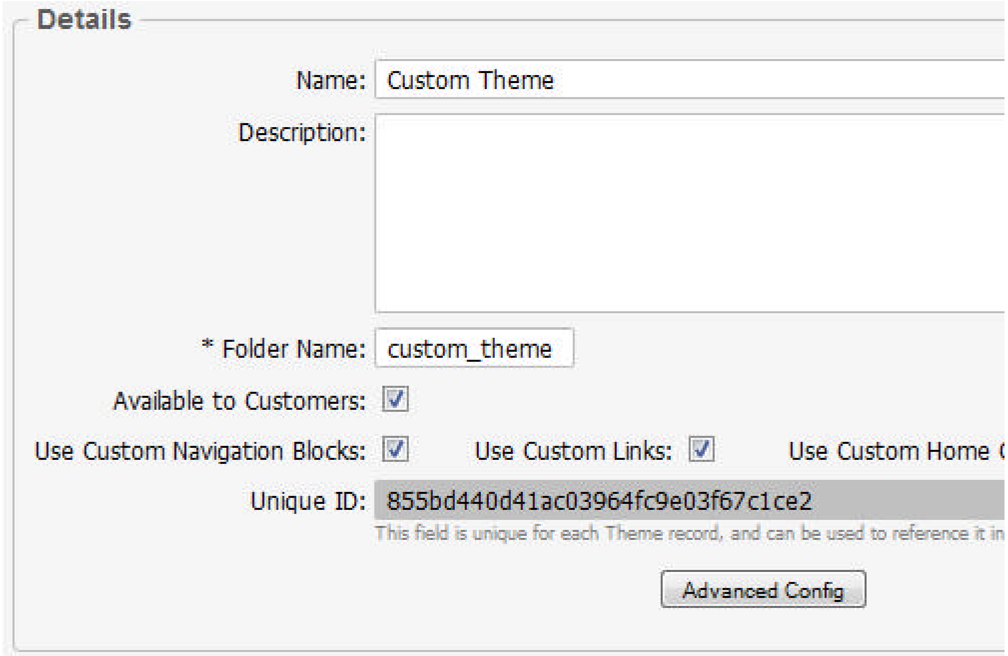
2. Click the Themes menu link



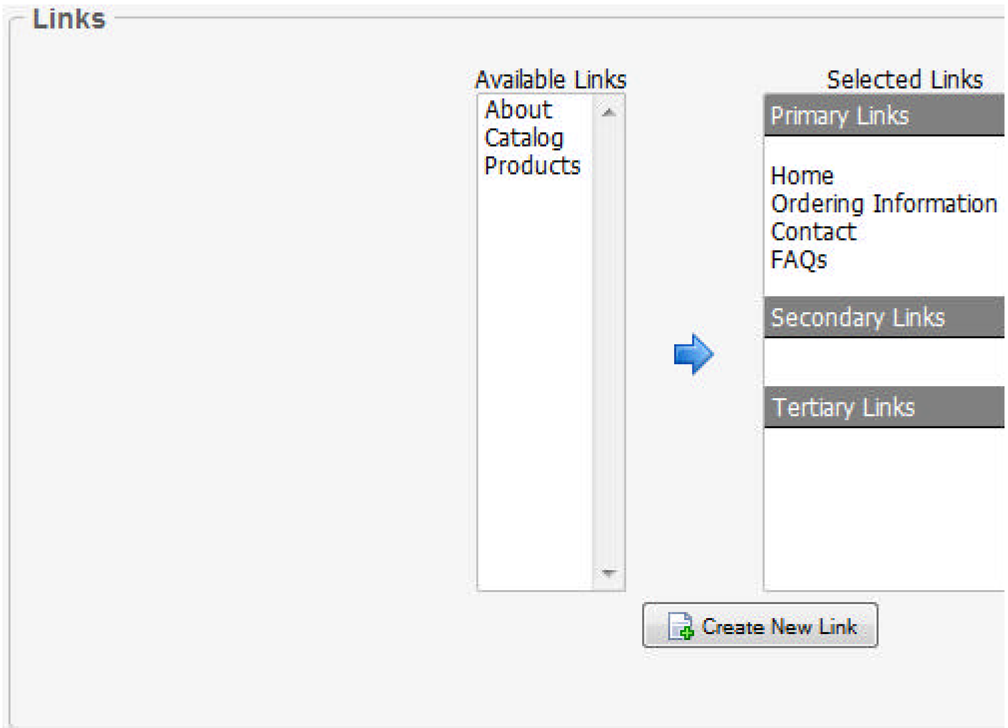
3. Click the record row for the theme you wish to modify. You can view your current theme and your store's default theme settings at the top of the table.

4. If you opened a custom theme record and the **Use Custom Links** field shown in the image below is not checked, the theme is using the default Links configuration from the master **squirrelcart** theme. Check the **Use Custom Links** field, which will allow this theme to use it's own Links. If this field is already checked, continue to the next step.

   Alternatively, if you opened a custom theme record and the **Use Custom Links** field is not checked, you can open the Squirrelcart theme record instead.



5. Locate the Links field set:



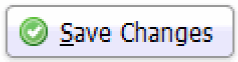
The **Available Links** field on the left shows Links that are not assigned to this theme. The **Selected Links** field shows Links that are already assigned to this theme. They are grouped in link sections corresponding to purpose. The order they appear in in this field is the order that they will be shown in on your storefront page.

6. Click the name of the Link record you want to add under **Available Links** to select it

7. Click the right arrow button between the 2 fields to add the Link to the **Selected Links** field

8. If you wish to change the position of the Link, click on it and then click the arrows to the right side of **Selected Links** to position it whereever you like.

9. Repeat this process for each Link you wish to add

10. Click 

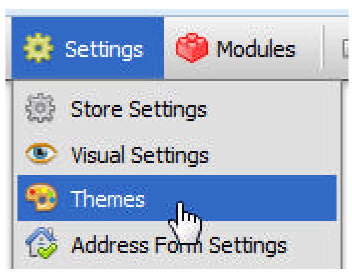
9.3.11.4 Links - Removing From Storefront

Overview

This topic explains how to remove a Link from a theme so that it no longer appears in your storefront when that theme is enabled.

1. Open your **control panel (Section 3)**

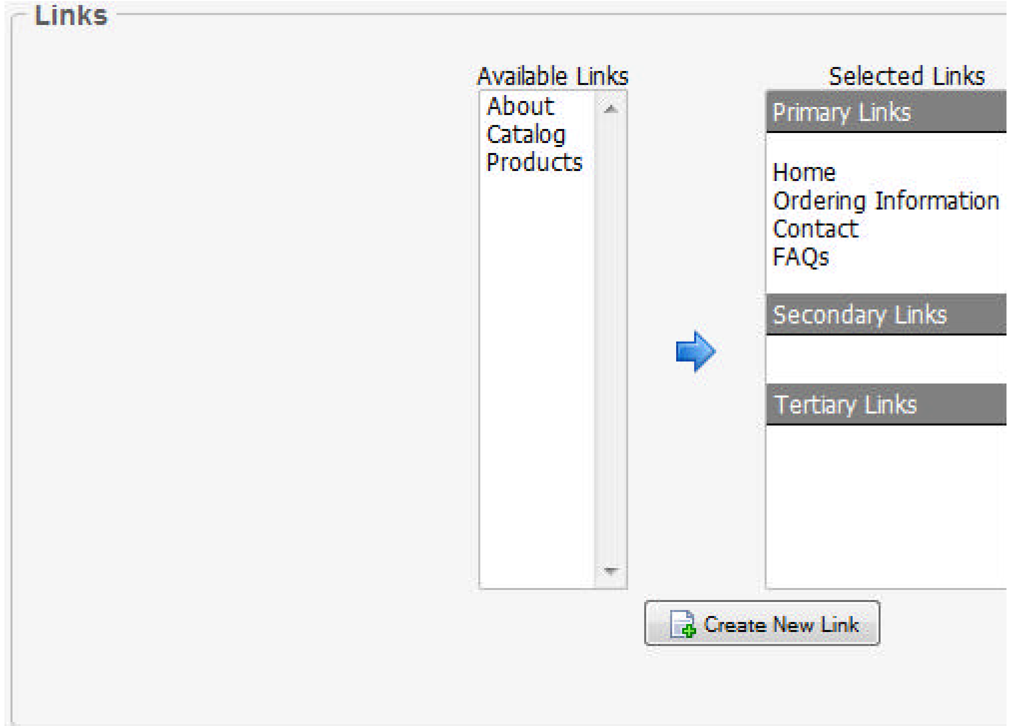
2. Click the Themes menu link



3. Click the record row for the theme you wish to modify. You can view your current theme and your store's default theme settings at the top of the table.

> If the theme does not have **Use Custom Links** checked, the theme is using the default Links configuration from the master **squirrelcart** theme. If you wish to customize the Links used for this theme, check **Use Custom Links**, follow the instructions in the **Adding to Storefront (Section 9.3.11.3)** topic in this section, and skip the rest of the steps below.

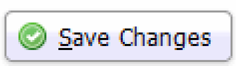
4. Locate the **Links** field set:



The **Selected Links** field on the right shows which Links are enabled. They are grouped by purpose. The order they appear in in this field is the order that they will be shown in on your storefront page.

5. Click the name of the Link you want to remove under **Selected Links** to select it

6. Click the  button between the 2 fields to remove the Link from **Selected Links**

7. Click 

9.3.11.5 Links - Changing Position

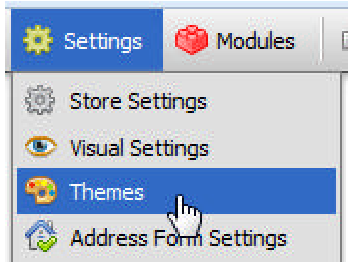
Overview

Squirrelcart allows you to group Links in up to (3) different link areas - Primary, Secondary, and Tertiary. Links appear in the order they are positioned on your theme record's Link fieldset.

Changing a Link's Position

This explains how to change the position of a link for any theme.

1. Click the **Themes** menu link

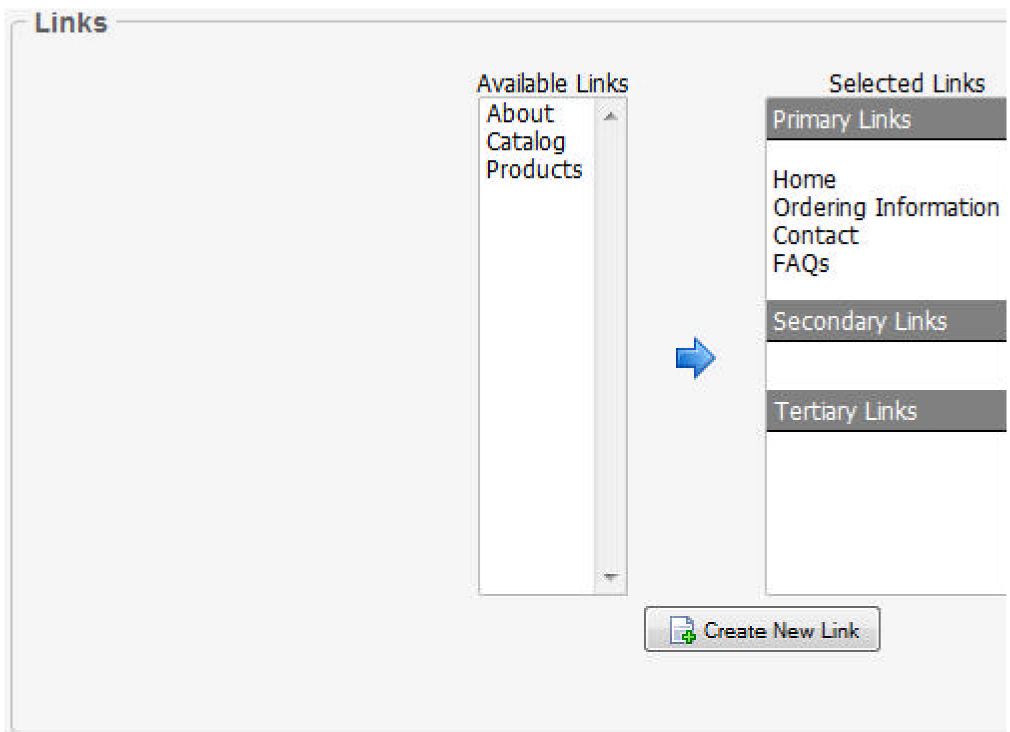


2. Click on the record row for the theme you wish to alter.

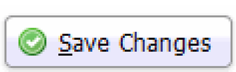
3. If you are modifying the built in **Squirrelcart** theme record, skip to step 5.

4. If the theme you are editing does not have the **Custom Links** field checked, you will need to check it and **Links - Adding to Storefront (Section 9.3.11.3)** to this theme. If it is already checked, continue below.

5. Click on the Link you wish to reposition in the **Selected Links** box.



6. Click one of the blue positioning arrows on the right side of the **Selected Links** box to move the link to the desired position. If you wish to move it to a different link area, position it under the heading for that link area.

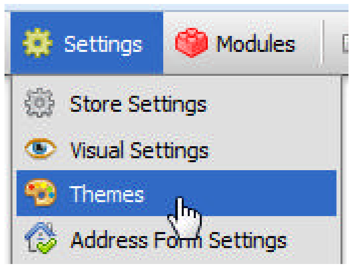
7. Click 

9.3.11.6 Links - Creating and Modifying

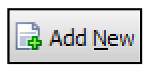
Creating / Modifying a Nav Block

1. Open the **control panel (Section 3)**

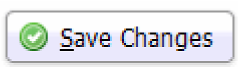
2. Click the **Themes** menu link



3. Click the **Links** link

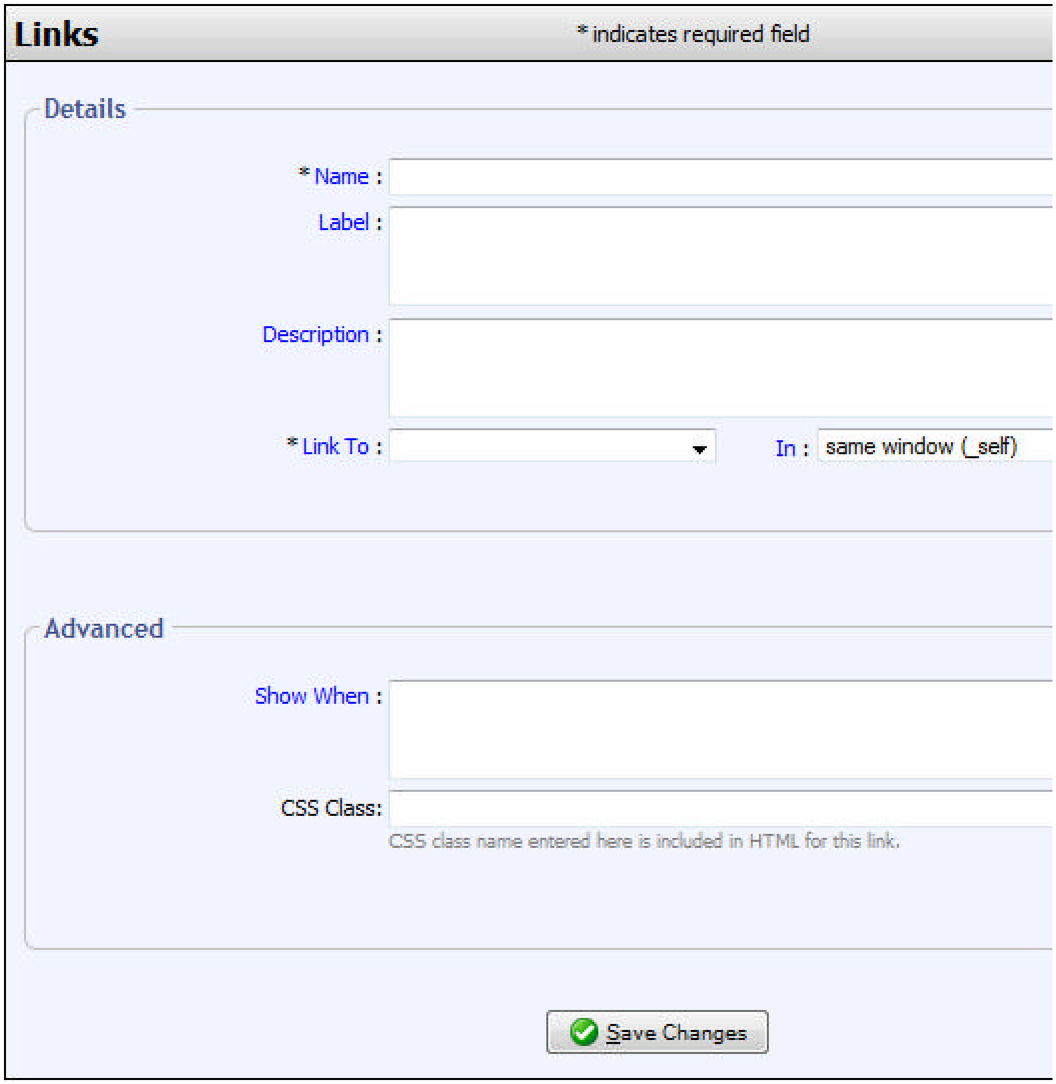
4. To create a new Link, click  . To modify an existing Link, click anywhere on it's record row.

5. Fill out the form, using the record overview below as a guide.

6. Click 

7. When creating a Link, you will most likely want to add it to your theme so it appears on your storefront page. Follow the instructions in the **Adding to Storefront (Section 9.3.11.3)** topic in this section.

Record Overview



Name
This is the name of this Link.

Label
This field is optional. It controls what is used inside the <a/> tag for this link, and is the label that will end up being clickable for this link. If left blank, the value of the **Name** field is used instead.

Description
For your reference only

Link To
This field controls what page opens when this link is clicked. This field is discussed in more detail in the "Linking to ..." sections below.

In
This field controls which window the link will open in. The default value is "same window".

Show When
This field controls when the Link will appear. It is an advanced field and should not be modified unless you are experienced with PHP. The format for this field should be PHP code that will evaluate to **true** when you want the Link to appear. PHP tags are not needed.

CSS Class

Any class name entered here is included in the <a /> tag comprising this Link. This is useful for targeting individual Links in your *CSS*.

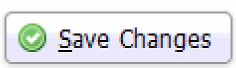
Unique ID

This field is unique for each Link, and can be used to reference it in the theme configuration files. This field is read only, and is genereated automatically by Squirrelcart. You should not need this information under normal circumstances.

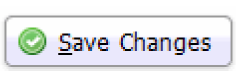
Linking to Content

Linking to a Content record in effect creates a page containing that content. For instructions, see the **Creating a Page topic (Section 9.3.13)** in this section.

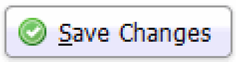
Linking to a URL

1. Set the **Link To** field to **custom URL**
2. Enter the URL you wish to link to in the **URL** field
3. Fill out the rest of the form
4. Click 

Linking to a Product

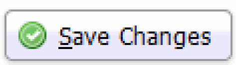
1. Set the **Link To** field to **product**
2. Select the product you wish to link to using the **Product** field
3. Fill out the rest of the form
4. Click 

Linking to a Category

1. Set the **Link To** field to **category**
2. Select the category you wish to link to using the **Category** field
3. Fill out the rest of the form
4. Click 

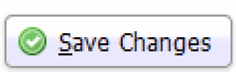
Linking to all Categories

To create a link that will show all categories set to "Display When Clicked or Viewed":

1. Set the **Link To** field to **categories**
2. Fill out the rest of the form
3. Click 

Linking to Built in Pages

Squirrelcart has some built in pages you might want to link to. Some of our modules also have pages specific to them. To link to one of those pages:

1. Set the **Link To** field to the built in page you wish to link to. Currently supported pages include:
   - news page
   - testimonials page
   - downloads page
   - account page
   - order history
2. Fill out the rest of the form
3. Click 

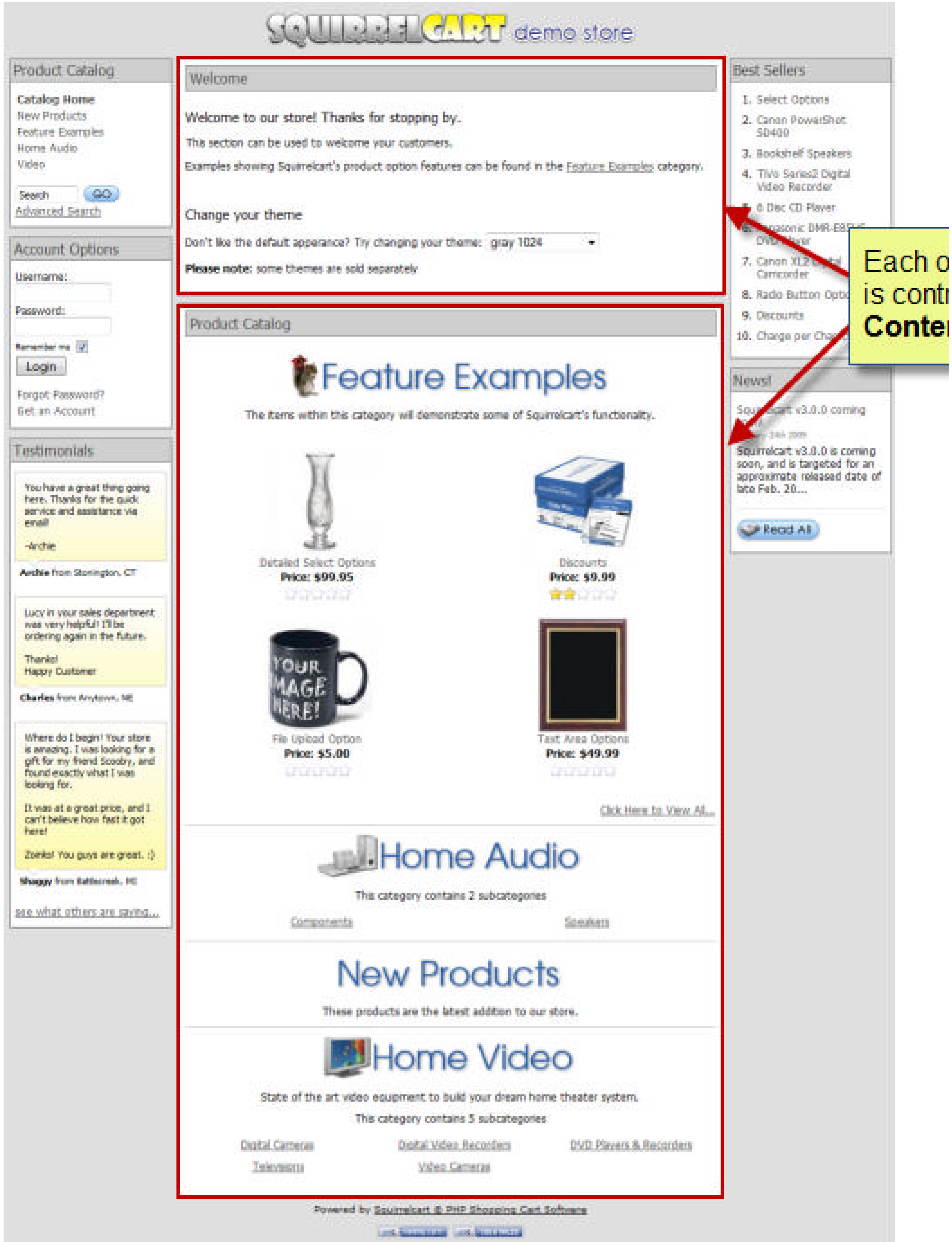
Squirrelcart supports creating custom pages which you can link to. For instructions, see the **Creating a Page topic (Section 9.3.13)** in this section.

9.3.12 Content

9.3.12.1 Content - Overview

Overview

Content records can be used to show specific pieces of content (HTML) in your storefront. They are used by default on your store's home page:



Each theme can be configured to display it's own Content.

Displaying Content

By default, Content records appear automatically on your store's home page. You can control what content appears on your store's home page on your theme's record in your control panel. For developers and advanced users, you can display content on any page containing Squirrelcart code as follows:

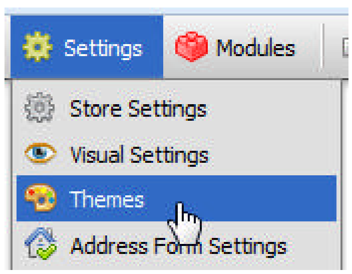
```
<?php
     // Print content from Content record having record number
"123"
     print sc_content(123);
?>
```

9.3.12.2 Content - Viewing All

Viewing All Content Records

1. Open your control panel

2. Click the **Themes** menu link



3. Click the **Content** link. A table will appear showing all the Content records in your database. To view one, click it's row.

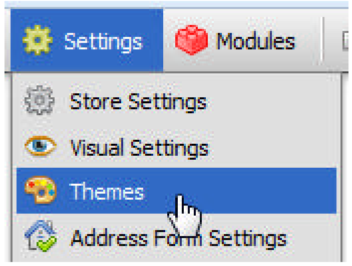
9.3.12.3 Content - Adding to Storefront

Overview

This topic explains how to add a Content record so that it appears on your storefront's home page when that theme is enabled. For instructions on creating a page using content in a Content record, see the **Creating a Page topic (Section 9.3.13)**.

1. Open your **control panel (Section 3)**

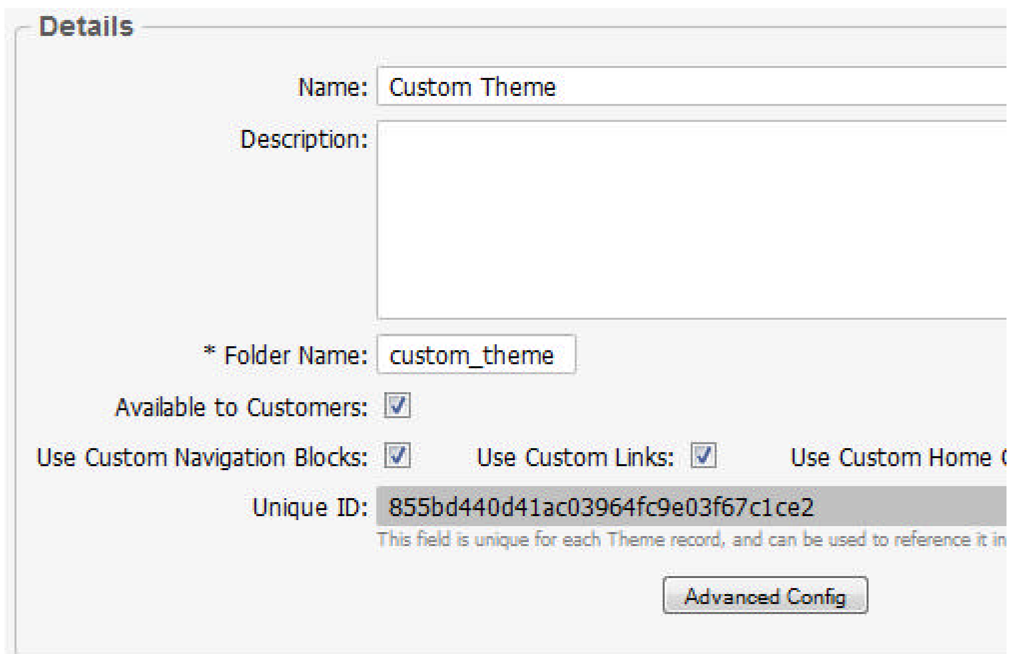
2. Click the **Themes** menu link



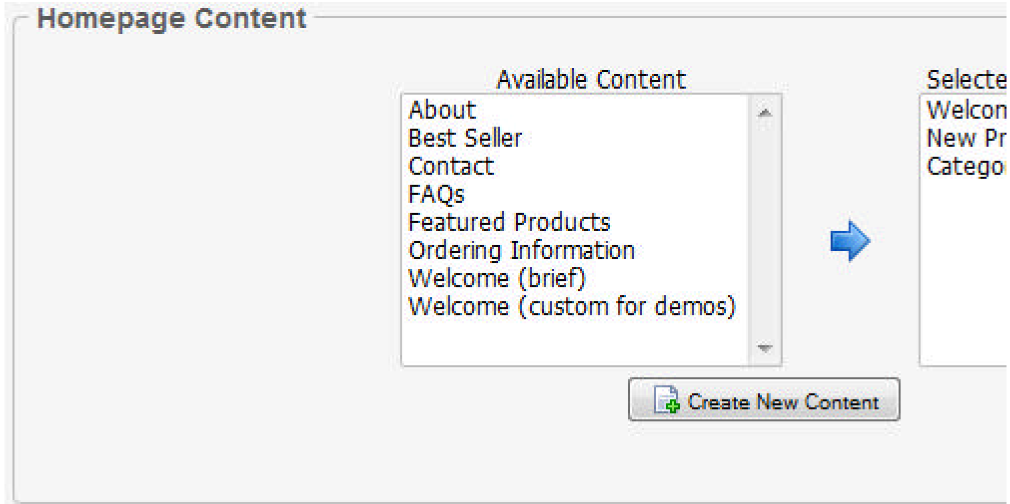
3. Click the record row for the theme you wish to modify. DO NOT click the **Squirrelcart** theme record as you cannot customize Content for the master theme. You can view your current theme and your store's default theme settings at the top of the table.

4. If you are modifiying the built in **Squirrelcart** theme, skip to step 6.

5. If the **Use Custom Home Content** field shown in the image below is not checked, the theme is using the default Content configuration from the master **squirrelcart** theme. Check the **Use Custom Home Content** field, which will allow this theme to use it's own Content. If this field is already checked, continue to the next step.



6. Locate the **Homepage Content** field set:



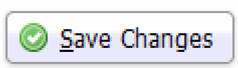
The **Available Content** field on the left shows Content records that are not assigned to this theme. The **Selected Content** shows Content records that are already assigned to this theme. The order they appear in in this field is the order that they will be shown in on your storefront's home page.

7. Click the name of the Content you want to add under **Available Content** to select it

8. Click the right arrow button between the 2 fields to add the Content to the **Selected Content** field

9. If you wish to change the position of the Content, click on it and then click the arrows to the right side of **Selected Navigation Blocks** to position it whereever you like.

10. Repeat this process for each Content record you wish to add

11. Click 

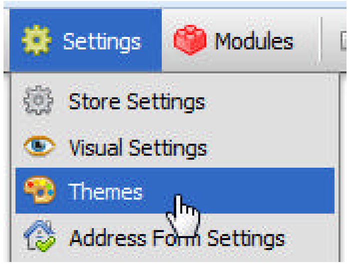
9.3.12.4 Content - Removing From Storefront Home Page

Overview

This topic explains how to remove Content from a theme so that it no longer appears on your storefront's home page when that theme is enabled.

1. Open your **control panel (Section 3)**

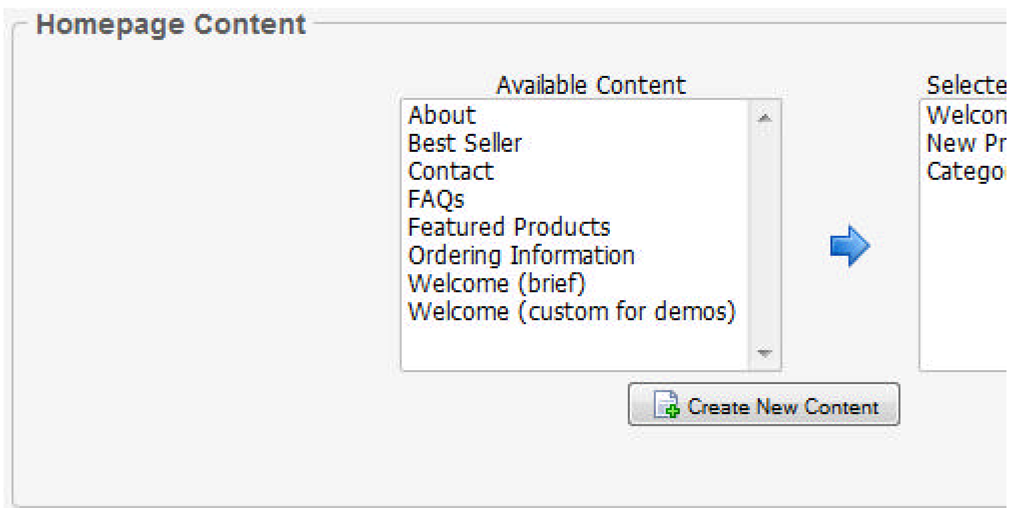
2. Click the **Themes** menu link



3. Click the record row for the theme you wish to modify. You can view your current theme and your store's default theme settings at the top of the table.

> If the theme does not have **Use Custom Home Content** checked, the theme is using the default Content configuration from the master **squirrelcart** theme. If you wish to customize the Content used for this theme, check **Use Custom Home Content,** follow the instructions in the **Adding to Storefront (Section 9.3.11.3)** topic in this section, and skip the rest of the steps below.

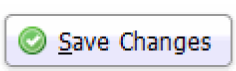
4. Locate the **Homepage Content** field set:



The **Selected Content** field on the right shows Content records that are enabled. The order they appear in this field is the order that they will be shown on your storefront's home page.

5. Click the name of the Content you want to remove under **Selected Content** to select it

6. Click the  button between the 2 fields to remove the Content from **Selected Content**

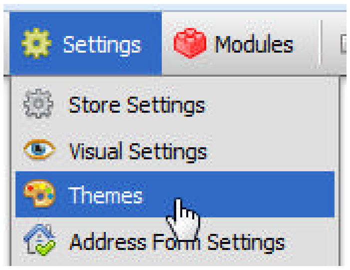
7. Click 

9.3.12.5 Content - Changing Position

Changing a Content Record's Position

This explains how to change the position of Content on your storefront's home page for any theme.

1. Click the **Themes** menu link

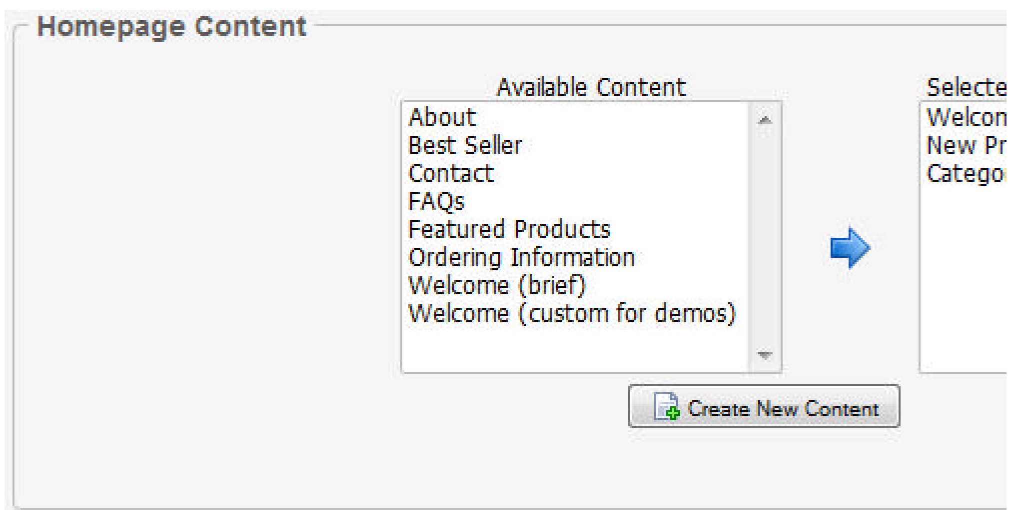


2. Click on the record row for the theme you wish to alter.

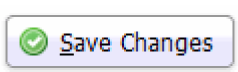
3. If you are modifying the built in **Squirrelcart** theme, skip the next step.

4. If the theme you are editing does not have the **Custom Home Content** field checked, you will need to check it and **add Content (Section 9.3.12.3)** to this theme. If it is already checked, continue below.

5. Click on the Content you wish to reposition in the **Selected Content** box.



6. Click one of the blue positioning arrows on the right side of the **Selected Content** box to move the Content to the desired position.

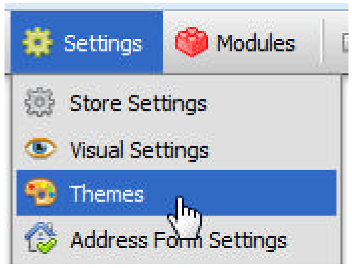
7. Click 

9.3.12.6 Content - Creating and Modifying

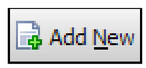
Creating / Modifying Content

1. Open the **control panel (Section 3)**

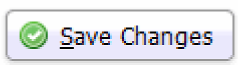
2. Click the **Themes** menu link



3. Click the **Content** link

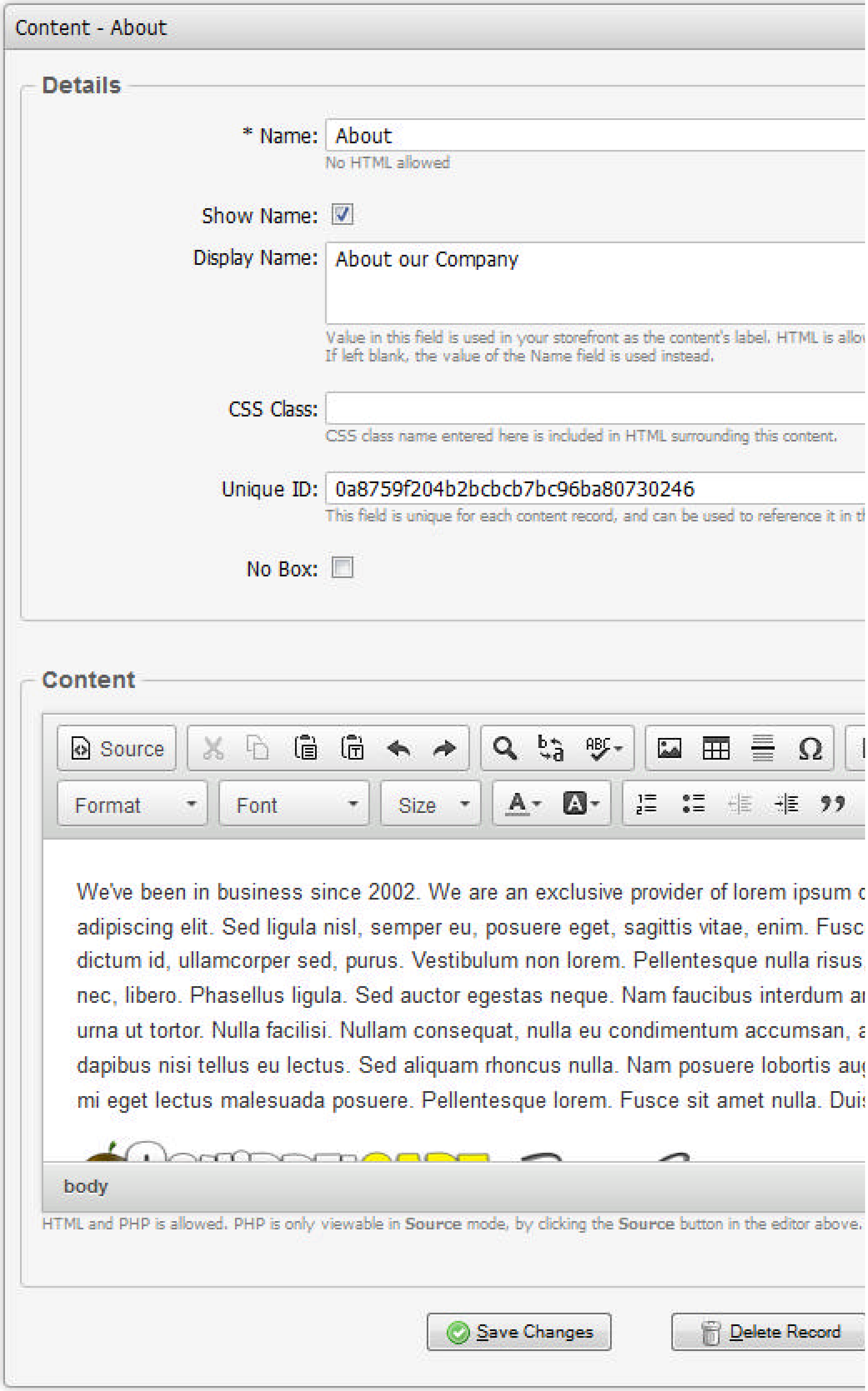
4. To create new Content, click  . To modify existing Content, click anywhere on it's record row.

5. Fill out the form, using the record overview below as a guide.

6. Click 

7. When creating new Content, you will most likely want to add it to your theme so it appears on your storefront's home page. Follow the instructions in the **Adding to Storefront Home Page (Section 9.3.12.3)** topic in this section. You can also **link to content to create your own pages (Section 9.3.13)**.

Record Overview


Content - About
Details
* Name:
About
No HTML allowed
Show Name:
Display Name:
About our Company
Value in this field is used in your storefront as the content's label. HTML is allo
If left blank, the value of the Name field is used instead.
CSS Class:
CSS class name entered here is included in HTML surrounding this content.
Unique ID:
0a8759f204b2bcbcb7bc96ba80730246
This field is unique for each content record, and can be used to reference it in t
No Box:
Content
Source
Format
Font
Size
We've been in business since 2002. We are an exclusive provider of lorem ipsum
adipiscing elit. Sed ligula nisl, semper eu, posuere eget, sagittis vitae, enim. Fusc
dictum id, ullamcorper sed, purus. Vestibulum non lorem. Pellentesque nulla risus
nec, libero. Phasellus ligula. Sed auctor egestas neque. Nam faucibus interdum a
urna ut tortor. Nulla facilisi. Nullam consequat, nulla eu condimentum accumsan,
dapibus nisi tellus eu lectus. Sed aliquam rhoncus nulla. Nam posuere lobortis au
mi eget lectus malesuada posuere. Pellentesque lorem. Fusce sit amet nulla. Dui
body
HTML and PHP is allowed. PHP is only viewable in Source mode, by clicking the Source button in the editor above.
Save Changes
Delete Record

Name
This is the name of the content. When Content is displayed on your storefront, this is used as the default label above the content.

Show Name

When checked, the name of the content record (or Display Name) will be shown above the content when shown in the storefront.

Display Name
The value in this field is used in your storefront as the content's label. HTML is allowed. If left blank, the value of the Name field is used instead.

CSS Class

Any class name entered here is included in the <div/> tag surrounding the content. This is useful for targeting content in your *CSS*.

Unique ID

This field is unique for each Content record, and can be used to reference it in the theme configuration files. This field is read only, and is genereated automatically by Squirrelcart. You should not need this information under normal circumstances.

No Box

For most themes, content records on the storefront home page will appear inside boxes. Checking this field will cause the content to not appear inside a box (no border, no box shadow, etc...).

> If you want all your content sections to not have borders, do not check **No Box.** Instead, use the built-in "No Boxes" content box style variant that comes with the built-in Squirrelcart theme.

Content
This is the content that will be shown when this Content record is displayed.

9.3.13 Creating a Page (Linking to Content)

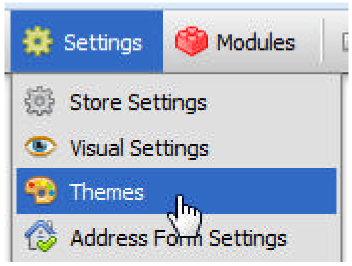
Overview

As of version 3, Squirrelcart can now be used as a full blown CMS (content management system). This page explains how to create your own pages by creating **links ({2194726D-B11E-4007-9917-0E2C1AB839A7})** to **content ({61A74EED-B0B1-4EE4-9D33-8E0681A01E96})**.

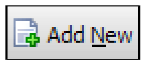
Instructions for Creating a Page

1. In order to create a page, you must have content to put on that page. Create that content via a Content record, using the instructions in the **Content - Creating and Modifying topic (Section 9.3.12.6)** as a guide. When done, continue below.

2. Click the **Themes** menu link:



3. Click the **Links** link

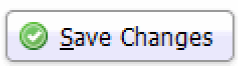
4. Click 

5. Enter a name for your link in the **Name** field

6. By default, that name is used as the text for the link (text directly inside the anchor tag). If you wish to use different text for the link, enter it in the optional **Label** field

7. Set the **Link To** field to **content**

8. Set the **Content** field to the content you want to appear on the page

9. Click 

10. In order to view the page, click the link on your storefront page. If the link is not present on your *storefront* page, see the Displaying Links section of the **Links - Overview topic ({2194726D-B11E-4007-9917-0E2C1AB839A7})** for instructions on how to display links.

Search Engine Settings

After following the steps above, the Link record will show the following additional fields that are specific to search engine indexing:

Page Title
This allows you to set the title of the page, used in the <title/> tag when viewing this page. If left blank, the value of the **Name** field is used instead.

Keywords
This field is used to populate the **keywords meta tag (Section 6.12.2)** when this page is viewed.

Meta Description
This field is used to populate the **description meta tag (Section 6.12.2)** when this page is viewed.

In Relation to SEO URLs

Pages created by linking to content have full support for Squirrelcart's **SEO URL feature (Section 6.12.3)**. When SEO URLs are enabled, you'll see an optional **SEO URL Name** field on Link records when **Link To** is set to **content.** That field works exactly as it does on other records that support the SEO URL feature. If you would like to manually control the term used in the URLs linking to this page, enter the term you wish to use in that field.

By default, SEO URLs linking to pages created in this manner appear as follows:

```
http://www.example.com/content/about
```

9.3.14 CSS Stylesheets

Overview

Many aspects of the cart's design are controlled by *CSS* (Cascading Style Sheets). In order to modify stylesheets, you'll need knowledge of CSS. This documentation assumes that you understand CSS enough to make changes to your stylesheets. If you are not familiar with CSS, we recommend picking up a book on it, or researching it on the web.

> Having trouble locating the class property for an element in your storefront? You might want to try the Firebug browser extension for Firefox. It makes finding the HTML code for a given element on a page easy. See here for more info: **http://getfirebug.com (http://getfirebug.com/)**

Inspecting CSS In Your Browser

You may need to view the CSS used by Squirrelcart in order to troubleshoot a layout issue, or to determine what you need to modify to change the appearance of something in the storefront. Here is how to view the CSS currently being used in the store:

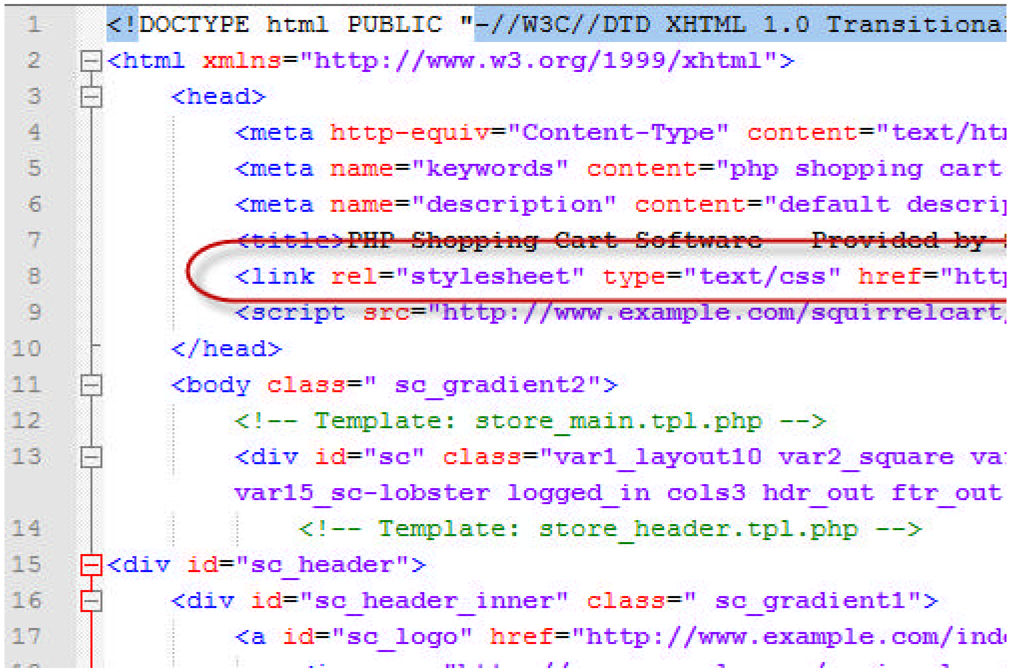
1. Navigate to the store page you wish to work with

2. View the source code in your browser.

   - In Firefox and Google Chrome, right click on the page and choose "View Page Source"
   - In Internet Explorer, right click on the page and choose "View Source"

3. Towards the top of the page, find the <head/> tag.

4. In the head tag, look for a <link/> tag linking to **style_main.css.php:**



5. To view the CSS associated with that URL, copy the URL to your clipboard and paste it into your browser's address bar:

6. To improve load times, Squirrelcart will automatically strip any comments and extra white space from CSS which can make it more difficult to inspect. To view the CSS with white spacing and comments, just change the value of the **no_comments** variable at the end of the URL from 1 to 0, and comments and white space will appear.

7. To improve load times, Squirrelcart uses PHP to insert CSS from different files so they all appear using this one URL. If you need to know which file certain CSS is actually inside, look for the comments that appear immediately above each file's CSS, as in:

```
/* Stylesheet file: style_main.css.php */
```

All the CSS below this comment and above any following similar "/* Stylesheet file: ..." comments is defined in the style_main.css.php file.

Working With Squirrelcart's CSS

Important: Never modify any stylesheets directly inside the master Squirrelcart theme folder:

```
squirrelcart/themes/squirrelcart
```

Doing so will trigger problems when upgrading to a newer version of Squirrelcart.

Extend Built-In CSS

The built-in master Squirrelcart theme has several stylesheets that are used to control various aspects of the store's appearance. The main stylesheet is named **style_main.css.php**. If you view the source HTML in your browser for the storefront page, this is the only stylesheet reference you will see inside the <head/> tag. Other stylesheets are included via PHP so only a single CSS reference is needed, improving load times. When you extend the built-in CSS, you use the built-in CSS stylesheets, and add your own CSS last via a single **style_custom.css.php** stylesheet.

Why do we use this approach?

As we release new versions of Squirrelcart, we sometimes need to add new CSS and edit existing CSS. With this approach, if you upgrade Squirrelcart you will automatically be getting the CSS changes corresponding to the version you upgrade to. This makes upgrading much easier because you don't have to make these changes yourself.

How to Extend Built-In CSS

1. You will need to be using a custom theme to extend the buit-in CSS. If you have not already created one, follow the instructions in the **Creating a Custom Theme topic (Section 9.3.6)**.

2. For this approach to work, you cannot have a stylesheet file named **style_main.css.php** inside your custom theme folder. If one is present, rename or delete it.

3. Create an empty text file named **style_custom.css.php** and upload it to your custom theme folder, as in **squirrelcart/themes/YOUR_THEME/style_custom.css.php**

4. Add any CSS you like to this file. It will automatically be included after the built-in CSS when using this theme. If you wish to alter the CSS for the store, just add CSS selectors to override ones already defined in the built-in CSS.

INI Settings

Some themes (like the master Squirrelcart theme) use INI files to define certain default values for CSS properties in some stylesheets. For example, the style_main.css.php stylesheet may have CSS like this:

```
html{
     background: <?php print $ini['bodyBgColor']?>;
     height: 100%;
}
```

The **<?php print $ini['bodyBgColor'] ?>** text is used to insert a HTML color code for the background color, that is definied in one of Squirrelcart's INI config files, or in **custom style settings (Section 9.3.16)** definted for the theme. If you are modifying CSS and wish to specify a different value, you can replace the <?php ?> with standard CSS values.

INI files are stored in the theme's config folder (**squirrelcart/themes/squirrelcart/config**) for example. They should not be modified.

9.3.15 Custom JavaScript

Overview

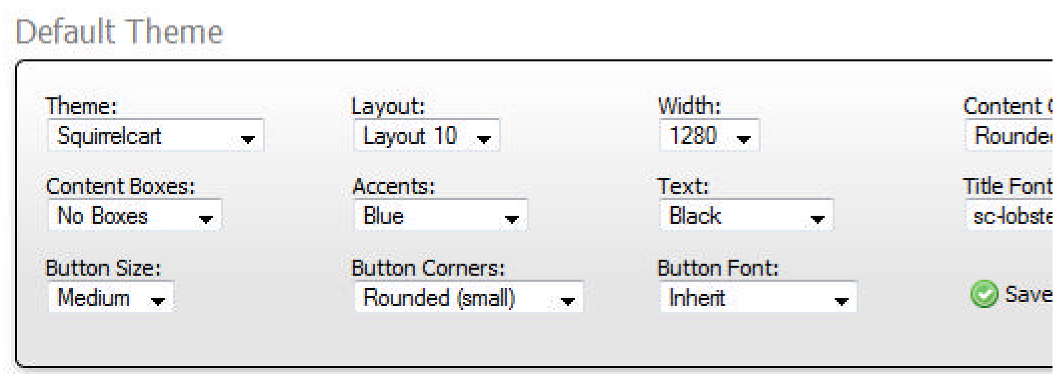
It is possible to add JavaScript to your theme that will appear on all pages of your store. If you create a file named **theme.js** and put it in your theme folder, that file will automatically be included inside your <head/> tag. Any JavaScript added to this file will be included when your store pages are loaded.

Alternatively, if you wish to add <script/> tags to your storefront pages, **add them to the store_main.tpl.php template file (Section 9.3.17.2)**.

9.3.16 Custom Style Settings

Overview

Some themes have variants that allow you to adjust the appearance of the store. For example, the built-in Squirrelcart theme includes 15 different variants to change layout design, width, colors, fonts, and many other aspects of the theme using predefined values stored in INI files. The variants can be seen below as **Layout, Width, Content Corners,** etc...



When you change the variant fields, you are telling Squirrelcart to use settings for that variant in your stylesheets. Those settings are defined in special INI files that should not be modified.

Custom style settings can be used to further tweak those settings beyond what you could normally change with the variants alone. They are available when using the master Squirrelcart theme, or a theme that is **extending that theme (Section 9.3.14)**, or any add-on theme that supports it. They are not available to themes that are **copying the built-in CSS (Section 9.3.14)** from the master Squirrelcart theme.

How to Specify Custom Style Settings

Custom style settings are applied on top of a theme's variant settings. You choose a starting point for customization by selecting the variants you wish to start with. Any changes you make after setting the starting point alter that design from the one specified by the starting point setting.

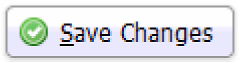
1. **Open your theme's record (Section 9.3.2)** in the control panel

2. In the **Custom Style Settings** fieldset, locate the fieldset labeled **Starting Point**. If you do not see these fieldsets, your theme does not support custom style settings.

3. If you've already done this step before, you can skip to #5 below. If this is the first time you are working with custom style settings, change the values in the **Starting Point** fieldset to match the design you wish to start with.

4. Click the **Set Starting Point** button. The page will reload.

5. Immediately below the **Starting Point** fieldset, you should see one or more fieldsets containing settings you can customize. These settings correspond to INI settings that are output into your stylesheets. Change the settings as needed.

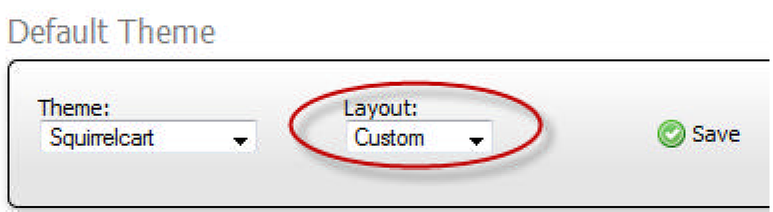
6. Click 

Changing your Starting Point

If you wish to change the starting point, change the values explained above in steps 1 - 3, and click the **Reset Starting Point** and save the record. Changing your starting point will cause all previously specified custom style settings to be lost.

Viewing the Custom Style Settings in Your Storefront

The custom style settings are used when you have your theme chosen and have the first variant set to "custom". For example, if you were to specify custom style settings for the **Squirrelcart** theme, your store will use them when you set the Default Theme as shown below:



9.3.17 Templates

9.3.17.1 Templates - Overview

Overview

Squirrelcart uses template files to allow you to customize the appearance of your store. Each template file controls a certain aspect of the store. For example, the **product_thumbnail** template controls the appearance of a single product, when a customer clicks on it's category.

Template files are stored within theme folders, and are one of the main components that make up a theme. Template file names always end in **.tpl.php**, as in **product_thumbnail.tpl.php.**

Modifying template files requires knowledge of HTML. We also recommend that you learn CSS if you don't already know it.

How Squirrelcart Chooses Which Template File to Display

The theme named **Squirrelcart** is considered the master theme. It's corresponding folder is at the following path:

```
squirrelcart/themes/squirrelcart
```

For this example, let's assume you've **created a custom theme (Section 9.3.6)** called **MyStore**, with a corresponding folder of **squirrelcart/themes/mystore**. You've also **set the custom theme as the default theme (Section 9.3.4)** for your store. Squirrelcart will make use of several template files for each page load. The template files utilized for each page depend on what was clicked on in your *storefront*.

When Squirrelcart needs a template file, it first looks in your default theme folder for it. If it does not find the template file in that folder, it then uses the one in the master theme folder. This has been designed this way to make your life easier as a designer. Squirrelcart follows this same logic when determining which image file to display. Here are the benefits of this approach:

- less files to maintain
  You only need to place the template files you wish to modify in your custom theme folder.
- easier upgrading in the future
  As we release new versions of Squirrelcart, it is inevitable that we will have to modify some of the template files in the master theme folder. By allowing you to only place the template files you wish to modify in your custom theme folder, there is a much lesser chance that you will miss out on a change made in one of the master template files.

Template PHP Code

Templates in Squirrelcart are PHP files. They contain HTML, with some PHP mixed in only for the purposes of outputting information that varies. You don't need to know PHP in order to customize Squirrelcart, but we recommend you read this section to familiarize yourself with some of the PHP we use so you can identify what it does. You can spot PHP code in templates by the opening and closing PHP tags:

```
<?php ?>
```

If you see PHP code in your templates and don't know what it's for, we recommend you leave that PHP unmodified. You can certainly modify any HTML you see as you normally would in any HTML page.

This section will explain some of the PHP code you may see in your template files.

Template Header

At the top of almost every template file you will find this code:

```
<?php /* This line prevents direct access to template. Don't
remove it. */ if (!defined('SC_INCLUDE_OK')) die; ?>

<!-- Template: <?php print basename(__FILE__) ?> -->
```

The first line is very important and should not be moved or altered. It ensures that code in the template file is only parsed (processed by PHP on your server) when it was directly requested by Squirrelcart. This is a security precaution.

The second line will print an HTML comment tag to the browser to help you locate the template file:

```
<!-- Template: product_detail -->
```

Variables

Squirrelcart uses PHP variables to output data:

```
<strong>First Name: </strong><?php print $First_Name ?><br/>
```

The example above includes some HTML (**<strong />** and **
** tags). It also includes a section of PHP beginning with **<?** and ending with **?>.** That section of PHP is used to print the value of the variable named **$First_Name** to the HTML source code. When sent to the browser, this HTML could look something like this:

```
<strong>First Name: </strong>Thomas<br/>
```

IF statements

If statements may appear in some templates. They surround code that will only be sent to the browser when the IF statement is true. For example, this IF statement in the product_detail.tpl.php template file causes the HTML that displays a product's price to only be sent to the browser when the product has a price configured on its product record:

```
<?php if ($Base_Price): ?>
     <div class="prod_price">
          <?php print $Price_Label?>
          <?php print sc_price($Base_Price) ?>
     </div>
<?php endif; ?>
```

FOREACH statements

A **foreach** statement is used to loop through a set of things and do something with them. In Squirrelcart's case, we use foreach statements in templates when we need to print out HTML for more than one thing. For example, suppose we have some information for a few products stored in a variable named **$Products**. We may loop through them in a template file like this:

```
<div class="products">
     <?php foreach($Products as $Product): ?>
          <strong>Product name is: </strong> <?php print
$Product['Name'] ?><br/>
     <?php endforeach; ?>
</div>
```

The resulting HTML sent to the browser would then be something like this:

```
<div class="products">
     <strong>Product name is: </strong> 19 Inch
LCD Monitor<br/>
     <strong>Product name is: </strong> 20 Inch
LCD Monitor<br/>
```

```
    <strong>Product name is: </strong> 24 Inch
LCD Monitor<br/>
</div>
```

9.3.17.2 Modifying Templates

Overview

This section explains how to modify template files. For more detailed information on how templates work and the code contained in them, see the **Templates - Overview topic ({44D40EA0-25A6-49E0-BF54-88B00E0C82E4})** in this section.

> ⚠ Important Note: You should never, under any circumstances, modify any of the template files located in the master theme folder, which is located here: **squirrelcart/themes/squirrelcart**. Doing so can make upgrading in the future very difficult!

Skill Requirements

Template files contain HTML. Modifying template files requires knowledge of HTML. Knowledge of *CSS* is also recommended.

Instructions

1. **Create a custom theme**

   If you do not have a custom theme created, you will need to create one in order to modify template files. Follow the instructions in the **Customizing > Themes > Creating a Custom Theme (Section 9.3.6)** topic as a guide. If you already have a custom theme created, you can skip this step.

2. **Switch to your custom theme**

   In order to see the changes that you are going to make to the template, you will need to be using your custom theme. You can check to see which theme you are using in the storefront, by viewing the theme drop down field in the **Account Options** nav block (you must be logged in). You can also check your theme in the control panel by clicking **Settings > Themes** and viewing the value of the **Your Theme** field.

   If you are not already using your custom theme, switch to it using the **Customizing > Themes > Switching Themes (Section 9.3.5)** topic.

3. **Determine which template file you need to modify**

   Determine which template file you will be modifying, using the **Template Guide** topic in this section as a reference. Alternatively, another good way to determine which template you need to alter is to view the source of your storefront page in your browser. Locate the area containing the HTML you wish to alter, and then look above it for a comment showing the name of the template file controlling that content:

```
<!-- Template file: product_detail -->
```

4. **Copy template to custom theme folder**

   Find the template file you wish to modify in the master theme folder - **squirrelcart/themes/squirrelcart**. Copy this file to your custom theme folder. Do not edit the file inside the master theme, and do not copy all the master theme files into your custom theme folder.

5. **Modify template**

   Make the changes you wish to the template file within your custom theme folder, and test your changes.

9.3.17.3 Template Guide

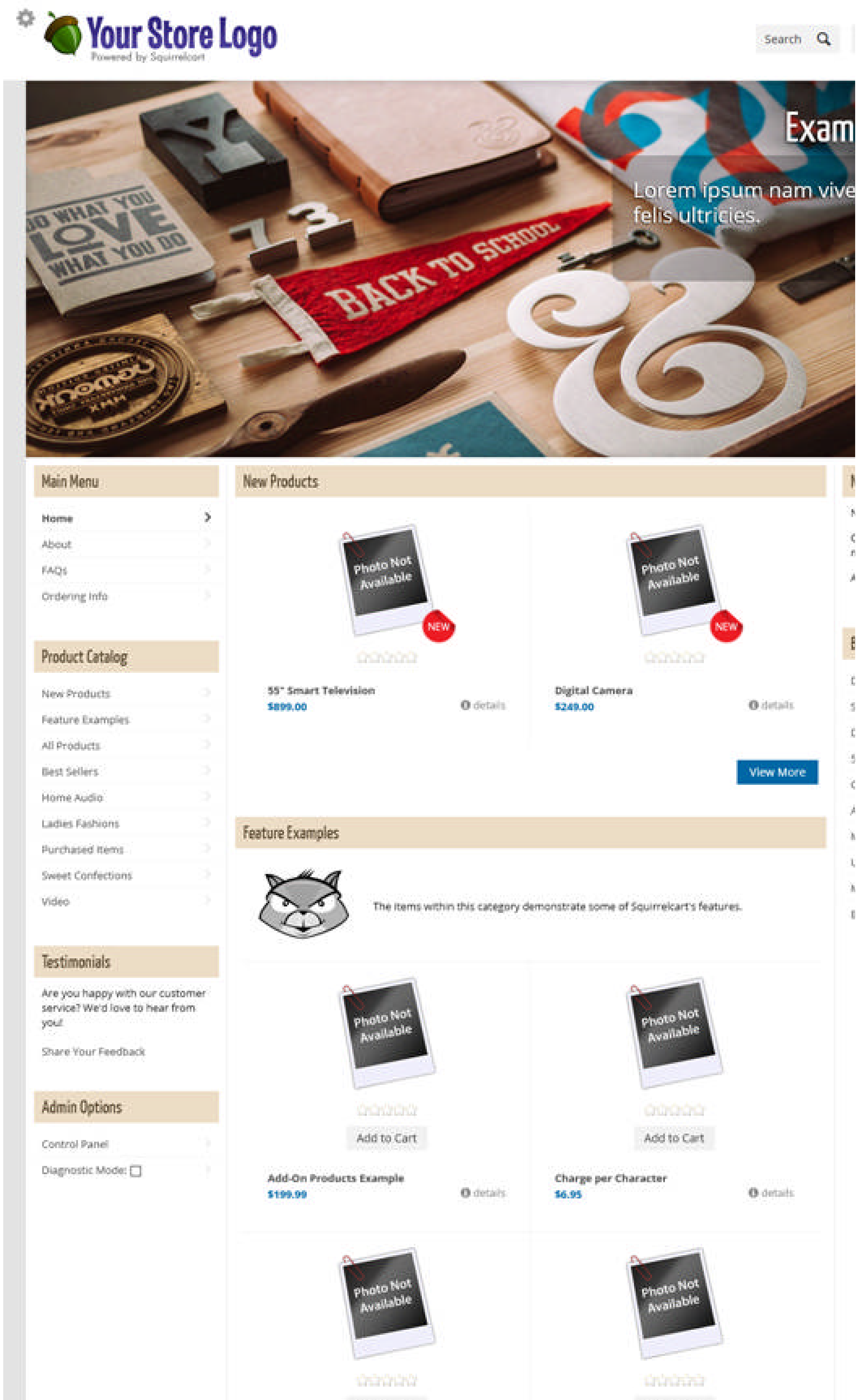
9.3.17.3.1 Template Guide - Overview

This section describes the different template files used to generate certain sections of code in your store. If you see a "*" character in a template file name in the topics in this section, it represents a wildcard that can match any text in the template names. For example, if we have 3 similar templates named "sample_on.tpl.php", "sample_off.tpl.php", and "sample_hidden.tpl.php", we may represent all 3 as "sample_*.tpl.php".

9.3.17.3.2 Storefront - Main Template

Overview

This page describes the templates involved in generating the storefront page. When using the default master **squirrelcart** theme, that page looks something like this:


Your Store Logo
Powered by Squirrelcart
Search
Lorem ipsum nam vive
felis ultricies.
Main Menu
Home
About
FAQs
Ordering Info
Product Catalog
New Products
Feature Examples
All Products
Best Sellers
Home Audio
Ladies Fashions
Purchased Items
Sweet Confections
Video
Testimonials
Are you happy with our customer service? We'd love to hear from you!
Share Your Feedback
Admin Options
Control Panel
Diagnostic Mode:
New Products
55" Smart Television
$899.00
details
Digital Camera
$249.00
details
View More
Feature Examples
The items within this category demonstrate some of Squirrelcart's features.
Add to Cart
Add-On Products Example
$199.99
Charge per Character
$6.95

Several templates are involved in generating your storefront, depending on the page being viewed. This page discusses the main template that controls the overall appearance of all pages in your storefront.

Primary template file - store_main.tpl.php

Template Overview

The template file **store_main.tpl.php** is the most important template in Squirrelcart. It controls the overall layout of your storefront.

The code below is accurate as of Squirrelcart version 5.5.0. Please keep in mind this is just an example and is subject to change. If you are running a newer version of Squirrelcart your code may differ.

Code Details

```
<?php /* This line prevents direct access to template. Don't remove it. */ defined('SC_INCLUDE_OK')) die; ?>
<!DOCTYPE html>
<html<?php print $HTML_Attributes?>>
<head>
	<meta http-equiv="Content-Type" content="text/html; charset=utf-8" />
	<title><?php print $Title ?></title>
	<meta name="description" content="<?php print $Description ?>" />
	<?php if ($Keywords):?><meta name="keywords" content="<?php print $Keywords ?>" /><?php endif;?>
	<meta name="viewport" content="width=device-width, initial-scale=1.0, maximum-scale=10" />
	<?php print $SC_meta ?>
	<?php print $SC_css ?>
	<?php print $SC_js ?>
</head>
<body class="<?php print $SC_Body_Classes?>">
	<!-- Template: <?php print basename(__FILE__) ?> -->
	<div id="sc" class="<?php print $SC_Classes ?> btn_wait_toggle">
		<?php print $Header_Outside ?>
		<div id="sc_outer" class="sc_section">
			<?php print $Header_Inside ?>
```

```
20 <div id="sc_inner" class="<?php print $SC_Page_Classes?>">
21     <div id="sc_nav">
22         <!-- left navigation -->
23         <?php if (sc_nav('Primary')): ?>
24         <aside id="sc_col1" class="nav_col">
25             <?php
26                 // Left Navigation section
27                 print sc_nav('Primary');
28             ?>
29         </aside>
30         <?php endif; ?>
31
32         <!-- right navigation -->
33         <?php if (sc_nav('Secondary')): ?>
34         <aside id="sc_col2" class="nav_col">
35             <?php
36                 // Right Navigation section
37                 print sc_nav('Secondary');
38             ?>
39         </aside>
40         <?php endif; ?>
41     </div>
42
43     <!-- main content -->
44     <div id="sc_main">
45         <?php print $Cart_Content; ?>
46     </div>
47 </div>
48 <?php print $Footer_Inside ?>
49 </div>
50 <?php print $Footer_Outside ?>
51 </div>
52 </body>
53 </html>
```

We will discuss some of the code that you will find in this template below. HTML knowledge is needed to understand this section. Note the line numbers, which will be referenced below this example block of code:

Line by Line Code Explanation

This section explains some of the lines shown above. We do not cover some of the more basic HTML tags. Only code specific to Squirrelcart is discussed.

```
<?
php /* This line prevents direct access to template. Don't remove
defined('SC_INCLUDE_OK')) die; ?>
```

This ensures that this file is only included by Squirrelcart, and is a security precaution. It appears at the top of all template files.

```
<!DOCTYPE html>
```

This is an HTML 5 document type delcaration - it ensures browsers know what type of page this is. We recommend that you do not change or remove this line.

```
<html<?php print $HTML_Attributes?>>
```

This is your typical HTML tag with a print statement to include additional attributes Squirrelcart needs to function.

```
<meta http-equiv="Content-Type" content="text/html; charset=utf-
8" />
<title><?php print $Title ?></title>
<meta name="description" content="<?php print $Description ?>" />
<?php if ($Keywords):?><meta name="keywords" content="<?
php print $Keywords ?>" /><?php endif;?>
<meta name="viewport" content="width=device-width, initial-
scale=1.0, maximum-scale=10" />
```

The values for these tags vary based on the page being viewed in Squirrelcart. For more information, see the **Configuration > Search Engine Settings** topic in this documentation.

```
<?php print $SC_meta ?>
```

Squirrelcart uses this to include additional meta-tags as needed.

```
<?php print $SC_css ?>
```

Squirrelcart uses this to include our of our stylesheets.

```
<?php print $SC_js ?>
```

Squirrelcart uses this to include our JavaScript.

```
<body class="<?php print $SC_Body_Classes?>">
```

This is your typical body tag, with a print statement to print classes that help us to format various elements on the page.

```
<!-- Template: <?php print basename(__FILE__) ?> -->
```

This line appears in all templates. In most templates, you'll find it at the top of the page. In this one, it's placed after the body tag. It outputs an HTML comment to make it easiery to locate the template file by viewing the source code. **Example:**

```
<!-- Template: store_main -->
```

```
<div id="sc" class="<?php print $SC_Classes ?
> btn_wait_toggle">
```

This box defined by this div is the boundary for the entire layout of the storefront page in the master **squirrelcart** theme.

```
<?php print $Header_Outside ?>
```

```
<?php print $Header_Inside ?>
```

This is how the header is added to the page. Some theme settings put the header outside (above) the main page box, and some put it inside, hence the two variables.

Alternatively, if you are working with a custom theme you can place your header using this instead:

```
<?php print $Header ?>
```

```
<div id="sc_nav">
     <!--  left navigation -->
     <?php if (sc_nav('Primary')): ?>
          <aside id="sc_col1" class="nav_col">
               <?php
                    // Left Navigation section
                    print sc_nav('Primary');
               ?>
          </aside>
     <?php endif; ?>

     <!--  right navigation -->
     <?php if (sc_nav('Secondary')): ?>
          <aside id="sc_col2" class="nav_col">
               <?php
                    // Right Navigation section
                    print sc_nav('Secondary');
               ?>
          </aside>
     <?php endif; ?>
</div>
```

This section of code displays the Navigation Blocks associated with this theme that are assigned to the Primary and Secondary navigation section. This is explained in more detail in the Navigation Blocks topic in this section. In the default **squirrelcart** theme, the primary navigation is on the left hand side of the page.

```
<!-- main content -->
<div id="sc_main">
     <?php print $Cart_Content; ?>
</div>
```

This controls the content in the center area of the page. The content in this area varies based on the page you are currently viewing.

```
<?php print $Footer_Outside ?>
```

```
<?php print $Footer_Inside ?>
```

This is how the footer is added to the page. Some theme settings put the footer outside (below) the main page box, and some put it inside, hence the two variables.

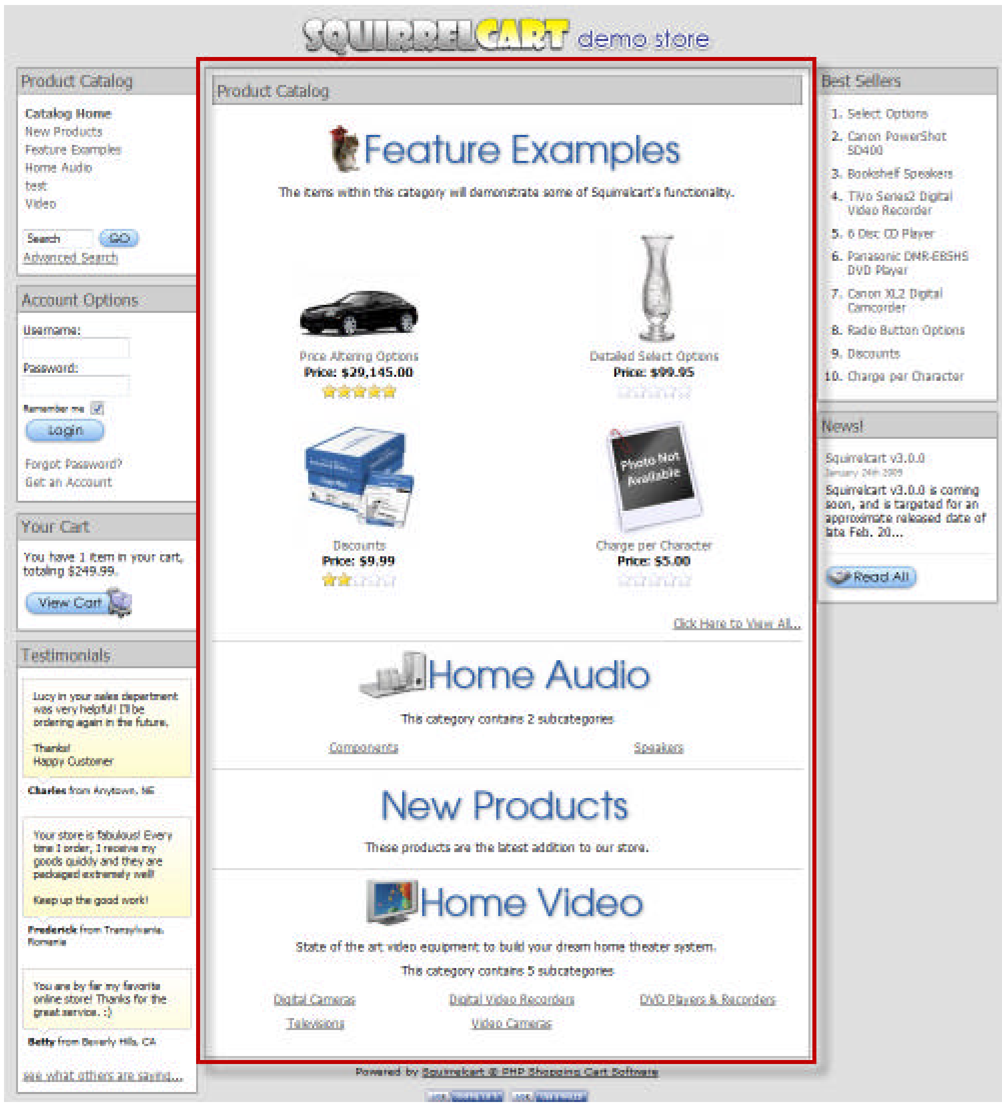
Alternatively, if you are working with a custom theme you can place your footer using this instead:

```
<?php print $Footer ?>
```

9.3.17.3.3 Storefront - Home Page Template

Overview

The page seen when a visitor first enters your store is considered your store's home page. The template controlling the content area of that page is **store_home.tpl.php:**



In older versions of Squirrelcart (version 2.x and older), that content was controlled by a file named **home.php**. As of version 3.0.0, that content is controlled by the **store_home.tpl.php** template file.

The storefront home page will display any Content that you have configured your theme to display. For more information on this, see the **Themes > Content** section of this documentation.

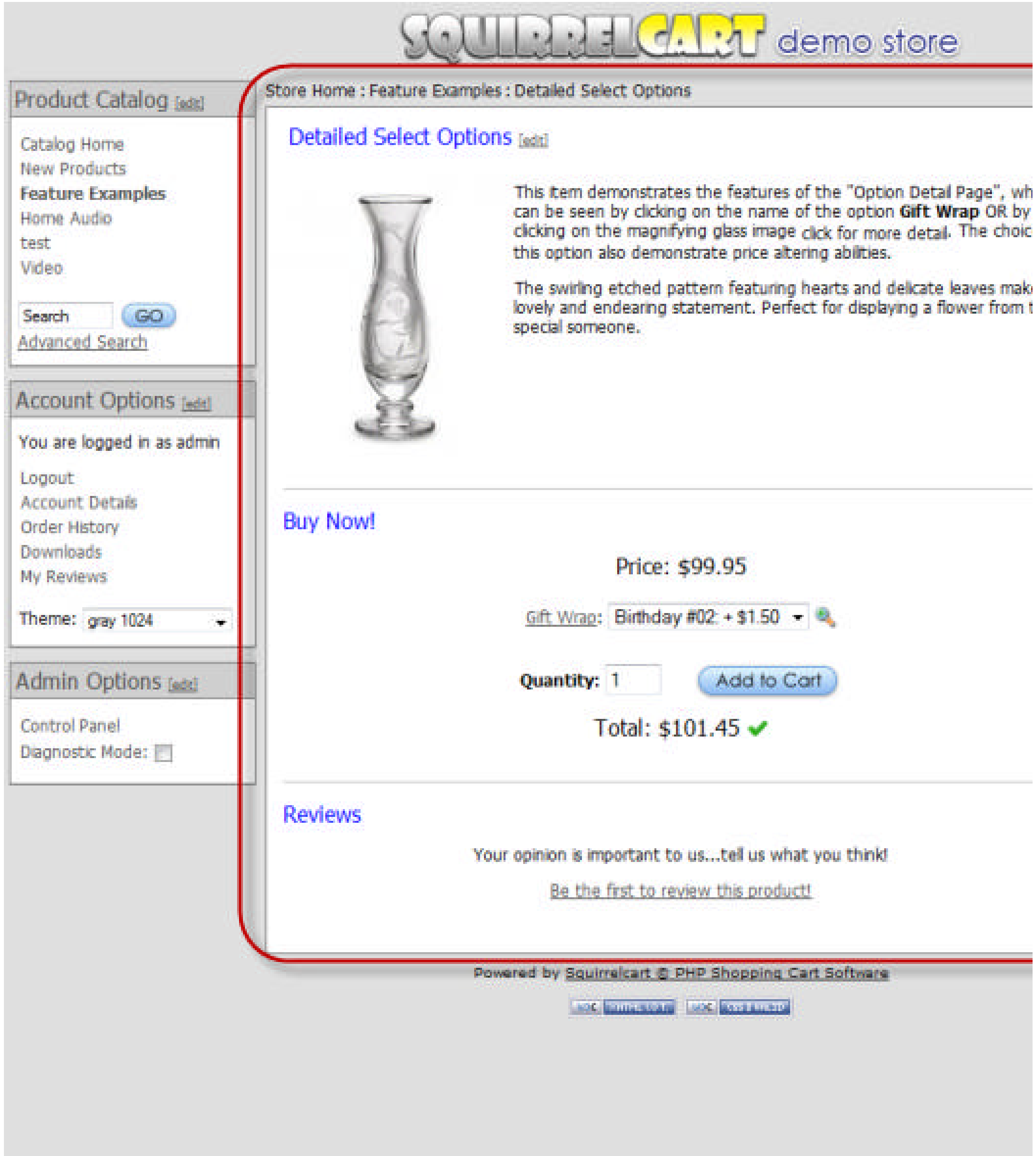
Advanced - Standalone Store Home Page

By default the **store_home.tpl.php** template file controls the area outlined in red in the image above. The rest of the page is controlled by the **store_main.tpl.php** template file. If you want the layout of your store's home page to differ from the rest of your storefront pages, you can cause the **store_home.tpl.php** template file to act on it's own and not appear as part of your storefront page. In order to do so, just add opening and closing <html /> and <body/> tags to **store_home.tpl.php.** If they are detected, your store's home page will only consist of the HTML generated by **store_home.tpl.php.** This can be used to generate an entrance splash page that doesn't conform to the layout of the rest of your storefront.

9.3.17.3.4 Storefront - Content Template

Overview

With the exception of the store's home page, the main content area shown below is controlled by the **store_content.tpl.php** template file, regardless of the page being viewed.



Template Code

This section explains the code in this template. The default code for this template looks like this:

```
<?php /* This line prevents direct access to template. Don't remove it. */ if (!defined('SC_INCLUDE_OK')) die; ?>
<!-- Template: <?php print basename(__FILE__) ?> -->

<?php if (isset($SC['msg_generic'])):?>
    <div class="sc_msg_generic">
         <?php print $SC['msg_generic'] ?>
    </div>
<?php endif; ?>

```

```
10: <?php print sc_breadcrumb_nav() ?>
11:
12: <div class="sc_content sc_main_content">
13:      <?php print $Cart_Content; ?>
14: </div>
```

Line #1:

This ensures that this file is only included by Squirrelcart, and is a security precaution. It appears at the top of all template files.

Line #2:

This line appears in all templates. It outputs an HTML comment to make it easiery to locate the template file by viewing the source code.

Example:

```
<!-- Template: store_main -->
```

Lines #4 - 8:

This prints any messages that need to be shown to the customer that aren't specific to the page being viewed.

Line #10:

This prints the breadcrumb navigation on pages that require it. The template that controls that navigation is **breadcrumb_nav.tpl.php**

Lines #12 - 14:

This prints the content corresponding to the page being viewed.

9.3.17.3.5 Navigation Blocks

Overview

Navigation Blocks are areas (boxes by default) that contain links and other HTML specific to navigating particular areas of your store:

For more information, see the **Navigation Blocks** area in this section of the documentation or more information

Template files

nav_block.tpl.php - This template file controls the appearance of all navigation blocks

account_options_nav.tpl.php - this controls the apperance of the inner content of the Account Options navigation block

admin_options_nav.tpl.php - this controls the apperanace of the inner content of the Admin Options navigation block, seen when you are logged in as a store admin.

best_sellers_nav.tpl.php - this controls the apperance of the inner content of the Best Sellers navigation block

cart_options_nav.tpl.php - this controls the appearance of the inner content of the Cart

Options navigation block. By default, this block only appears when you have at least one item in your cart.

welcome_back_nav.tpl.php - this controls the apperance of the inner content of the Welcome Back navigation block

category_preview_main.tpl.php - this controls the appearance of the inner content of the Category Preview navigation block. This block is usually shown when you are viewing a product's detail page, and shows other items in the current category.

category_preview_box.tpl.php - this controls the apperance of a single product in the Category Preview navigation block explained above.

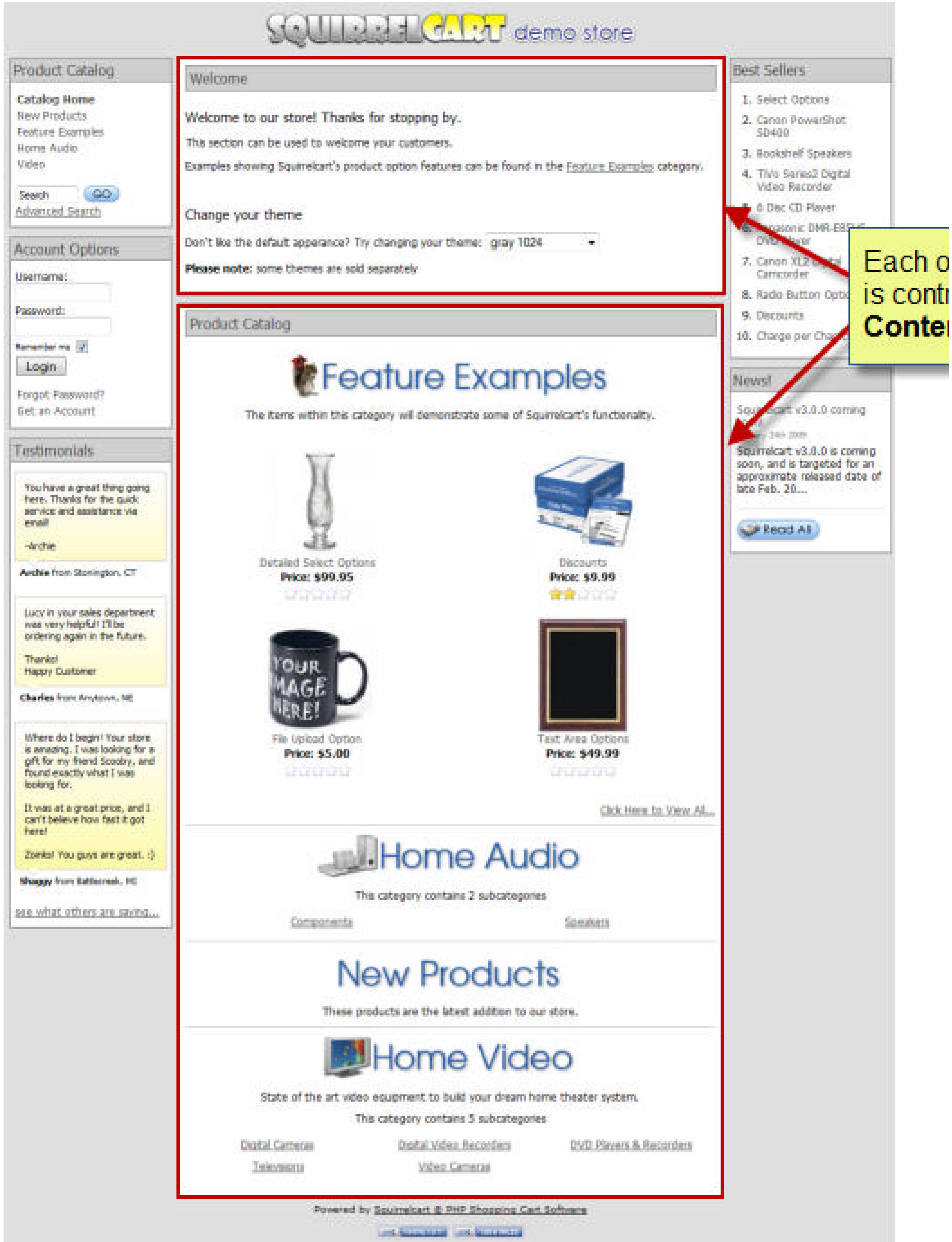
product_catalog_nav.tpl.php - this controls the appearance of the inner content of the Product Catalog navigation block, which shows links to your categories and your search box.

product_catalog_nav_link.tpl.php - this controls the appearance of a single link in the Product Catalog navigation block explained above.

9.3.17.3.6 Content

Overview

Content records are used to display specific pieces of content in your storefront:



Squirrelcart comes with some built in content records, and you can easily create your own to add any information you like.

For more information, see the **Content** area in this section of the documentation or more information.

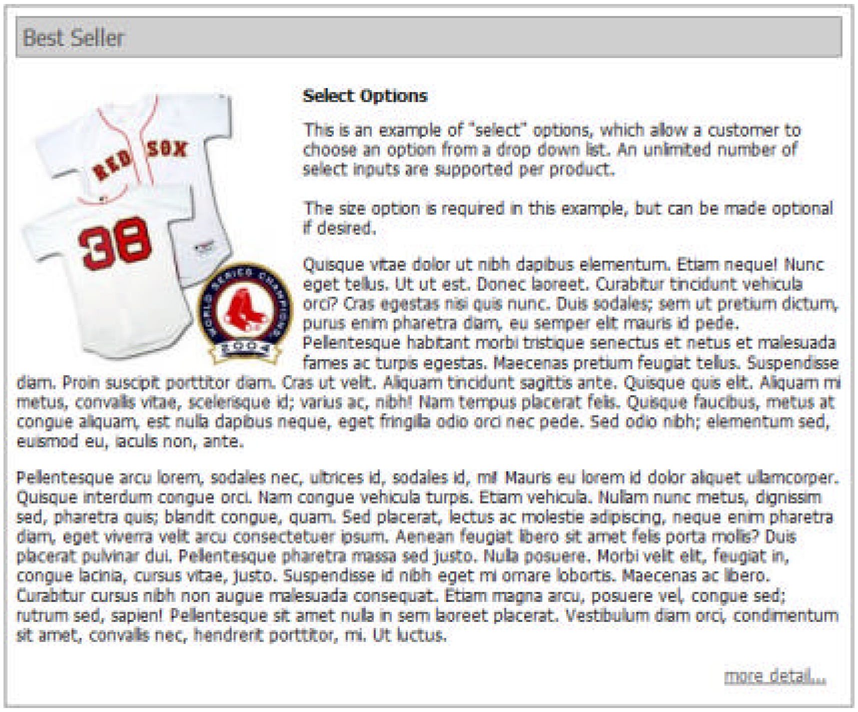
Template Files

Overview

You can easily add custom Content records in Squirrelcart. Custom content records do not use a template, and are controlled entirely by the Content's record. Some built in Content records in Squirrelcart have their content controlled via templates. Those Content records are described below, along with the templates used to modify them.

Best Seller(s)

The Best Seller content area by default shows your best selling item:



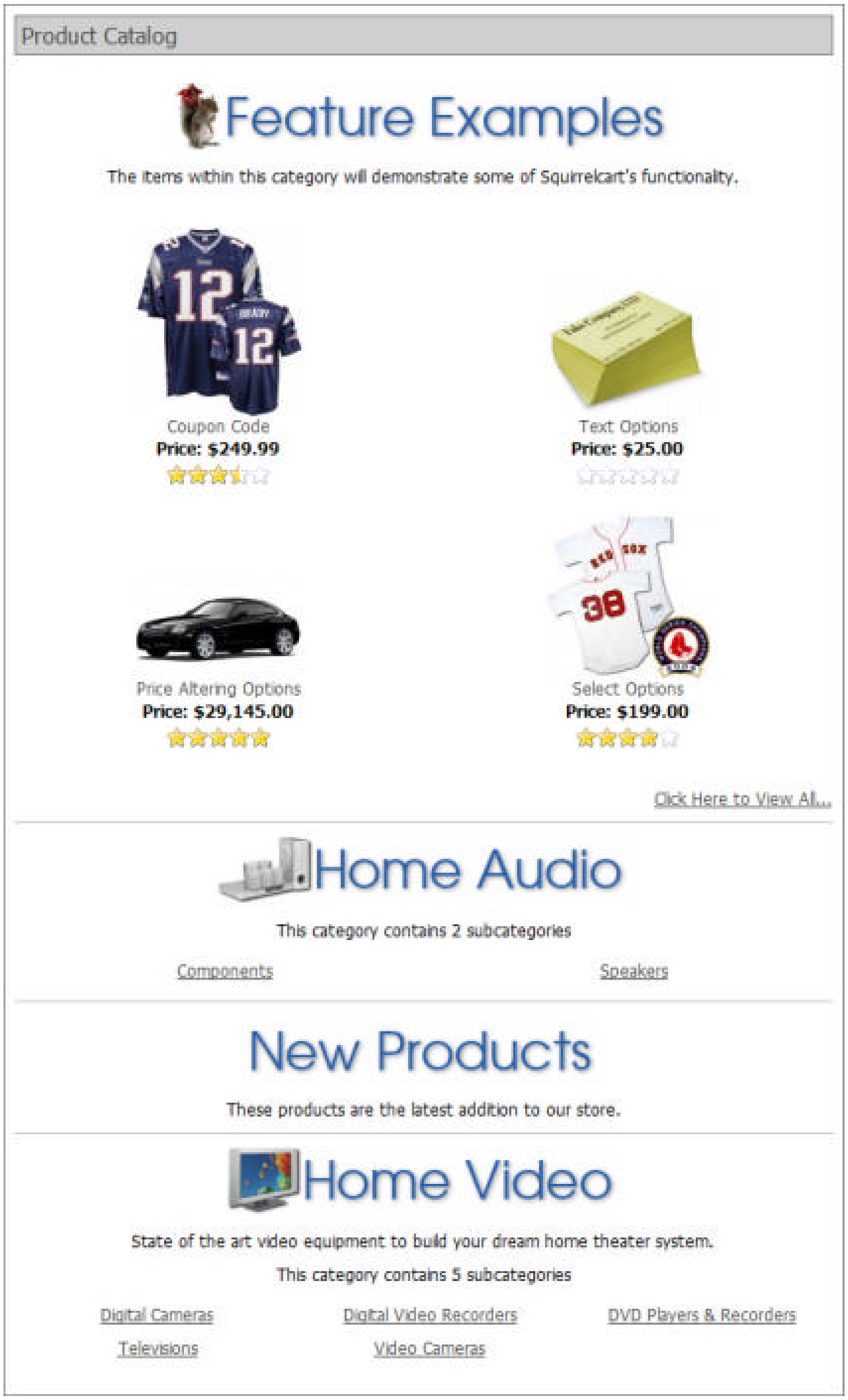
Templates for this Content are as follows:

best_sellers_main.tpl.php - controls the overall appareance of the best sellers Content

best_sellers_box.tpl.php - controls the appearance of each best seller in the best sellers Content

Product Catalog

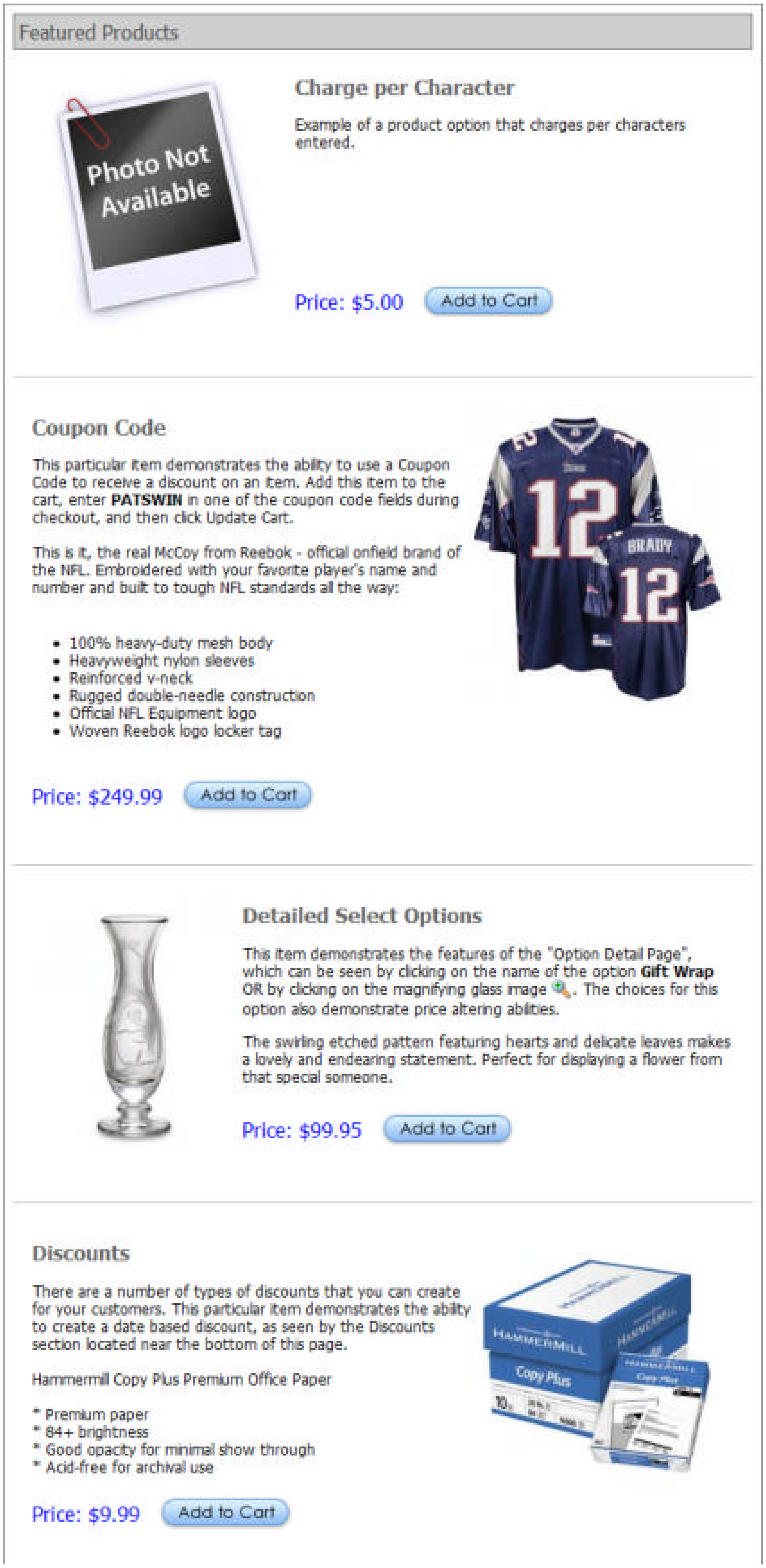
The Product Catalog content area shows categories that are set to "Display When Clicked or Viewed":



This Content uses the same templates as explained on the **Category topic (Section 9.3.17.3.7)** in this section.

Featured Products

By default, this Content displays 4 products from the category containing the most products in your store.


Featured Products
Photo Not Available
Charge per Character
Example of a product option that charges per characters entered.
Price: $5.00
Add to Cart
Coupon Code
This particular item demonstrates the ability to use a Coupon Code to receive a discount on an item. Add this item to the cart, enter PATSWIN in one of the coupon code fields during checkout, and then click Update Cart.
This is it, the real McCoy from Reebok - official onfield brand of the NFL. Embroidered with your favorite player's name and number and built to tough NFL standards all the way:
100% heavy-duty mesh body
Heavyweight nylon sleeves
Reinforced v-neck
Rugged double-needle construction
Official NFL Equipment logo
Woven Reebok logo locker tag
Price: $249.99
Add to Cart
Detailed Select Options
This item demonstrates the features of the "Option Detail Page", which can be seen by clicking on the name of the option Gift Wrap OR by clicking on the magnifying glass image. The choices for this option also demonstrate price altering abilities.
The swirling etched pattern featuring hearts and delicate leaves makes a lovely and endearing statement. Perfect for displaying a flower from that special someone.
Price: $99.95
Add to Cart
Discounts
There are a number of types of discounts that you can create for your customers. This particular item demonstrates the ability to create a date based discount, as seen by the Discounts section located near the bottom of this page.
Hammermill Copy Plus Premium Office Paper
* Premium paper
* 84+ brightness
* Good opacity for minimal show through
* Acid-free for archival use
Price: $9.99
Add to Cart

Templates for this Content are as follows:

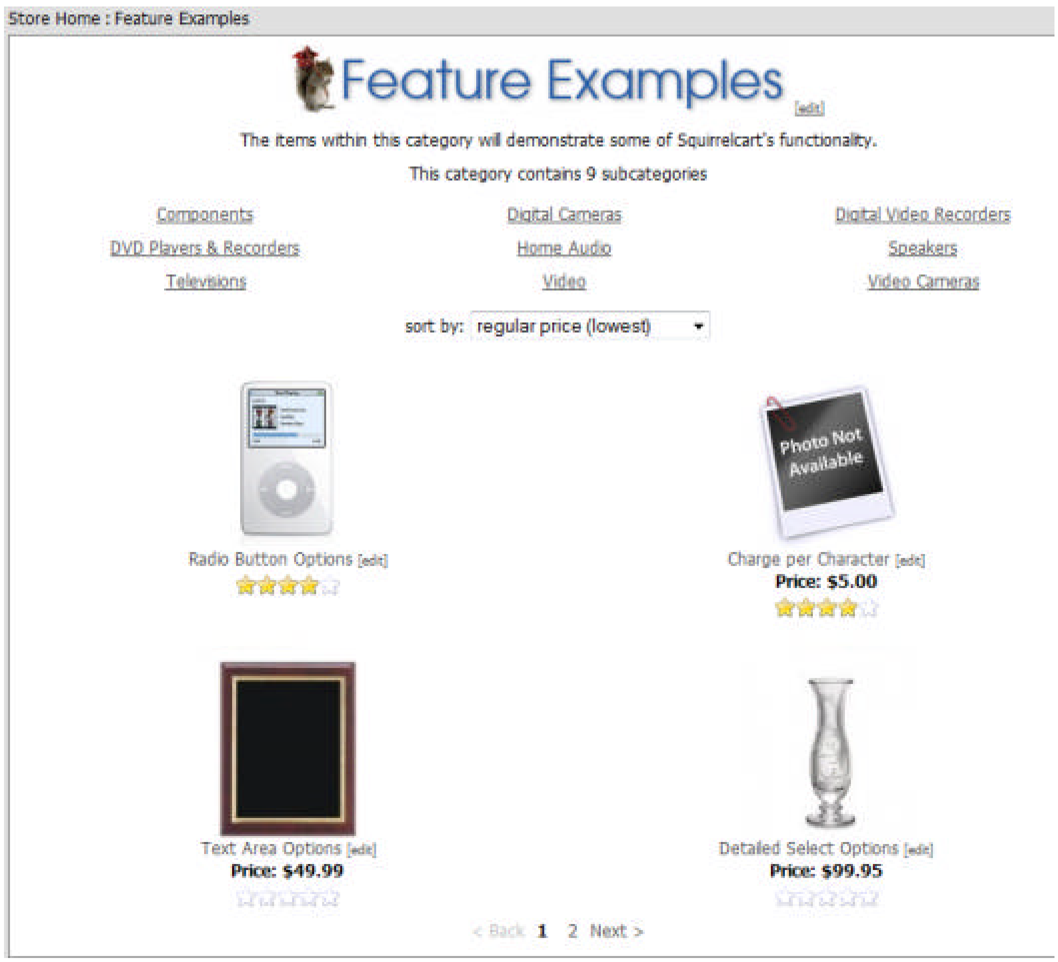
featured_product.tpl.php - controls the apperance of each product in this Content

You can change the category used, and the number of products displayed by passing parameters to the **sc_featured_products_content()** function that can be seen when viewing the source code for this Content record. For more information, see the Developer Guide section of this documentation.

9.3.17.3.7 Template Guide - Category

Overview

This page describes the templates involved in generating the category page, which is displayed when a category is clicked on. These same templates are also used to display categories on your store's home page that are set to "Display When Clicked or Viewed".



Templates

breadcrumb_nav.tpl.php - The bread crumb navigation appears at the very top of the image above. This template is also used when viewing a product's detail page. You can customize the code that separates each link by using the **bread crumb separator** field in **Visual Settings**

(Section 6.2).

category.tpl.php
This is the main template file that controls the appearance of the entire category section of code.

subcategory.tpl.php
If the category has subcategories, this template file controls the appearance of each one on the parent category's page.

product_thumbnail.tpl.php
This controls the appearance of a single product.

> The **Products_per_Row** and **Products_per_Page** fields control how many products appear in each row and on each page. The fields can be found on the **Visual Settings page (Section 6.2)** (storewide) and the **Category record (Section 7.2.2)** (to override Visual Settings).

product_thumbnail_reviews.tpl.php
If you are using the Reviews module, this template file controls the review stars below each product.

price_html.tpl.php

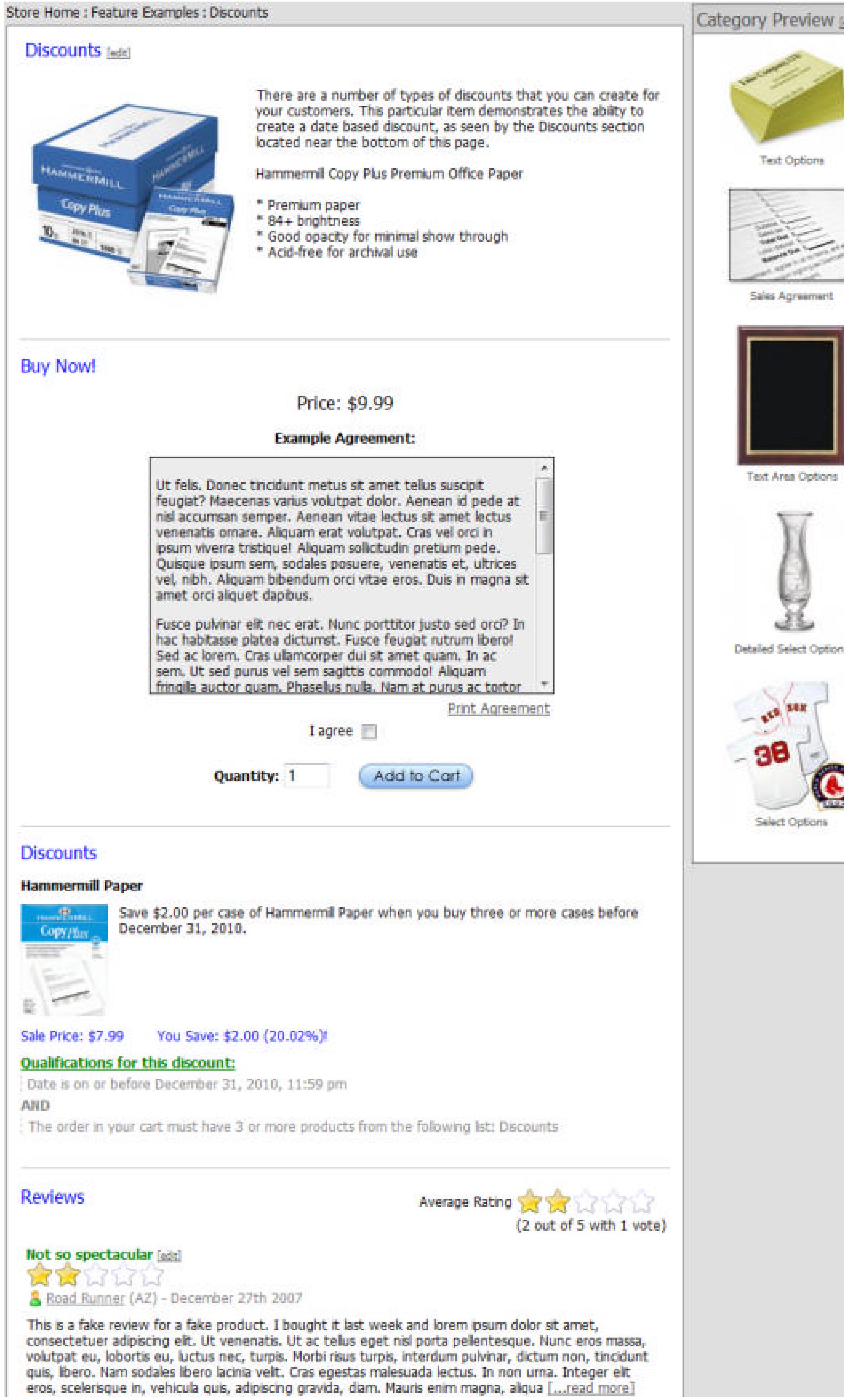
This template is used to display all prices in Squirrelcart's storefront page. You shouldn't need to modify this template under normal circumstances. You can control the currency symbols used before and after your prices on the **Visual Settings (Section 6.2)** page in your control panel.

page_navigation.tpl.php
This controls the appearance of the page navigation at the bottom of the page. This template is used on other pages.

9.3.17.3.8 Template Guide - Product Detail

Overview

The templates in this topic control the appearance of the Product Detail code, which appears when you click on a product thumbnail image, or the "more detail" link below it.


Store Home : Feature Examples : Discounts
Category Preview
Discounts [edit]
There are a number of types of discounts that you can create for your customers. This particular item demonstrates the ability to create a date based discount, as seen by the Discounts section located near the bottom of this page.
Hammermill Copy Plus Premium Office Paper
* Premium paper
* 84+ brightness
* Good opacity for minimal show through
* Acid-free for archival use
Text Options
Sales Agreement
Text Area Options
Detailed Select Option
Select Options
Buy Now!
Price: $9.99
Example Agreement:
Ut felis. Donec tincidunt metus sit amet tellus suscipit feugiat? Maecenas varius volutpat dolor. Aenean id pede at nisl accumsan semper. Aenean vitae lectus sit amet lectus venenatis ornare. Aliquam erat volutpat. Cras vel orci in ipsum viverra tristique! Aliquam sollicitudin pretium pede. Quisque ipsum sem, sodales posuere, venenatis et, ultrices vel, nibh. Aliquam bibendum orci vitae eros. Duis in magna sit amet orci aliquet dapibus.
Fusce pulvinar elit nec erat. Nunc porttitor justo sed orci? In hac habitasse platea dictumst. Fusce feugiat rutrum libero! Sed ac lorem. Cras ullamcorper dui sit amet quam. In ac sem. Ut sed purus vel sem sagittis commodo! Aliquam fringilla auctor quam. Phasellus nulla. Nam at purus ac tortor
Print Agreement
I agree
Quantity: 1
Add to Cart
Discounts
Hammermill Paper
Save $2.00 per case of Hammermill Paper when you buy three or more cases before December 31, 2010.
Sale Price: $7.99
You Save: $2.00 (20.02%)!
Qualifications for this discount:
Date is on or before December 31, 2010, 11:59 pm
AND
The order in your cart must have 3 or more products from the following list: Discounts
Reviews
Average Rating
(2 out of 5 with 1 vote)
Not so spectacular [edit]
Road Runner (AZ) - December 27th 2007
This is a fake review for a fake product. I bought it last week and lorem ipsum dolor sit amet, consectetuer adipiscing elit. Ut venenatis. Ut ac tellus eget nisl porta pellentesque. Nunc eros massa, volutpat eu, lobortis eu, luctus nec, turpis. Morbi risus turpis, interdum pulvinar, dictum non, tincidunt quis, libero. Nam sodales libero lacinia velit. Cras egestas malesuada lectus. In non urna. Integer elit eros, scelerisque in, vehicula quis, adipiscing gravida, diam. Mauris enim magna, aliqua [...read more]

Templates

breadcrumb_nav.tpl.php
The bread crumb navigation appears at the very top of the image above. This template is also used when viewing a category's page. You can customize the code that separates each link by using the bread crumb separator field in **Visual Settings (Section 6.2)**.

product_detail.tpl.php
This controls the overall appearance of the product detail area.

price_html.tpl.php

This template is used to display all prices in Squirrelcart's storefront page. You shouldn't need to modify this template under normal circumstances. You can control the currency symbols used before and after your prices on the **Visual Settings (Section 6.2)** page in your control panel.

quick_total.tpl.php

If you are using our Quick Total module, this template file controls the appearance of the quick total that appears below the quantity field.

product_detail_review*.tpl.php

If you are using our Reviews module, these template files controls the apperance of the Reviews section of this page.

category_preview_main.tpl.php
This controls the appearance of the code inside the **Category Preview** nav block that appears to the right of the product detail.

category_preview_item_box.tpl.php
This controls the appearance of a single product inside the **Category Preview** nav block.

product options
Product Option templates are discussed in the **Product Options topic (Section 9.3.17.3.9)** in this section.

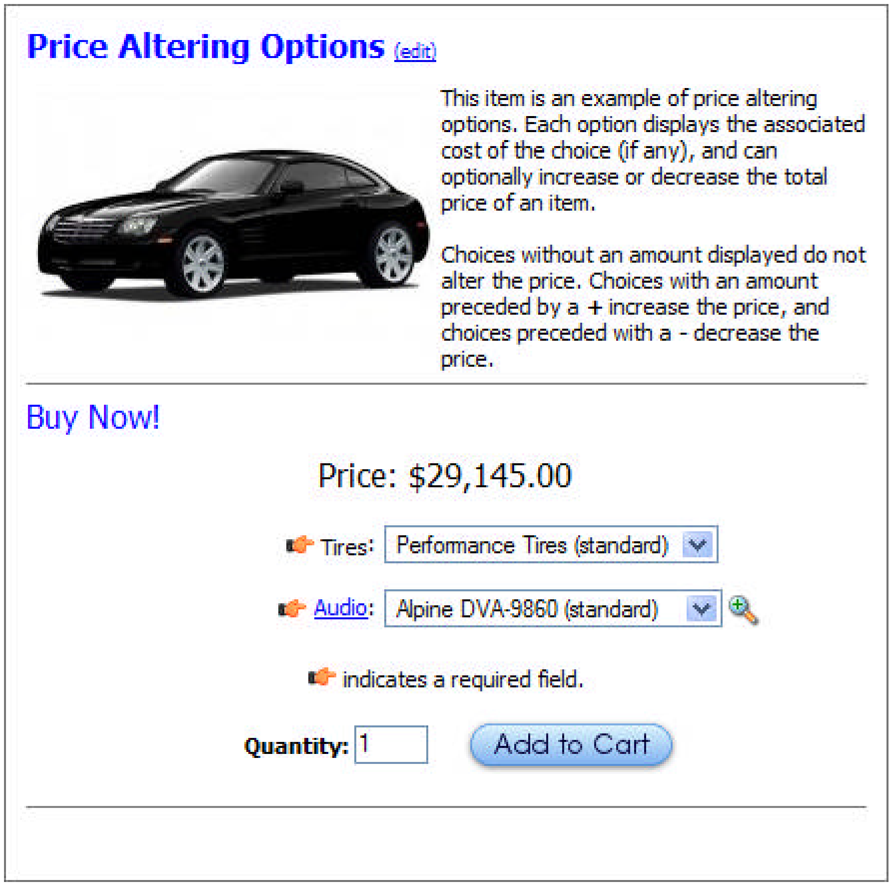
also_ordered_products.tpl.php
This template is used to show the **Customers Who Ordered This Item Also Ordered** section of your product pages.

related_products.tpl.php
This template is used to display related products.

9.3.17.3.9 Template Guide - Product Options

Templates for Options on the Product Detail Page

Templates in this section control the appearance of product options on the product detail page, which is seen when a product thumbnail image is clicked.



options.tpl.php
This controls the appearance of a single options, regardless of type. It controls everything for that option except for the field itself, which is controlled by the templates below.

option_file.tpl.php
This controls the appearance of a file upload optoin.

option_radio.tpl.php
This controls the appearance of a radio optoin.

option_select.tpl.php
This controls the appearance of a select optoin.

option_text.tpl.php
This controls the appearance of a text option.

option_textarea.tpl.php

This controls the appearance of a textarea option.

Templates for Options on the Option Detail Page

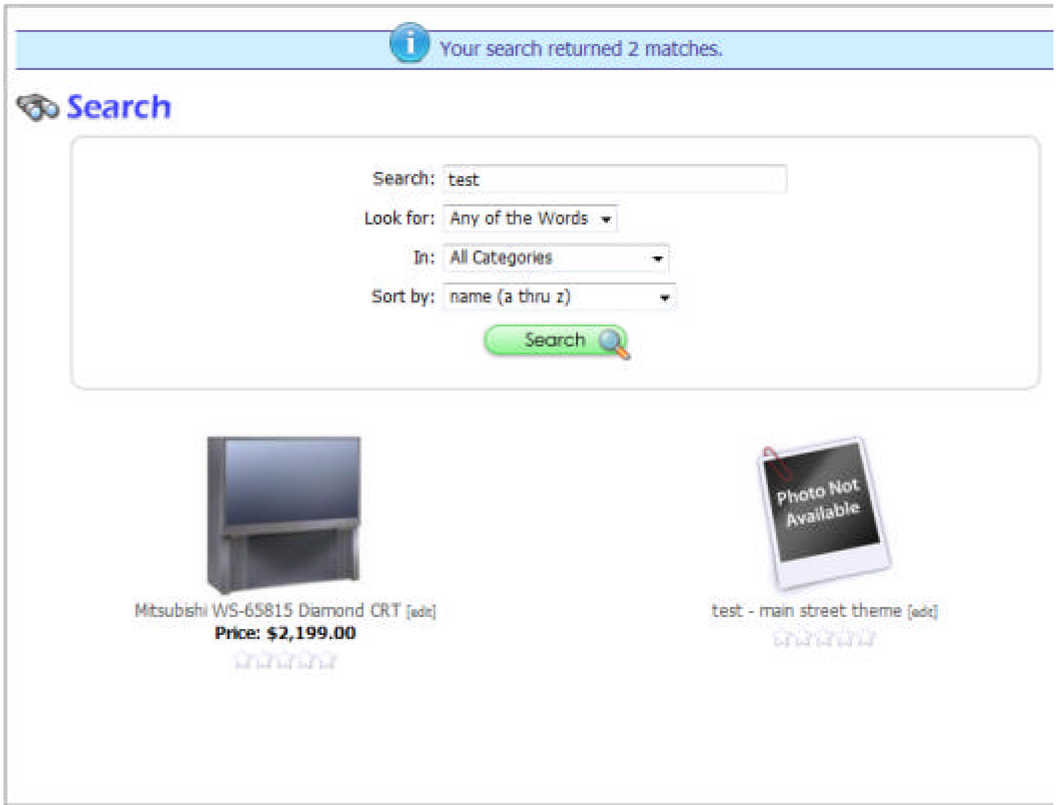
Templates in this section control the appearance of the option detail page, which is shown when a detail link is clicked next to a product option.

option_detail_page.tpl.php
This controls the appearance of the page as a whole.

You can control the number of choices that appear per row on the Option record, using the **Choices per Row** field.

9.3.17.3.10 Template Guide - Advanced Search

This page describes the templates necessary to generate the Advanced Search page.



search_results.tpl.php
This controls the entire search area

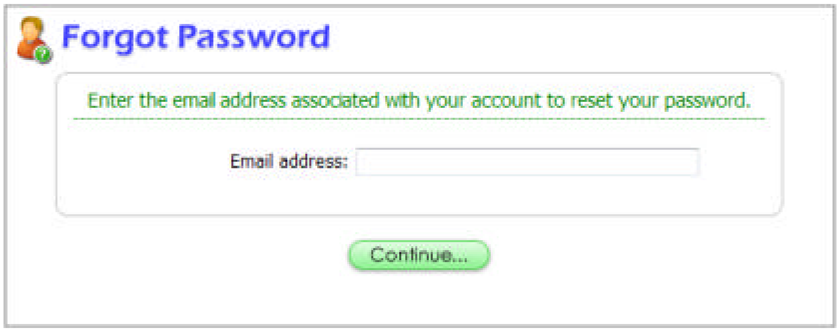
message.tpl.php
This controls the message seen after a search. This template file is common to all messages.

product_thumbnail.tpl.php
This controls the appearance of the products in the search results. This template is also used on other pages.

page_navigation.tpl.php
This controls the appearance of the page navigation at the bottom of the page when the results span more than a single page. This template is used on other pages.

9.3.17.3.11 Template Guide - Forgotten Password

This page describes the template files used to generate the forgotten password form, and resulting pages. This form is seen when you click the **Forgot Password?** link in the **Account Options** nav block.



forgot_password.tpl.php
This is the template used to control the forgot password page.

forgot_password_email.tpl.php
This template controls the text formatted email sent when the Forgot Password form is submitted

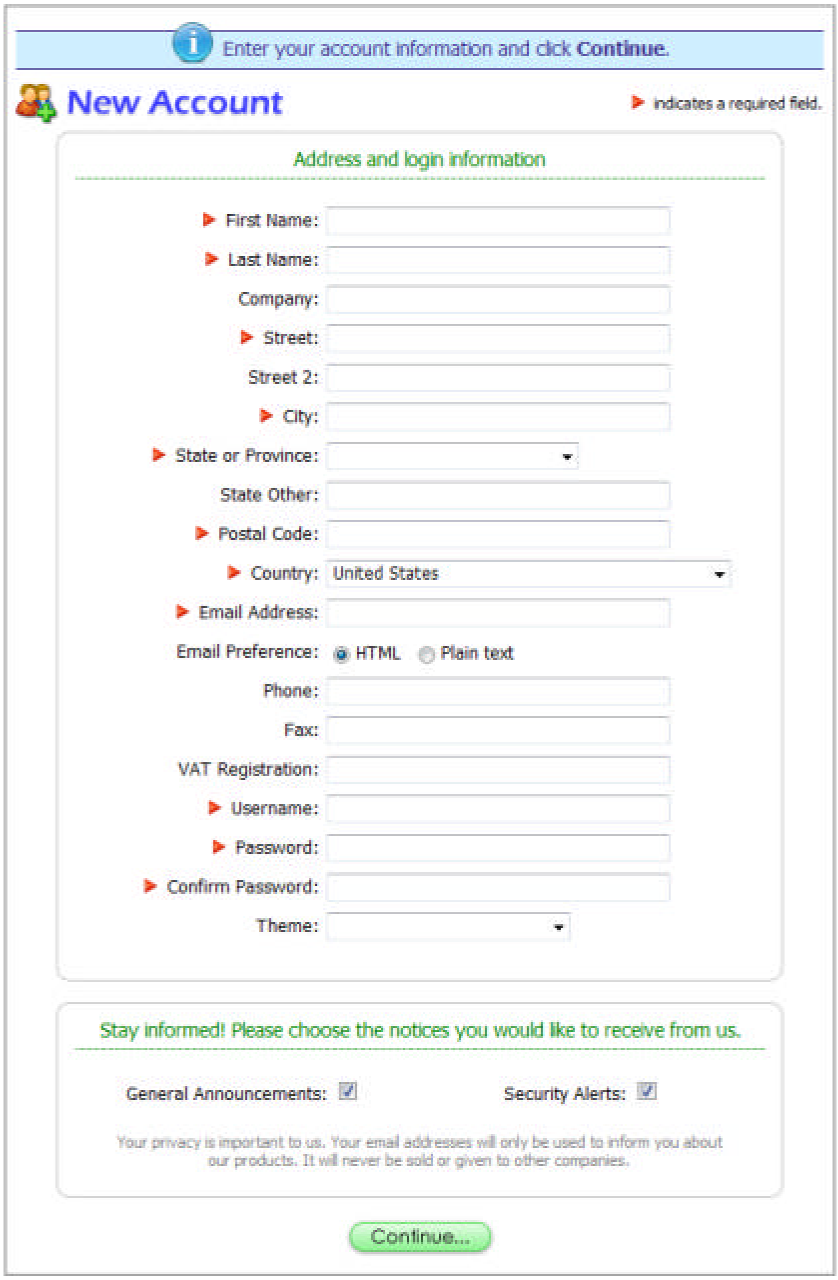
forgot_password_email_htm.tpl.php
This template controls the HTML formatted email sent when the Forgot Password form is submitted

You can enable human verifcation for this form via the instructions on the **Human Verification page (Section 8.4)**.

9.3.17.3.12 Template Guide - Account Form

Overview

This page describes the templates involved in generating the new account form, which is seen when clicking the **Get an Account** link in the **Account Options** nav box. The same templates also control the form seen when modifying your account.



You can control the fields that appear on this form using the **Address Form Settings (Section 6.4.1)** page in your control panel.

You can enable human verifcation for this form via the instructions on the **Human Verification page (Section 8.4)**.

Template Files

account_form.tpl.php
This controls the appearance of the form as a whole.

news_account_groups.tpl.php
If you have the News module installed and have at least one group setup as a "News Group", this template controls the section of this form that controls opting in or out of news groups.

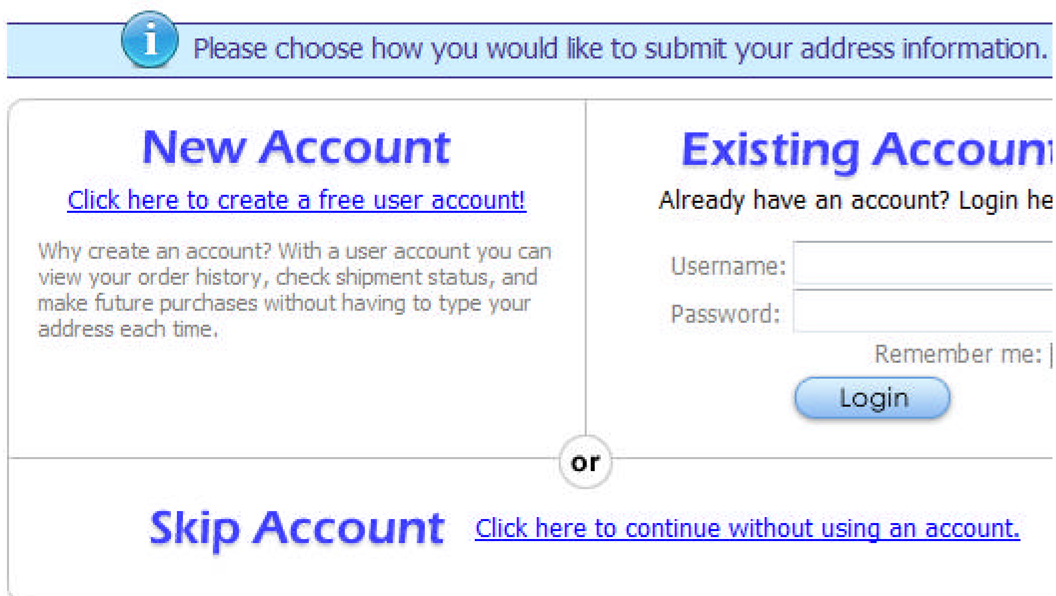
9.3.17.3.13 Template Guide - Account Choice

Overview

This page describes the templates involved in generating the Account Choice page, which is seen during checkout if the customer is not logged in AND the **Show Account Choice** field is checked on your **Visual Settings (Section 6.2)** page.

The **Skip Account** code at the bottom of the table is only seen when **Force Account Creation** setting is not checked on your Visual Settings page.

The account choice page is also shown during other operations that require a customer to login, such as when submitting a review.



Templates

message.tpl.php
This template controls the checkout progress steps at the top of the page. They are explained in more detail in the **Viewing Cart topic ('Template Guide - Viewing Cart' in the on-line documentation)** in this section.

account_choice.tpl.php
This is the main template that controls everything other than the message at the top of the form.

9.3.17.3.14 Checkout

Overview

There are several different templates involved in generating your checkout pages, depending on the step you are on during checkout.

Main Checkout Template - checkout.tpl.php

Overview

Every portion of the checkout process has the overall apperance controlled by the **checkout.tpl.php** template file. This template is used for every checkout step.

Code Explanation

The default code for the **checkout.tpl.php** template file is as follows:

```
<?php /* This line prevents direct access to template. Don't remove it. */ if (!defined('SC_INCLUDE_OK')) die; ?>
<!-- Template: <?php print basename(__FILE__) ?> -->

<div class="checkout">
	<div class="checkout_progress">
		<div class="step1 <?php print $Step_1_State ?>">
			<?php if ($Step_1_URL): ?>
				<a href="<?php print $Step_1_URL ?>">
					<?php print $Step_1_Label ?><br/>
					<?php print $Step_1_Text ?>
				</a>
			<?php else: ?>
				<?php print $Step_1_Label ?><br/>
				<?php print $Step_1_Text ?>
			<?php endif; ?>
		</div>
		<div class="step2 <?php print $Step_2_State ?>">
			<?php if ($Step_2_URL): ?>
				<a href="<?php print $Step_2_URL ?>">
					<?php print $Step_2_Label ?><br/>
					<?php print $Step_2_Text ?>
				</a>
			<?php else: ?>
				<?php print $Step_2_Label ?><br/>
				<?php print $Step_2_Text ?>
			<?php endif; ?>
		</div>
		<div class="step3 <?php print $Step_3_State ?>">
			<?php if ($Step_3_URL): ?>
				<a href="<?php print $Step_3_URL ?>">
					<?php print $Step_3_Label ?><br/>
					<?php print $Step_3_Text ?>
				</a>
			<?php else: ?>
				<?php print $Step_3_Label ?><br/>
				<?php print $Step_3_Text ?>
			<?php endif; ?>
		</div>
```

```
39:             <div class="step4 <?php print $Step_4_State ?>">
40:                 <?php print $Step_4_Label ?><br/>
41:                 <?php print $Step_4_Text ?>
42:             </div>
43:         </div>
44:
45:         <?php print sc_msg($Success_Message,'success') ?>
46:         <?php print sc_msg($Alert_Message,'alert') ?>
47:         <?php print sc_msg($Error_Message,'error') ?>
48:         <?php print sc_msg($Info_Message) ?>
49:
50:         <!-- content varies based on step we are on in the checkout progress -->
51:         <?php print $Checkout_HTML ?>
52: </div>
```

Line #1:

This ensures that this file is only included by Squirrelcart, and is a security precaution. It appears at the top of all template files.

Line #2:

This line appears in all templates. It outputs an HTML comment to make it easiery to locate the template file by viewing the source code.

Example:

```
<!-- Template: store_main -->
```

Line #4:

This surrounds the entire checkout content

Lines #5 - 43:

This section of code outputs the checkout progress steps. The labels for the steps can be controlled on the **Visual Settings (Section 6.2)** page in your control panel.

Lines #45 - 48:

Each line outputs a different type of message if one is available. The **message.tpl.php** template file controls the overall appearance of these messages.

Line #51:

This line outputs HTML that varies based on the step we are on in the checkout process. See the section below for details on templates used for specific checkout steps.

Viewing Cart Templates

checkout_view.tpl.php - controls most of the HTML when viewing your cart

checkout_view_buttons.tpl.php - this template is used to display the buttons used to checkout - Continue Shopping, Empty Cart, Update Cart, and Checkout

checkout_view_buttons_amazon.tpl.php - this is an alternate template used in place of **checkout_view_buttons.tpl.php**. It is only used when **Checkout By Amazon (Section 6.8.2.7)** is enabled.

checkout_view_buttons_google.tpl.php - this is an alternate template used in place of **checkout_view_buttons.tpl.php**. It is only used when **Google Checkout (on-line documentation)** is enabled.

Empty Cart Template

checkout_empty_cart.tpl.php - When the customer clicks **Empty Cart**, this template is used to display the confirmation form.

Account Choice Template

The account choice form may appear during checkout if enabled. This form is used for other operations as well, and is discussed in the **Account Choice (Section 9.3.17.3.13)** topic in this section.

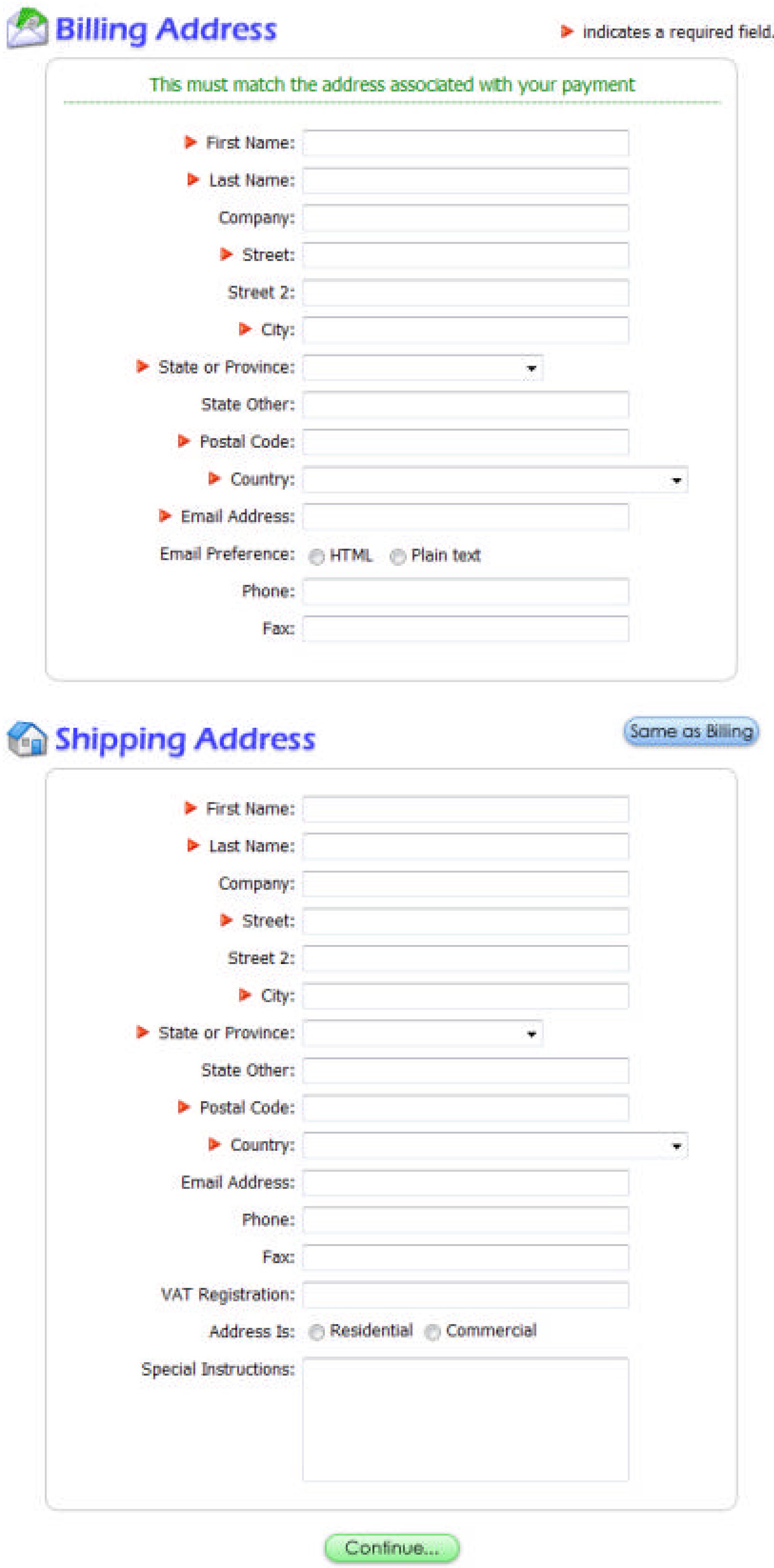
Account Form Template

The account form may appear during checkout if your customer chooses to create an account during the checkout process. This form is used for other operations as well, and is discussed in the **Account Form (Section 9.3.17.3.12)** topic in this section.

Address Form Template

Overview

The address form is seen when the customer clicks **Skip Account** on the Account Choice page, OR if they click **Edit** in one of the address blocks at the top of the Viewing Cart page. The fields shown on the form are controlled by the **Address Form Settings (Section 6.4.1)** page.

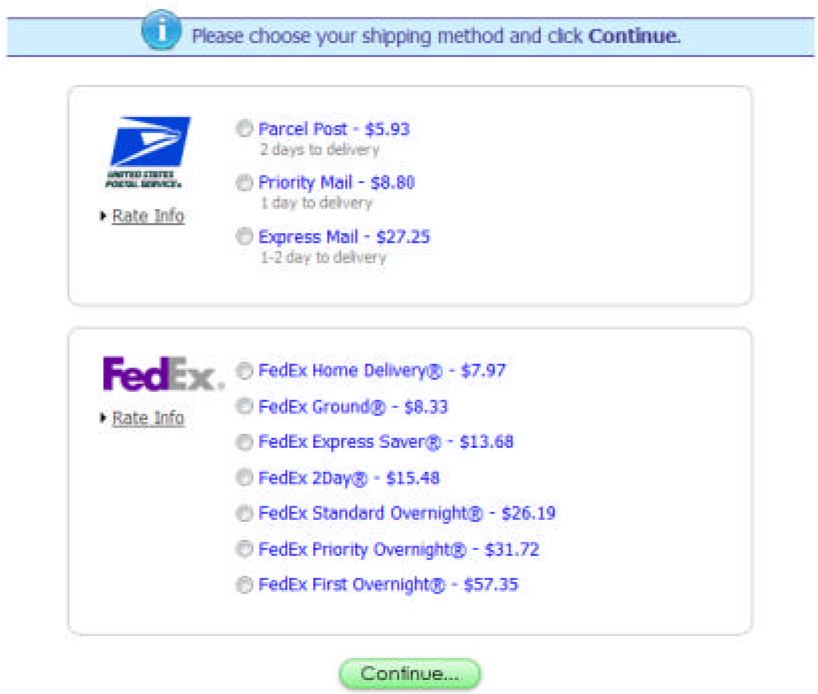

Billing Address
indicates a required field.
This must match the address associated with your payment
First Name:
Last Name:
Company:
Street:
Street 2:
City:
State or Province:
State Other:
Postal Code:
Country:
Email Address:
Email Preference: HTML Plain text
Phone:
Fax:
Shipping Address
Same as Billing
First Name:
Last Name:
Company:
Street:
Street 2:
City:
State or Province:
State Other:
Postal Code:
Country:
Email Address:
Phone:
Fax:
VAT Registration:
Address Is: Residential Commercial
Special Instructions:
Continue...

Templates

checkout_address_form.tpl.php - controls the entire address form, with the exception of the template listed below

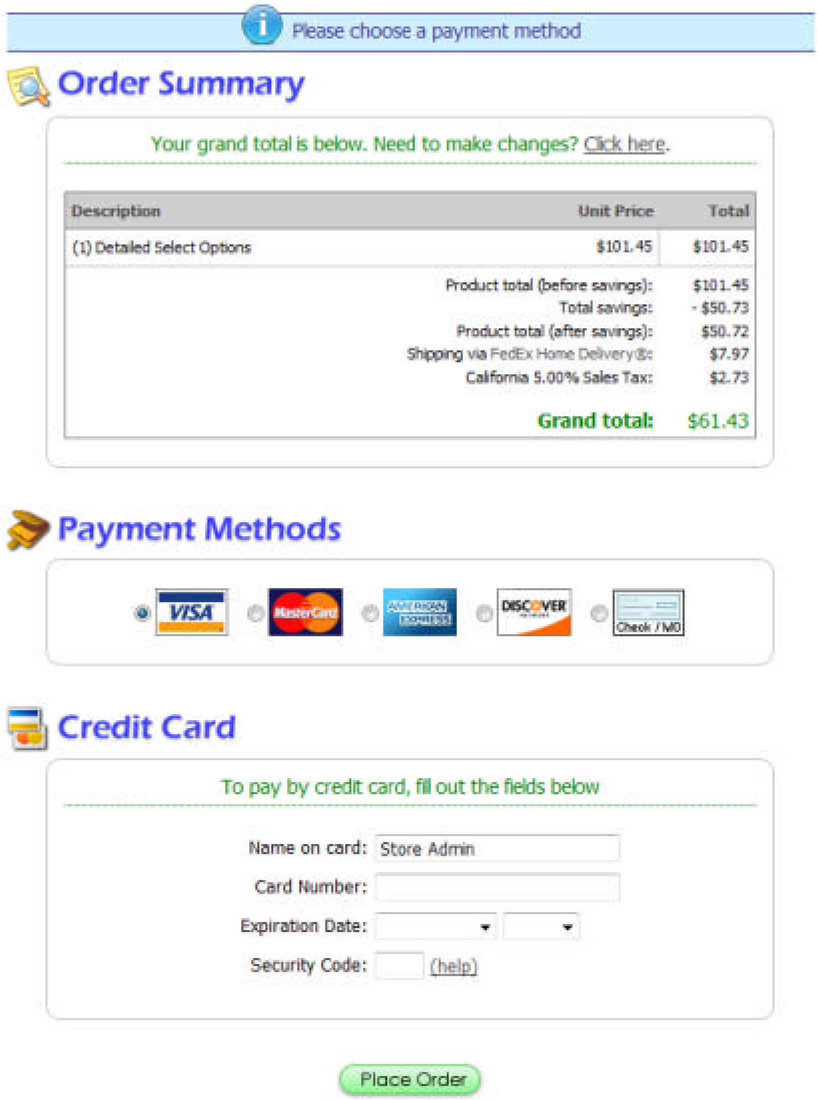
checkout_address_paypal_express.tpl.php - if PayPal Express Checkout (part of PayPal Website Payments Pro) is enabled, this template is used to show the button to checkout via Express Checkout.

Shipping Rate Form Template



checkout_ship.tpl.php - This template controls the shipping rate selection form.

Payment Templates



checkout_pay.tpl.php - this is the main template that controls the payment portion of the checkout process

checkout_pay_cvv2_help.tpl.php - this template controls the page that is shown when you click the "help" link to the right of the Security Code field

checkout_pay_final.tpl.php - some payment gateways require a separate page after the one shown above, to send/confirm payment. This template controls that page.

checkout_pay_order_summary.tpl.php - this template controls the order summary at the top of the payment page

checkout_pay_redirect.tpl.php - for payment systems that require sending the customer to their site for payment, this template controls the page shown while that redirect is occurring

checkout_pay_redirect_iframe.tpl.php - this template is used in conjunction with the one listed directly above

checkout_pay_stratapay*.tpl.php - templates used in conjunction with the **Stratapay (Section 6.8.2.13)** payment method.

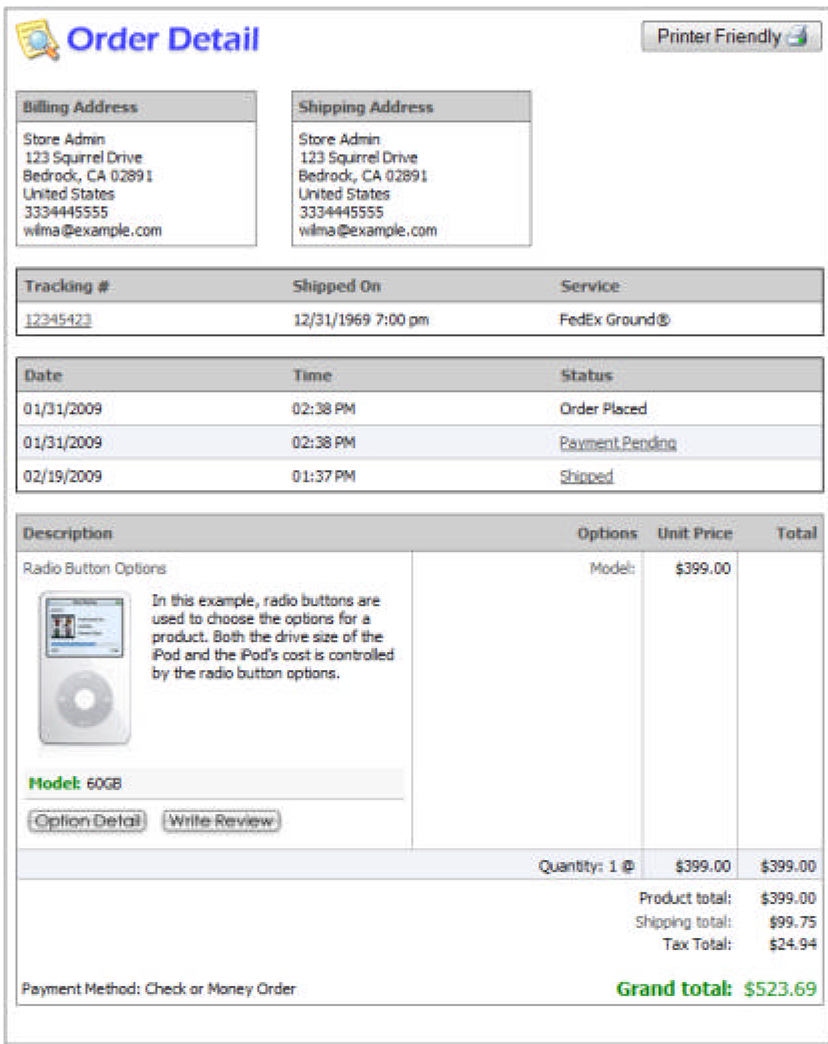
Checkout Done Template

When an order is completed, a thank you page is shown that includes a record of what the customer ordered. The HTML for that section of the checkout is controlled by the **checkout_done.tpl.php** template file. The "Thanks for your order..." message at the top of the page is controlled by the **Thank You Message** field on your **Visual Settings (Section 6.2)** control panel page.

9.3.17.3.15 Template Guide - Order Detail

Overview

This page describes the templates used to generate the order detail for an order.



It is seen on the thank you page after placing an order, on the Order History page after opening an order, and in the control panel when **viewing orders (Section 7.4.1)** in "invoice mode".

Template Files

order_detail.tpl.php
This controls the overall appearance of the entire order detail seen in the storefront

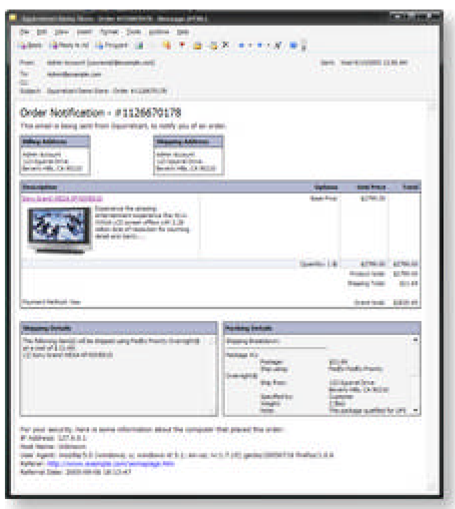
order_detail_admin.tpl.php
This acts just like the **order_detail.tpl.php** template, and controls the overall appearance of the entire order detail seen in the control panel

order_detail_printable.tpl.php
This controls the appearance of the page seen when you click the **Printer Friendly** link to print an order from the order detail page.

9.3.17.3.16 Template Guide - Order Emails

Overview

This page describes the template files used to generate the order emails that Squirrelcart sends. Emails are sent upon completion of an order to the merchant, and to the customer (if enabled in **Store Settings (Section 6.1)**). Emails can be sent in plain text and HTML. By default, they are sent in mixed format so that a customer can either read the message in HTML or plain text depending on their email preferences.



Templates

Both order emails sent to the customer and merchant are virtually identical, and are identical in name except for the prefix. The prefix for the email sent to the customer is **order_email_customer_**, and the prefix for the email sent to the merchant is **order_email_merchant_**.

order_email_customer_html.tpl.php
This is the main template that controls the overall appearance of the HTML version of the order email sent to the customer confirming their order.

order_email_customer_text.tpl.php
This is the main template that controls the overall appearance of the text version of the order email sent to the customer confirming their order.

order_email_merchant_html.tpl.php
This is the main template that controls the overall appearance of the HTML version of the order email sent to the merchant to notify them of an order.

order_email_merchant_text.tpl.php
This is the main template that controls the overall appearance of the text version of the order email sent to the merchant to notify them of an order.

9.3.17.3.17 Account Creation Emails

Overview

This page describes the template files used to generate the emails that Squirrelcart sends when a customer creates a user account.

An notification email is sent to the merchant when **Email Account to Merchant** is enabled on the **Store Settings (Section 6.1)** page.

An welcome email is sent to the customer when **Email Account to Customer** is enabled on the **Store Settings (Section 6.1)** page.

Emails can be sent in plain text and HTML. By default, they are sent in mixed format so that a customer can either read the message in HTML or plain text depending on their email preferences.

Templates

Account creation emails sent to the customer and merchant are very similar in content, and are identical in name except for the prefix. The prefix for the email sent to the customer is **account_email_customer**, and the prefix for the email sent to the merchant is **account_email_merchant**.

account_email_customer_html.tpl.php
This is the main template that controls the overall appearance of the HTML version of the welcome email sent to the customer thanking them for creating an account.

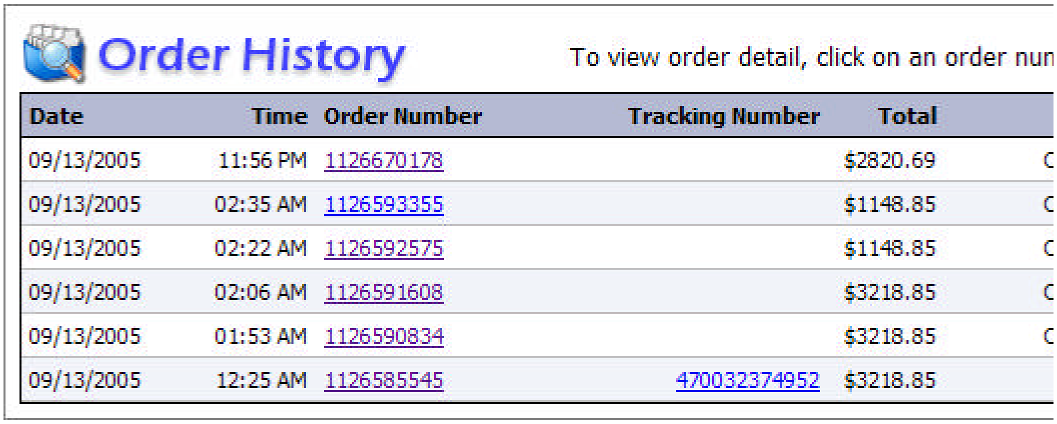
account_email_customer_text.tpl.php
This is the main template that controls the overall appearance of the text version of the welcome email sent to the customer thanking them for creating an account.

account_email_merchant_html.tpl.php
This is the main template that controls the overall appearance of the HTML version of the email sent to the merchant to notify them of a new account.

account_email_merchant_text.tpl.php
This is the main template that controls the overall appearance of the text version of the email sent to the merchant to notify them of a new account.

9.3.17.3.18 Template Guide - Order History

The templates on this page control the Order History page, which is seen when a logged in customer clicks the **Order History** link in the **Account Options** nav block.


Order History

To view order detail, click on an order nun

Date	Time	Order Number	Tracking Number	Total	
09/13/2005	11:56 PM	1126670178		$2820.69	C
09/13/2005	02:35 AM	1126593355		$1148.85	C
09/13/2005	02:22 AM	1126592575		$1148.85	C
09/13/2005	02:06 AM	1126591608		$3218.85	C
09/13/2005	01:53 AM	1126590834		$3218.85	C
09/13/2005	12:25 AM	1126585545	470032374952	$3218.85	

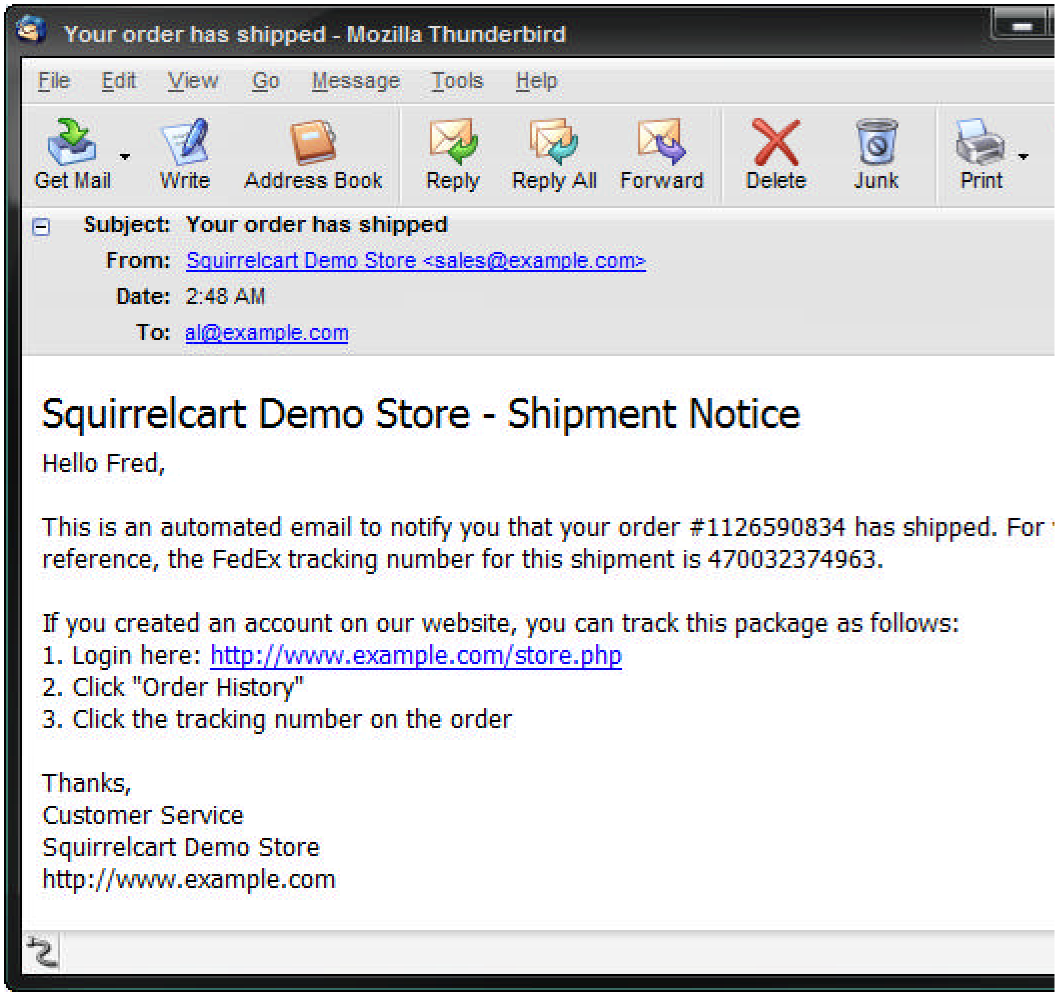
order_history.tpl.php
This controls the overall appearance of the order history section.

order_status_popup.tpl.php
This controls the page seen when an order status link is clicked for more detail.

9.3.17.3.19 Template Guide - Ship Notification Emails

Overview

This page describes the templates used to generate the Ship Notification Email. This email is sent to the customer when a shipment is created for their order, and you have the **Email Ship Notification** field checked on your **Store Settings (Section 6.1)** page. By default, the email is sent in both HTML and text within the same email.



Templates

ship_notify_email_html.tpl.php
This controls the entire HTML version of the shipment notification email.

ship_notify_email_text.tpl.php
This controls the entire text version of the shipment notification email.

9.3.18 Advanced

9.3.18.1 Making Themes Portable

Overview

If you would like to make a theme that can be used in another installation of Squirrelcart, you'll need to save that theme.

> Please note - Squirrelcart is sold for use on a single web site. Using Squirrelcart on additional websites requires that you purchase a Squirrelcart license for each separate installation.

Saving Themes

How it Works

Saving a theme updates a special XML config file inside the theme's folder named **config.xml.php**. That file is used when installing that theme in another Squirrelcart installation and contains a copy of all records associated with that theme, including:

- Navigation Blocks
- Content Records
- Links
- All settings on the theme's record in your control panel

When a theme is installed all associated navigation blocks, content records, and links are imported along with that theme. If any of these records are already present in the database prior to installing a theme, those already existing records are used instead.

Example

You create a theme and assign the following navigation blocks to it:

- Product Catalog
- Help Info
- Best Sellers

You save this theme and install it in another Squirrelcart installation. That installation has "Product Catalog" and "Best Sellers" navigation blocks already, but does not have a "Help Info" navigation block. When installing the theme in this installation, a "Help Info" navigation block will automatically be added along with whatever content was entered on it's record.

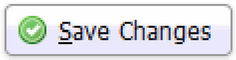
> If you make any changes to a theme's associated records, you must save that theme in order for those changes to be ported to another Squirrelcart installation.

How to Prepare and Save Themes for Reuse

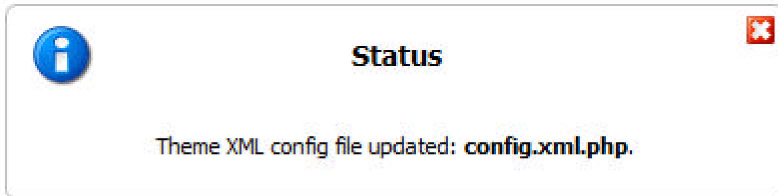
1. Make sure you are happy with the apperance of your theme.

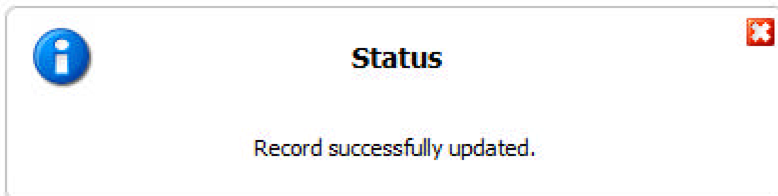
2. Analyze Navigation Blocks, Content, and Link records to make sure they contain data that is acceptable to you. All of these records have the potential to show up in the target Squirrelcart installation when this theme is installed.

3. Open your theme's record in your control panel

4. Click 

5. Make sure you see a notice indicating the XML config file for your theme has been updated:





6. If you see the dialog boxes shown above, your theme was saved properly. If the first one is missing, check your permissions.

Moving a Theme to Another Installation

After saving a theme as explained above, you can move it to another Squirrelcart installation. In the steps below, "source installation" represents the installation of Squirrelcart with the theme already installed. The term "target installation" represents the installation you want to move the theme to.

1. Download the theme's folder from the source installation's **squirrelcart/themes/** folder.

2. Upload the same folder to the target installation's **squirrelcart/themes/** folder.

3. Follow the instructions in the **Installing a Theme topic (Section 9.3.7)**.

9.3.18.2 PHP Developer Tips

Overview

If you are a PHP developer, you might find some of the info below helpful when designing your own themes for Squirrelcart.

Referencing Theme Specific Variables in Your Template Files

Squirrelcart has a feature that allows you to associate merchant supplied data with a theme. You can use this to gather information that you might want to output somewhere in a template file, or to control some custom code entered in a template file. This feature allows you to enable up to 25 fields on a theme's record, which can be altered by a merchant and referenced by you in Squirrelcart's template files.

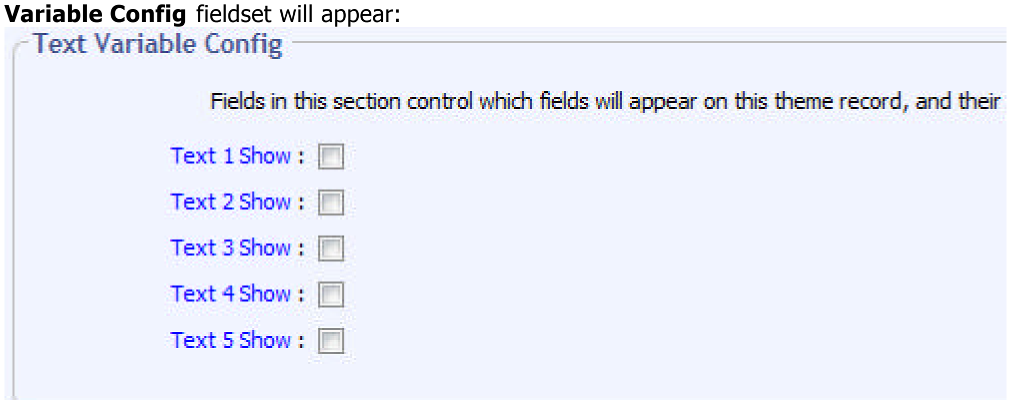
Adding Config Fields to a Theme's Record

1. Open a theme's record

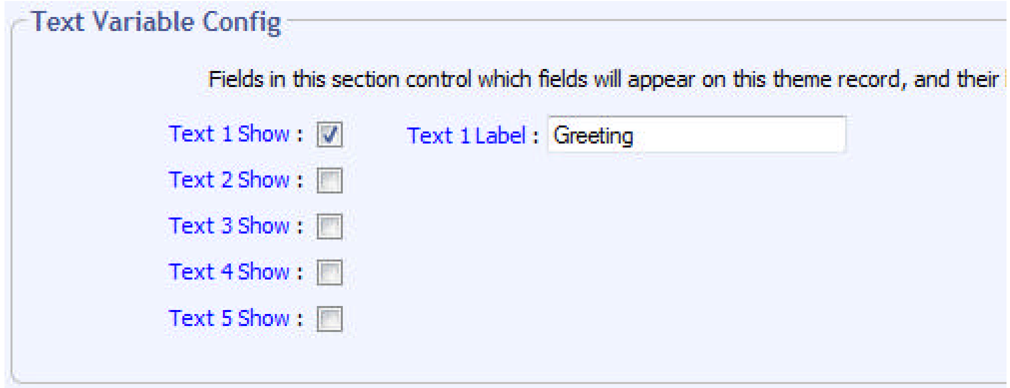
2. Click the **Advanced Config** button, to display the **Advanced Configuration** field set:

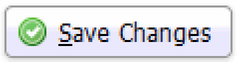
3. You can gather data using 5 different types of fields - text, HTML fields (via rich text editor), checkboxes, radio buttons, and select inputs. For each type, you can gather up to 5 separate values for a total of 25 custom variables. Decide which type of field you want to use for the data you want to collect.

4. For text variables, check **Show Text Variables**. For HTML, check **Show HTML Variables**. For all other field types, check **Show Settings** and then check the field below that corresponding to the type of field you wish to add to the theme's record. For this example, we will gather a greeting via a text field - so check the **Show Text Variables** field. A **Text Variable Config** fieldset will appear:



5. Check the **Text 1 Show** field to tell Squirrelcart to show the 1st text config field on the theme's record. Enter a label for the field. For this example, enter **Greeting**:

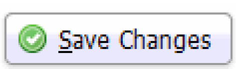


6. Click 

7. Open the theme's record again. You should see a section at the bottom labeled **Variables**. In the **Text** fieldset inside it you'll see a text field with the label **Greeting**:

This field can now be used by a merchant after they've installed this theme.

8. To set a default value for this variable, enter it in it's field. For this example, enter **Hello there!**

9. Click 

Now that you've added a custom variable to your theme, read the section below to find out how to access it's value.

Accessing Theme Variables in Template Files

All variables entered on a theme's record are available in the PHP array $SC['theme_config'].

Continuing with the example from the section above, we now have a theme that has a text field to gather a greeting to be used in this theme. The steps below explain how you can access the value of this variable for use in your template files. For this example, we will put the greeting on the storefront page right after the store logo.

If you haven't already done so, read the topic explaining **how to properly modify template files (Section 9.3.17.2)** before continuing.

1. Open the store_main.tpl.php template file in an editor

2. Locate the area you wish to add your code to. For this example, locate the store's logo code:

```
<div id="sc_logo" class="tip" title="Click to go to our homepa
     <a href="<?php print $Storefront_Home_URL ?>">
          <img src="<?php print $Logo_Image['dyn'] ?>" alt="<?
     </a>
</div>
```

3. To print out the greeting the merchant has entered on their theme record, add a PHP print statement as follows:

```
<div id="sc_logo" class="tip" title="Click to go to our homepa
     <a href="<?php print $Storefront_Home_URL ?>">
          <img src="<?php print $Logo_Image['dyn'] ?>" alt="<?
     </a>
     <h2><?php print $SC['theme_config']['Greeting'] ?></h2>
</div>
```

Theme Setup File - pre_theme.php

How it Works

If you need a place to put your own custom PHP that is specifically related to a theme you are creating, the best place for it is the **pre_theme.php** file, which can be placed in **squirrelcart/themes/YOUR_THEME/.**

If your theme contains a pre_theme.php file, Squirrelcart will include that file before including any template files. You can put code in this file to setup special variables you might need access to in your templates.

Security for pre_theme.php

To ensure your pre_theme.php file is not loaded directly via a browser, we recommend adding this as the very first line after your opening PHP tag:

```
/* This line prevents direct access to template. Don't remove
it. */ if (!defined('SC_INCLUDE_OK')) die;
```

Example

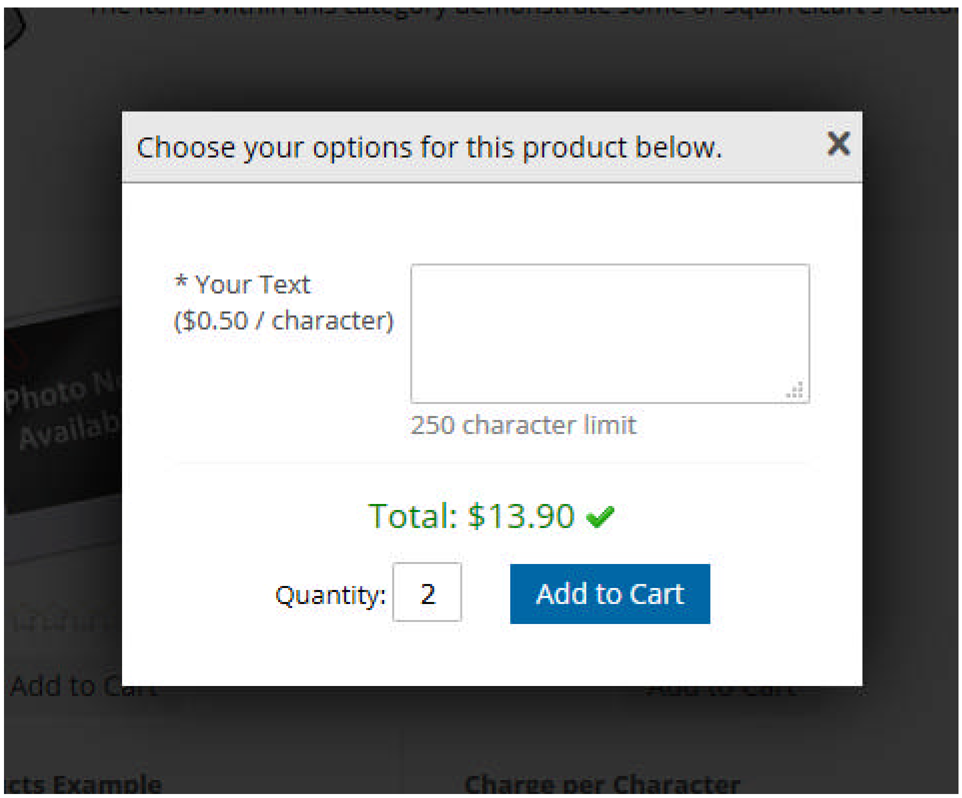
Here is an example of a pre_theme.php file that is used to set some theme_config variables to default values when they are not already set on the theme's record:

```
<?php
/*******************************************************************

     pre_theme.php

     Purpose: this is not a template file, and should not be mod
     sets up certain theme specific variables prior to including

*******************************************************************
/* This line prevents direct access to template. Don't remove it

// setup variables for phone number and email
$SC['theme_config']['Phone_Number']  = $SC['settings']['Phone_Nu
$SC['theme_config']['Email_Address'] = $SC['settings']['Customer_
?>
```

9.3.18.3 Custom Modal Windows

Overview

Squirrelcart has a modal window feature which is used to gather information from a customer in a window overlaid on top of the current page:



This topic explains how you can add custom modal boxes to your own content in Squirrelcart.

Example Code

The example code below can be included **on a page in Squirrelcart (Section 9.3.13)** and demonstrates how you could add one or more modal windows that interact with each other:

```
<a href="#" data-modal="modal_test" class="modal_open">test me</a>
<div id="modal_test" class="modal">
     <h4>Interested in cheese?</h4>
     <div class="inner">
          <p>Well?</p>
          <a href="#" class="btn btn_yes modal_open" data-
modal="modal_test2">Mmmm, Yes! Tell me more.</a>
          <a href="#" class="btn btn_no modal_close">No Thanks</a>
     </div>
</div>

<div id="modal_test2" class="modal">
     <h4>How so?</h4>
     <div class="inner">
          <p>What kind of cheese?</p>
          <a href="#" class="btn btn_yes modal_open" data-
modal="modal_test3">Cheddar</a>
               <a href="http://www.amazon.com/Finlandia-Swiss-7-5-
ounce-igourmet/dp/B00182GKOY/ref=sr_1_3?
s=grocery&ie=UTF8&qid=1443641006&sr=1-3&keywords=swiss+cheese"
class="btn btn_no">Swiss</a>
          <a href="#" class="btn btn_no modal_close">Nevermind</a>
     </div>
</div>

<div id="modal_test3" class="modal">
     <h4>No way.</h4>
     <div class="inner">
          <p>You are not ready for that cheese.</p>
          <a href="#" class="btn btn_no modal_close">OK</a>
     </div>
</div>
```

9.4 Fatal Error Page

Overview

When Squirrelcart encounters an error that causes it to not be able to function, a fatal error is displayed. This can occur when there is a problem with your configuration file, or if your MySQL host becomes unavailable. You can customize the page that is shown as follows.

1. The file that is normally used to display the fatal error is **squirrelcart/includes/sc_failure.inc.php.** Copy this file into the root of your website, in the same location that your *storefront* page is in.

2. Rename the file to **sc_failure.php**

3. Modify the file as needed. Squirrelcart will automatically use this file if it is found.

10 Modules - Overview

10.1 Modules - Overview

Overview

Modules are optional components that can be added to Squirrelcart to add functionality. They can be purchased **here (http://www.squirrelcart.com/index.php?crn=65)**.

10.2 Installing and Upgrading

Steps

Every module is different, but generally the install / upgrade process will be the same.

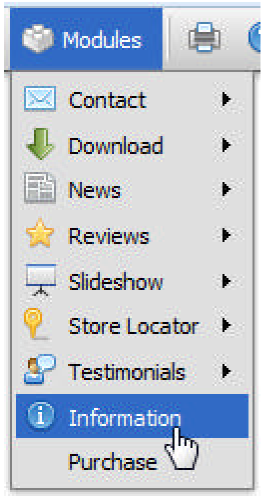
1. Install or upgrade Squirrelcart
2. Download the module from our Downloads page. You will only see links for the downloads that you have purchased.
3. Extract the downloaded ZIP file, and follow the instructions in the read me file.

For most modules, the install process is as simple as uploading the module's folder to **squirrelcart/modules**, and then loading Squirrelcart's control panel to view the status of the install or upgrade.

> The module installation process is only begun once per session. To ensure that your module(s) are installed, close all browser windows and then login to Squirrelcart's control panel.

10.3 Viewing Installed Modules

To see which modules are installed, use this menu link:



10.4 Templates

Overview

If you haven't already done so, read through the Customizing section of this documentation. You will need to do so for the information below to make sense.

If a module is used to control any content that is seen in the storefront, the templates will be located inside a templates folder within the module. For example, the templates for the Download module are located here:

squirrelcart

|__modules

|__download

|__templates

If you need to customize any of these files, they work similar to the other template files in Squirrelcart. Do not modify them in place. Instead, copy only the ones you need to change to your custom theme folder, and modify them there.

10.5 Contact

10.5.1 Contact Module Overview

Overview

The purpose of Squirrelcart's Contact module is to allow your customers to easily communicate with you, and vice versa. The Contact module provides a highly configurable contact page, and control panel features to facilitate communication.

Some of the features include:

- Contact form for customer to send you an email, with an optional vCard attachment containing all of their contact information.

- Customer can receive a confirmation email if enabled, along with an optional vCard containing your contact info.
- Control the contact page header and footer
- Control which fields appear on the form, and their labels
- Add a "Department" field to route customer emails to different departments
- reCaptcha support, to prevent spam submissions
- Show your departments' contact info and optional business hours
- Show your retail locations' contact info, optional maps and business hours
- vCard support, to include a .vcf file attachment in contact emails, containing all contact info. vCard files can be used to add contacts in Microsoft Outlook, smart phones like the iPhone, and many other applications.
- Download vCards on customer and order records in the control
- hCard support for your department and retail store location info

10.5.2 Contact Page

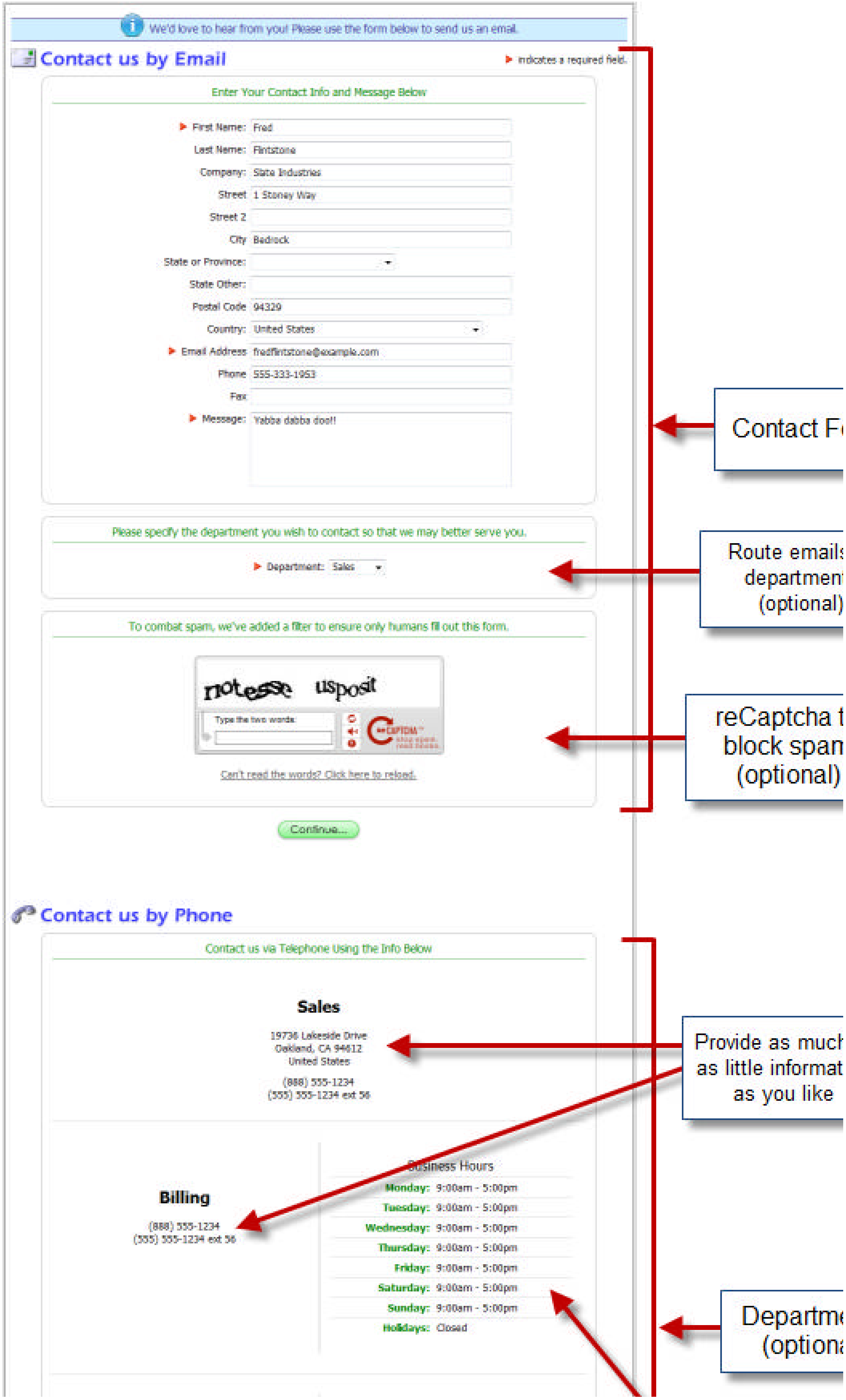
10.5.2.1 Contact Page Overview

Overview

The contact page is the page your customers can use to send you and your staff emails. It also can be used to display department information, and retail store locations with optional maps. For information on how to access the Contact page in your storefront, see **the next topic (Section 10.5.2.2)**.

Contact Page Breakdown

The contact page is highly customizable. You have full control over which sections appear on the page, and what they contain. Here is an example of a contact page with a contact form, departments, and retail stores:


We'd love to hear from you! Please use the form below to send us an email.
Contact us by Email
indicates a required field.
Enter Your Contact Info and Message Below
First Name: Fred
Last Name: Flintstone
Company: Slate Industries
Street 1 Stoney Way
Street 2
City Bedrock
State or Province:
State Other:
Postal Code 94329
Country: United States
Email Address fredflintstone@example.com
Phone 555-333-1953
Fax
Message: Yabba dabba doo!!
Please specify the department you wish to contact so that we may better serve you.
Department: Sales
To combat spam, we've added a filter to ensure only humans fill out this form.
Type the two words:
Can't read the words? Click here to reload.
Continue...
Contact us by Phone
Contact us via Telephone Using the Info Below
Sales
19736 Lakeside Drive
Oakland, CA 94612
United States
(888) 555-1234
(555) 555-1234 ext 56
Billing
(888) 555-1234
(555) 555-1234 ext 56
Business Hours
Monday: 9:00am - 5:00pm
Tuesday: 9:00am - 5:00pm
Wednesday: 9:00am - 5:00pm
Thursday: 9:00am - 5:00pm
Friday: 9:00am - 5:00pm
Saturday: 9:00am - 5:00pm
Sunday: 9:00am - 5:00pm
Holidays: Closed
Contact F
Route emails
department
(optional)
reCaptcha t
block spam
(optional)
Provide as much
as little informat
as you like
Departme
(optiona

10.5.2.2 Contact Page - Viewing and Linking to

Overview

This page explains how to view your Contact page. It also explains how to link to your contact page from your storefront page. Depending on the theme you are using, you may or may not already have a link that will open your contact page.

URL to your Contact Page

Squirrelcart has built in features to link to your Contact page, which are described in the sections below. If you prefer to have the URL so you can link to that page yourself, the default query string URL is:

```
http://www.example.com/store.php?contact=page
```

If you are using our **SEO URLs feature (Section 6.12.3)**, the default URL is:

```
http://www.example.com/store.php/contact
```

If you are using our **SEO URLs (Advanced) feature (Section 6.12.3)** to hide your storefront page from URLs, the URL is:

```
http://www.example.com/contact
```

Linking to Your Contact Page

If you do not already have a link to your contact page, you will need to add one in the control panel.

Determining if you Already have a Contact Page Link

If you are using the default Squirrelcart theme or a custom theme based on it, you may have a Contact link in the **Main Menu** navigation block. By default, this navigation block appears on the left side of the storefront page as the first nav block:

Other themes may also have a built-in Contact link. In our Main Street theme, the link is located in the top horizontal navigation area:

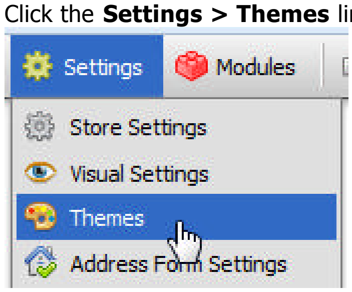
If you already have a contact link, you won't need to add one. If you do not have one, see the instructions below.

Adding a Link to Your Contact Page

You can add a link to your contact page using Squirrelcart's Links feature. For more information on this feature, please see the **Customizing > Themes > Links** section of this documentation.

Adding a link to your storefront page is a two part process. First, you must create the Link record to defined the link itself. Then, you must add that link to your storefront page.

1. Click the **Settings > Themes** link in your control panel:

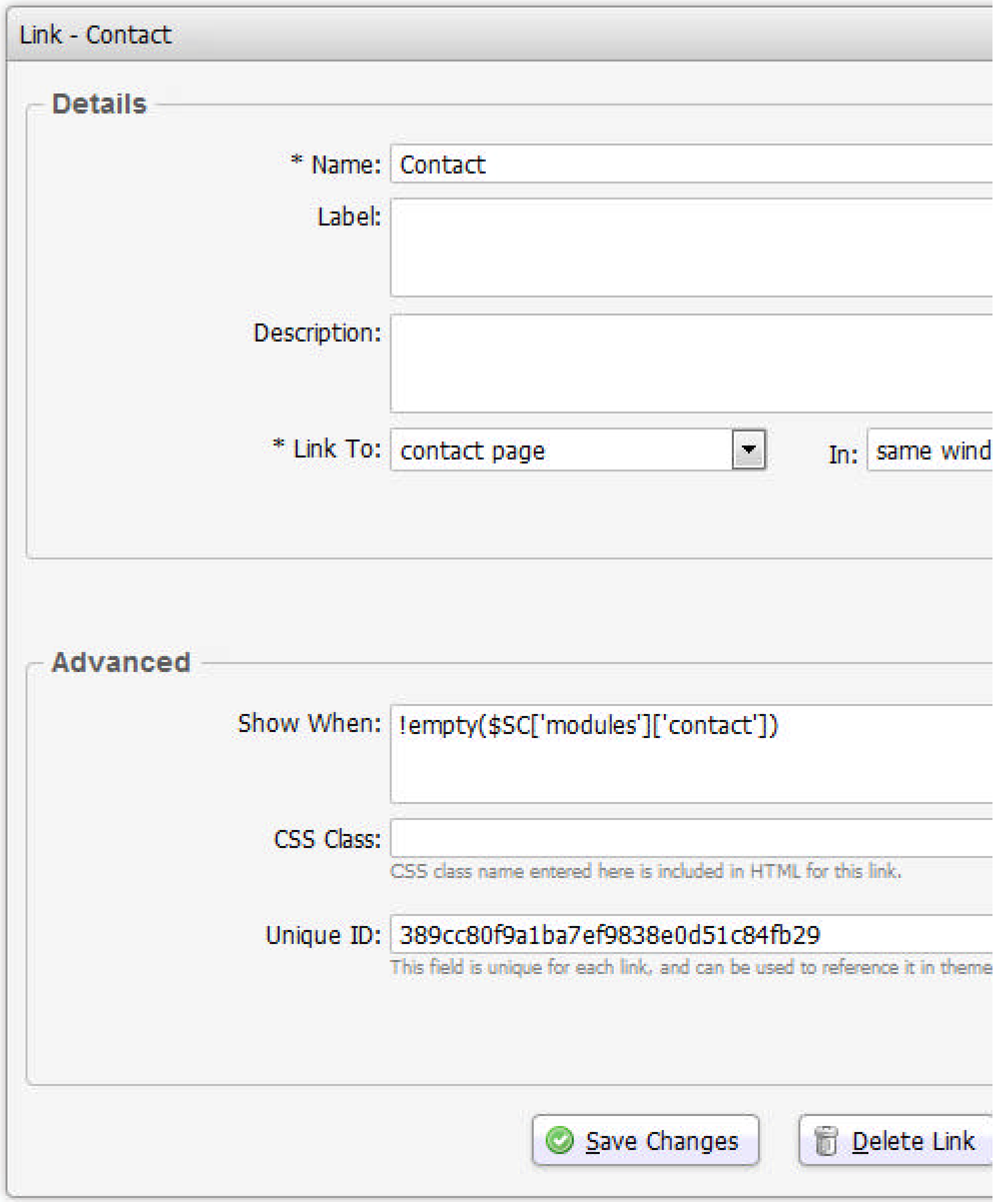


2. Click the **Links** link. A table will appear showing all the Link records in your database.

3. You may already have a *Contact* Links record in the table. If you see one, click anywhere on it's row to edit it. If you do not see one, click the 

button to open a new record.

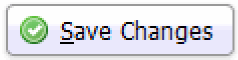
4. The default Contact Link record should look like this:



Make sure your record matches what you see above:

- If you want the link to read something other than **Contact**, enter your own label text in the **Label** field.
- The **Description** field is for reference only and can be left blank.
- The **Link To** field must be set to **contact page**
- The **In** field can be set to whatever you like. We recommend setting this to **same window (_self)**
- The **Show When** field controls when this link will appear. The value you see above causes the link to only appear when the module is installed. If you don't plan on removing the module you can safely leave this field blank.
- You will not see the **Unique ID** field on a new record. In most cases, you will never need the value in this field. Squirrelcart automatically generates this is value for internal use.

5. After confirming that your Contact record matches the image above, click the



button.

6. Now that you have created the link record for your Contact page, you will need to add it to your storefront page. **This topic (Section 9.3.11.3)** explains how to do this.

> If you have trouble getting your Contact page link to appear, **contact our support department (http://www.squirrelcart.com/support.php)** and we can assist you.

10.5.2.3 Contact Page Configuration

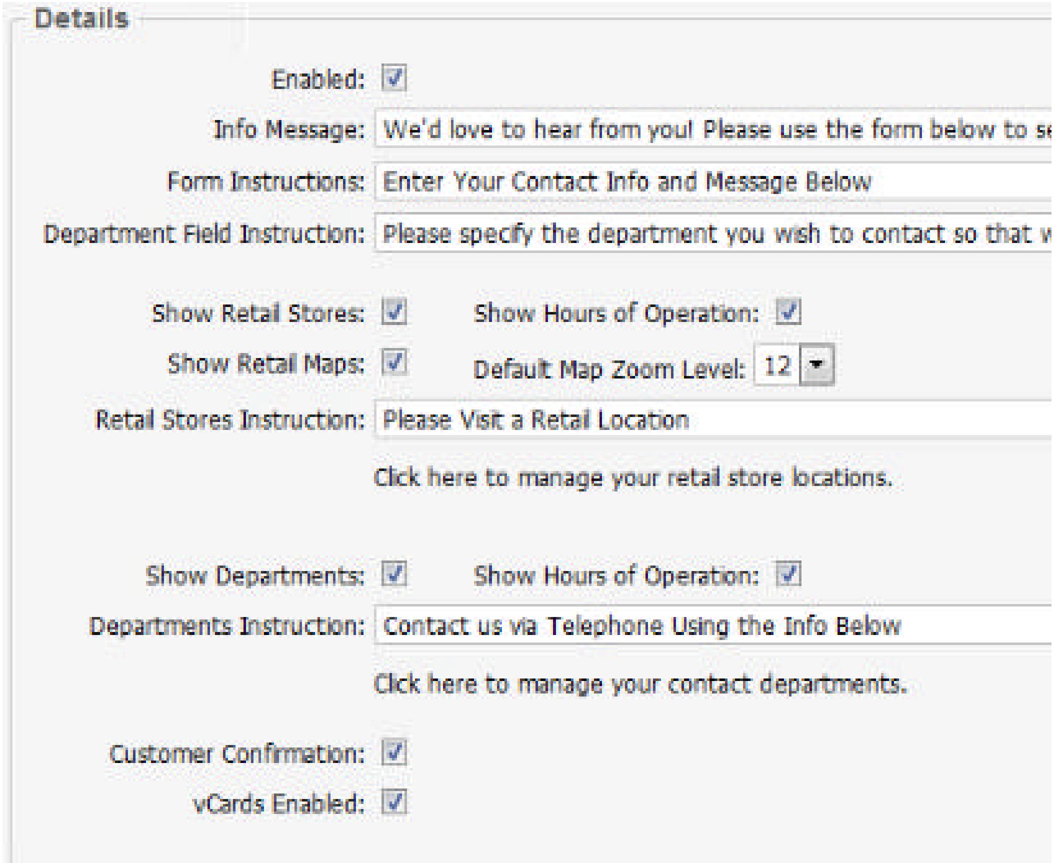
Overview

The contact page provided by Squirrelcart's Contact module is highly configurable via your control panel. To adjust your settings, click the **Contact Settings** link in your control panel:

Use the guide below when configuring your contact page.

> As with many features of Squirrelcart, if you are logged in as store admin you will find [edit] links next to some elements of your contact page. Clicking those links will take you to the record that controls that element for quick editing.

Details



Enabled

This field is used to enable or disable this module. If you suspect a problem or need to take the module offline for any reason, uncheck this field.

Info Message

This text appears at the top of your contact page, in an info message box.

Form Instructions

This appears above the contact form to instruction the customer.

Department Field Instruction

If you have the Department field enabled, this message is seen above it to assist your customers.

Show Retail Stores

When checked, a Retail Stores section will appear on your contact page containing information about your retail stores. Retail Stores are **Location records (Section 6.9.1)** that have the "Retail Store" field checked to indicate the location is a retail store.

The following fields control how your retail stores are shown, and only appear when the **Show Retail Stores** field is checked:

Show Hours of Operation

When checked, hours of operation will appear for your locations if they are entered on their respective Location records.

Show Retail Maps

When checked, a Google map will appear for your retail store locations that have valid address information assigned to them.

Default Map Zoom Level

When **Show Retail Maps** is enabled, this field controls the default zoom level of the map. The lower the number, the further out the zoom level is.

Retail Stores Instruction

This information appears at the top of the retail store section of the contact page.

Show Departments

When checked, a Departments section will appear on your contact page containing information about your Contact Departments. See the **Modules > Contact > Contact Page > Departments** section in this documentation for more info on working with departments.

> This field does NOT control whether or not your customers will see a Department field on the contact form to route their emails to different departments. That feature is controlled by the **Department** field in the **Contact Form Fields** fieldset described further below in the section of the same name.

The following fields control how your contact departments are shown, and only appear when the **Show Departments** field is checked:

Show Hours of Operation

When checked, hours of operation will appear for your contact departments if they are entered on their respective **Contact Department records (Section 10.5.2.4.2)**.

Departments Instruction

This information appears at the top of the departments section of the contact page.

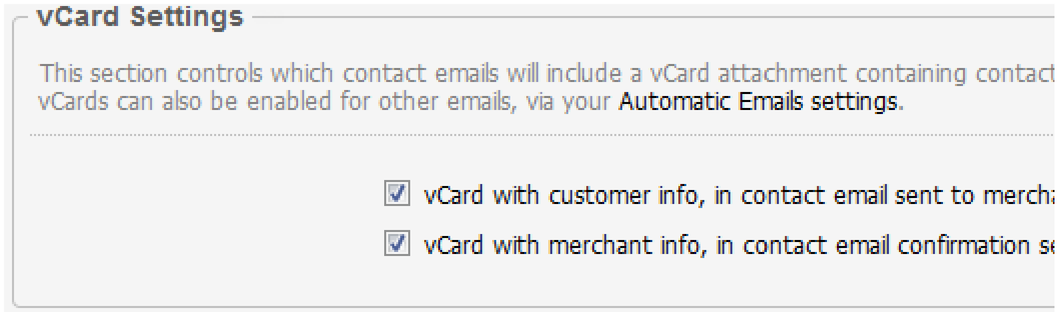
Customer Confirmation

When checked, your customer will receive a confirmation email when they submit the contact form.

vCards Enabled

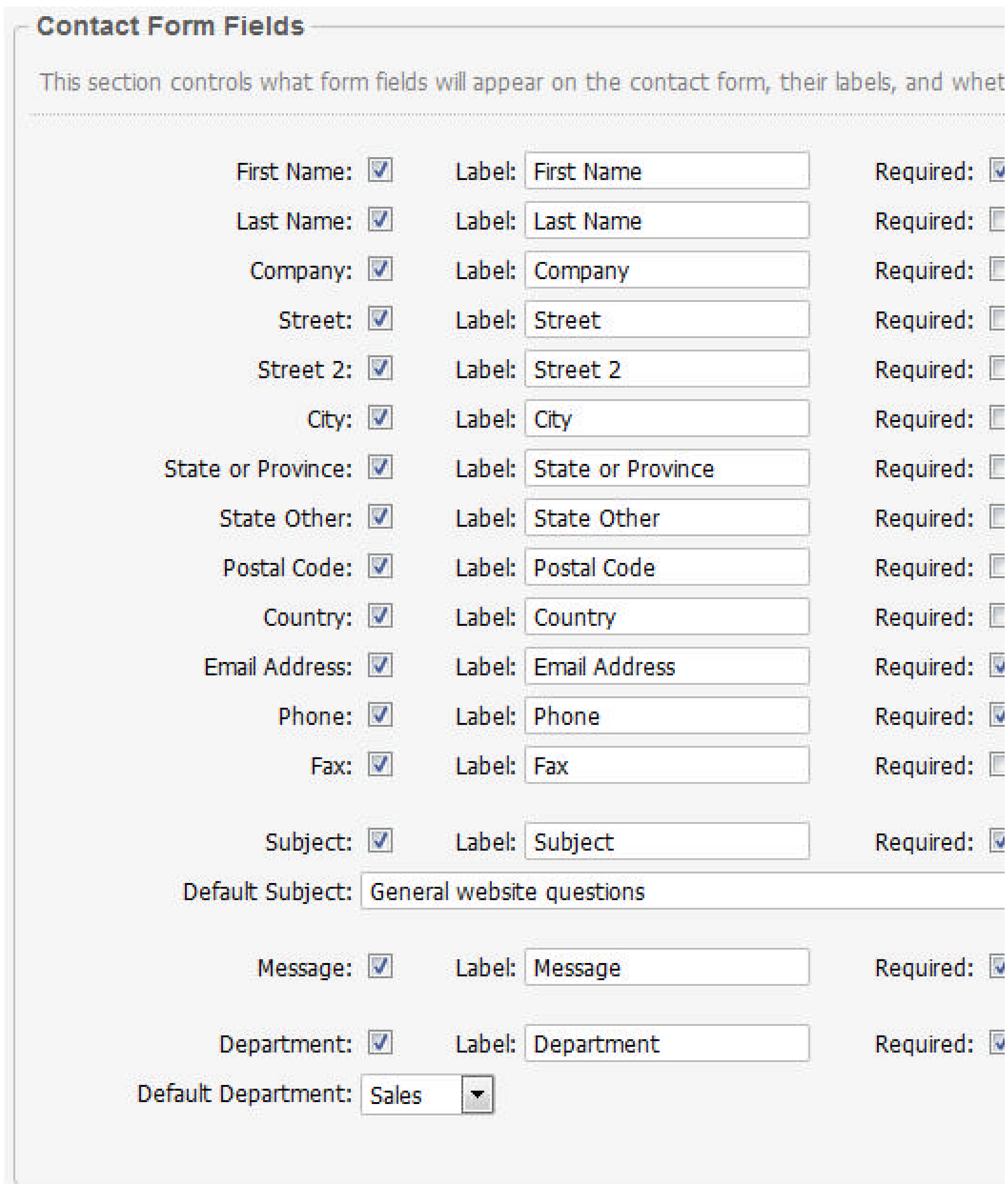
When checked, vCard features will be enabled. For more information on this, see the **Modules > Contact > vCards** section of this documentation.

vCard Settings



This fieldset appears when the **vCards Enabled** field is checked. For more information on this, see the **Modules > Contact > vCards** section of this documentation.

Contact Form Fields



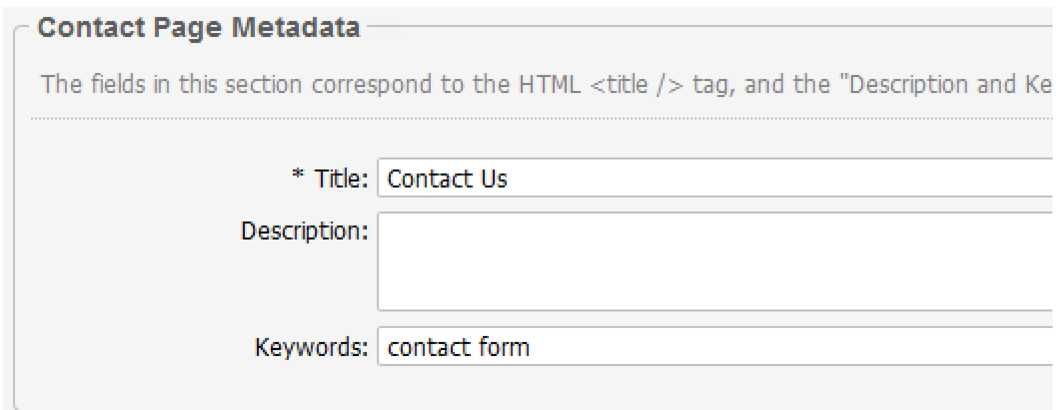
This fieldset controls which fields will appear on your contact form on the contact page. The first column contains field names. When a field name is checked, it will appear on the contact form. The second column contains the label for each field. The third column controls whether or not the field will be a required field.

The **Department** field will display a drop down (select input) field listing your Contact Departments. This allows the customer to **route their email to particular department (Section 10.5.2.4.4)** email address(es).

Contact Page Header and Contact Page Footer

These rich text fields allow you to add optional header and footer text to the top and bottom of the contact page.

Contact Page Metadata



This section works just like our other search engine settings for products, categories, links, etc...

Title

This is used for the contact page's <title /> tag, and title meta tag.

Description

This is used for the contact page's description meta tag.

Keywords

This is used for the contact page's keywords meta tag.

10.5.2.4 Departments

10.5.2.4.1 Contact Departments Overview

Overview

Contact Departments allow you to define department records along with their name, location, hours, and associated staff email addresses. Departments can be displayed on your contact page. They can also be used to show a Department field on your contact form for the purpose of routing customer emails to different department email addresses.

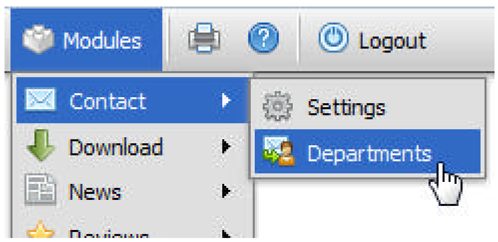
10.5.2.4.2 Creating and Modifying Departments

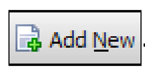
Overview

This topic explains how to create contact departments in your control panel. Please note that the Contact module comes with one built-in Contact department record named Sales (by default) which cannot be disabled or deleted.

Instructions

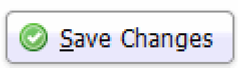
1. Click the **Modules > Contact > Departments** link



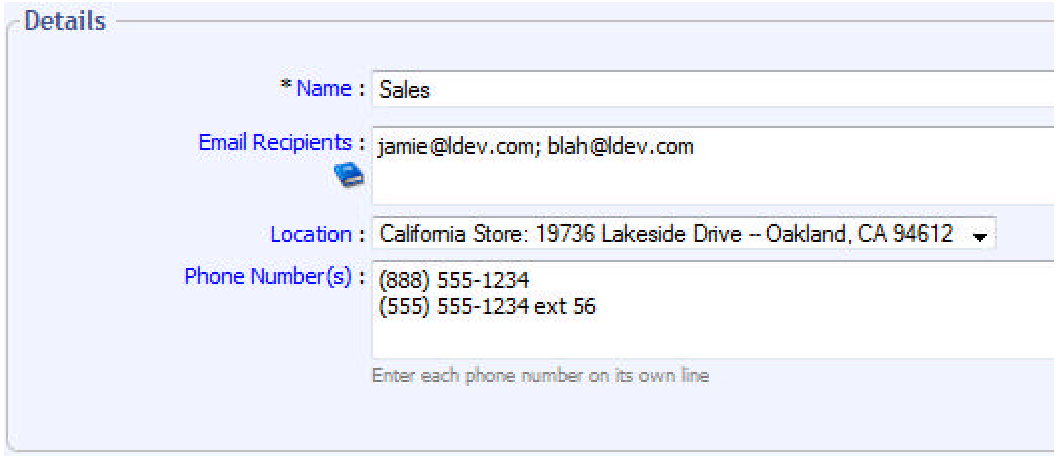
2. To create a new department, click 

. To modify an existing one, click the pen icon at the beginning of it's record row. (You can also click anywhere on the row to edit a record)

3. Fill out the form fields, using the description below as a guide.

4. Click 

Details



Name

Name of the department - your customers may see this.

Email Recipients

This field controls the email recipients for customer messages, when the customer chooses this department on the contact form. Enter addresses separated by semicolons, or use the address book button to add groups or user accounts to the field.

Enabled

This field when checked will enable this department. When unchecked, the department is disabled.

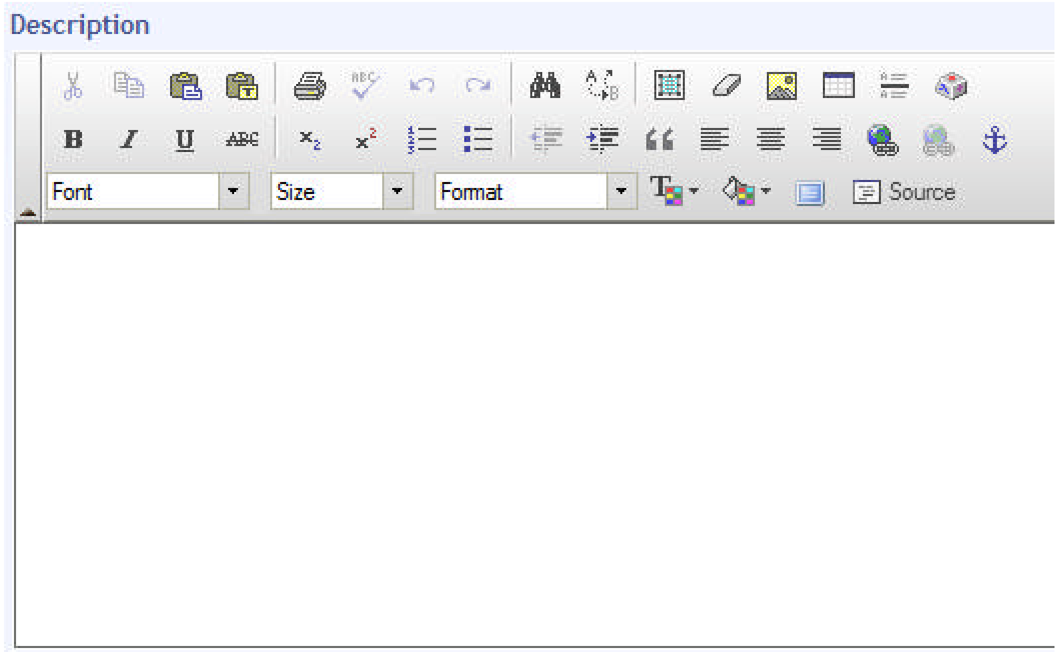
Location

The location of this department (optional). The values in this field come from your **Location records (Section 6.9.1)**.

Phone Numbers

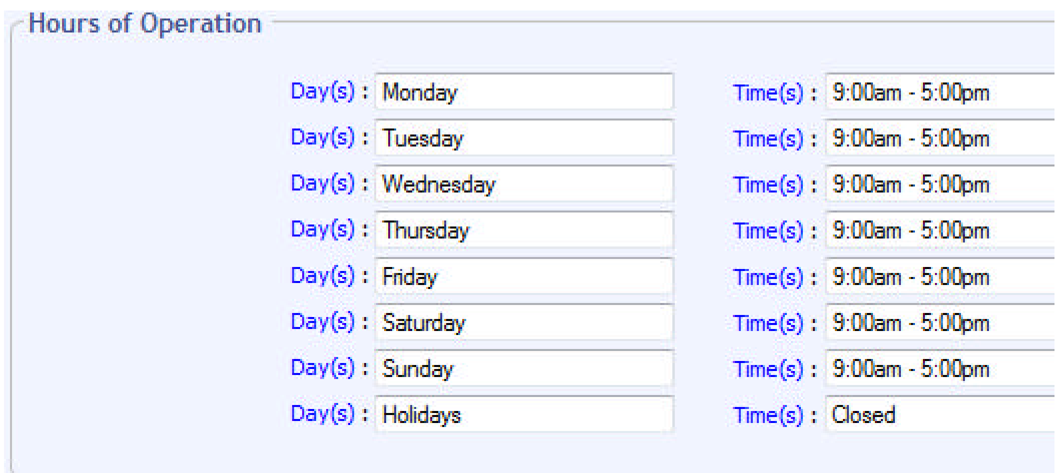
Enter each phone number on it's own line. This info is shown to your customers if the **Show Departments** field is checked on your **Contact Settings page (Section 10.5.2.3)**.

Description



Anything entered here will appear below the department on the Contact Page, if the **Show Departments** field is checked on your **Contact Settings page (Section 10.5.2.3)**.

Hours of Operation



Use this section if you want to display your hours of operation to customers on the Contact Page, when the **Show Departments** field is checked on your **Contact Settings page (Section 10.5.2.3)**.

10.5.2.4.3 Displaying Departments on Contact Page

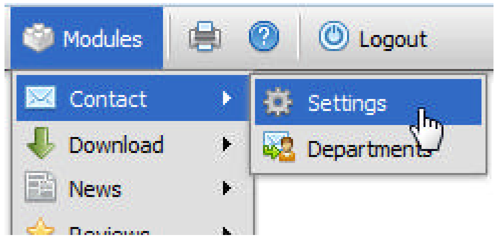
Overview

Your Contact Departments can be displayed to your customers on the **Contact Page (Section**

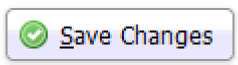
10.5.2.1), along with whatever information you've assigned to those departments on their **Contact Department records (Section 10.5.2.4.2)**.

How to Enable or Disable the Contact Departments Section of your Contact Page

1. Click the **Modules > Contact > Settings** link in your control panel



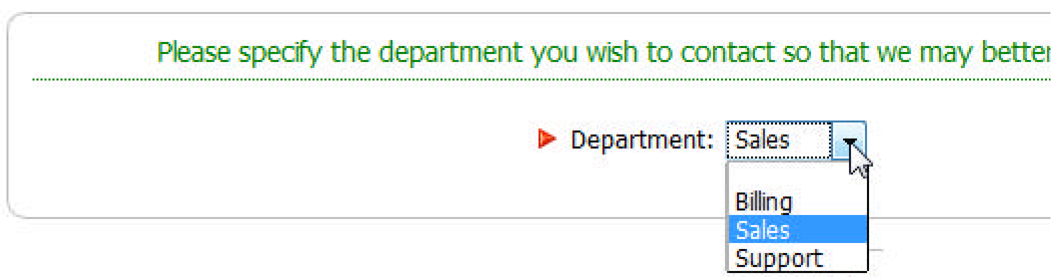
2. To enable the Contact Departments section of the contact page, check the **Show Departments** field. To disable it, uncheck the same field.

3. Click 

10.5.2.4.4 Routing Emails to Departments

Overview

The Contact module has the ability to route customer email to your Contact Department emails. This feature is optional. When disabled, customer emails will go to the same address(es) you have configured as order email recipients. When the Department field is enabled, your customers will see a form section like this, to choose a department to send their message to:



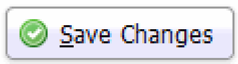
Enabling or Disabling Email Routing via Contact Departments

1. In order to enable email routing, you must have at least two Contact Department records in your control panel. If you do not have two, **create at least one (Section 10.5.2.4.2)** in addition to the built-in Sales department before continuing.

2. Click the **Modules > Contact > Settings** link to open the Contact Settings record

3. In the **Contact Form Fields** fieldset, check the box next to **Department** to enable the Department field.

4. Adjust the Label, Required, and Default Department fields if needed

5. Click 

10.5.2.5 Contact Page - Spam Prevention

Squirrelcart has some built in features to aid in preventing spam form submissions. If you still receive spam from your contact page, we recommend you enable reCaptcha support. Instructions for that can be found **here (Section 11.2)**.

10.5.2.6 hCards

Overview

hCards are an XHTML representation of the **vCard format (Section 10.5.3.1)**. The format allows you to markup contact information in a certain way so that other scripts can differentiate between contact information and other web page data. This then allows applications that support hCards to obtain contact records from pages containing hCards.

You can find more information about the hCard format here:

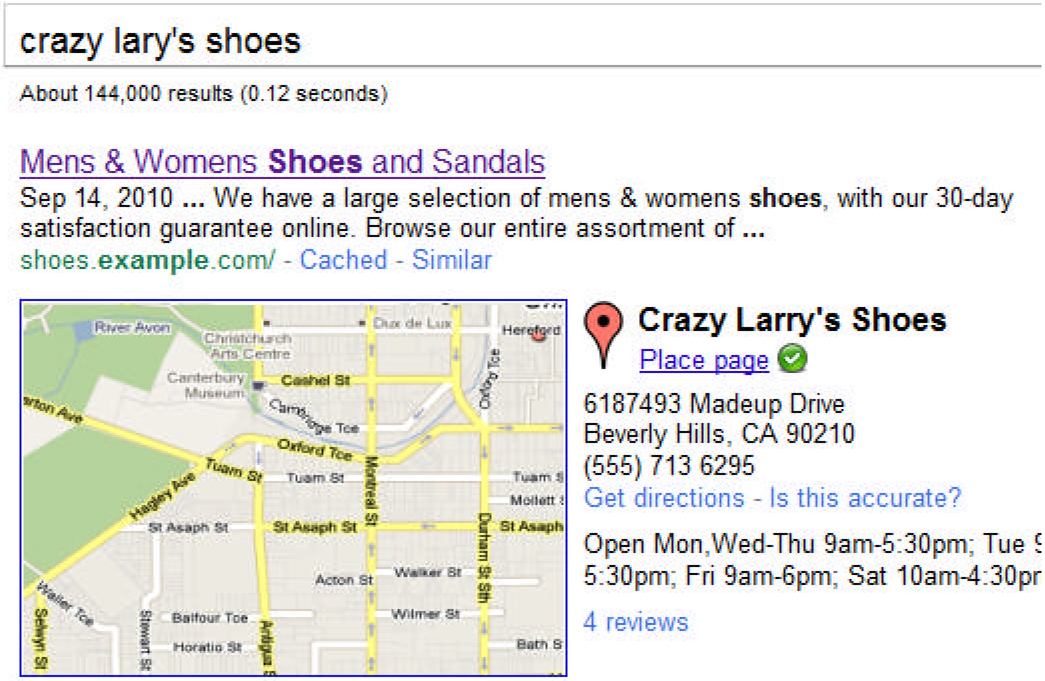
http://microformats.org/wiki/hcard

Uses

It might be hard at first to understand why hCards can be useful. Once you see them in the wild, it may become clearer.

Google

A good example of why this is useful is on Google. If your site contains an hCard for a location and Google chooses to index your hCards, the information is used in local searches and can get you more traffic. Here is an example of data that was obtained via hCards, and how it appears in a Google search:



Mobile Phones and Devices

hCard formats are recognized by some mobile devices. A list of some of them can be found **here (http://microformats.org/wiki/mobile)**.

hCards in Squirrelcart's Contact Module

Squirrelcart formats all contact information on your contact page in valid hCard format. This includes the contact information for both your departments, and your retail stores - if the corresponding sections for them are enabled on your **Contact Settings page (Section 10.5.2.3)** in the control panel. This should allow any hCard compatible script or application to locate the hCards on your contact page.

10.5.2.7 Retail Locations

Overview

Retail locations can be displayed on your contact page by checking the **Show Retail Stores** field on your **Contact Settings page (Section 10.5.2.3)** in the control panel. When enabled, all locations that are designated as retail stores will appear on your contact page, with optional business hours and Google maps.

For more information on Locations, see **this topic (Section 6.9.1)**.

10.5.3 vCards

10.5.3.1 vCards Overview

Overview

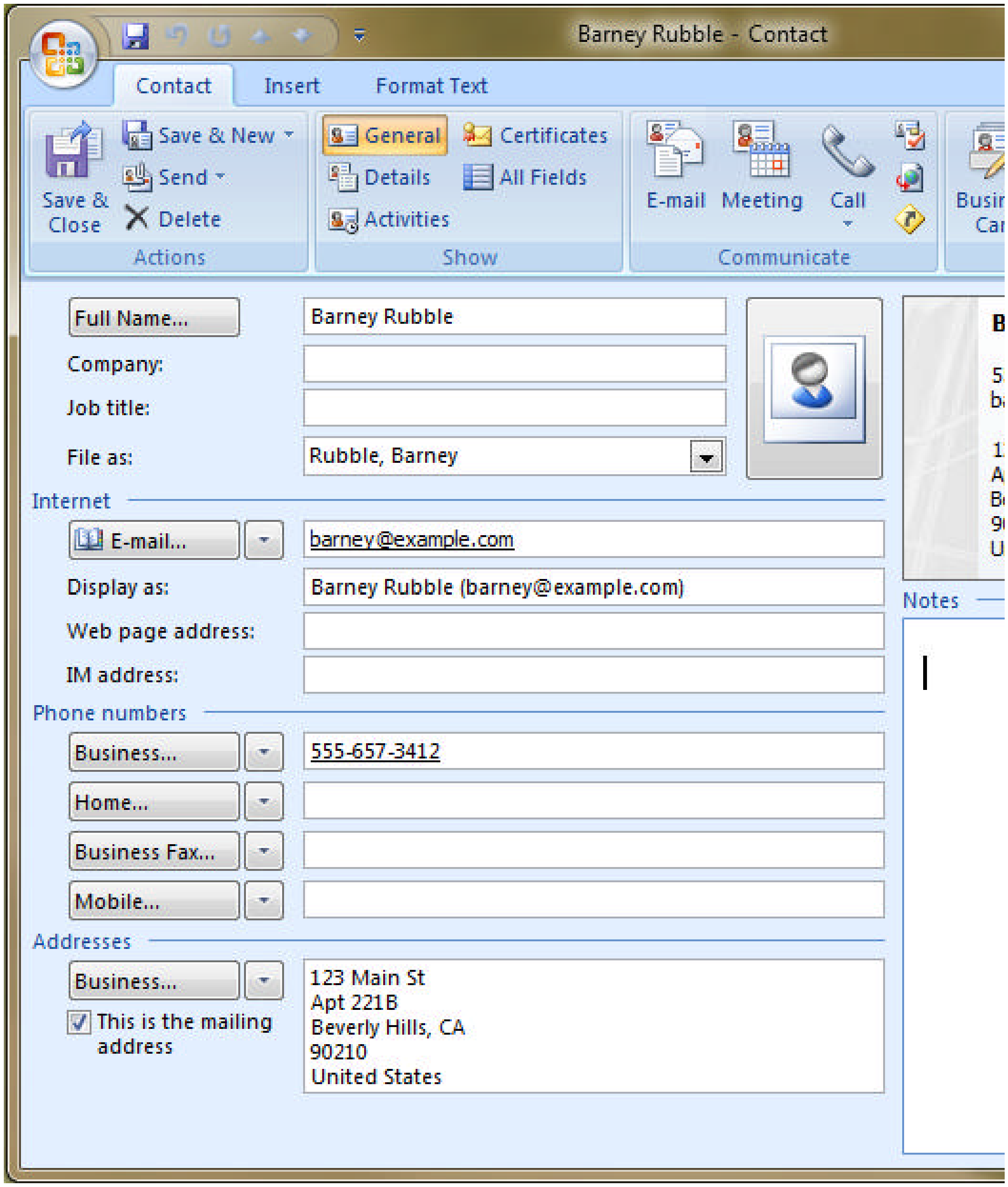
vCard is a file format standard for electronic business cards, usually stored in ".vcf" files. You can read more about it **here (http://en.wikipedia.org/wiki/VCard)**. The Contact module provides several vCard features which can all be turned on or off as needed:

- vCard attachment on contact form email sent to you, containing the customer's contact info
- vCard attachment on contact form email confirmation sent to your customer, containing your department or default contact info
- vCard attachment on order email sent to you, containing customer contact info
- vCard attachment on order email receipt sent to your customer, containing your store contact info
- vCard links in control panel customer and order records, to download a vCard file to your computer.

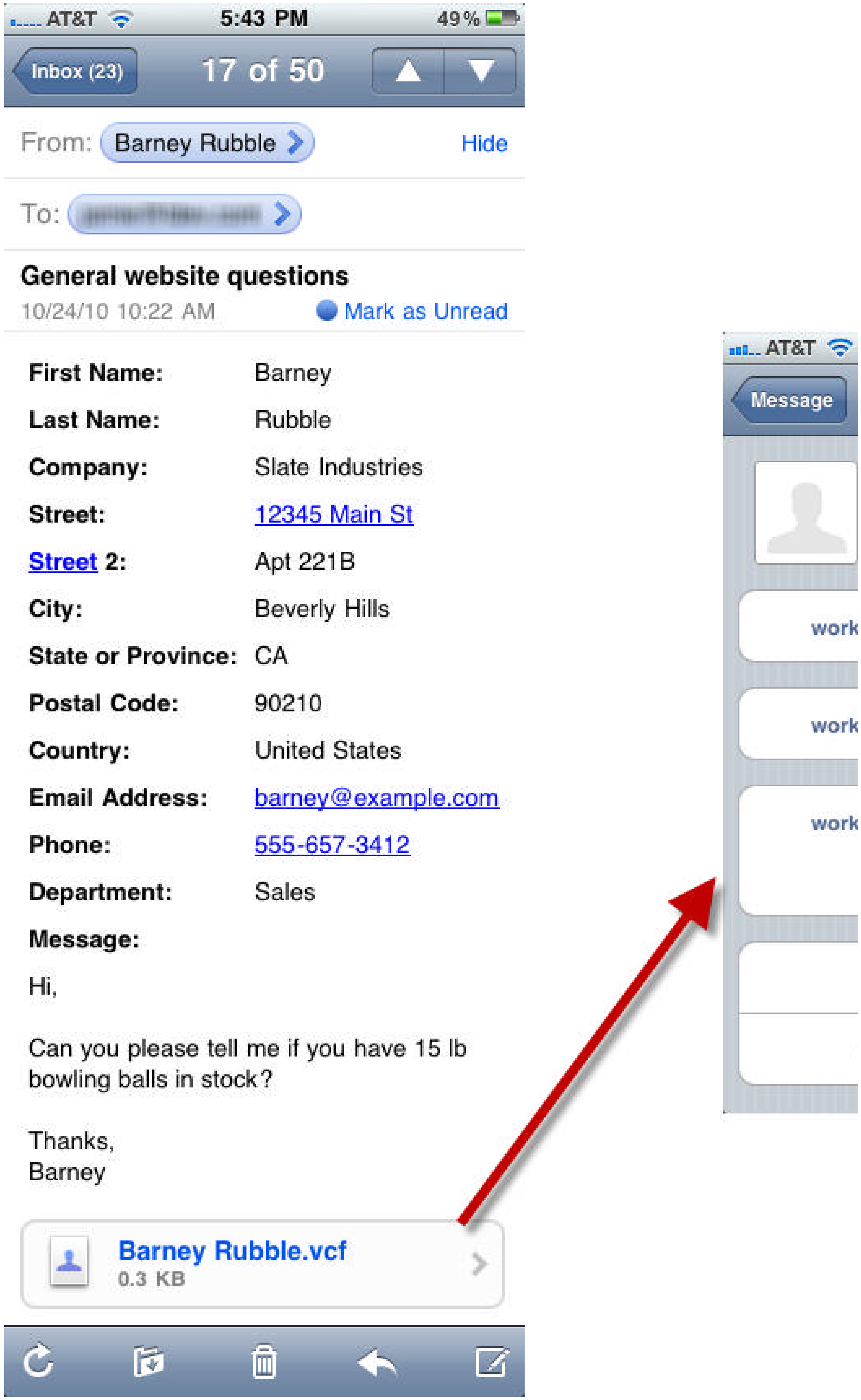
How to use vCards

vCards are files ending in ".vcf". If you have an email or contact program installed on your computer and you double click on a .vcf file to open it, it will open in that program. The program will usually give you an option to add the contact to your address book or contacts.

Microsoft Outlook Example



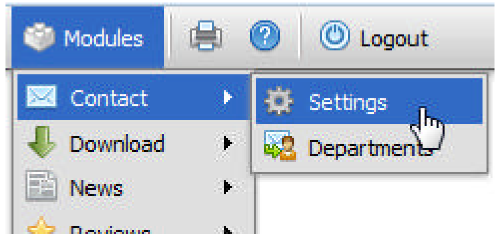
iPhone Example


AT&T
5:43 PM
49 %
Inbox (23)
17 of 50
From: Barney Rubble
Hide
To:
General website questions
10/24/10 10:22 AM
Mark as Unread
First Name: Barney
Last Name: Rubble
Company: Slate Industries
Street: 12345 Main St
Street 2: Apt 221B
City: Beverly Hills
State or Province: CA
Postal Code: 90210
Country: United States
Email Address: barney@example.com
Phone: 555-657-3412
Department: Sales
Message:
Hi,
Can you please tell me if you have 15 lb bowling balls in stock?
Thanks,
Barney
Barney Rubble.vcf
0.3 KB
AT&T
Message
work
work
work

10.5.3.2 Enabling and Disabling vCards

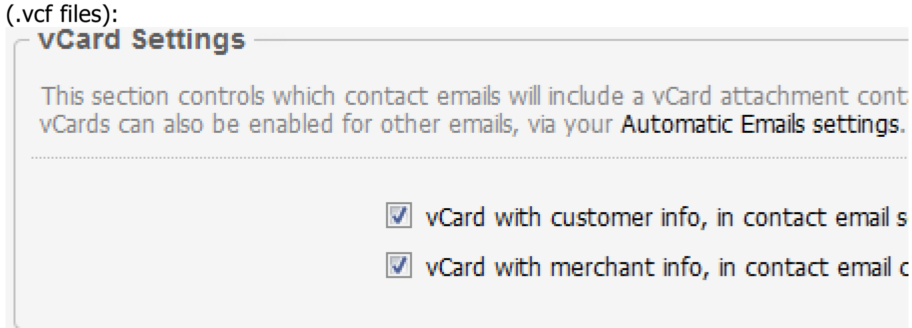
Instructions

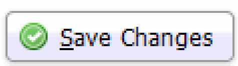
1. Open your Contact Settings control panel page:



2. To enable vCard support, check the **vCards Enabled** field in the **Details** fieldset. To disable vCard support, uncheck the same field.

3. If you are enabling vCard support, use the **vCard Settings** fieldset to control which emails sent by the contact module (if any) you want to include vCard attachments in (.vcf files):



4. Click 

You can include vCards in other emails sent by Squirrelcart (order emails, account notice emails, etc...), via the settings in the **Automatic Emails table (Section 7.7)**.

10.5.3.3 Downloading vCards

Overview

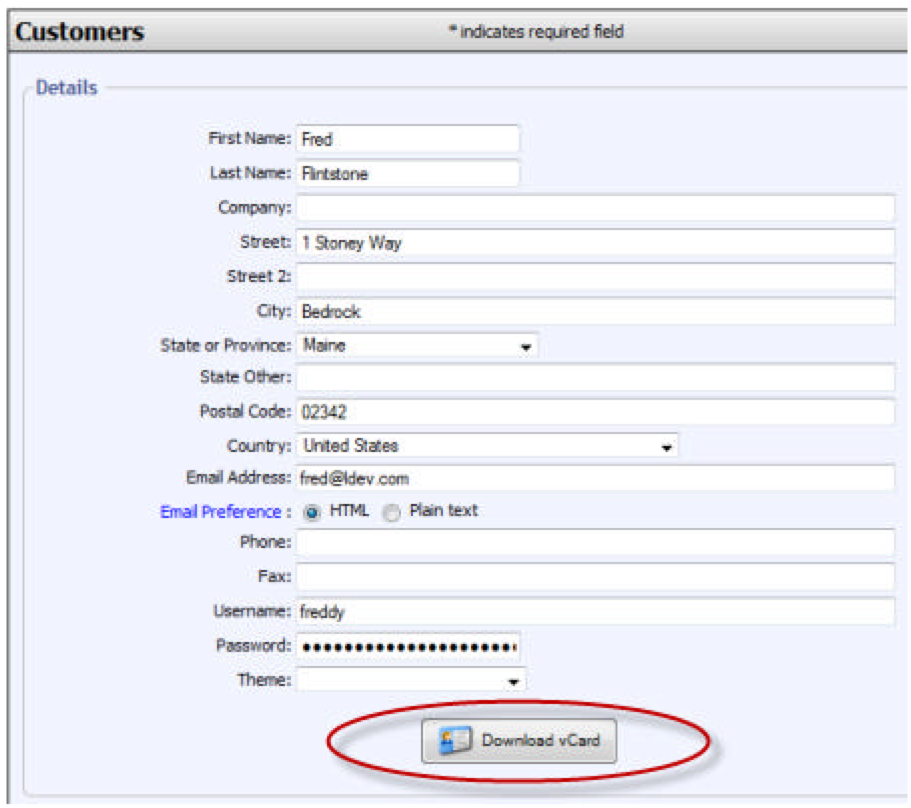
When vCard support is **enabled (Section 10.5.3.2)**, Squirrelcart provides a few options for downloading vCard files (files ending in ".vcf").

Downloading from an Email

When vCards are enabled for contact form or order emails, those emails will include an attached .vcf file. To download the file, download the attachment as you would with any other email attachment. If you have a program like Microsoft Outlook installed, double clicking the file will open it in the associated program.

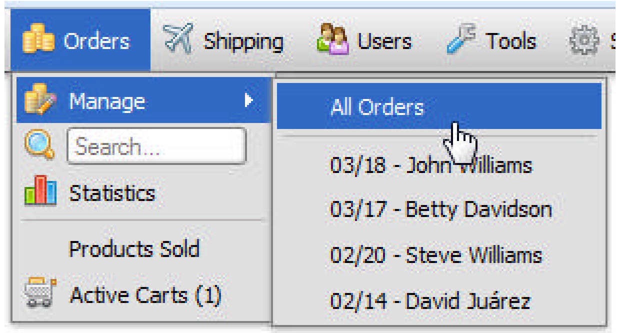
Downloading from a Customer Record

1. Open the **Control Panel (Section 3)**
2. Click the  icon
3. Click anywhere on a customer row (or on the pen icon for that row) to open a customer record
4. Click the **Download vCard** button to start the download:



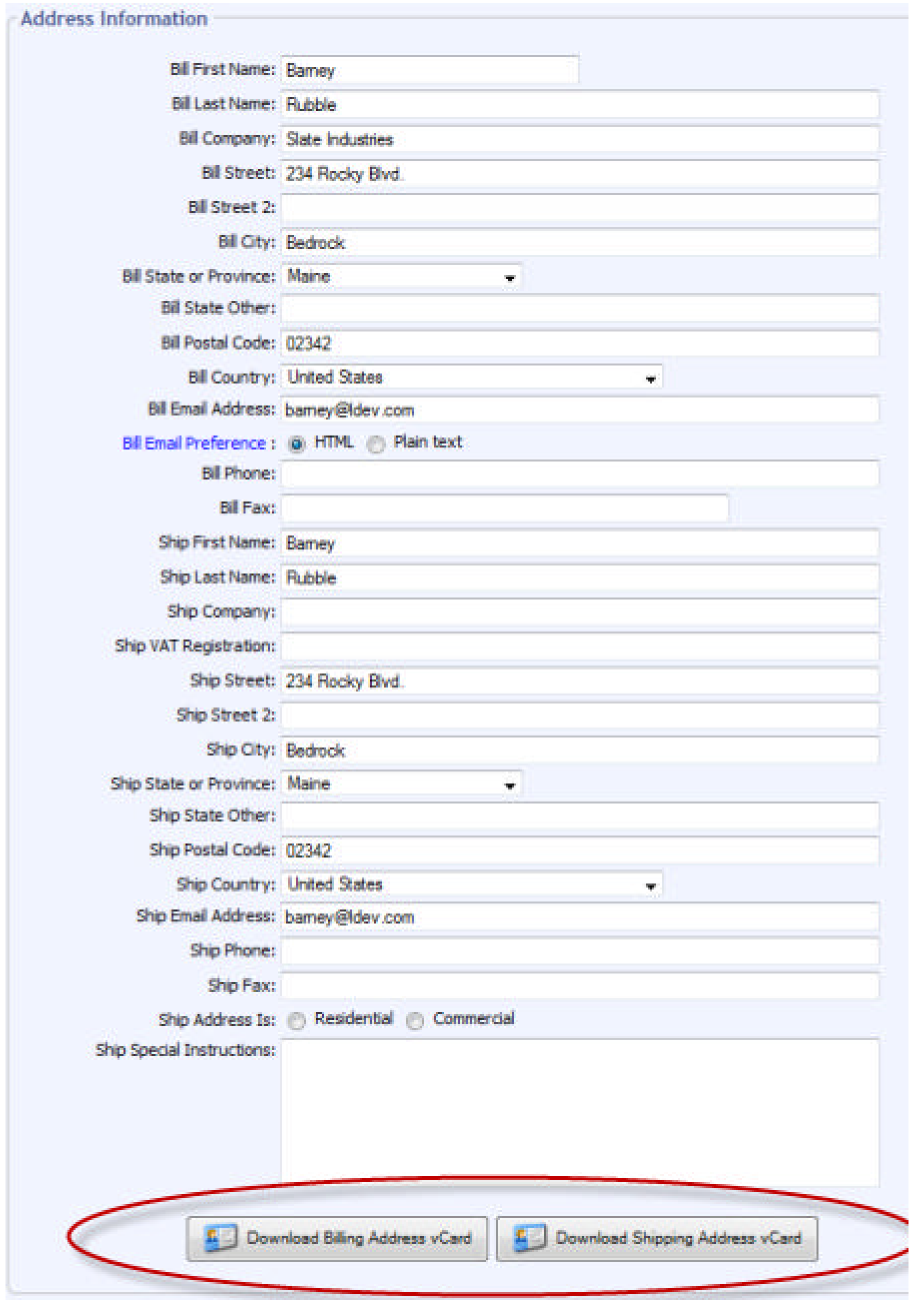
Downloading from an Order Record

1. Open the **Control Panel (Section 3)**
2. Click the **Orders > Manage** menu link



3. You will see a table showing your orders. Click anywhere on the row that contains the record you wish to open.

4. In the **Address Information** fieldset, click the button corresponding to the address you wish to download a vCard for:



10.6 Download Module - Overview

10.6.1 Download Module - Overview

The Download module allows you to deliver downloads to your customers. You can group your downloads together in Download Sections, and control whether or not a customer is allowed to download a particular file or see a particular Download Section. For more information on the Download module, please see our **Modules page (http://www.squirrelcart.com/index.php?crn=65)**.

10.6.2 Download Module - Security

Download Process Explained

Viewing the Downloads Page

When your customer clicks the link to get to your downloads page, Squirrelcart looks for all Download Sections in your database. If a Rule Set is not assigned to the Download Section, that section is displayed. If a Rule Set is assigned, the Download Section is only displayed if the rules specified in the Rule Set pass validation.

Once a Download Section is found to display, all Downloads assigned to that section are located, and the same process is followed. If no Rule Set is assigned to the Download, it is shown. If a Rule Set is assigned, the Download only appears if the Rule Set validates.

Downloading

To prevent tampering, when a customer clicks a download link, the same process described above is followed before granting access to the file. If either the Download Section record's Rule Set OR the Download record's Rule Set fail to validate, the download is prohibited.

The link to download a file is not the full URL to the file that you have stored in your sc_data/downloads folder. The link will look something like this: **http://www.example.com/store.php?downloads=1&id=123**. In this example, 123 is the record number of the file that is being downloaded from the Files table.

Provided all rules pass validation, Squirrelcart opens the file inside your secure **sc_data/downloads** folder, and streams it to the customer using PHP.

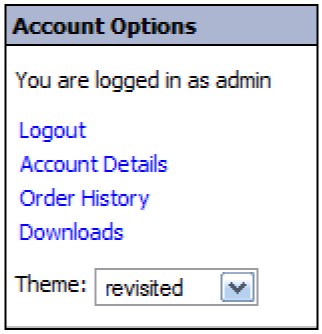
Securing Your Source Files

The Download module stores your source files in the **downloads** folder inside your **sc_data** folder. For this reason, it is very important that you configure Squirrelcart so that the **sc_data** folder is not web accessible. The most common location is to have it at the same level as the folder that contains your squirrelcart folder. This is explained in step 5 of the **Installation > Uploading Files via FTP (Section 2.4)** topic.

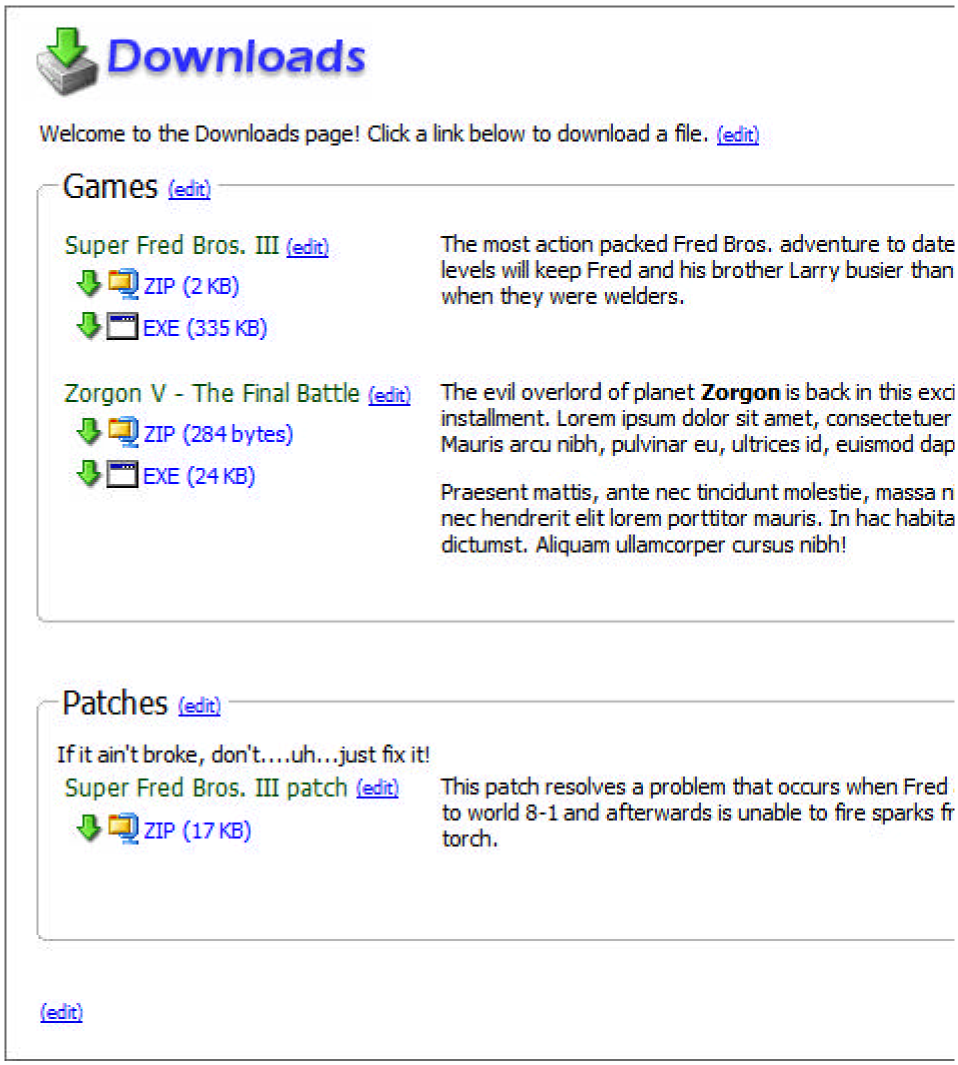
10.6.3 Downloads Page

Overview

Your downloads page is where all available downloads are shown to a customer. By default, if you have the Download module installed and a customer is logged in, they will see a **downloads** link in the Account Options nav block:



Clicking the Downloads link will bring them to your downloads page, which looks something like this:



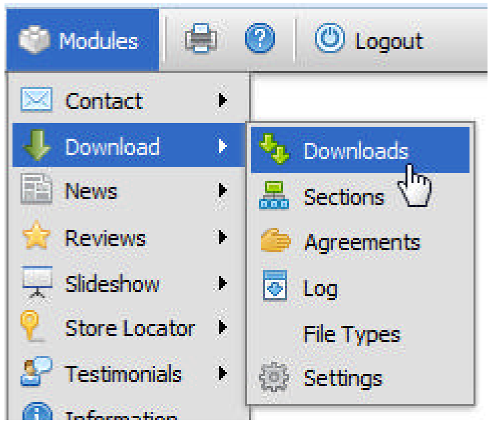
The blue (edit) links in the screenshot above only appear when you are logged in as a Store Admin. They allow you to quickly access Downloads, Download Sections, and Download Settings, should you need to make a change.

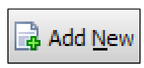
10.6.4 Download Records

Overview

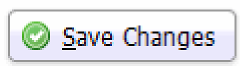
Each download requires a record in the Downloads table to define it. This explains those records, and how to add them.

1. Click the Downloads menu link in the control panel



2. Click the 

button.

3. A new Download form will open. Fill out the form using the record overview below as a guide, and click 

.

Record Overview

Name
This is the name of the download, and will be shown on the Downloads page.

Release Date
This is not shown on the Downloads page by default, but can be added to the download.tpl.php template file as follows:

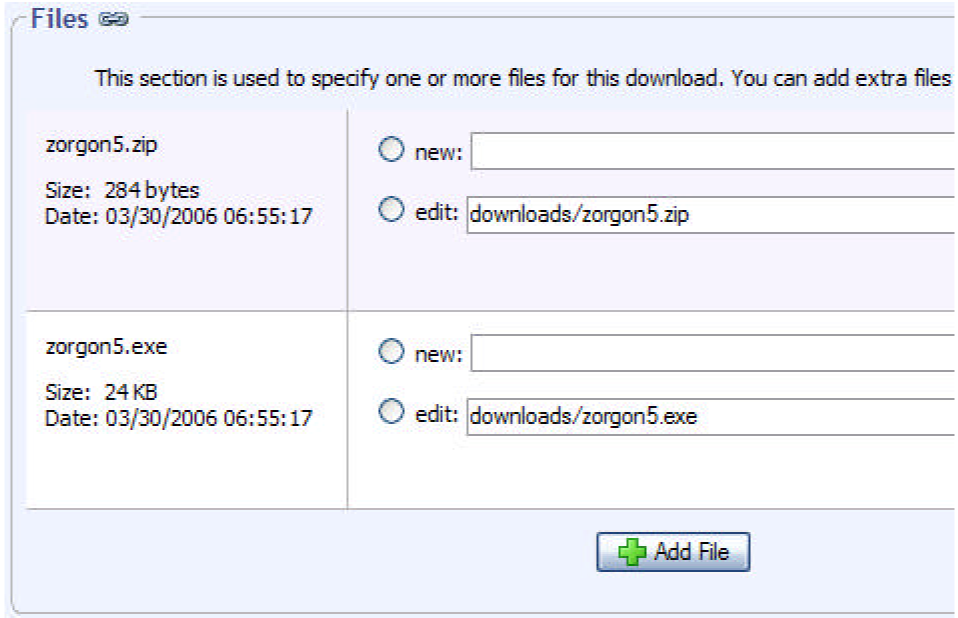
```
<?=$Release_Date?>
```

Description
This is the description of the download. HTML or plain text are supported. If you have the Rich Text Editor module installed, HTML in this field can be modified with it.

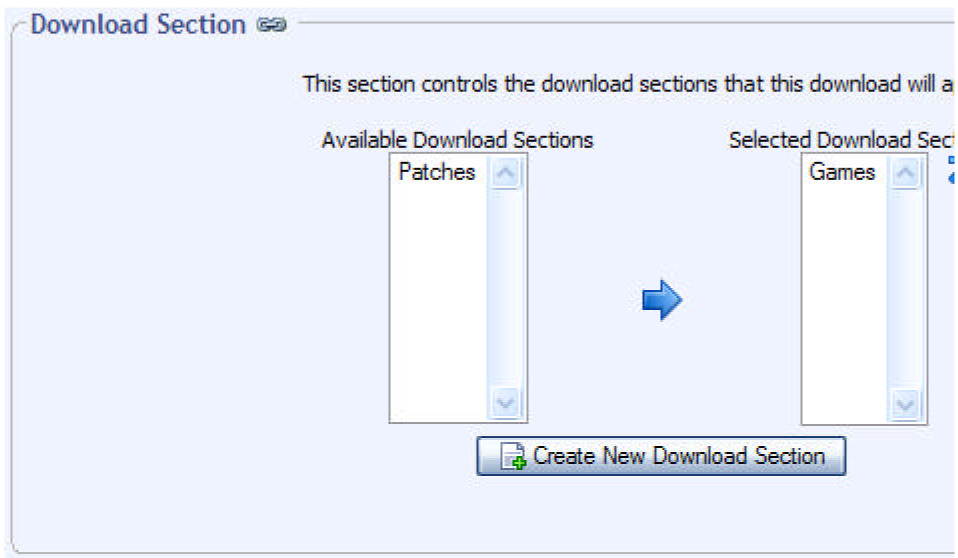
Show Agreement
This determines whether or not a license agreement will be shown for this download. You can also set this on the Download Section that this download is in.

Agreement
This is only shown when **Show Agreement** is set to **yes**. It allows you to choose the agreement to display.

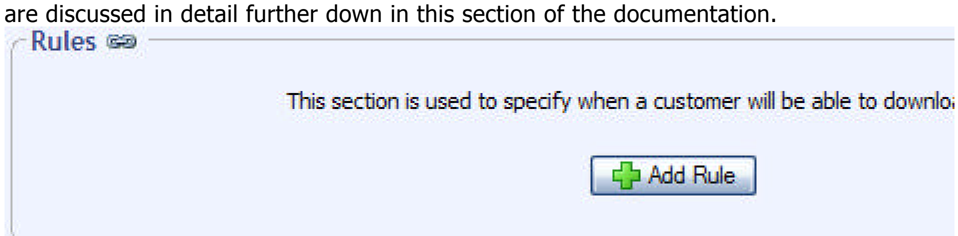
Enabled
This field gives you a quick way to temporarily disable a download without having to delete it.



This section controls the files that will be offered for this download. Multiple files can be added to support different formats. For example, you may want to offer ZIP files and EXE files, or one file for Mac and one for Windows.



This controls which Download Section(s) this download will appear in. Download Sections are discussed in detail further down in this section of the documentation.



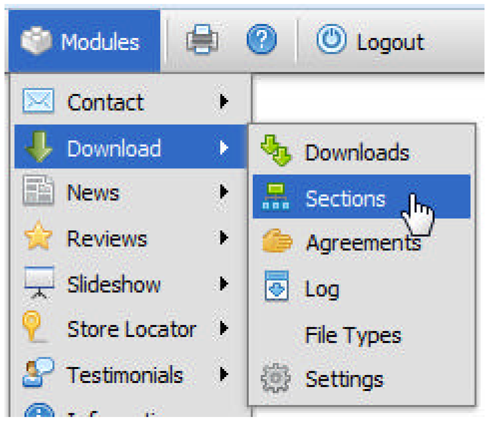
This section is used to specify when a customer can download the files associated with this download. By default, if no Rules are applied, the download is offered provided that it is not restricted at the Download Section level. This is explained in the **Security topic (Section 10.6.2)** in this section. This uses the Rule System described in the **Managing Your Store > Rule System** section of the documentation.

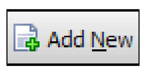
10.6.5 Download Sections

Overview

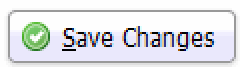
Downloads are grouped together in Download Sections. Each Download Section requires a record in the Download Sections table to define it. This explains those records, and how to add them.

1. Click the Download Sections menu link in the control panel



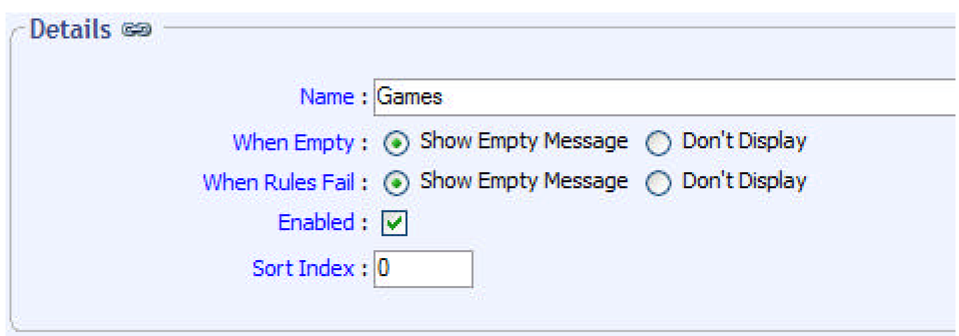
2. Click the 

button.

3. A new Download Section form will open. Fill out the form using the record overview below as a guide, and click 

.

Record Overview

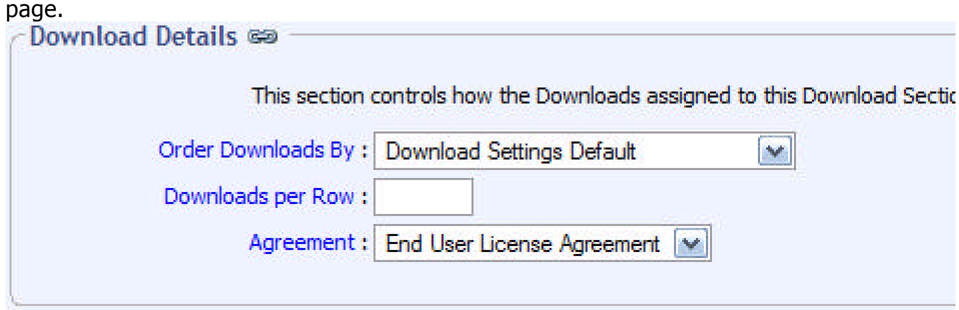


Name
This is the name of this section, and will appear on the Downloads page as a label.
When Empty
This controls what will happen when there are no Downloads associated with this Download Section.
When Rules Fail
This controls what will happen when the rules assigned to this section fail to validate.
Enabled

This field gives you a quick way to temporarily disable a section without having to delete it.

Sort Index

This is an optional field that can be used to sort Download Sections on the Downloads page.



Order Downloads By

This controls how the Downloads assigned to this section will be sorted on the Downloads page.

Downloads per Row

This controls how many Downloads will be shown per row on the Downloads page. Leave blank to use the default from the Download Settings form.

Agreement

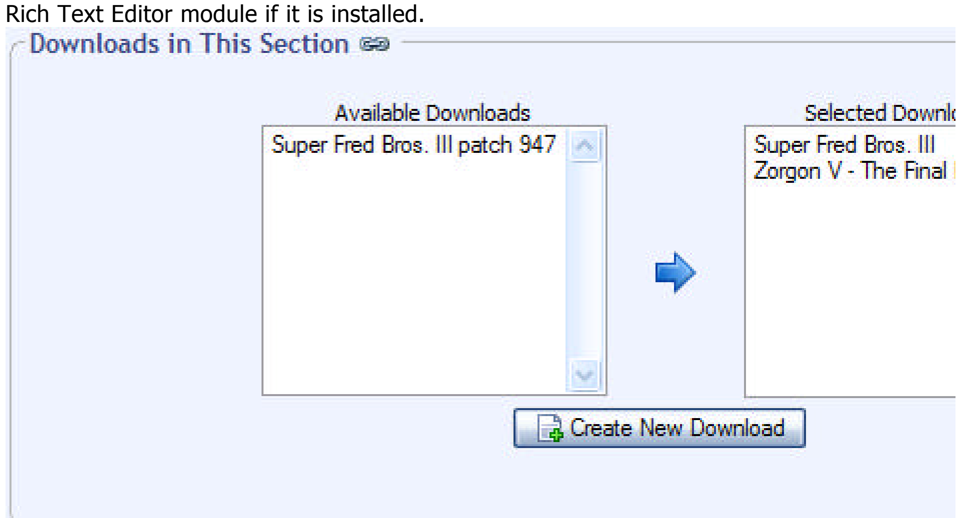
This controls whether or not an agreement will be shown to the customer before issuing the download.

Description

This controls the description that appears at the top of the Download Section. HTML and plain text are allowed. This field works with the Rich Text Editor module if it is installed.

Empty Message

This controls the message that will appear inside the Download Section when no downloads can be shown. HTML and plain text are allowed. This field works with the Rich Text Editor module if it is installed.



This controls which downloads are assigned to this section. If the **Order Downloads By** field is set to **Position on Download Section Record**, you can use the arrows on the order the downloads appear in.

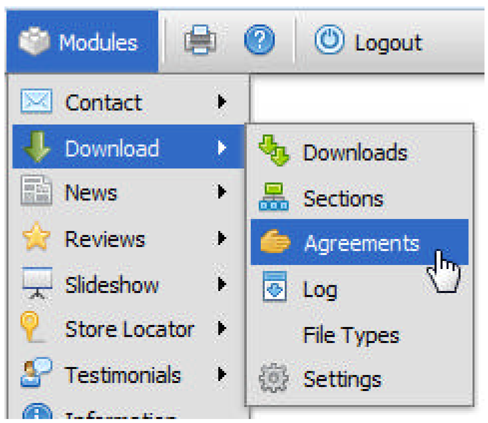
This section is used to specify when a customer can will see this Download Section, and also controls whether or not they can download the files assigned to this section. This is explained in more detail in the **Security topic (Section 10.6.2)** in this section. This uses the Rule System described in the **Managing Your Store > Rule System** section of the documentation.

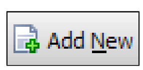
10.6.6 Download Agreements

Overview

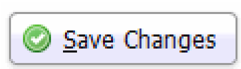
Download Agreements allow you to show an agreement to the customer before they download a file. You can also force them to confirm to that agreement in order to download. Each Download Agreement requires a record in the Download Agreements table to define it. This explains those records, and how to add them.

1. Click the Download Agreements menu link in the control panel



2. Click the 

button.

3. A new Download Agreement form will open. Fill out the form using the record overview below as a guide, and click 

.

Record Overview

Name
This is for your reference.
Description
This is for your reference.
Confirm
When checked, the customer must agree to the terms in order to download the file. When unchecked, the agreement is shown but the customer does not have to indicate agreement.
Agreement From
This controls where the content for the agreement will come from. When set to **use field**, the agreement is taken from the **Agreement Text** field. When set to **use file**, the agreement is taken from a file that you specify.
Agreement Text
This is only shown when the **Agreement From** field is set to **use field**. It controls what will be shown for the agreement. HTML and plain text are allowed.
Agreement File
This section is only shown when **Agreement Text** is set to **use file**. It allows you to specify a file to use as the license agreement.

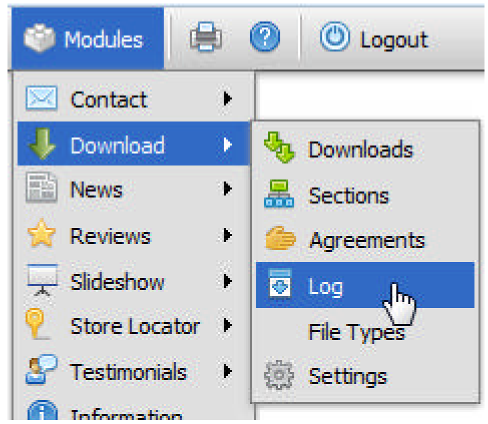
10.6.7 Download Log

Overview

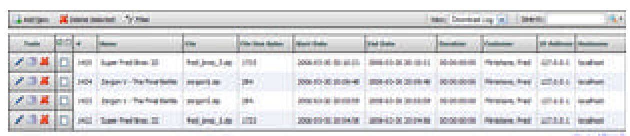
Squirrelcart's Download Module tracks every download in a log. You can use this to troubleshoot download problems, to determine which customer downloaded a file, to see how long your downloads are taking, etc...

Viewing the Download Log

To view the Download Log, click the Download Log menu link in the control panel:



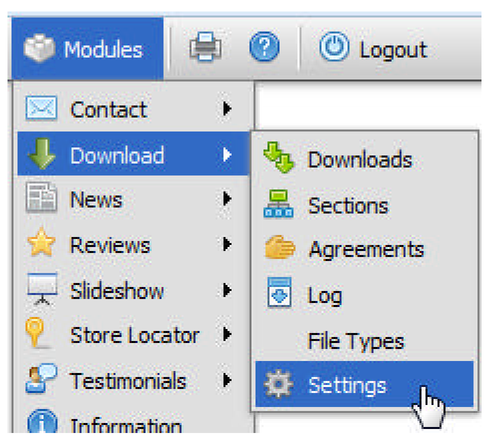
The Download Log looks something like this:



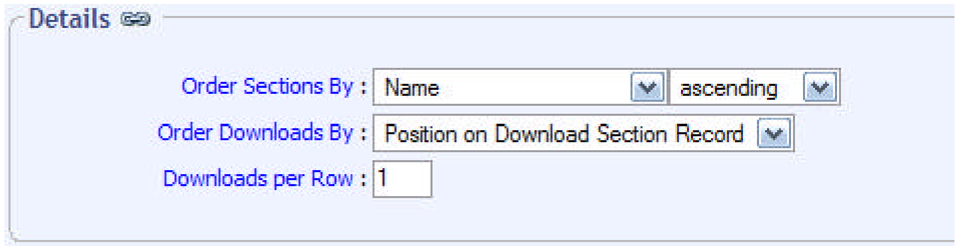
10.6.8 Download Settings

Overview

The Download Settings page is used to control how the Downloads module functions. To open the page, click this menu link:



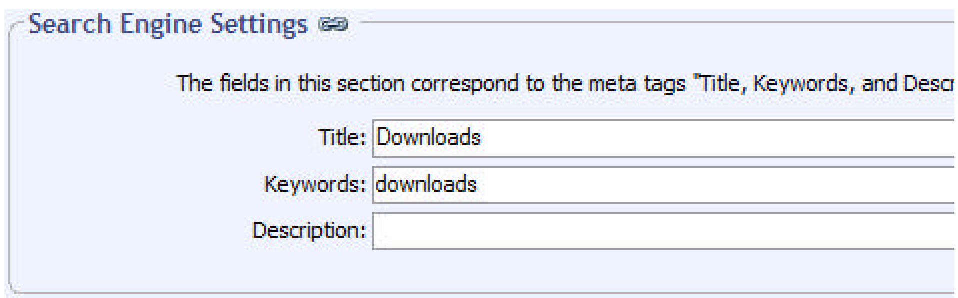
Explanation of Fields



Order Sections By
This controls what field will be used to arrange the Download Sections on the Downloads Page by.

Order Downloads By
This controls what field from the Downloads table will be used arrange the downloads inside a section. This field can be overriden on the Download Section record if needed.

Downloads per Row
This controls how many downloads will be shown on a single row before starting a new one. The default is 1.



The fields in this section control what will appear in the meta tags "Title, Keywords, and Description", and the <title /> tag. This section is very similar to the main **search engine settings (Section 6.12.2)** for your store.

Page Header
This field controls what will be shown at the top of the Downloads page. HTML and plain text is supported. This field works with the Rich Text Editor module if you have it installed.

Page Footer
This field controls what will be shown at the bottom of the Downloads page. HTML and plain text is supported. This field works with the Rich Text Editor module if you have it installed.

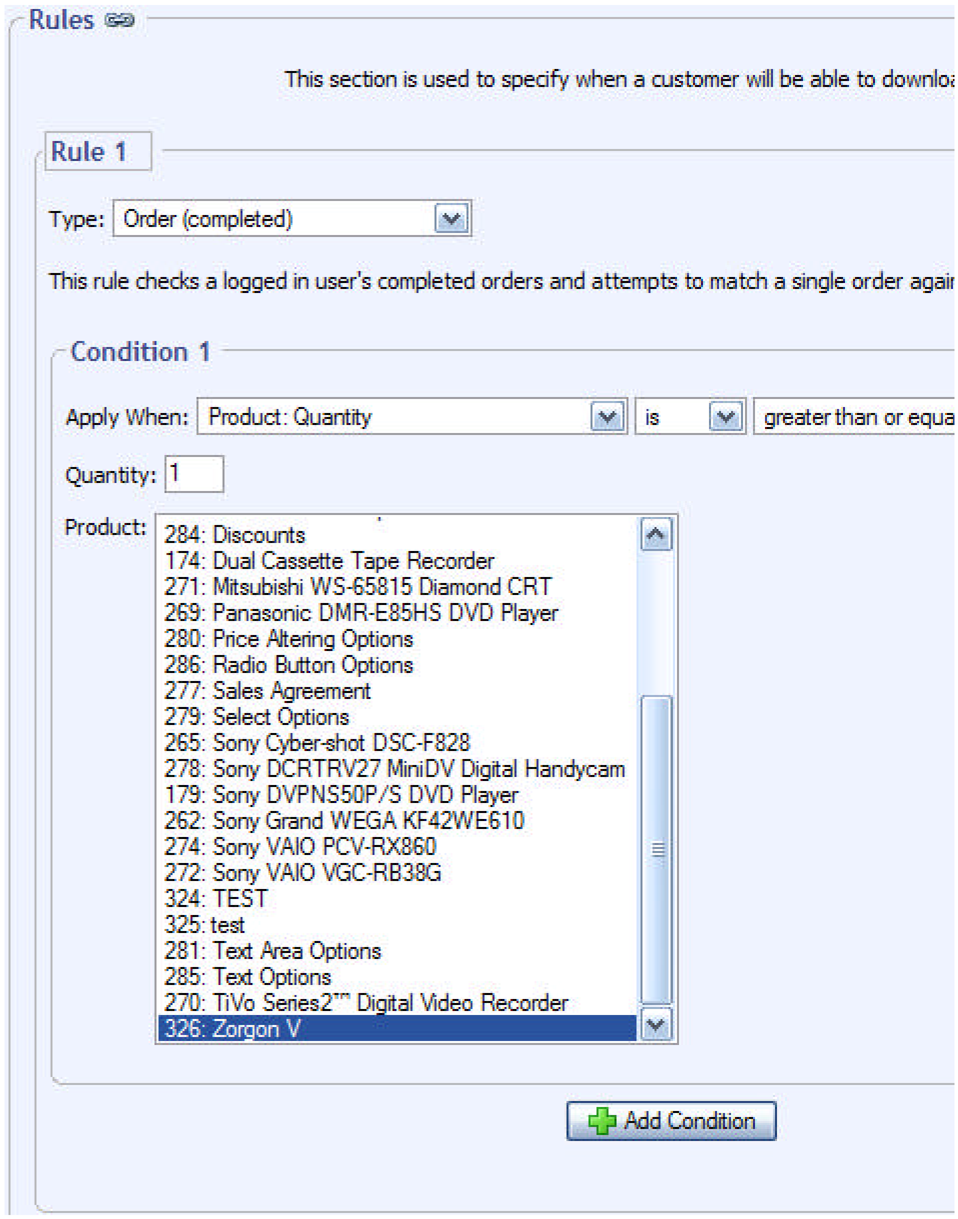
10.6.9 Rule Examples

Overview

To control when a download will be offered, you need to use Squirrelcart's rule system. The rule system is described in detail in the **Managing Your Store > Rule System** section of this documentation. You can offer downloads based on just about any set of conditions you can come up with. Below, we will show screen shots of some common scenarios you might need to setup. We will not discuss how to actually create the Rule Sets shown in the examples, as this is explained in the main Rule System section. You can assign rules on Download Sections and Downloads. If all downloads for a particular section should be offered based on the same conditions, it is more efficient to assign your rules to the Download Section record itself. If each download has different criteria for issuing it, you are better off assigning rules on the Download records themselves.

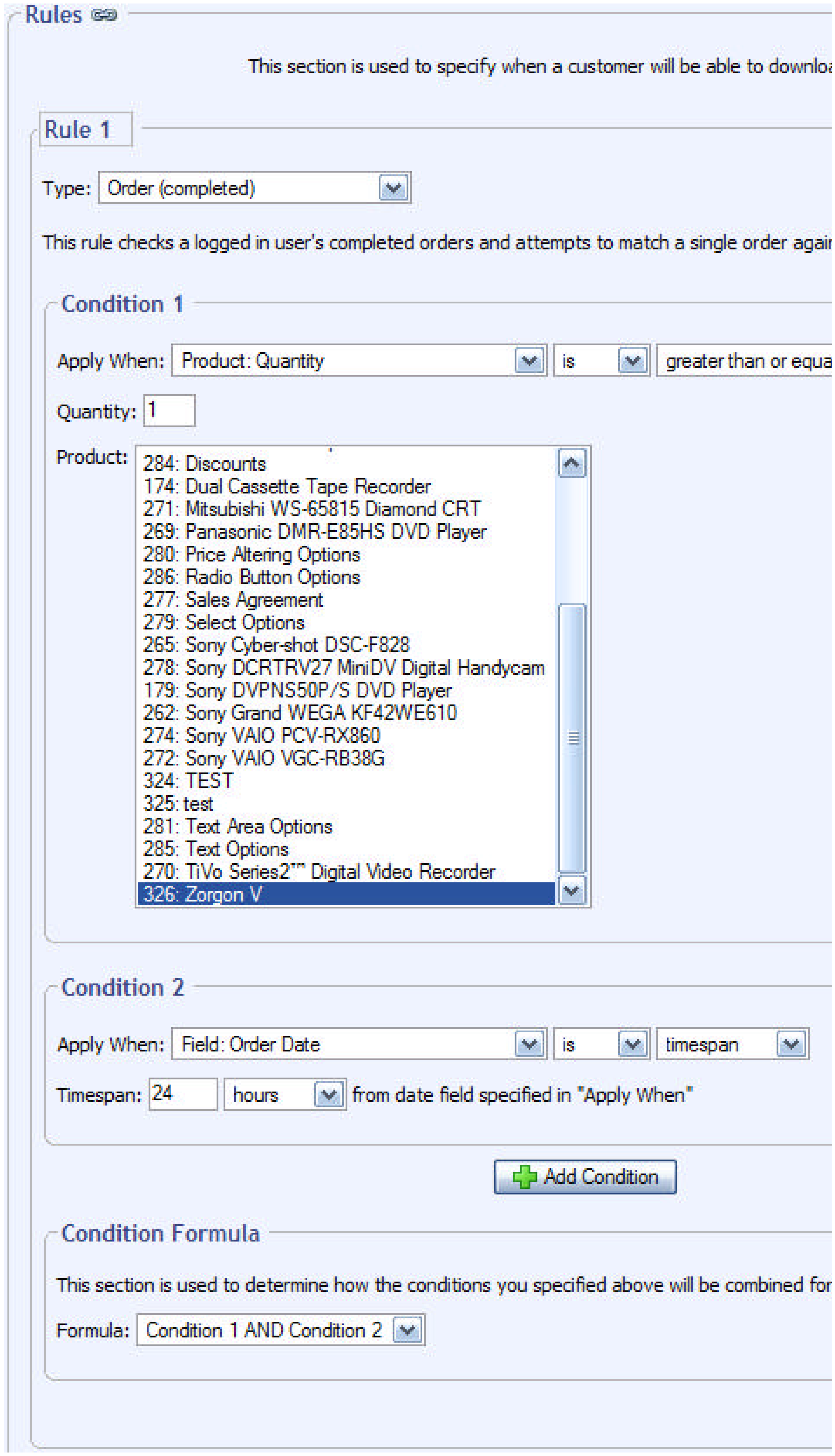
Download Based on Product Purchased

The most common Rule Set needed for downloads is one that will not allow a file to be download unless a particular product has been purchased. The Rule Set in the example below will only allow downloading when the product "Zorgon V" has been purchased.



Time Limited Based on Product Purchased

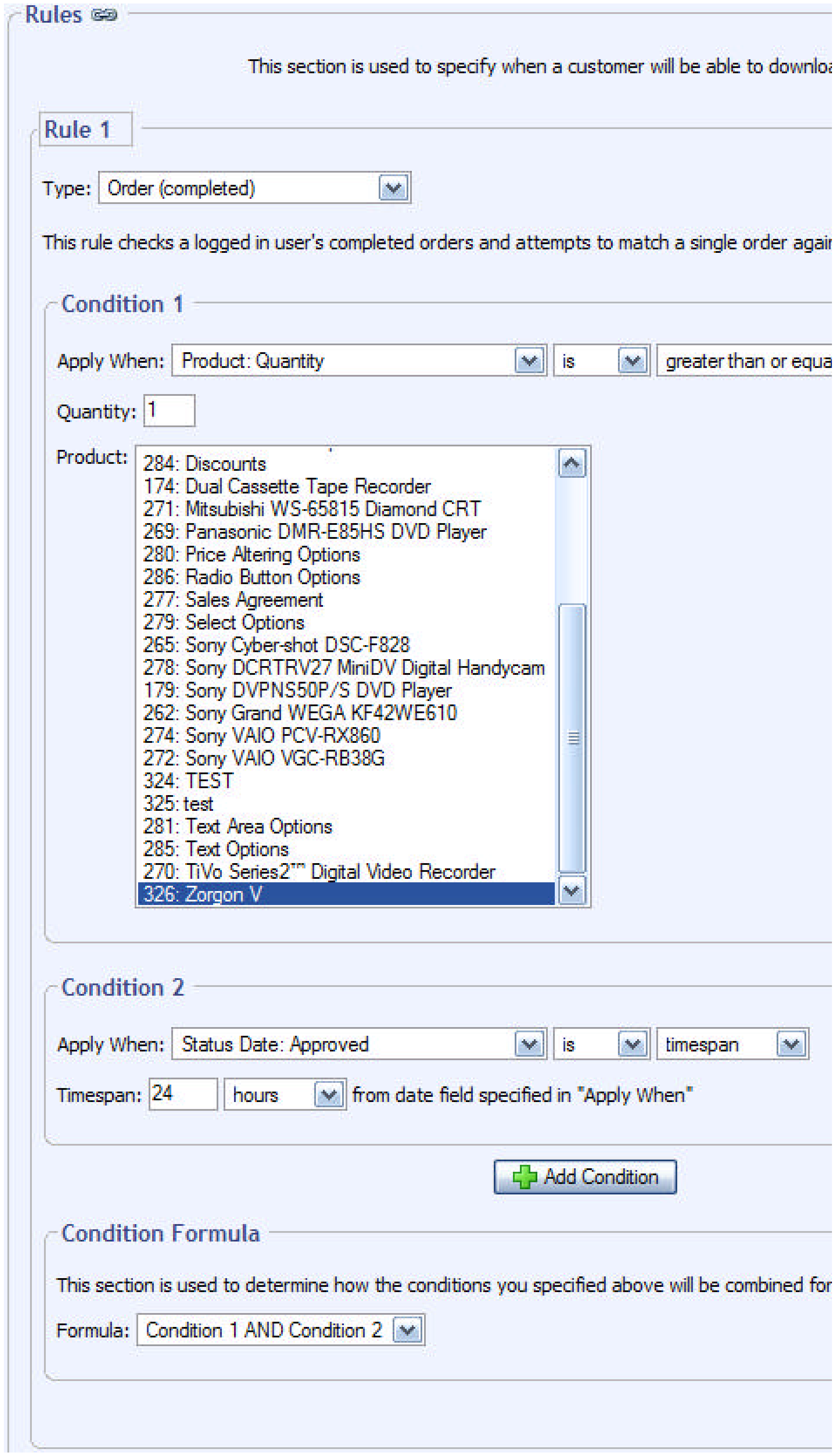
If you wish to offer a download only when a particular product has been purchased, and you wish to also limit the amount of time that they can download after ordering, use the example below as a guide.


Rules
This section is used to specify when a customer will be able to downloa
Rule 1
Type: Order (completed)
This rule checks a logged in user's completed orders and attempts to match a single order agai
Condition 1
Apply When: Product: Quantity
is
greater than or equa
Quantity: 1
Product:
284: Discounts
174: Dual Cassette Tape Recorder
271: Mitsubishi WS-65815 Diamond CRT
269: Panasonic DMR-E85HS DVD Player
280: Price Altering Options
286: Radio Button Options
277: Sales Agreement
279: Select Options
265: Sony Cyber-shot DSC-F828
278: Sony DCRTRV27 MiniDV Digital Handycam
179: Sony DVPNS50P/S DVD Player
262: Sony Grand WEGA KF42WE610
274: Sony VAIO PCV-RX860
272: Sony VAIO VGC-RB38G
324: TEST
325: test
281: Text Area Options
285: Text Options
270: TiVo Series2™ Digital Video Recorder
326: Zorgon V
Condition 2
Apply When: Field: Order Date
is
timespan
Timespan: 24 hours from date field specified in "Apply When"
Add Condition
Condition Formula
This section is used to determine how the conditions you specified above will be combined for
Formula: Condition 1 AND Condition 2

Time Limited Download Based on Product Purchased and Date Order is Approved

Use the example below if you need to limit a download for all the following conditions:

- Offer when a particular product is purchased
- Only when you approve the order by adding an "Approved" order status to it
- For a limited time, based on the time and date you approved the order


Rules
This section is used to specify when a customer will be able to downloa
Rule 1
Type: Order (completed)
This rule checks a logged in user's completed orders and attempts to match a single order agai
Condition 1
Apply When: Product: Quantity
is
greater than or equa
Quantity: 1
Product:
284: Discounts
174: Dual Cassette Tape Recorder
271: Mitsubishi WS-65815 Diamond CRT
269: Panasonic DMR-E85HS DVD Player
280: Price Altering Options
286: Radio Button Options
277: Sales Agreement
279: Select Options
265: Sony Cyber-shot DSC-F828
278: Sony DCRTRV27 MiniDV Digital Handycam
179: Sony DVPNS50P/S DVD Player
262: Sony Grand WEGA KF42WE610
274: Sony VAIO PCV-RX860
272: Sony VAIO VGC-RB38G
324: TEST
325: test
281: Text Area Options
285: Text Options
270: TiVo Series2™ Digital Video Recorder
326: Zorgon V
Condition 2
Apply When: Status Date: Approved
is
timespan
Timespan: 24
hours
from date field specified in "Apply When"
Add Condition
Condition Formula
This section is used to determine how the conditions you specified above will be combined for
Formula: Condition 1 AND Condition 2

10.7 News - Overview

10.7.1 News Module - Overview

Overview

The **News** module gives you the ability to communicate important information to your customers. You can do so by displaying news posts on your website, or by sending mailings. For more information on this module, please see our **Modules (http://www.squirrelcart.com/index.php?crn=65)** page.

Storefront Components

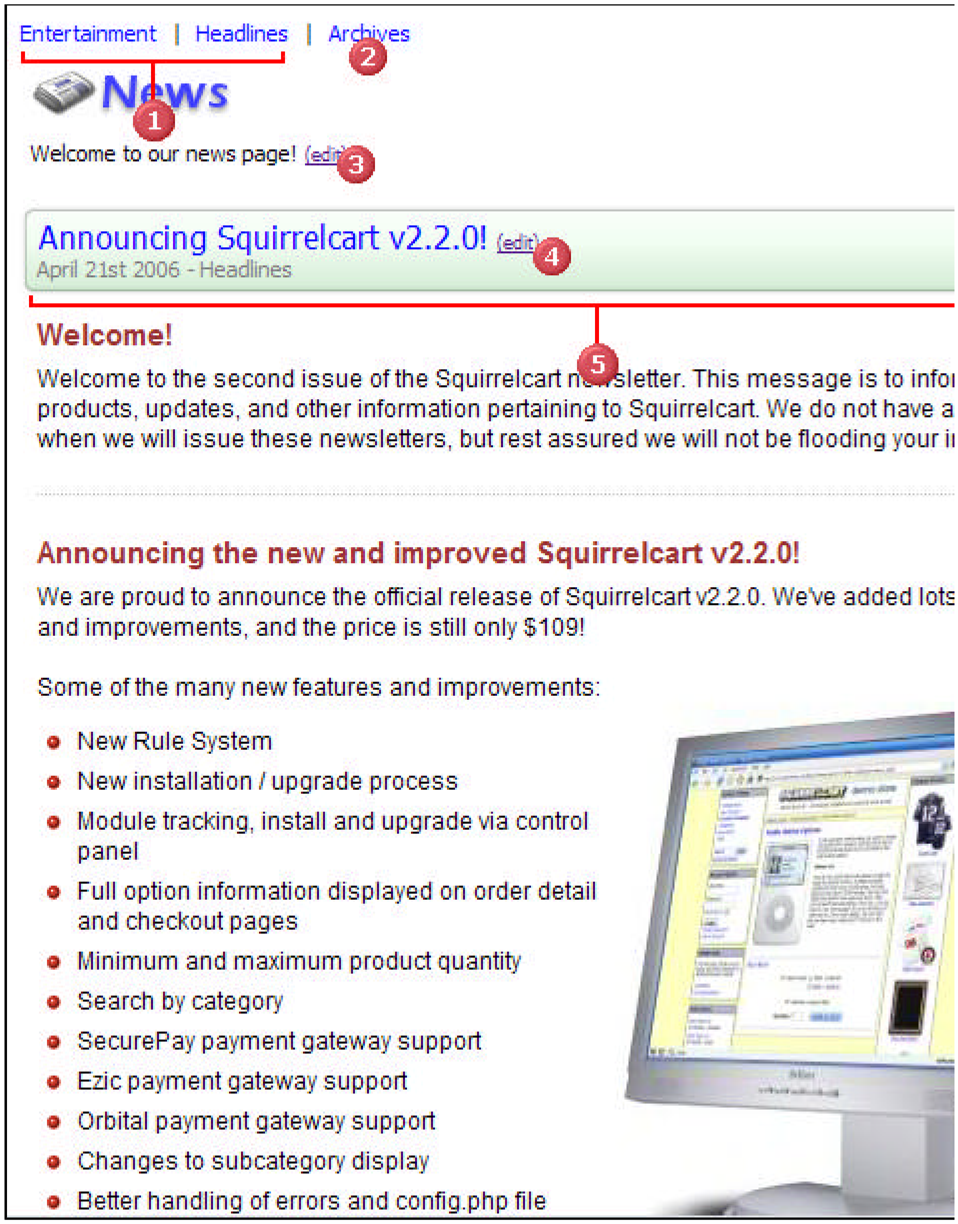
News Navigation Block

The News Navigation Block is seen on your storefront page. You can place it in the left or right navigation.

It contains a brief excerpt from your recent News Posts, with a link to read each one in full.

To control the appearance of the News Nav Block, see the **Navigation Block** section of the **News Settings page (Section 10.7.4)**.

News Page



The News Page is seen when any of the links in the News Navigation Block are clicked. The numbers in the image above are explained below.

1. Links to your News Sections

2. Links to your Archives

3. Link to edit the header of the page

4. Link to edit this particular News Post

5. Everything in the green bar is considered the header for the News Post

6. Link to edit the footer of the page (not shown in image)

10.7.2 On Your Website

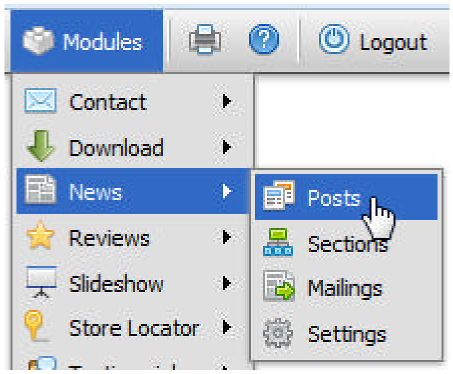
10.7.2.1 News Posts

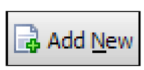
Overview

News Posts are used to create news entries on your website. They can be shown in the News Navigation Block, the News Page, or both.

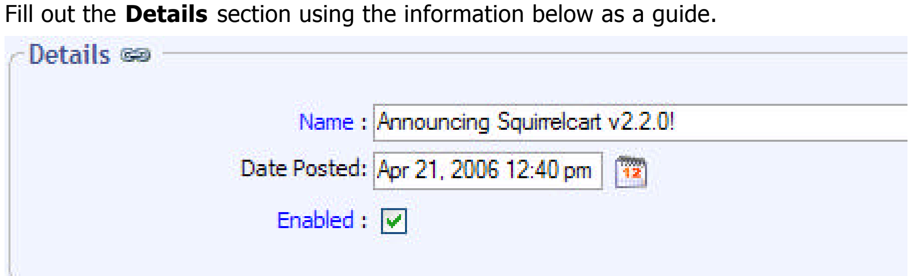
Creating a News Post

1. Click the "Modules > News > Posts" menu link



2. Click 

3. Fill out the **Details** section using the information below as a guide.



Name
This is the name of the news post, and should not contain HTML.

Date Posted
The date the post was created

Enabled
This field gives you a way to hide a post until you are ready to display it. This field

must be checked for the post to be visible.

4. Fill out the **Post** section using the information below as a guide

Display on News Page
Checking this field will caues the news post to appear on your News Page. All other fields in this section are hidden until this field is checked.

Post Name
This field is optional. If you wish to have a different post name appear to your users other than what is in the **Name** field, enter it here. This field accepts plain text and HTML.

Show Header
Checking this field causes the post header to display on your News Page.

Post From
This field controls where the content for the post will come from.

use field - allows you to enter the content in a field on this record

use file - allows you to specify an HTML file on your server to use for the post. When this option is used, the file should be a complate HTML file including an <html /> and <body /> tag. The file is displayed on your News Page in a frameset. For this reason, any anchor tags in the file should have their "target" property set to "_parent" if you do not want the link to open inside the frame.

5. Fill out the **Navigation** section using the information below as a guide. This section controls how this post will appear in your News Navigation Block.

Display in Navigation
Checking this field will cause this news post to appear in your News Navigation Block. All of the other fields in this section are only visible when this field is checked.

Nav Name
This field is optional. It is used as the name of the post in the nav block. If this field is not populated, the value of the **Name** field is used.

Display Using
This controls how the content for this post will appear in the News Navigation Block.

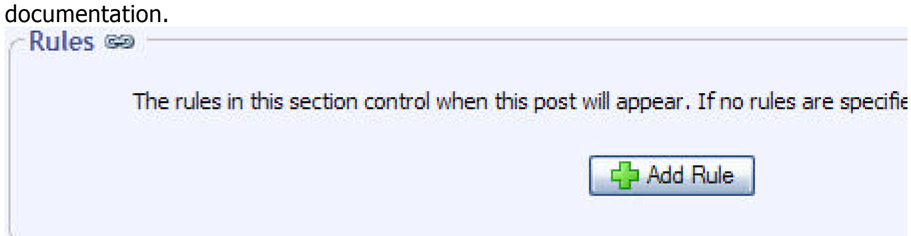
excerpt from post - this allows you to use an excerpt of the full post, starting from the beginning. When this is selected, the **# Characters** field controls how many characters are used in the excerpt. If your post contains HTML, it's stripped for the purpose of creating the excerpt.

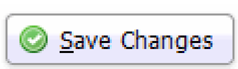
full post - this option allows you to use the full post content in the News Navigation Block

other - this option allows you to specify the content for the post using a separate field. This allows you to have the text for the post in the nav block be different than what is seen on the News Page.

6. If you want to assign the post to a particular section, do so in the **News Section** field set. This is optional.

7. If you wish to limit when this post will appear, do so using the **Rules** field set**.** Rule Sets are discussed in detail in the **Managing Your Store > Rule System ({DAD3FB89-5C44-4804-A6E5-558CA380A78D})** section of this documentation.



8. Click 

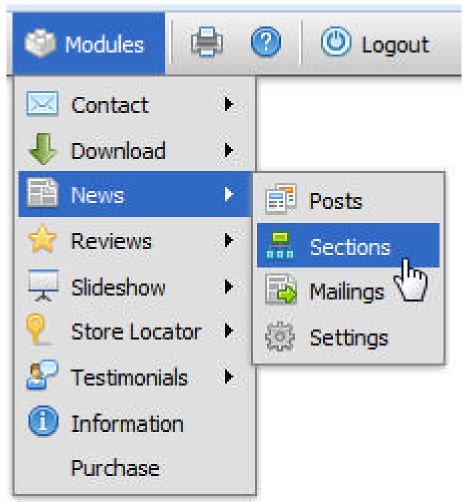
10.7.2.2 News Sections

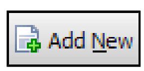
Overview

News Sections allow you to organize your posts into sections, similar to categories.

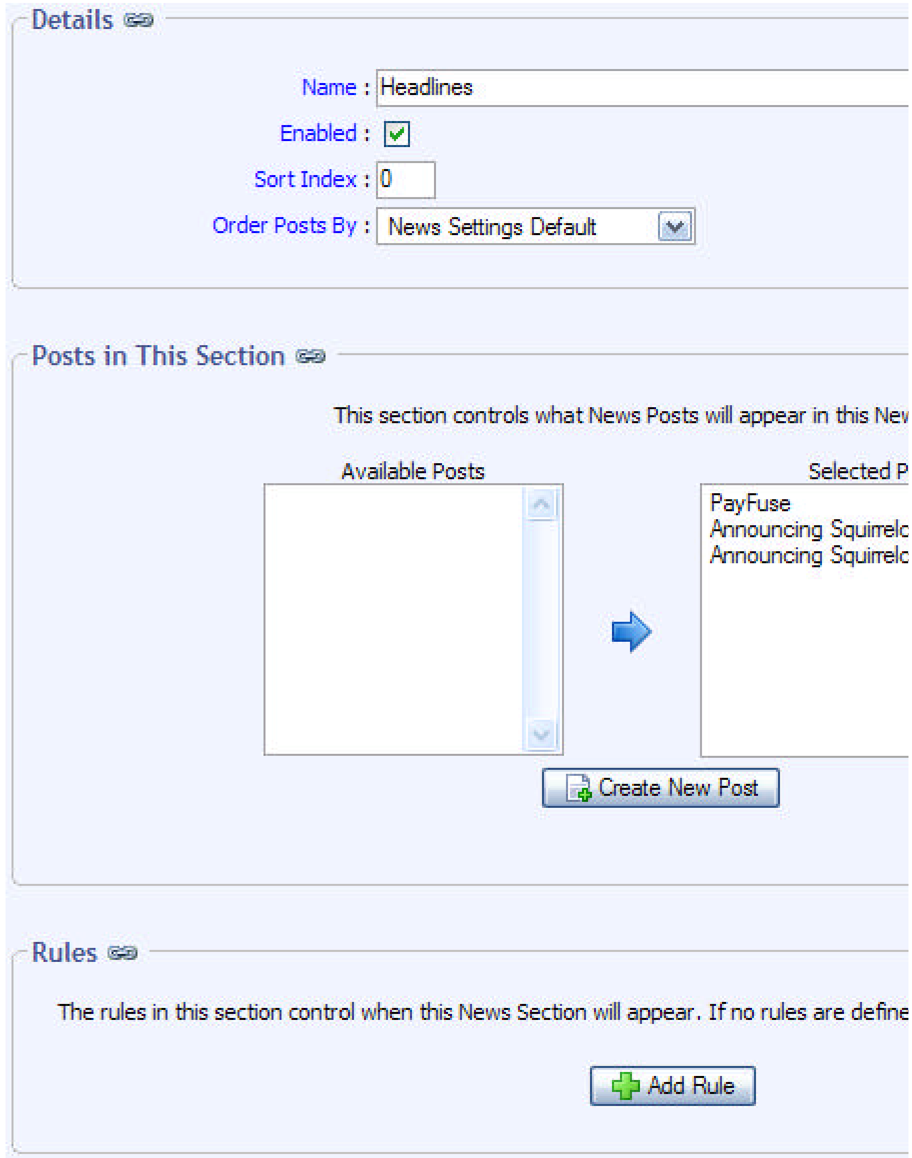
Creating a News Section

1. Click the "Modules > News > Sections" menu link in the control panel.



2. Click 

3. Fill out the form using the information below as a guide.



Name
The name of the section

Enabled
When unchecked, this section will not appear on your News Page

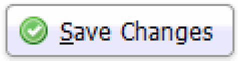
Sort Index
You may sort sections on your news page by any field on the section's record. If you set the "Order Sections By" field on your News Settings page to Sort Index, this field can then be used to control the order of sections by entering numbers representing the order you want the sections to appear in.

Order Posts By
This controls how the posts in this section will be ordered.

Posts in This Section
This controls which posts will appear in this section.

Rules

This can be used to restrict when a section will appear. Rule Sets are discussed in detail in the **Managing Your Store > Rule System ({DAD3FB89-5C44-4804-A6E5-558CA380A78D})** section of this documentation.

4. Click 

10.7.3 Mailings

10.7.3.1 News Groups

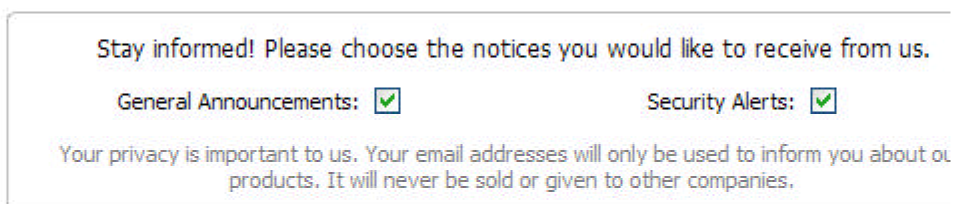
Overview

News Groups are regular groups in Squirrelcart that you've designated for use with the News module. By designating a group as a "News Group", customers with user accounts will have the option to opt in or out of the group. You can then choose the group as the recipient when creating a mailing.

> It is not necessary to designate a group as a News Group in order to send mailings to its members, but it is recommended. Users usually do not appreciate receiving unsolicited email. If you are creating a News Group and want to add all your customers to it, we recommend sending an initial mailing to the group letting them know that you've created the list and they've been added because they are a customer, along with instructions for removing themselves.

How Customers Opt In/Out of News Groups

When you designate a group as a News Group, that group will appear in a new box at the bottom of the account page, seen when the customer logs in and clicks "Account Details". It's also seen when the customer is creating a user account.

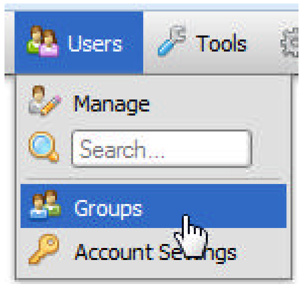


You can control the text that appears at the top and bottom of this box using the **Header** and **Footer** fields in the **Account Page Opt In** section of the **News Settings (Section 10.7.4)** page.

> If you've created 1 or more News Groups and don't see the box shown above on the account page, it may be because you are missing the PHP code needed to display it. The code goes in the "account_form.tpl.php" template file, and is as follows:
>
> ```
> <?=$News_Groups?>
> ```

Creating a News Group

1. Click the "Settings > Groups" menu link in the control panel

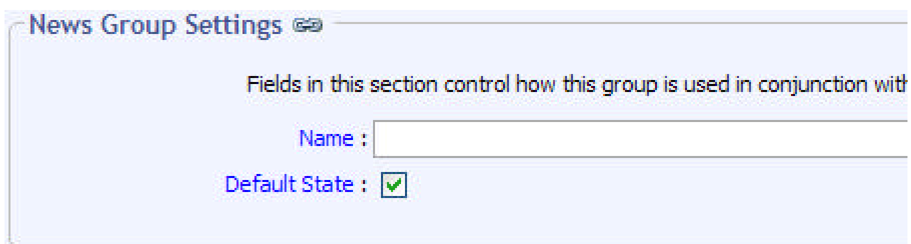


2. If you want to create a new group, click 

. If you want to designate an existing group as a News Group, click it's record row to open it.

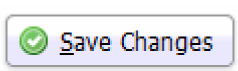
3. Enter a **Name** for the group, and check the **News Group** field to indicate that you want this group to be a news group. A fieldset labeled **News Group Settings** will appear.

4. Fill out the **News Group Settings** section using the information below as a guide.



Name
This field is optional. It controls the name of the group that will appear on the Opt/In section of the Account Page. If left blank, the **Name** field in the **Details** fieldset will be used.

Default State
This controls the default state of the checkbox that controls membership for this group on the Opt/In section of the Account Page.

5. Click 

10.7.3.2 Sending a Mailing

Preparation

Before sending a mailing, you will need to make some preparations.

1. Decide what format you want to send the message in. Squirrelcart's News Module supports the following formats:

   HTML
   This format sends the email as an HTML page. With this option, you can add images, links, etc...

   plain text
   This format displays the message just as it's typed, in plain text

   multi-part (HTML and plain text)
   This format is the best of both worlds. It sends the message in 2 parts, one being HTML and the other being text. The reader can then choose how they want to see the message via the settings in their email client. We recommend this format whenever possible.

2. If you are using the HTML or multi-part formats, you will need to design the HTML portion of the message. Squirrelcart allows you to specify the HTML as a file, or pasted in a field. We recommend that you design the HTML message in a separate file. Include <html> and <body> tags as you normally would on an HTML page. There are some important things to keep in mind when writing HTML that will be used in an email.

   Paths
   Because the HTML is not being seen by loading a page on your site, all paths in the HTML should be full paths, including your domain name.

   Correct Examples:

   click here

   Incorrect Examples:

   click here

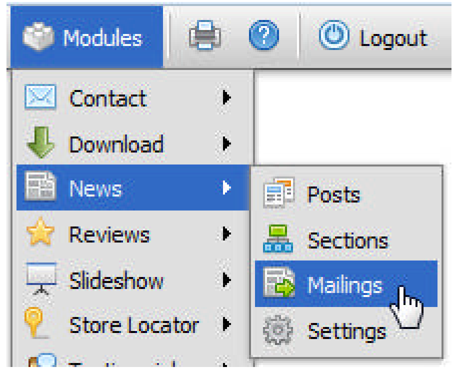
   Javascript
   Because most email clients will block the use of javascript, it's a good idea to not use it in HTML emails.

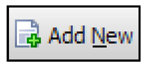
   Dimensions
   Design with the average size of an email window in mind. Many users tend to read their email in a smaller window than they use to browse web pages, so it's a good idea to not design the email for a large window.

Sending a Mailing

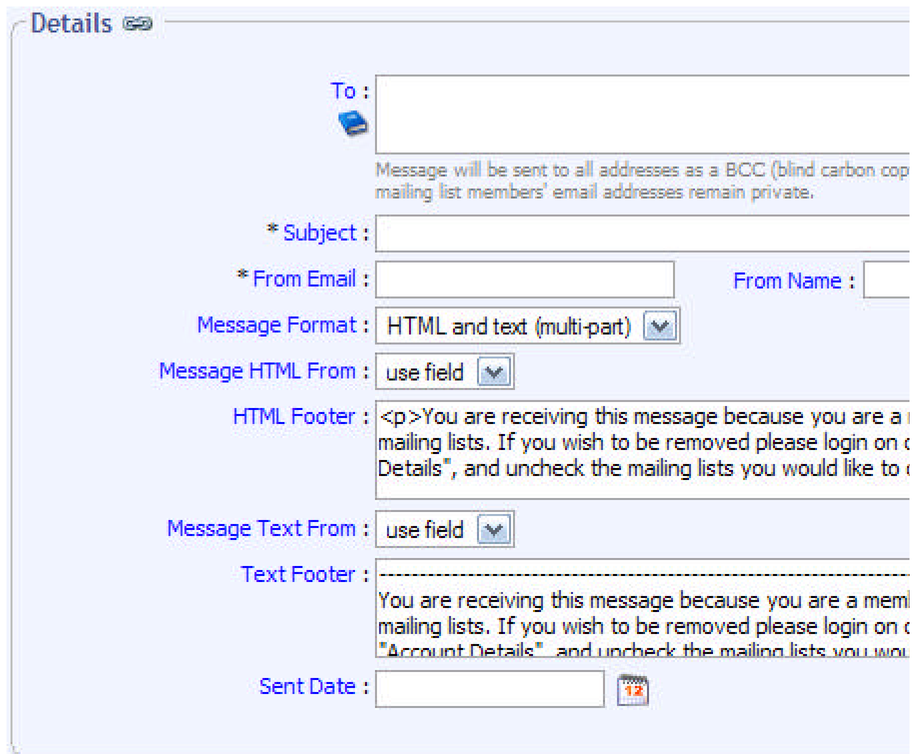
> If you are planning on sending a mailing to a large number of users, it's always a good idea to send it to yourself first, so you can test it's appearance. You can then go back into the mailing, change the recipients, and send the final version.

1. Click "Modules > News > Mailings" in the control panel menu.



2. Click 

   You will see a form with a **Details** section similar to below:



3. Choose your recipients using the **To** field. To choose from users and groups, click the address book icon. You can also manually enter email addresses in the field (separating them with semicolons). All messages will be sent as a BCC (blind carbon copy) so you won't expose email addresses to other users.

4. Enter a subject in the **Subject** field.

5. Enter the email address that you wish the message to be from using the **From Email** field. Some web servers will require that this address be on your domain.

6. Enter a short descriptive name to represent the sender of the message in the **From**

Name. This is used in email clients as the name corresponding to the email address sending the message.

7. Set the **Message Format** field using the information from the Preparation section above as a guide.

8. Specify how you will provide the email content using the **Message HTML From** and **Message Text From** fields. Depending on what you've chosen for **Message Format**, you may only see one of these fields. The corresponding **HTML Message** and **Text Message** fields will change from textarea fields to file upload fields, depending on your selection.

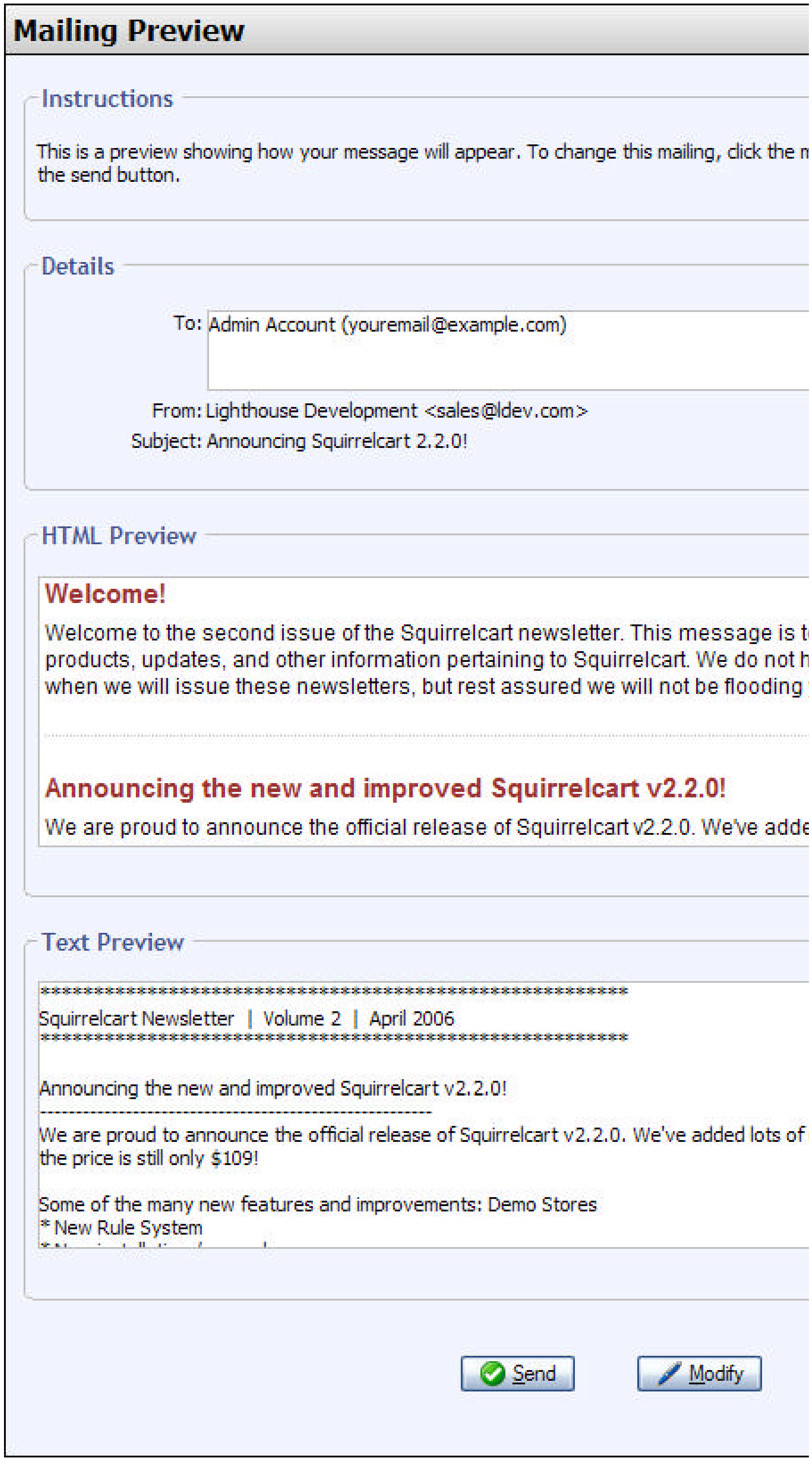
9. Set the **HTML Footer** and **Text Footer** fields to whatever you'd like to use for footers. Depending on what you've chosen for **Message Format**, you may only see one of these fields. The footers will be added to the bottom of their corresponding messages.

10. Leave the **Sent Date** field blank. It will be populated automatically after you send the message.

11. Specify values for the **HTML Message** and **Text Message** fields. Depending on what you've chosen for **Message Format**, you may only see one of these fields.

12. Click **Continue...**

    A preview of the message will be shown. You can use this preview to ensure that every thing is correct.



13. Click the **Send** button, and wait. You will see a **Status** fieldset appear at the bottom of the preview. This will show the status of the mailing. When complete, you

will see a message indicating that fact. Keep in mind that this may take several minutes depending on the number of recipients, and you should not close the window until it completes.

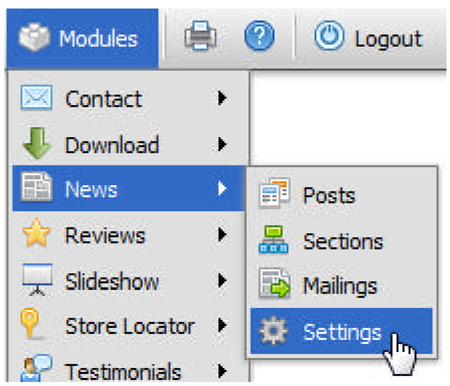
> In order to prevent over utlizing your server, Squirrelcart will only send a message to a maximum of 50 recipients. If your mailing is going to more than 50 recipients, Squirrelcart will automatically send additional messages as needed. For example, if you have 150 recipients, Squirrelcart will send your mailing in 3 messages. The status of each message will appear in order, and when the final message is sent, a "Finished" field set will appear.

10.7.4 News Settings

Overview

The news settings page gives you control over all aspects of the News module.

To open the News Settings page, click "Modules > News > Settings" in the control panel.



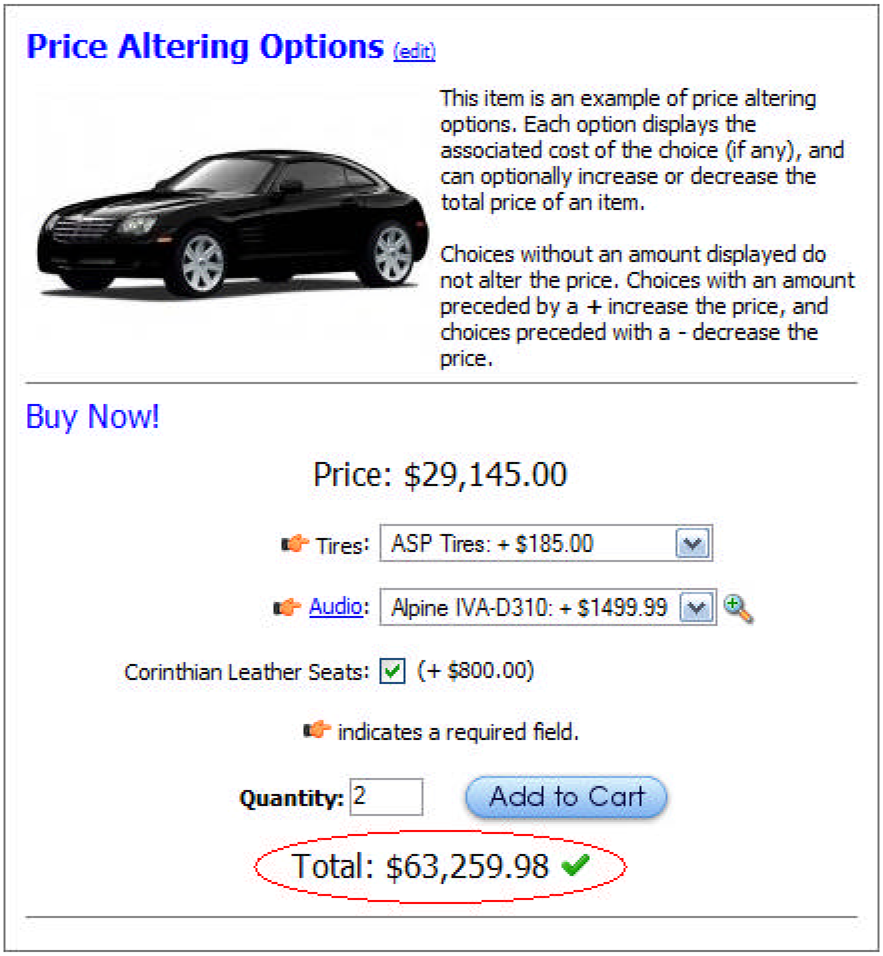
10.8 QuickTotal Module - Overview

Overview

The QuickTotal module provides pricing information on the fly to your customers on the Product Detail page, without having to add the item to the cart. It shows the total price the customer will pay for the item as it appears on screen. It's capabilities include:

- Updating the price total when the quantity changes
- Updating the price total when any type of product option is chosen
- Accurately calculating prices while taking into account any discounts assigned to the product

QuickTotal works in all major browsers.



For more information on the QuickTotal module, please see our **Modules page (http://www.squirrelcart.com/index.php?crn=65)**.

10.9 Photo Gallery

10.9.1 Storefront Features

Overview

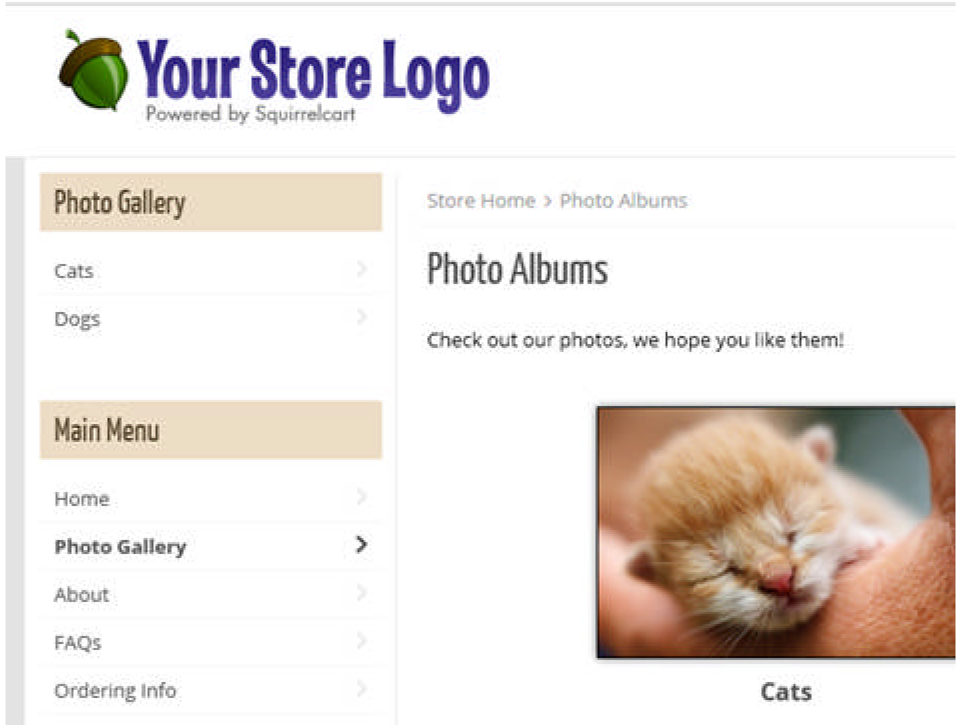
This module is great for showing off product and customer photos, and to provide additional information about your products.

Photo Gallery Pages

This explains the different pages displayed by the photo gallery module.

Photo Gallery homepage

The gallery homepage displays your albums:



There is a built in Link record you can assign to your store which links to this page. See below for more information.

If you would like to link to the gallery homepage manually, the URL will vary based on your store location and your SEO settings.

If you are using query string URLs, the URL to the gallery page will be similar to this:

`http://www.example.com/store.php?pg_albums`

If you are using SEO URLs, the URL to the gallery page will be similar to this:

`http://www.example.com/store.php/albums`

Album Page

Clicking on an album link will display sets nested inside the album (AKA sub-albums), and any photos assigned to the album:

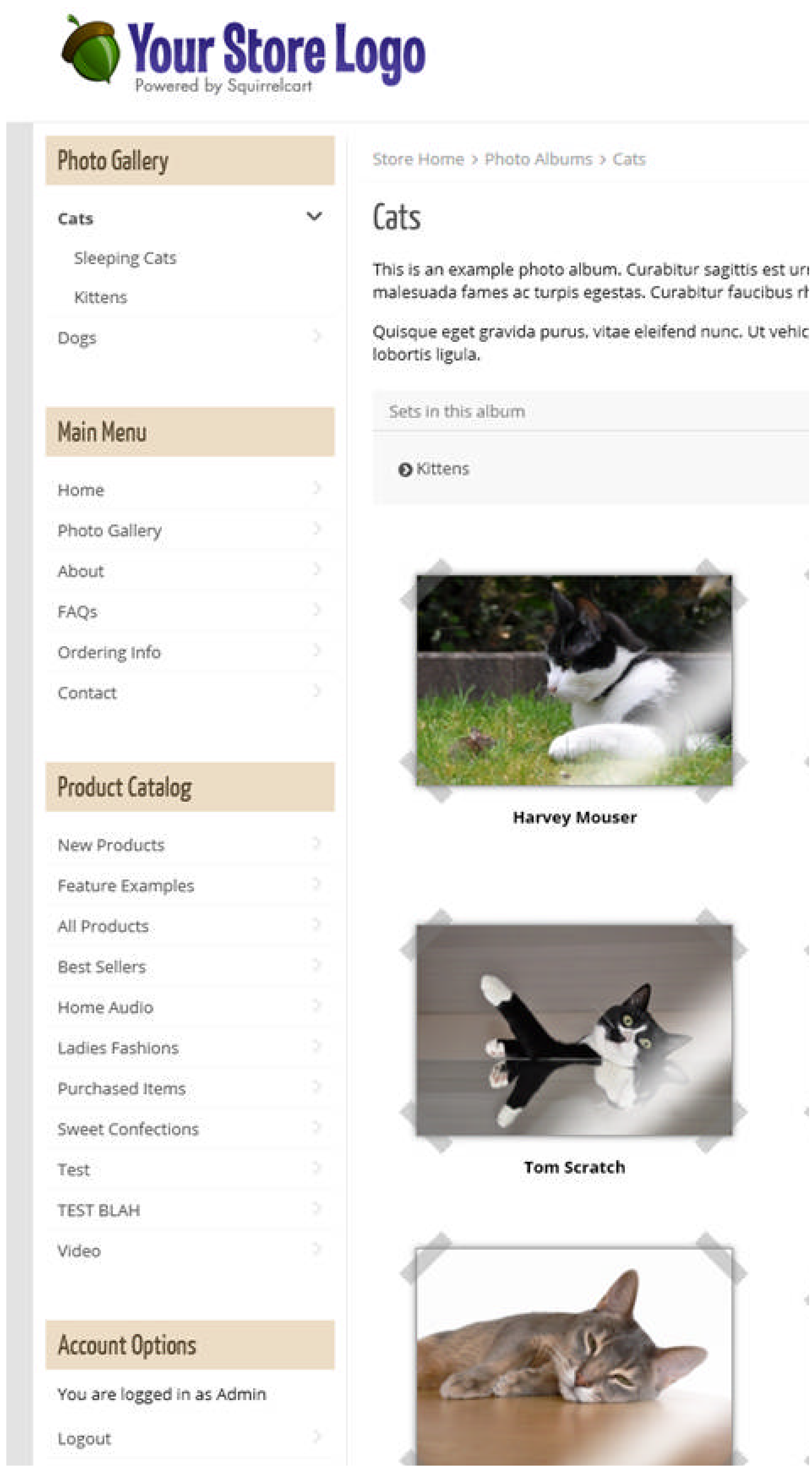
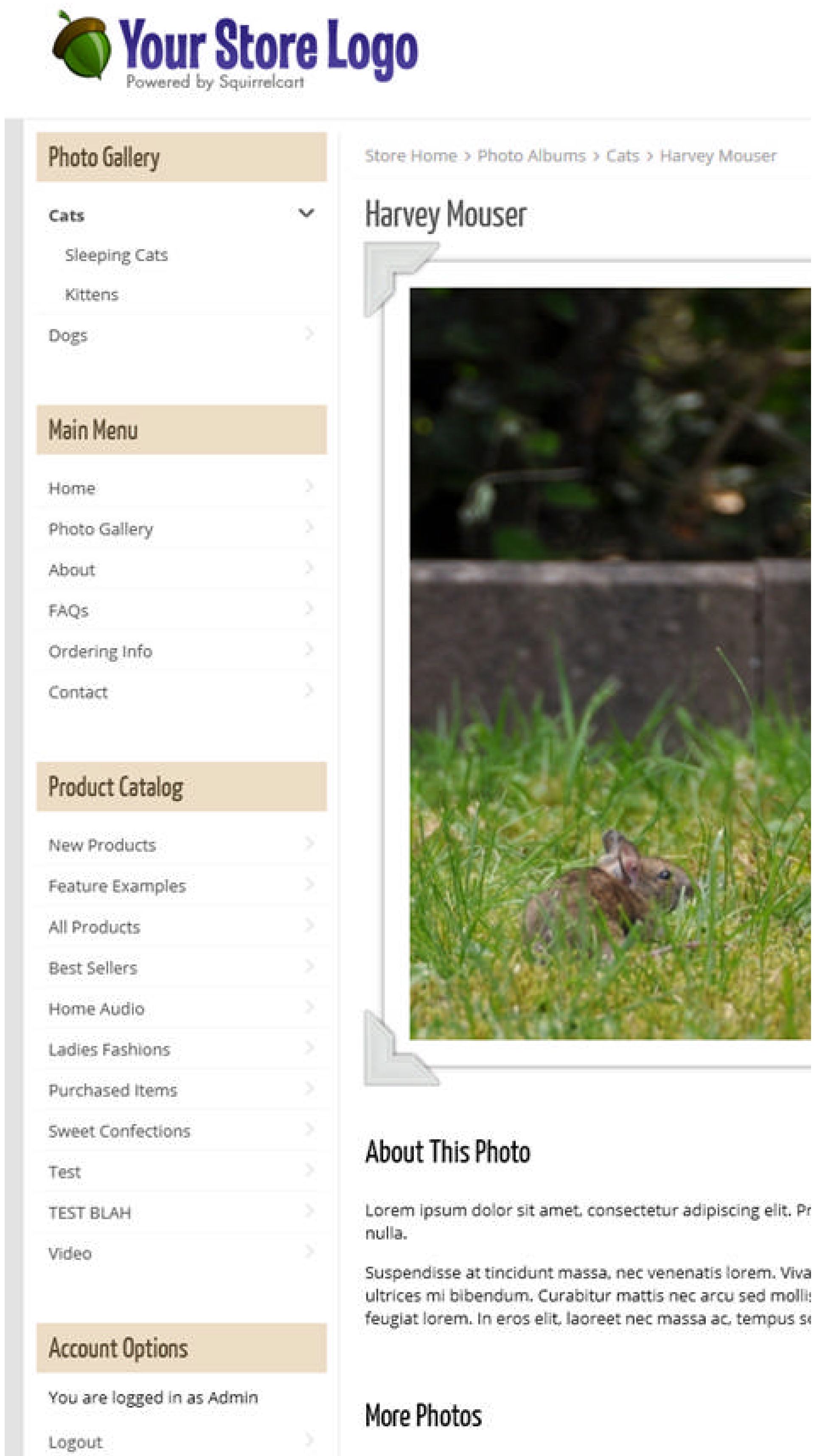

Your Store Logo
Powered by Squirrelcart
Photo Gallery
Cats
Sleeping Cats
Kittens
Dogs
Main Menu
Home
Photo Gallery
About
FAQs
Ordering Info
Contact
Product Catalog
New Products
Feature Examples
All Products
Best Sellers
Home Audio
Ladies Fashions
Purchased Items
Sweet Confections
Test
TEST BLAH
Video
Account Options
You are logged in as Admin
Logout
Store Home > Photo Albums > Cats
Cats
This is an example photo album. Curabitur sagittis est ur
malesuada fames ac turpis egestas. Curabitur faucibus r
Quisque eget gravida purus, vitae eleifend nunc. Ut vehic
lobortis ligula.
Sets in this album
Kittens
Harvey Mouser
Tom Scratch

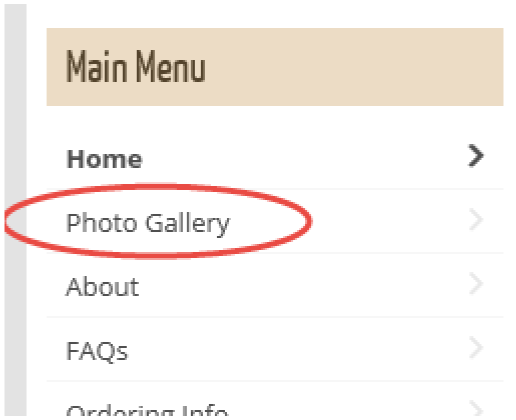
Photo Page

Clicking on any photo link opens that photo's page:


Your Store Logo
Powered by Squirrelcart
Photo Gallery
Cats
Sleeping Cats
Kittens
Dogs
Main Menu
Home
Photo Gallery
About
FAQs
Ordering Info
Contact
Product Catalog
New Products
Feature Examples
All Products
Best Sellers
Home Audio
Ladies Fashions
Purchased Items
Sweet Confections
Test
TEST BLAH
Video
Account Options
You are logged in as Admin
Logout
Store Home > Photo Albums > Cats > Harvey Mouser
Harvey Mouser
About This Photo
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Pr
nulla.
Suspendisse at tincidunt massa, nec venenatis lorem. Viva
ultrices mi bibendum. Curabitur mattis nec arcu sed molli
feugiat lorem. In eros elit, laoreet nec massa ac, tempus s
More Photos

Link

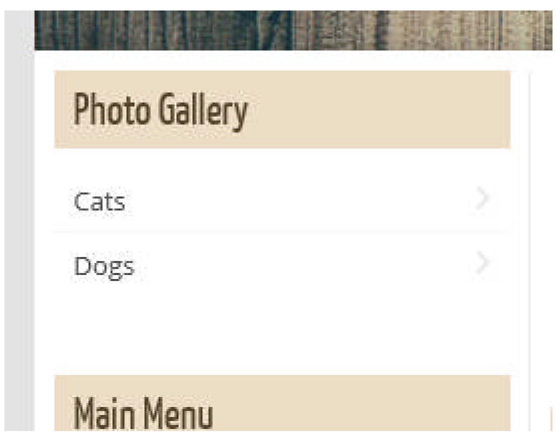
There is a built-in photo gallery link which when clicked will open the gallery page which displays your albums.



To add this link to your store, **see this topic (Section 9.3.11.3)**.

Navigation Block

There is a built in Photo Gallery navigation block which displays links to your albums:



To add this navigation block to your store, **see this topic (Section 9.3.10.3)**.

Content Record

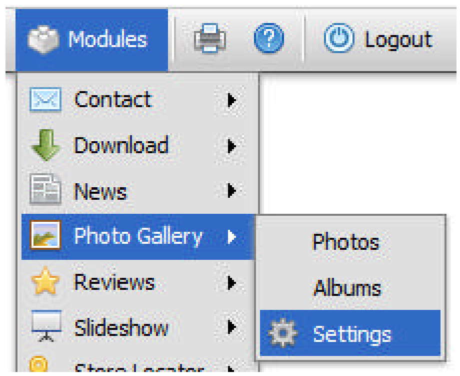
The built in photo gallery content record displays at the exact same information seen on the photo gallery homepage, and can be used to add that information to your store's homepage. See **Customizing > Content** for more information.

10.9.2 Control Panel

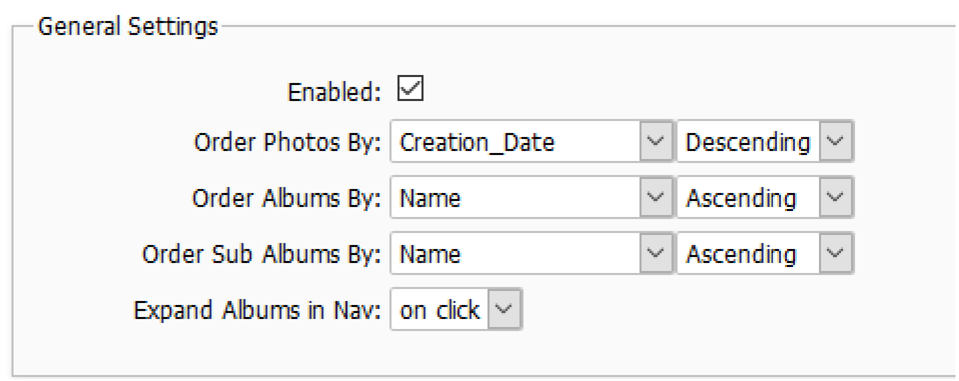
10.9.2.1 Photo Gallery Settings

Overview

You'll find settings for the photo gallery module under **Modules > Photo Gallery > Settings:**



General Settings



Enabled

Use this setting to turn the module on and off.

Order Photos By

This controls the sort order of photos.

Order Albums By

This controls the sort order of albums.

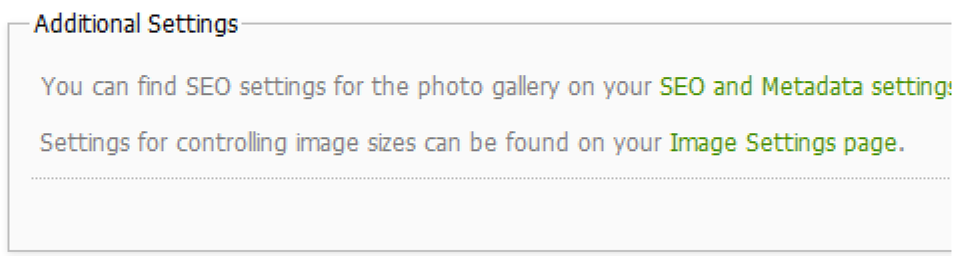
Order Sub Albums By

This controls the sort order of sub albums (sets) within an album.

Expand Albums in Nav

This controls whether or not sub albums will be visible by default in the photo gallery navigation block.

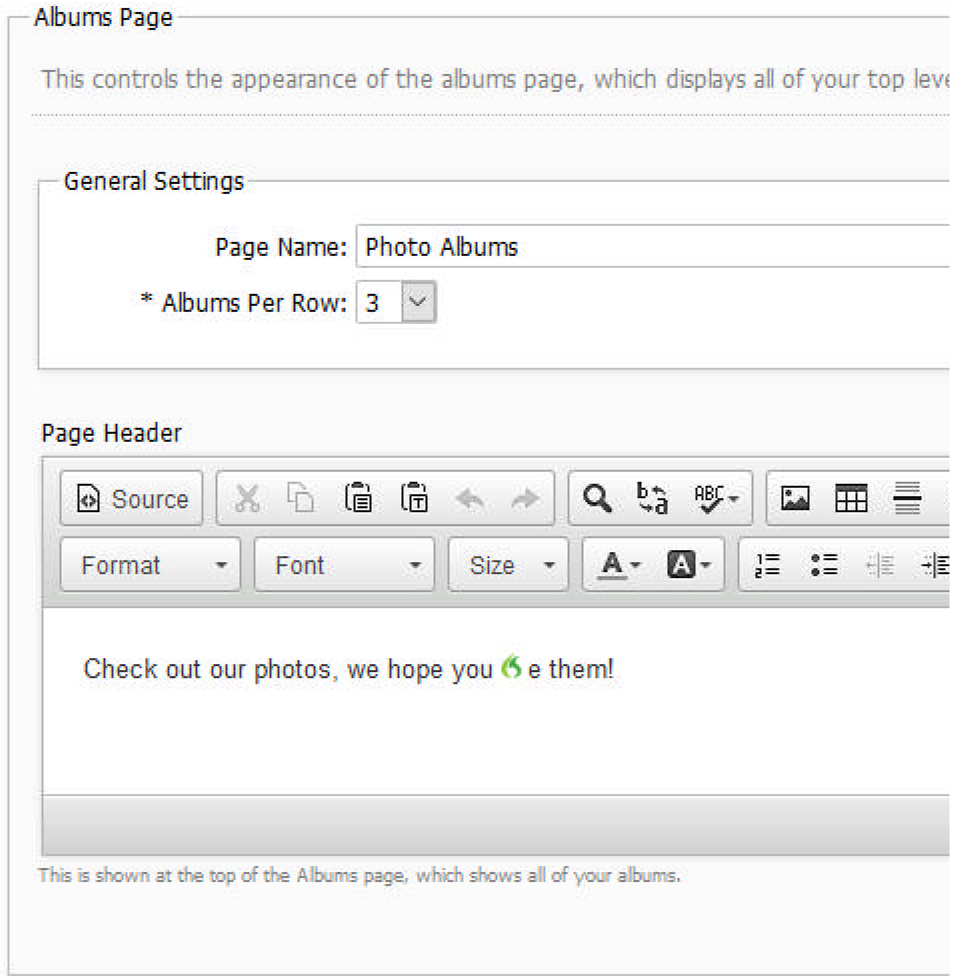
Additional Settings



SEO and Metadata settings specific to the photo gallery module can be found on the **SEO and Metadata settings page (Section 6.12.2)** in the control panel.

Settings controlling image sizes (when the Auto Size feature is enabled) can be found on the **Image Settings page (Section 5.4)**.

Albums Page



General Settings

Page Name

This is shown at the very top of the albums page.

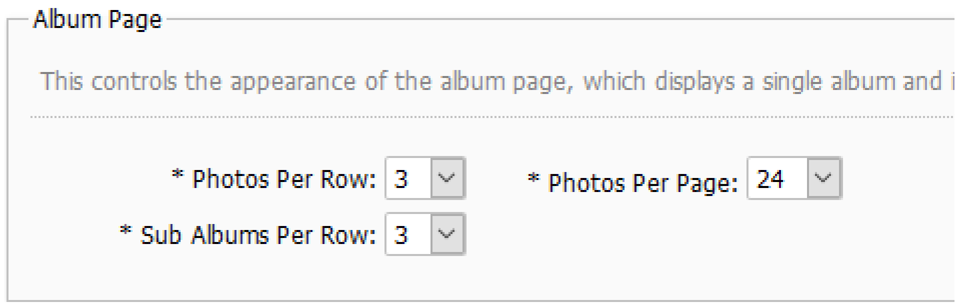
Albums Per Row

This controls how many albums are shown per row on large screens.

Page Header

This is shown below the Page Name, at the top of the albums page.

Album Page



Photos Per Row

This controls how many photos will appear per row on large screens when viewing an album.

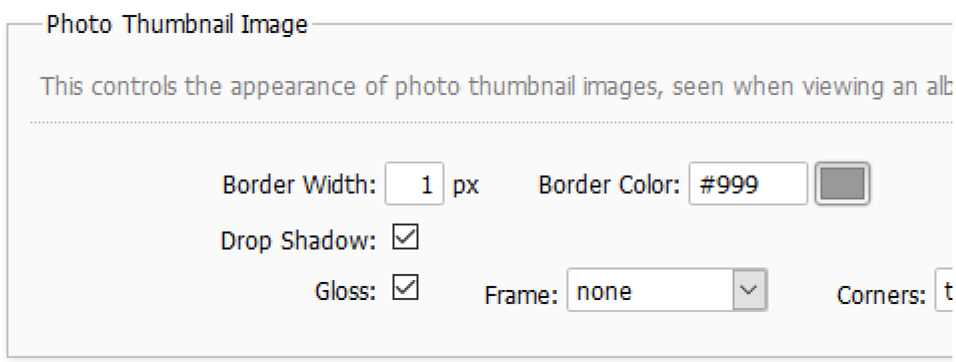
Photos Per Page

This controls how many photos will appear per page when viewing an album.

Sub Albums Per Row

This controls how many sub albums will appear per row.

Photo Thumbnail Image



These settings control the appearance of photo thumbnail images, which are seen on each album page.

Border Width & Color

This adds an optional border around the image.

Drop Shadow

This adds a drop shadow behind the image.

Gloss

This adds a slight reflective shine affect on top of the image.

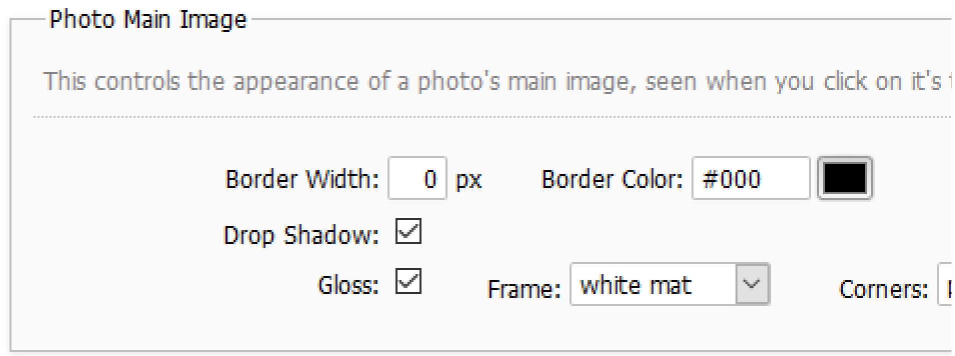
Frame

This allows you to add different style frames around the image.

Corners

This overlays corner elements to give the appearance they are holding the image down.

Photo Main Image

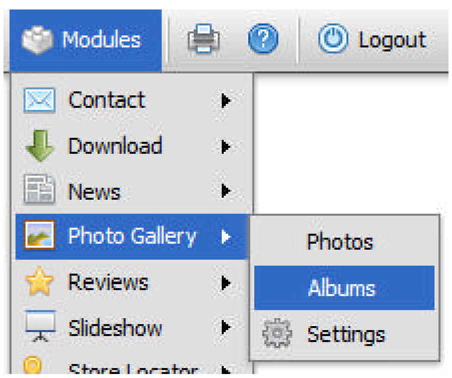


These settings work exactly the same as the ones explained above under **Photo Thumbnail Image**.

10.9.2.2 Working with Albums

Overview

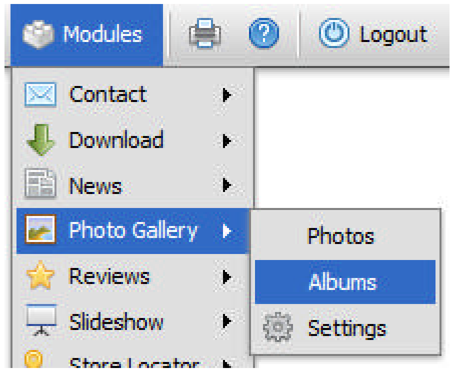
You can view your albums in the control panel under **Modules > Photo Gallery > Albums:**



You can work with these records as you would any other record in Squirrelcart.

Adding and modifying albums

1. Open the albums page:

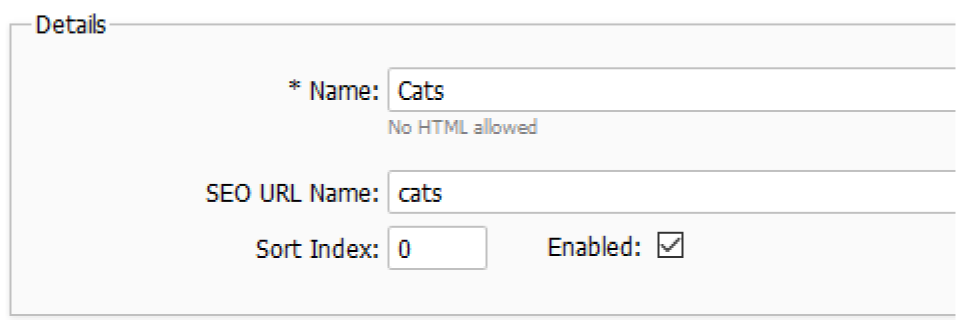


2. To create a new album click the **Add New** button. To edit an existing album click anywhere on its record row.

3. Fill out the form as needed using the album record overview below, and click the **Save Changes** button.

Album Record Overview

Details



Name

This is the name of the album seen at the top of the album's page and below the album's thumbnail image.

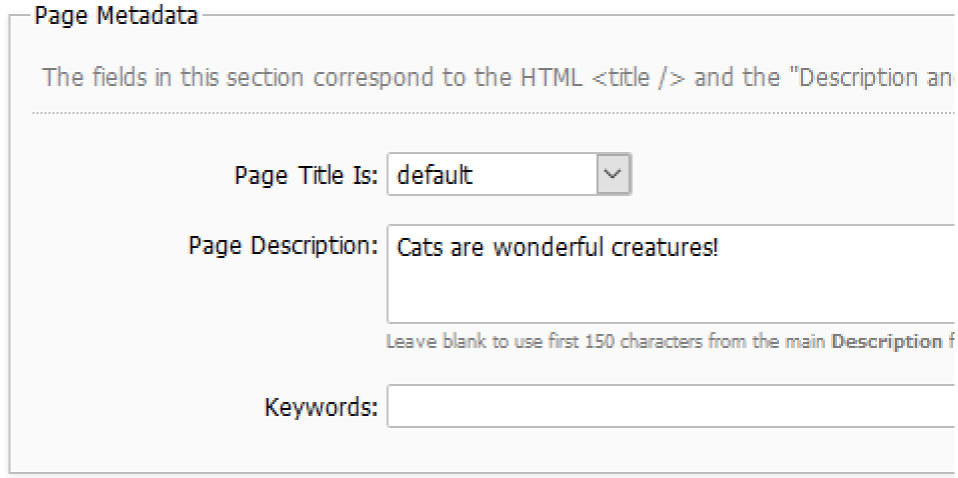
SEO URL Name

This is used in the URL linking to this album's page.

Sort Index

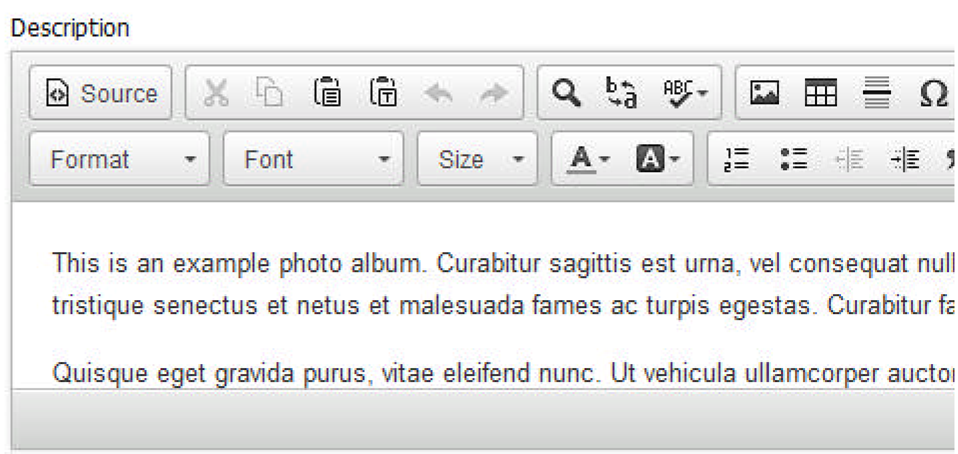
This can be used to manually control the sort order of albums by setting **Order Albums By** on your settings page to **Sort Index**.

Page Metadata

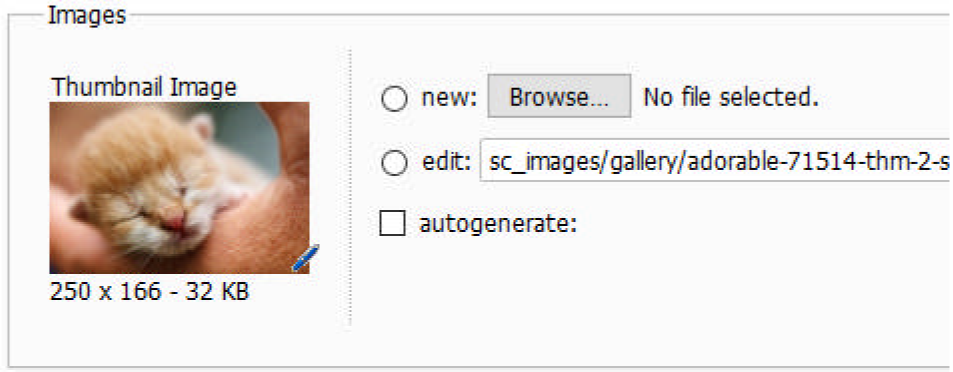


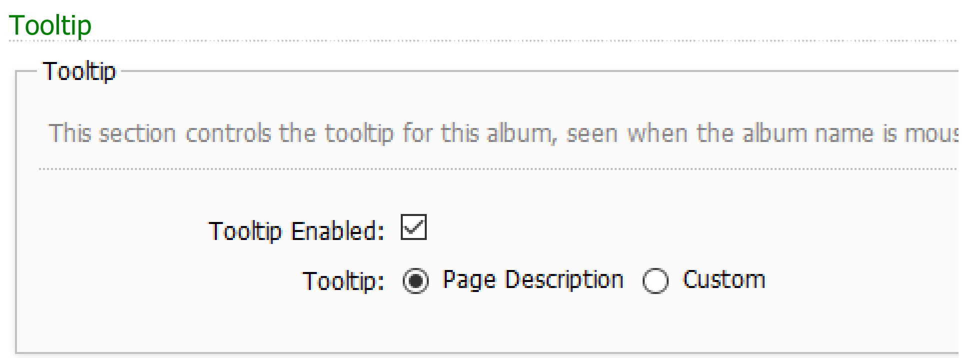
This works the same as all other page metadata settings in Squirrelcart.

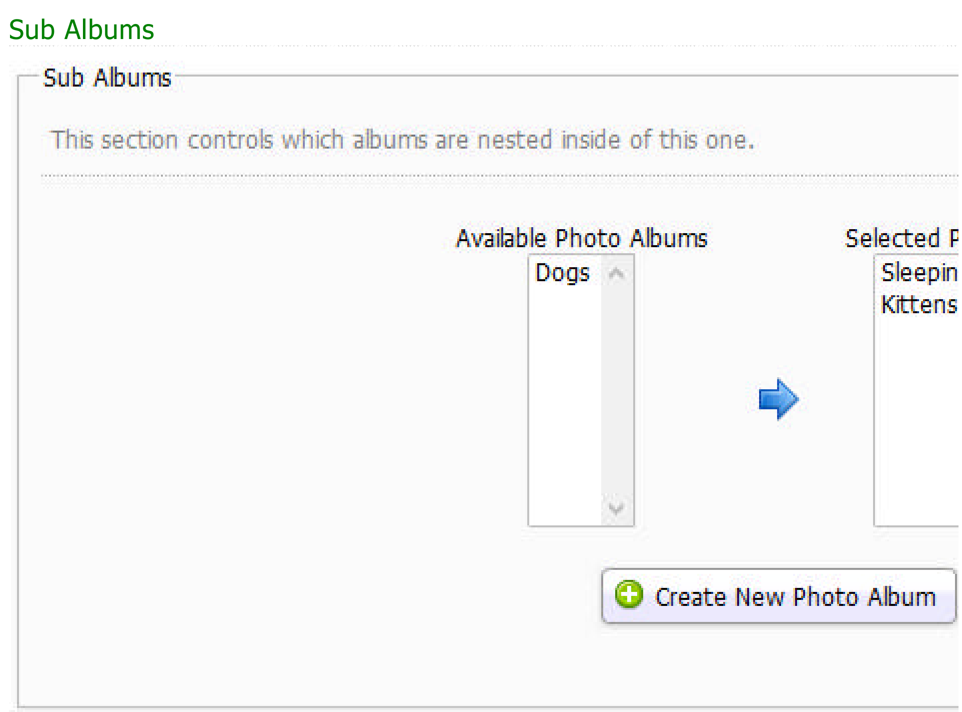
Description



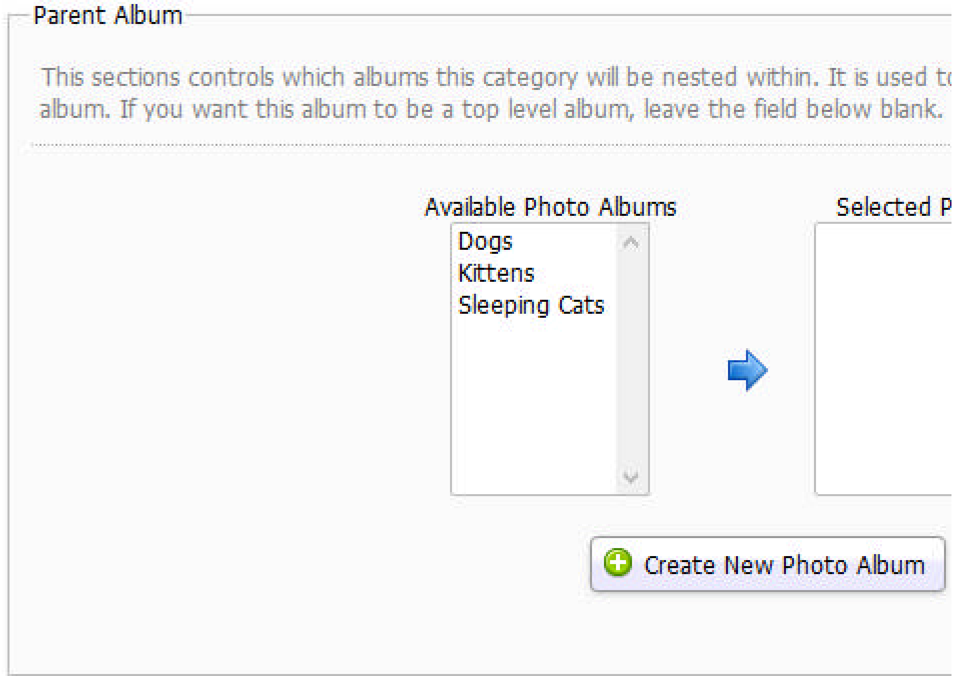
Images


Images
Thumbnail Image
250 x 166 - 32 KB
new: Browse... No file selected.
edit: sc_images/gallery/adorable-71514-thm-2-s
autogenerate:


Tooltip
Tooltip
This section controls the tooltip for this album, seen when the album name is mous
Tooltip Enabled:
Tooltip: Page Description Custom


Sub Albums
Sub Albums
This section controls which albums are nested inside of this one.
Available Photo Albums
Dogs
Selected P
Sleepin
Kittens
Create New Photo Album

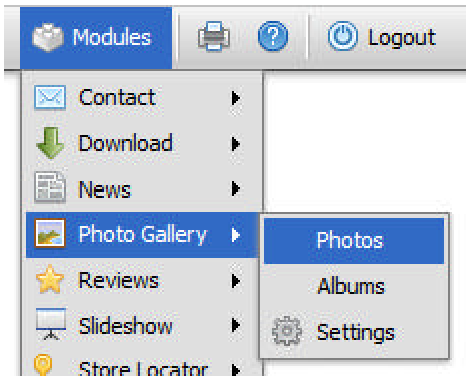
Parent Album



10.9.2.3 Working with Photos

Overview

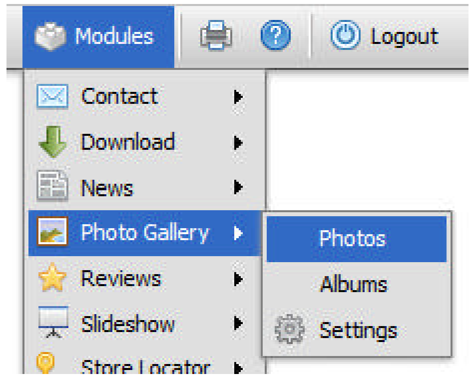
You can view your photos in the control panel under **Modules > Photo Gallery > Photos:**



You can work with these records as you would any other record in Squirrelcart.

Adding and modifying photos

1. Open the photos page:

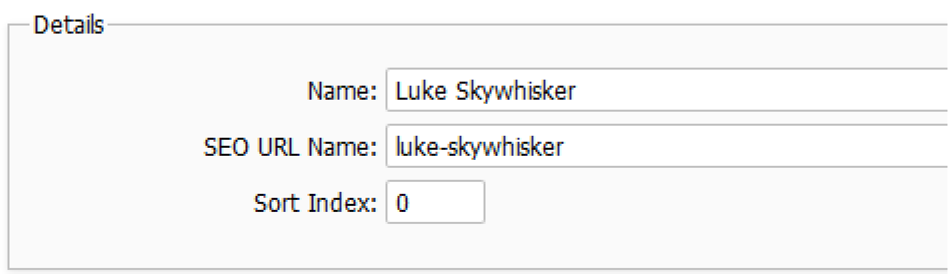


2. To create a new photo click the **Add New** button. To edit an existing photo click anywhere on its record row.

3. Fill out the form as needed using the photo record overview below, and click the **Save Changes** button.

Photo Record Overview

Details



Name

This is the name of the photo seen at the top of the photo's page and below the photo's thumbnail image.

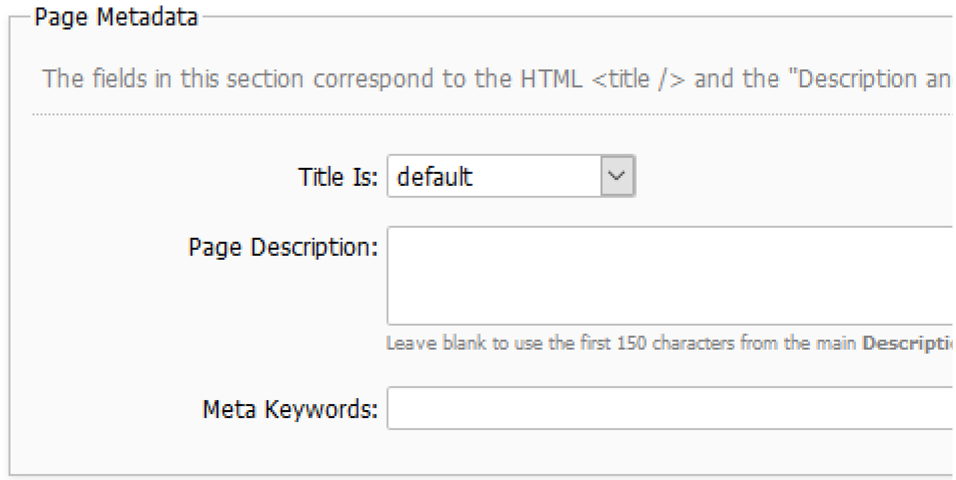
SEO URL Name

This is used in the URL linking to this photo's page.

Sort Index

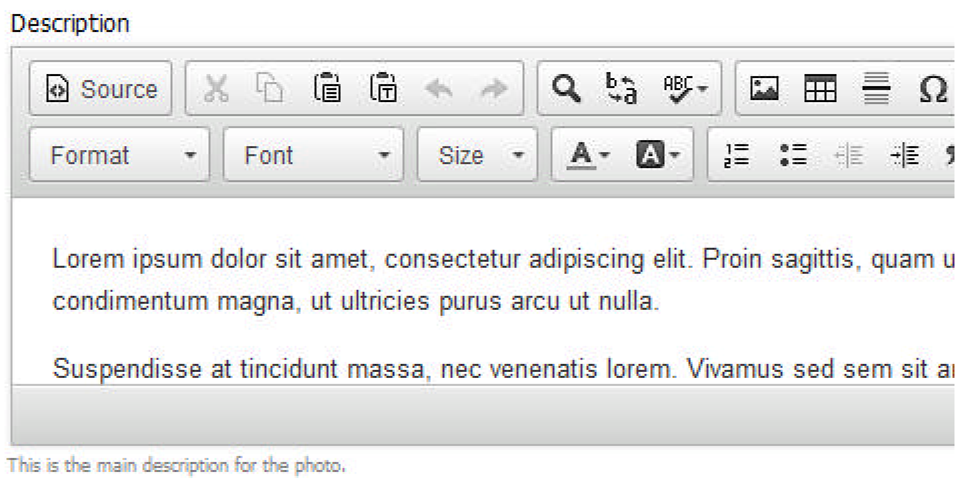
This can be used to manually control the sort order of photos within an album, by setting **Order Photos By** on your settings page to **Sort Index**.

Page Metadata

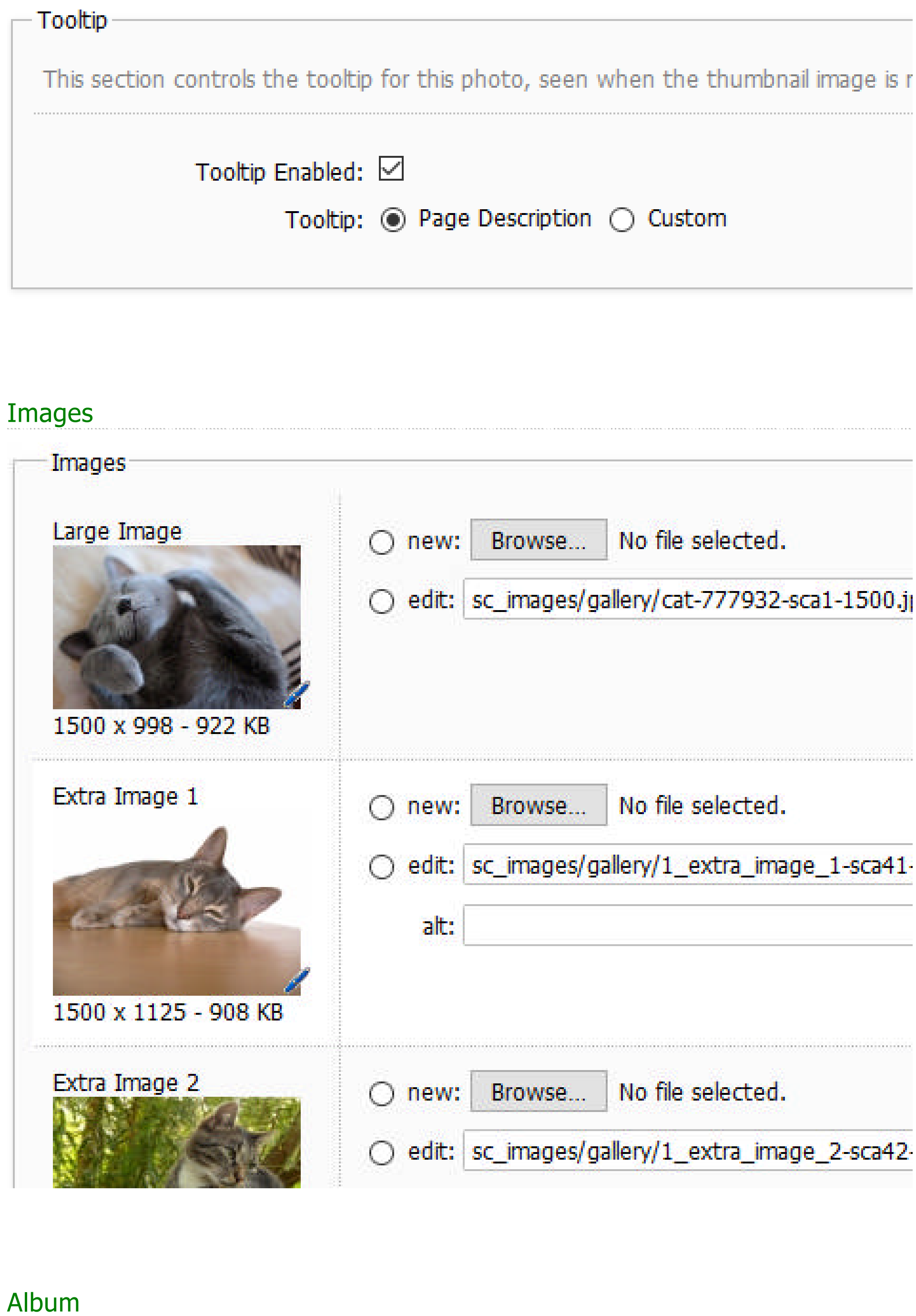


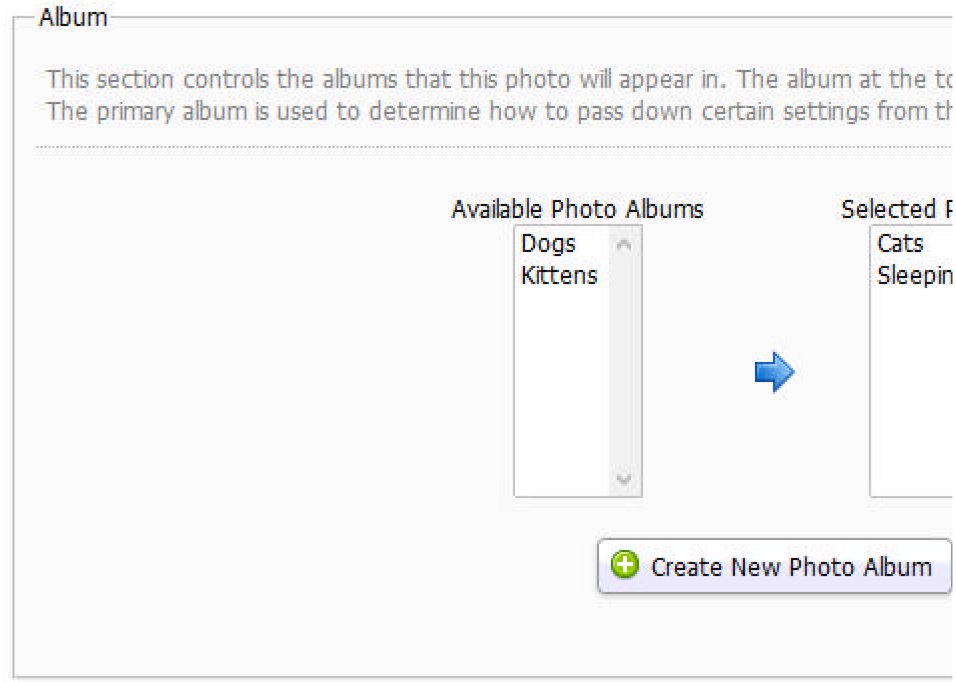
This works the same as all other page metadata settings in Squirrelcart.

Description



Tooltip


Tooltip
This section controls the tooltip for this photo, seen when the thumbnail image is r
Tooltip Enabled:
Tooltip: Page Description Custom
Images
Images
Large Image
new: Browse... No file selected.
edit: sc_images/gallery/cat-777932-sca1-1500.j
1500 x 998 - 922 KB
Extra Image 1
new: Browse... No file selected.
edit: sc_images/gallery/1_extra_image_1-sca41-
alt:
1500 x 1125 - 908 KB
Extra Image 2
new: Browse... No file selected.
edit: sc_images/gallery/1_extra_image_2-sca42-
Album



10.10 Reviews

10.10.1 Storefront Features

10.10.1.1 Reading Reviews

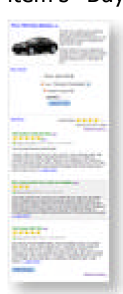
Overview

Your customers can read reviews in a few different ways, as described below.

Reading Reviews for a Single Product

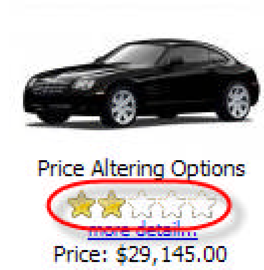
Reading a Subset of Reviews

When viewing a product's detail page, by default up to 3 reviews will appear below the item's "Buy Now" section:

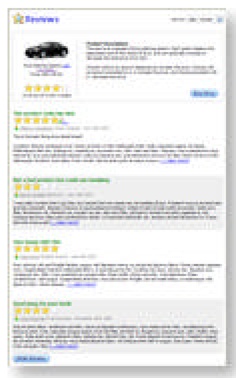


Reading all Reviews

To read through all reviews on a product, customers can click the "read all 4 reviews" link shown in the image above. They can also get to the same page by clicking the rating indicator below your product thumbnails:

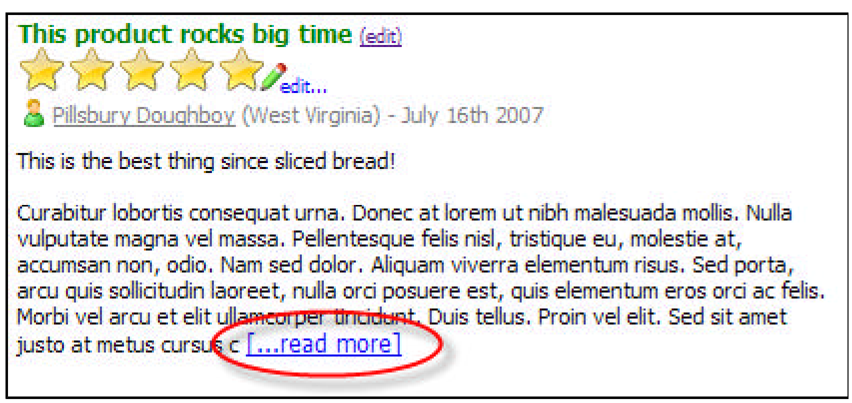


Both of those links will take you to the product reviews page, which looks like this:



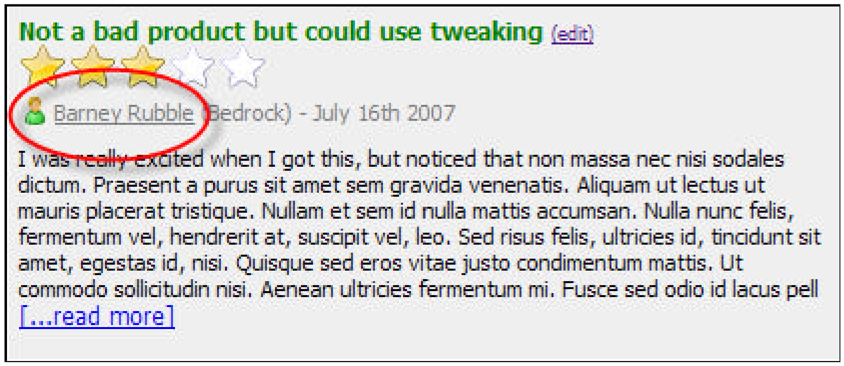
Reading a Truncated Review

Reviews that are longer than the value you have entered in the **Review Truncate Length** field on your **review settings page (Section 10.10.2.2)** will appear truncated. To read a review in it's entirety, click the [...read more] link that follows the truncated review text:

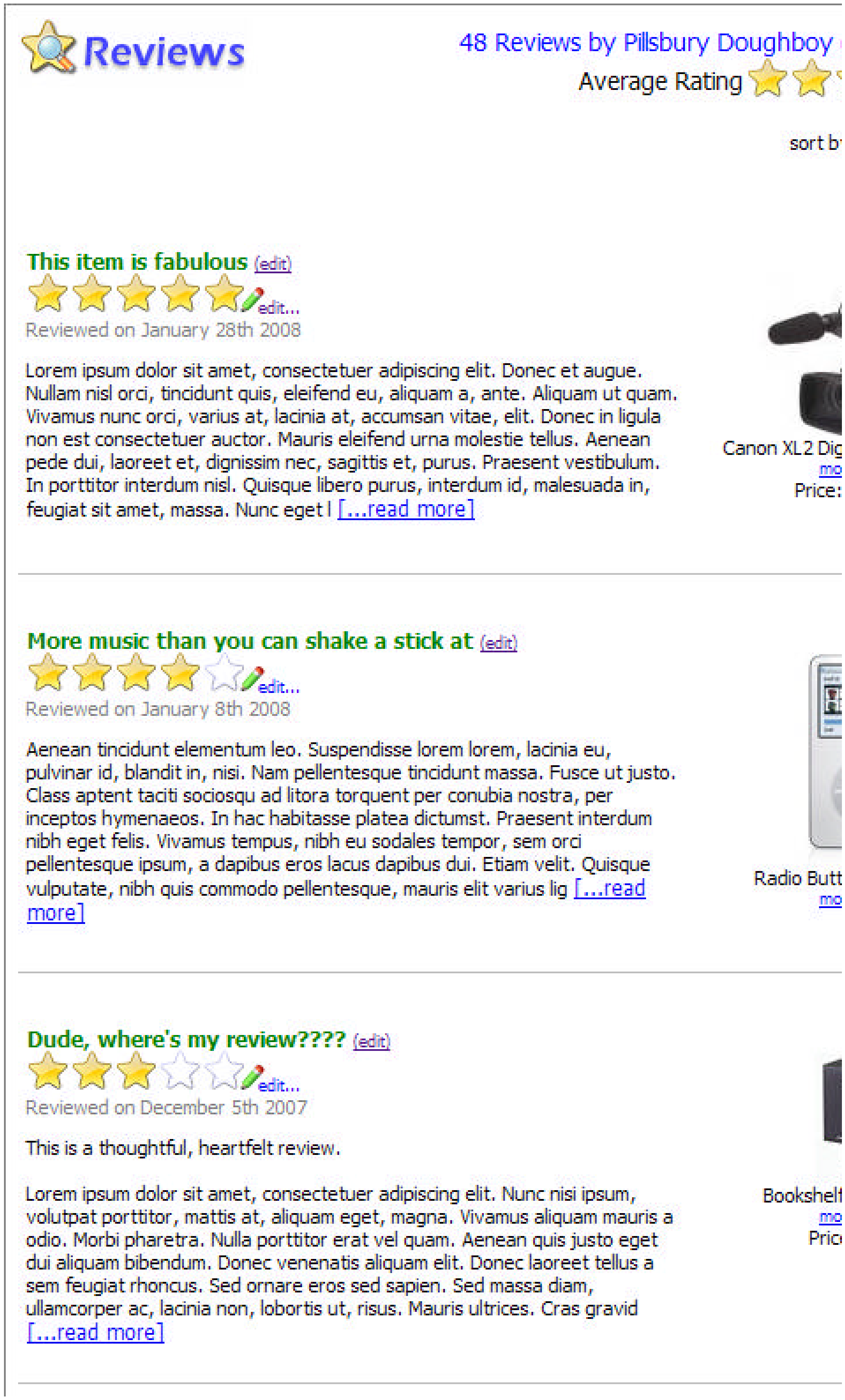


Reading All Reviews Written by a Particular Reviewer

To see all reviews written by any given reviewer, click their name on any of their reviews:



That will open the reviewer page, showing all reviews that this customer has submitted:



10.10.1.2 Writing Reviews

Overview

Writing reviews requires a customer account. Your customers can write a review for any product provided they have not already written a review for.

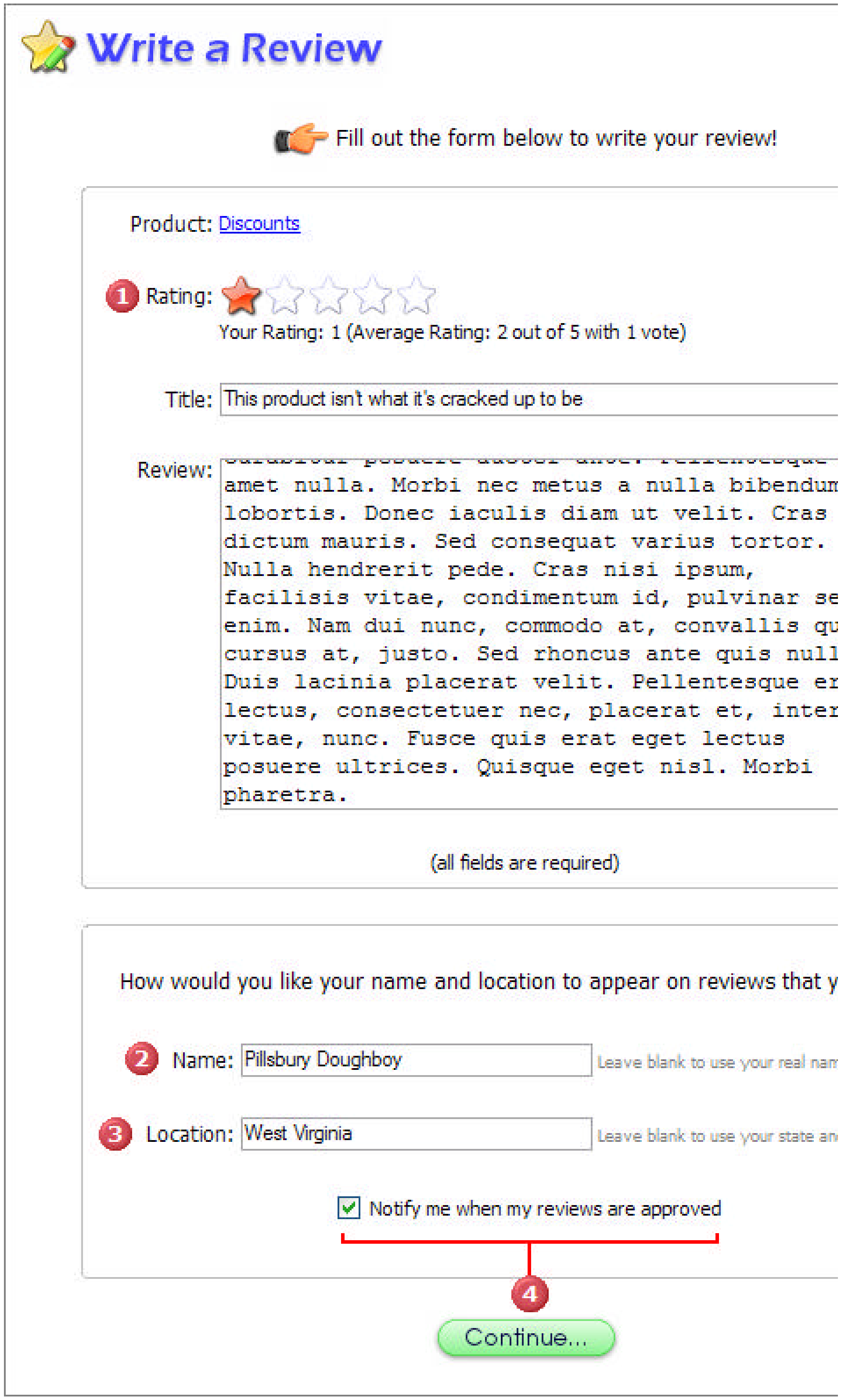
Process

Your customer must click the 

button to start the review process. For products that do not have any reviews, they can also click the blank star rater under your product thumbnails:

If the customer is not logged in, they will be presented with the **account choice (Section 9.3.17.3.13)** form, where they can either create a new account, or login with an existing account.

After they login, they will be presented with the write review form



1. This is the field used to rate this item from 1 to 5. When your customer first sees the form, this will show the product's average rating. When they click to choose their own rating the field changes to indicate their selection.

2. This is the name that will appear on the review. Some customers may not want their real name shown on the internet, and can enter a pseudonym via this field. If moderation is enabled, approving the review will also approve this information. Changing this field on a review will update the reviewer's name on all reviews they have previously written.

3. This is the location of the user. This is provided to give the customer the option of not sharing their personal information. They can enter their location however they like, just a city, a nickname for a city, just a country, etc... If moderation is enabled, approving the review will also approve this information. Changing this field on a review will update the reviewer's location on all reviews they have previously written.

4. This field only appears when moderation is enabled. It allows the customer to indicate that they would like to receive an email when their review has been approved. This happens automatically when a review is given an approved status by a moderator.

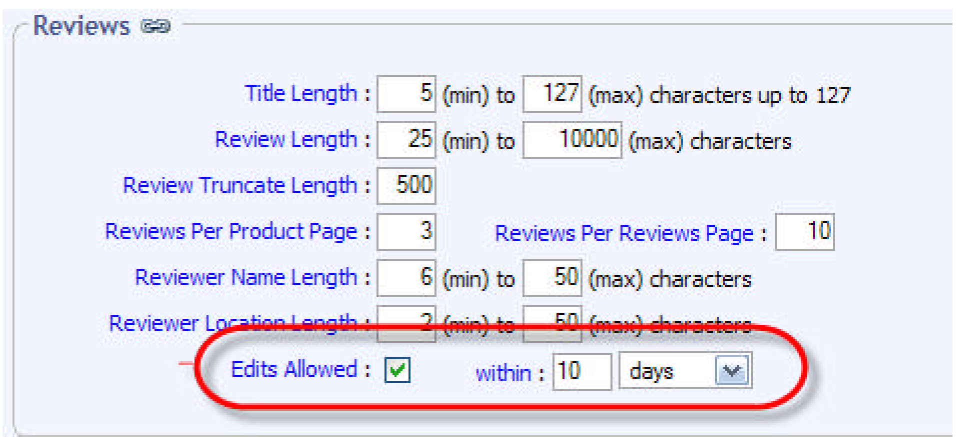
After the customer fills out the form and clicks the **Continue** button, their review will be added to your database. If moderation is disabled, the review will appear immediately in the storefront. If moderation is enabled, the review will appear only after you **mark the review as approved ({71DD4A0A-124C-4FEB-9B89-B8B808481002})**.

> You can enable human verifcation for this form via the instructions on the **Human Verification page (Section 8.4)**.

10.10.1.3 Editing Reviews

Overview

After a customer has submitted a review, they may edit that review if you have **Edits Allowed** checked on your review settings page in your control panel.

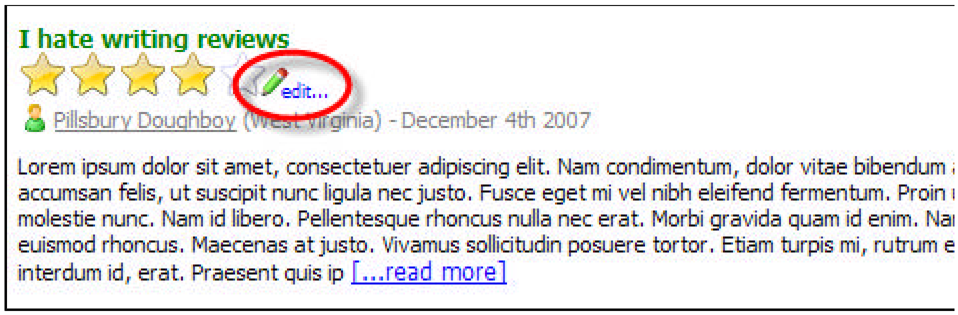


If the review was written within the amount of time specified after the **within** field shown above, your customer will be able to modify their review. If that time has past, they will not.

How to Edit a Review

> This explains how a customer can edit their own review. To learn how a merchant can edit a customer's review, see the **Modules > Reviews > Control Panel > Editing a Review (Section 10.10.2.4)** topic.

In order for a customer to edit a review, they must click the **edit...** link shown on the review they wish to edit:



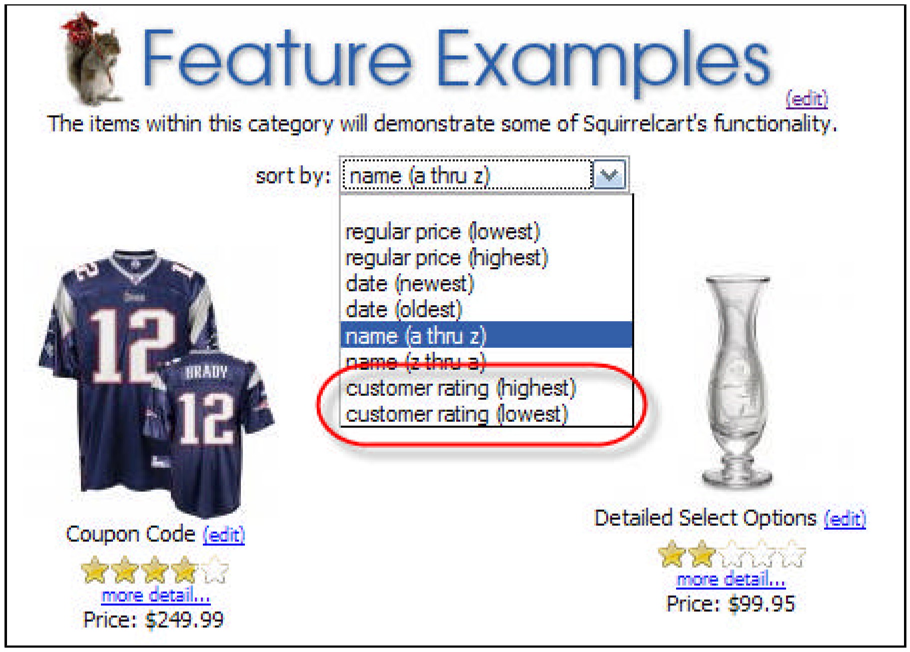
Reviews are edited using **the same form used to write them (Section 10.10.1.2)**.

If you have moderation enabled, the review status will be set back to "pending" for you to approve the changes.

10.10.1.4 Sorting Products by Rating

Sorting Products by Rating

If you have the **Customers Can Sort** field on your **Visual Settings (Section 6.2)** page enabled, your customers can sort products by their ratings when viewing a category:

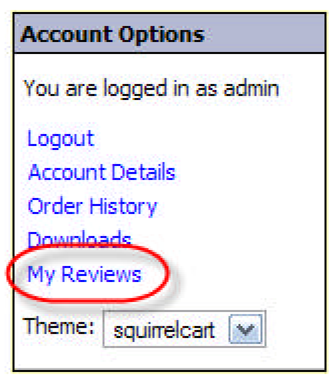


If a product does not have a rating, when sorting by "customer rating (highest)", those products will appear at the end of the list. When sorting by "customer rating (lowest)", they will appear first.

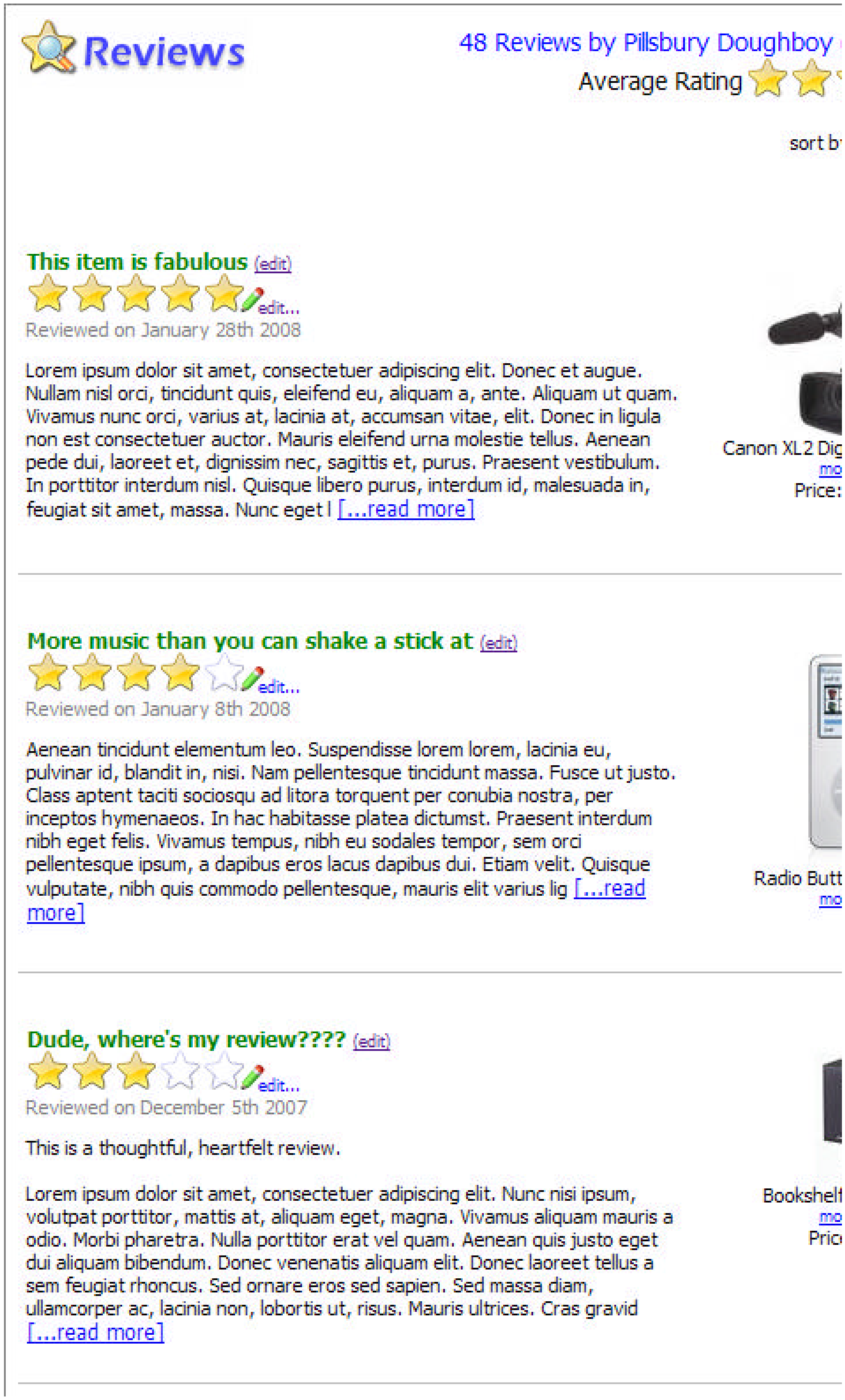
10.10.1.5 My Reviews

Overview

Customers that have submitted reviews will see a **My Reviews** link in the **Account Options** navigation block after logging in:



Clicking that link will open a page showing all of their reviews:



10.10.2 Control Panel

10.10.2.1 Moderation

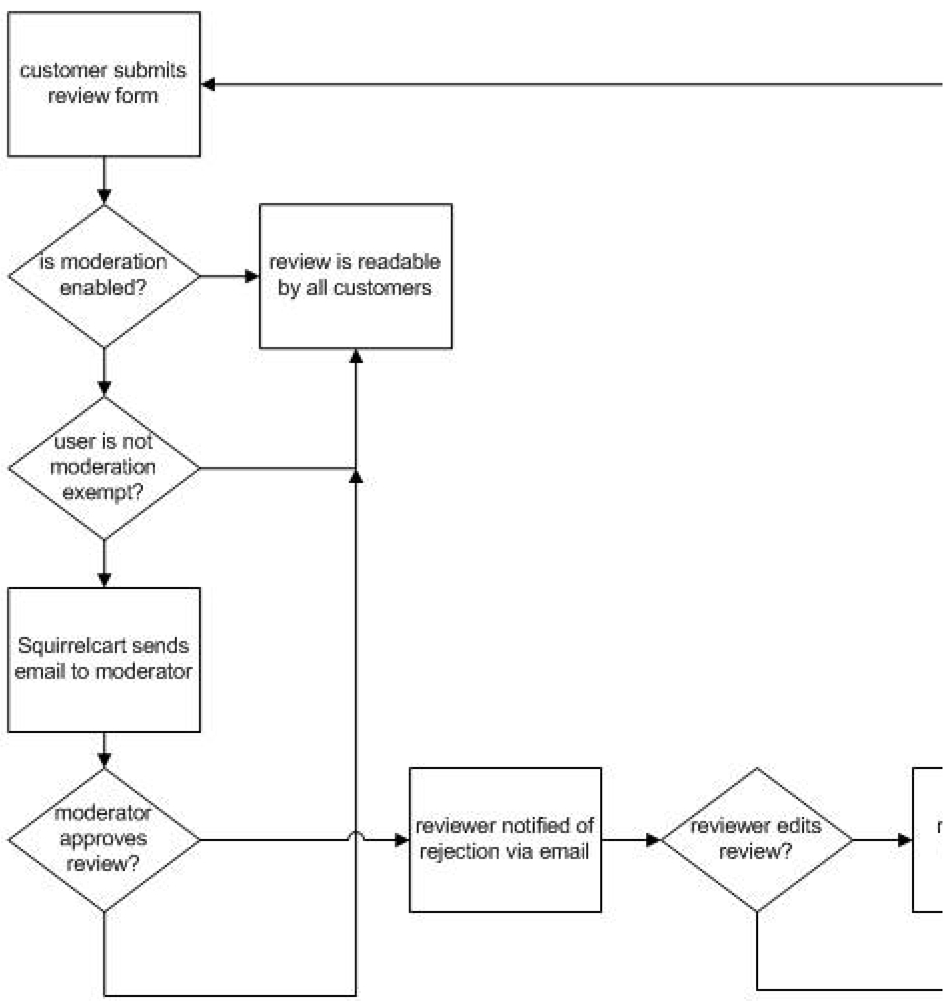
10.10.2.1.1 Review Moderation - Overview

Overview

Squirrelcart allows you to moderate reviews before they can be seen in your storefront. This allows you to read through a review to ensure it does not contain profanity, or objectionable content. While we do recommend moderating all reviews, we do not recommend moderating reviews for the sole purpose of not allowing negative reviews to be submitted.

Moderation Process

The diagram below explains how the moderation process works. All boxes shaped like diamonds are decision points. The areas pointing straight down from those boxes indicate a **yes** decision. Arrows pointing to the right from those boxes indicate a **no** decision.



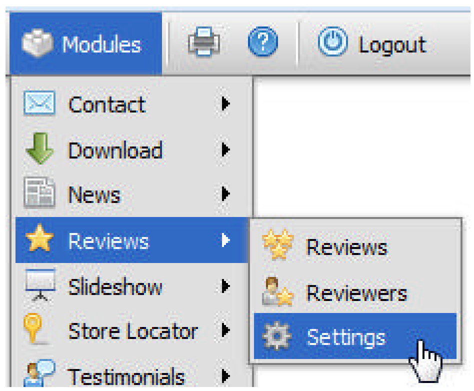
10.10.2.1.2 Enabling and Disabling Review Moderation

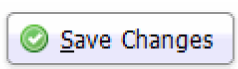
Overview

Moderation is enabled by default. The process for enabling and disabling moderation is the same.

Instructions

1. Login to your control panel
2. Click the review settings menu link



3. To enable moderation, make sure the **Moderation** field is checked. To disable moderation, uncheck the same field.
4. Click 

There are settings on your Review Settings page specific to moderation. Those settings are discussed in the "**Modules > Reviews > Control Panel > Settings (Section 10.10.2.2)**" topic.

10.10.2.1.3 Designating Moderators

Overview

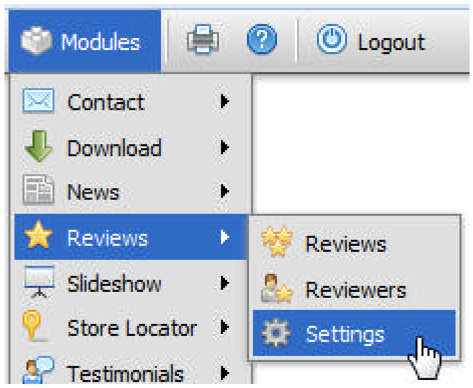
In Squirrelcart, designating someone as a "Moderator" will cause pending review emails to be sent to them. It will not provide any special access to that person. For this reason, moderators should also be placed in the **Store Admin** group if they are not already a member.

Designating Moderators

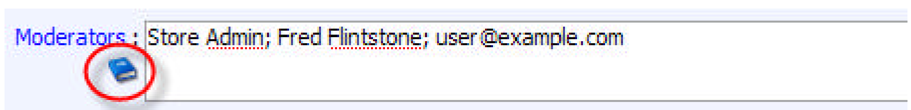
By default, all members of the **Store Admin** group are automatically moderators. You should only need to follow this process if you want to add additional moderators, or remove existing ones.

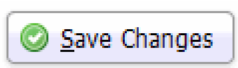
1. Login to your control panel

2. Open the Review Settings page:



3. Enter groups, individual customers, or email addresses to the **Moderators** field:



4. Click 

10.10.2.1.4 How to Moderate Reviews

Overview

This page explains how to moderate a review. For an overview of how the entire moderation process works, see the "**Modules >Reviews > Control Panel > Moderation ({71DD4A0A-124C-4FEB-9B89-B8B808481002})**" topic.

Review Status

Each review record has a status field which can be set (in various ways) to one of the 3 following values:

approved: A review with this status will be viewable in your storefront by all customers

pending: A review with this status will only be viewable in your storefront by the reviewer, and by store admins

rejected: A review with this status will not be viewable in your storefront by anyone

The process of moderation involves setting this field. There are a few ways to do so outlined below.

How to Moderate Reviews via Email

If **moderation is enabled (Section 10.10.2.1.2)** in your control panel, a pending review email will be sent to all **moderators (Section 10.10.2.1.3)** (everyone in the **Store Admin** group by default). At the bottom of that email you will find a yellow box with 3 moderation options:

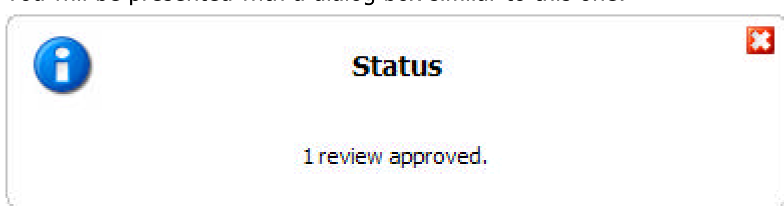
Approving a Review via Email

1. To approve a review, click the **[approve]** moderation link in the pending review email.

2. If you are not logged in as a store admin, you will be prompted to do so.

   > If you login with the **remember me** option checked, you will not be prompted to login the next time you moderate a review.

3. You will be presented with a dialog box similar to this one:



4. If you have the **Email Moderation** field on your **Review Settings page (Section 10.10.2.2)** enabled and the customer chose to be notified of the status of their review, they will receive an email indicating that the review has been approved.

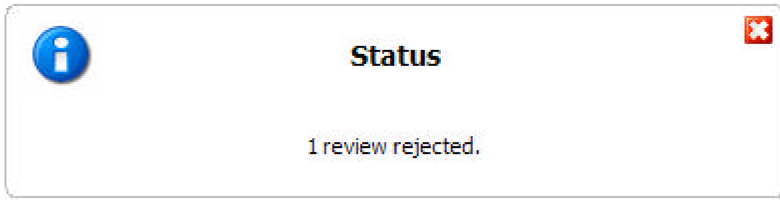
Rejecting a Review via Email

1. To reject a review, click the **[reject]** moderation link in the pending review email.

2. If you are not logged in as a store admin, you will be prompted to do so.

   > If you login with the **remember me** option checked, you will not be prompted to login the next time you moderate a review.

3. You will be presented with a dialog box similar to this one:

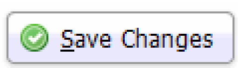


4. If you have the **Email Moderation** field on your **Review Settings page (Section 10.10.2.2)** enabled and the customer chose to be notified of the status of their review, they will receive an email indicating that the review has been rejected.

Edit/Reply to a Review via Email

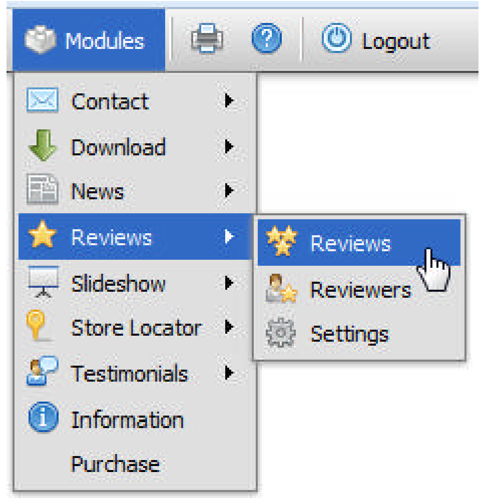
The **[edit/reply]** option is discussed in detail in the topic "**Modules > Reviews > Control Panel > Editing a Review (Section 10.10.2.4)**", under the **Method 2** heading.

How to Moderate a Single Review in Your Control Panel

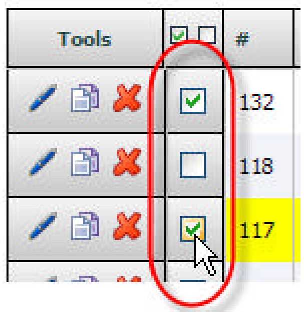
1. **Open the review record (Section 10.10.2.4)** you wish to moderate in your control panel
2. Change the **status** field
3. If you wish to send a note to the reviewer, enter one in the **Note to Reviewer** field
4. Click 

How to Moderate Mutliple Reviews in Your Control Panel

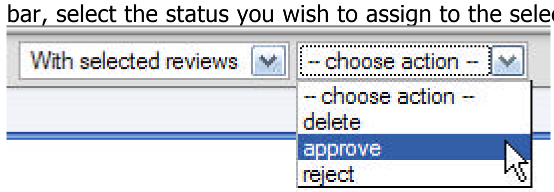
1. Open the reviews table in your control panel



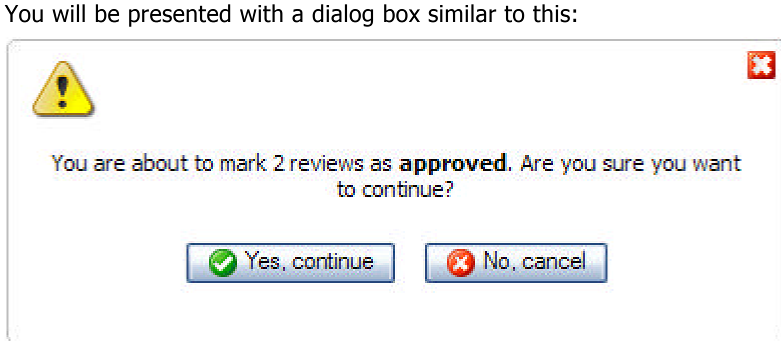
2. Select the reviews you wish to moderate using the checkboxes in the selection column



3. Using the record action fields in the bottom left hand corner of Squirrelcart's status bar, select the status you wish to assign to the selected reviews.

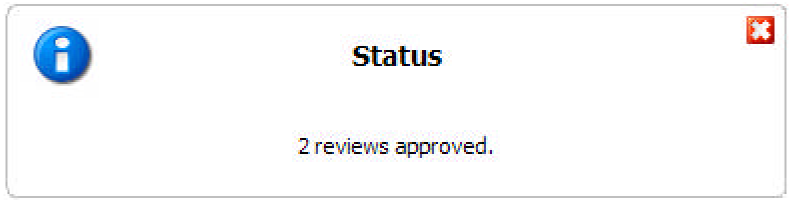


4. You will be presented with a dialog box similar to this:



5. Click the button labeled **Yes, continue**

6. The reviews will be updated and you will see a dialog box similar to this:



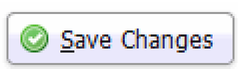
7. If you have the **Email Moderation** field on your **Review Settings page (Section 10.10.2.2)** enabled and the customers chose to be notified of the status of their reviews, they will receive an email indicating the moderation status change.

10.10.2.1.5 Exempting Reviewers

Overview

You can exempt reviewers from moderation. Doing so will cause all reviews written by that reviewer to be automatically marked as "approved". You may want to do this for certain reviewers that have shown a history of writing reviews that do not contain objectional material.

How to Exempt Reviewers from Moderation

1. **Open the reviewer record (Section 10.10.2.6)** for the reviewer you wish to exempt from moderation
2. Check the **Moderation Exempt** field in the **Reviewer Settings** section
3. Click 

10.10.2.1.6 Banning Reviewers

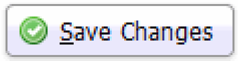
Overview

Banning reviewers will prevent them from writing new reviews, and will cause all their past reviews to not appear in your storefront.

How to Ban Reviewers

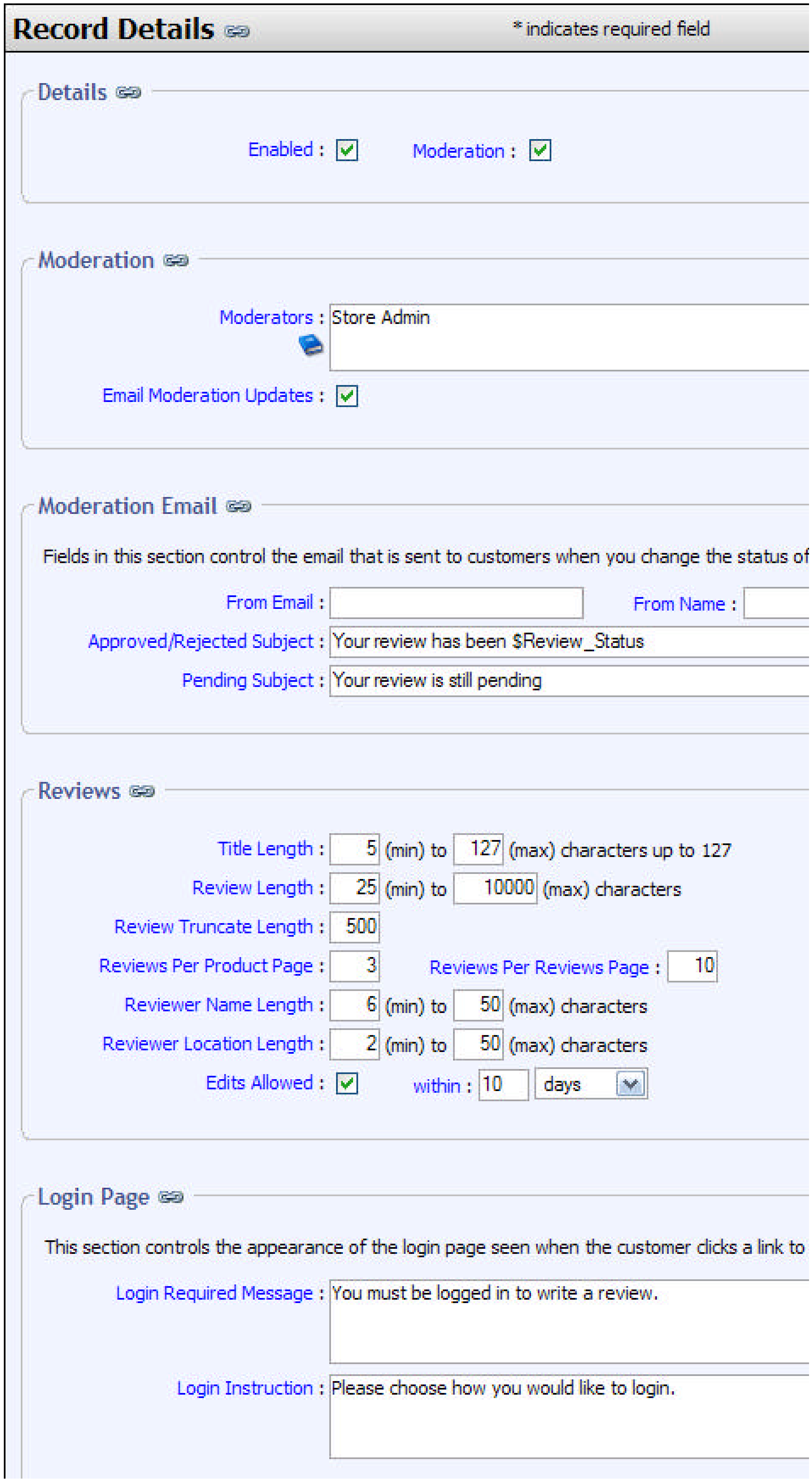
1. **Open the reviewer record (Section 10.10.2.6)** for the reviewer you wish to ban

2. Check the **Banned** field in the **Reviewer Settings** section

3. Click 

10.10.2.2 Reviews - Settings

Overview


Record Details
* indicates required field
Details
Enabled :
Moderation :
Moderation
Moderators :
Store Admin
Email Moderation Updates :
Moderation Email
Fields in this section control the email that is sent to customers when you change the status of
From Email :
From Name :
Approved/Rejected Subject :
Your review has been $Review_Status
Pending Subject :
Your review is still pending
Reviews
Title Length : 5 (min) to 127 (max) characters up to 127
Review Length : 25 (min) to 10000 (max) characters
Review Truncate Length : 500
Reviews Per Product Page : 3
Reviews Per Reviews Page : 10
Reviewer Name Length : 6 (min) to 50 (max) characters
Reviewer Location Length : 2 (min) to 50 (max) characters
Edits Allowed :
within : 10 days
Login Page
This section controls the appearance of the login page seen when the customer clicks a link to
Login Required Message :
You must be logged in to write a review.
Login Instruction :
Please choose how you would like to login.

Details

Enabled: enables or disables the review module

Moderation: turns the **Moderation feature ({71DD4A0A-124C-4FEB-9B89-B8B808481002})** on and off

Moderation

Moderators: any group, customer account, or email address added to this field will receive moderatin emails. This is discussed in more detail in the "**Modules > Reviews > Control Panel > Moderation > Designating Moderators (Section 10.10.2.1.3)**" topic.

Email Moderation Updates: when checked, emails will be sent to reviewers when the status of one of their reviews is changed

Moderation Email

This section controls the email sent to customers when **Email Moderation Updates** is enabled.

From Email: This is the email address that moderation emails sent to reviewers will come from. If left blank, the store default is used.

From Name: This is the name shown as the sender of moderation emails. If left blank, the store default is used.

Approved/Rejected Subject: This is the subject line for emails sent to reviewers when their review is approved or rejected. The status can be added to the subject using the **$Review_Status** variable as shown in the image above.

Pending Subject: This is the subject line for emails sent to reviewers when their review is pending moderation.

Reviews

Title Length: minimum and maximum number of characters allowed for a review title

Review Length: minimum and maximum number of characters allowed for a review

Review Truncate Length: number of characters in a review shown when viewing a preview of that review

Reviews Per Product Page: number of reviews shown on a single page when viewing a product's detail page

Reviews Per Reviews Page: number of reviews to show per product reviews page, seen when you click the link on a product to read all reviews.

Reviewer Name Length: minimum and maximum length for reviewer name in # of characters. Cannot exceed 255 characters.

Reviewer Location Length: minimum and maximum length for reviewer location in # of characters. Cannot exceed 255 characters.

Edits Allows: Check this field to allow customers to edit their reviews. A **within** field will appear to the right to allow you to specify how long from it's creation date you will allow a reviewer to edit their review.

Login Page

Login Required Message: message that appears at the top of the login page, explaining why they are being asked to login.

Login Instruction: instruction telling the customer what to do on the login page.

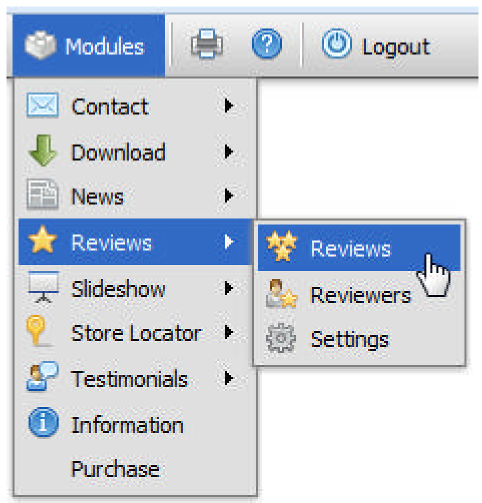
10.10.2.3 Viewing Reviews

Overview

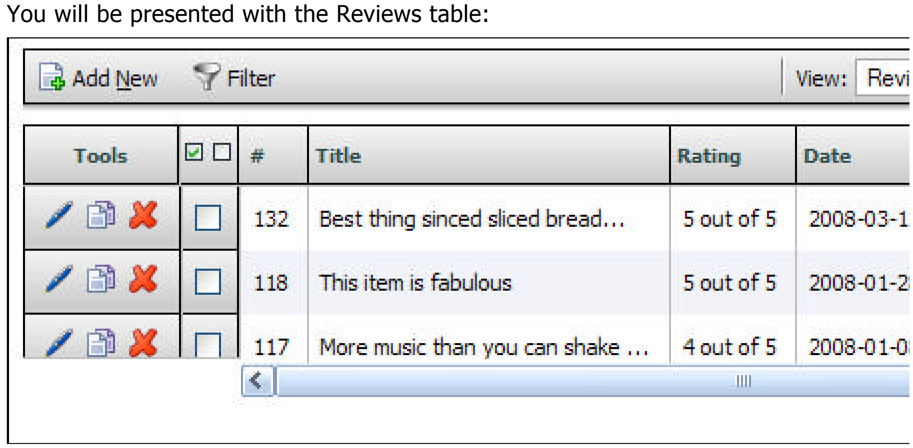
Reviews can be seen in your control panel as follows:

1. Login as store admin

2. In your control panel, click the Reviews link:



3. You will be presented with the Reviews table:



10.10.2.4 Editing a Review

Overview

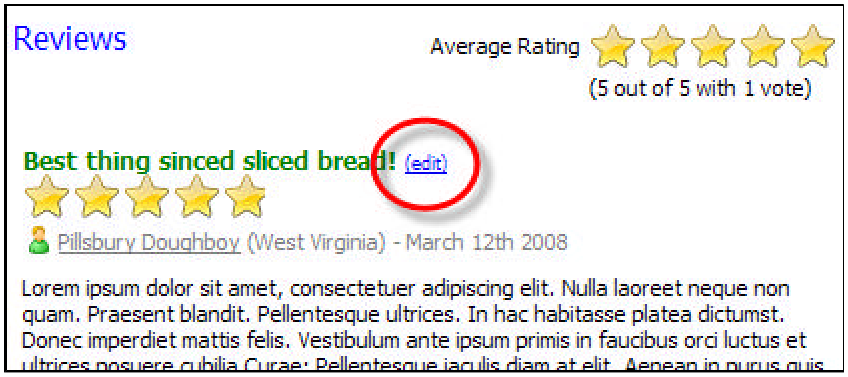
If you need to edit a customer's review (to correct typos, etc...), you can do so in your control panel.

Instructions

There are 3 ways to open a review for editing. All of them require that you first login as store admin.

Method 1

Click the **(edit)** link to the right of the review's title in your storefront:

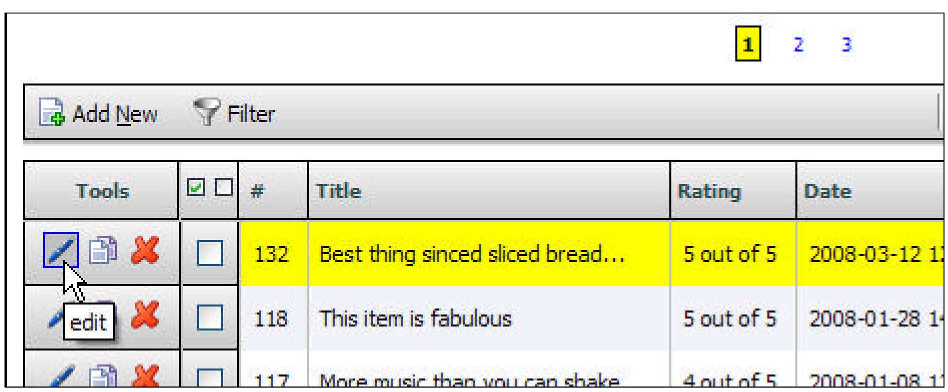


Method 2

If moderation is enabled, you will receive an email when a review is submitted. Clicking the **[edit/reply]** link will open a review in edit mode:

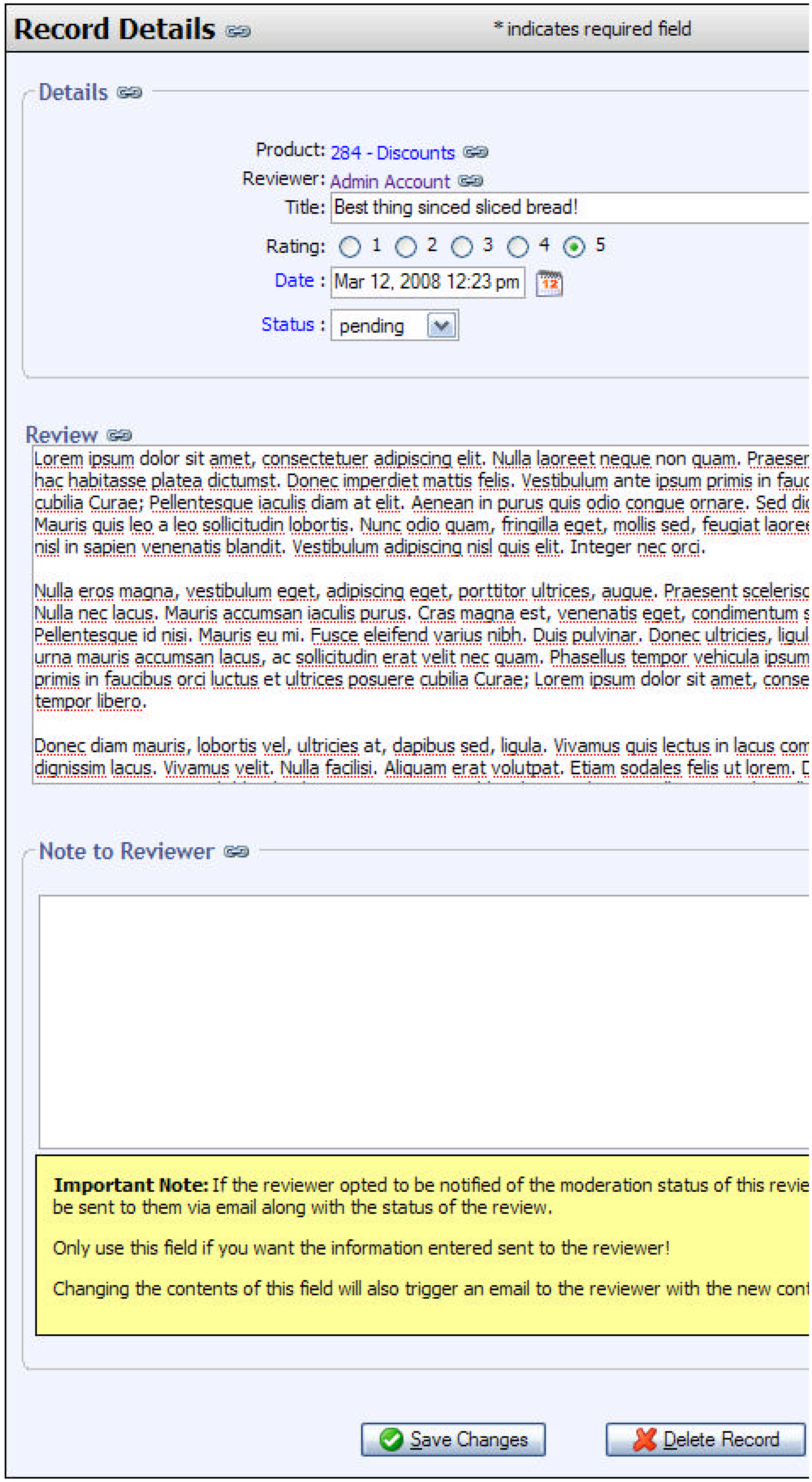
Method 3

Clicking anywhere on a review record's row, or on the pen icon at the beginning of it's row in your control panel will open a review in edit mode:



Record Overview

Once the review record is opened in edit mode, the record will look something like the image below.


Record Details
* indicates required field
Details
Product: 284 - Discounts
Reviewer: Admin Account
Title: Best thing sinced sliced bread!
Rating: 1 2 3 4 5
Date : Mar 12, 2008 12:23 pm
Status : pending
Review
Note to Reviewer
Important Note: If the reviewer opted to be notified of the moderation status of this revie
be sent to them via email along with the status of the review.
Only use this field if you want the information entered sent to the reviewer!
Changing the contents of this field will also trigger an email to the reviewer with the new cont
Save Changes
Delete Record

Field are as follows:

Product: The product that was reviews. Click the link to edit that product.

Reviewer: Link to the reviewer that submitted the review

Title: Review title

Rating: Rating given by reviewer

Date: Date that review was submitted

Status: Moderation status of the revew. For more information on moderation, see the **Moderation topic ({71DD4A0A-124C-4FEB-9B89-B8B808481002})** in this section.

Review: Full text of review entered by customer

Note to Reviewer: Anything entered in this field will be sent to the reviewer. This can be used to send a note regarding the moderation status of the review to the reviewer.

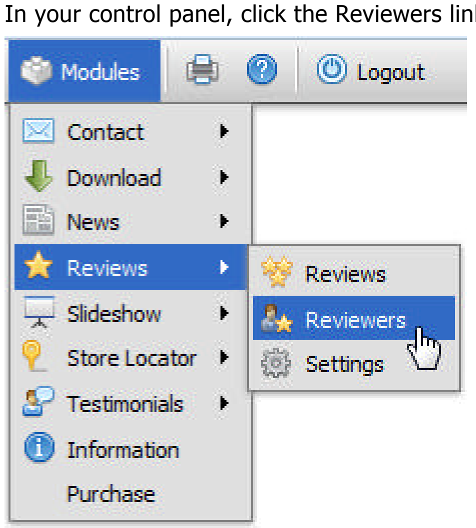
10.10.2.5 Viewing Reviewers

Overview

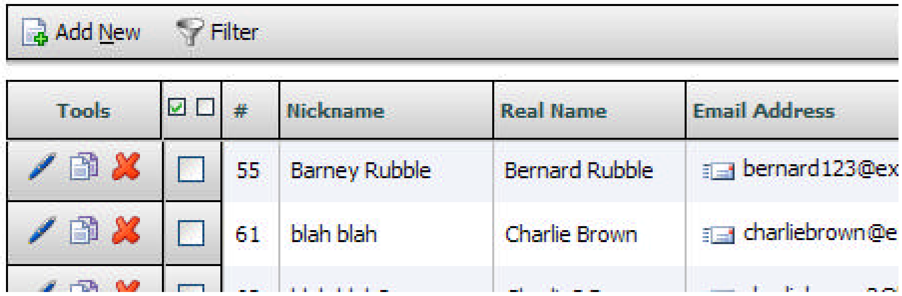
Reviewers can be seen in your control panel as follows:

1. Login as store admin

2. In your control panel, click the Reviewers link:



3. You will be presented with the Reviewers table:

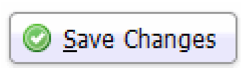


10.10.2.6 Editing a Reviewer

Overview

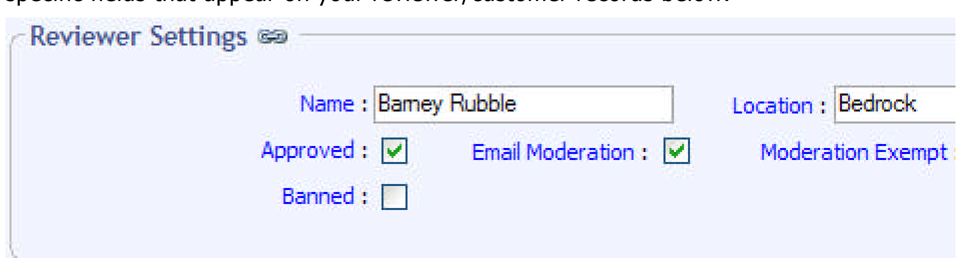
Reviewer records are also Customer records. You can open a reviewer record by clicking on any customer record in your control panel, or by clicking on a reviewer record in the **Reviewers table (Section 10.10.2.5)**.

Instructions

1. Follow the instructions in the **Viewing Reviewers (Section 10.10.2.5)** topic to open the Reviewers table
2. Click anywhere on a reviewers row, or on the pen icon at the beginning of that row to edit a reviewer record
3. Make changes to the form, and click the  button.

Record Overview

Because a reviewer record is in fact a customer record, we will only cover the reviewer specific fields that appear on your reviewer/customer records below.



Name: This is the name specified by the reviewer. This does not have to match their real name.

Location: This is the location specified by the reviewer, and does not have to match their actual location.

Approved: When moderation is enabled, checking this field will mark this reviewer as approved. This in essence is approving their "Name" and "Location"

Email Moderation: When this is checked and moderation is enabled, the customer will receive an email notice when the moderation status of their review changes.

Moderation Exempt: When moderation is enabled, checking this will make this customer exempt from moderation. All reviews submitted by them will automatically be approved.

Banned: Check this to ban a reviewer from submitting reviews. This will also hide their previously submitted reviews.

10.11 Store Locator

10.11.1 Store Locator - Overview

Overview

The purpose of Squirrelcart's Store Locator module is to allow your customers to easily locate retail store locations near them. They can search by zip code, or by state. When searching by zip code, matches will include an approximate distance between the customer and the locations that match their search.

The Store Locator module provides a highly configurable store locator page, and control panel features to customize the way the locator page appears.

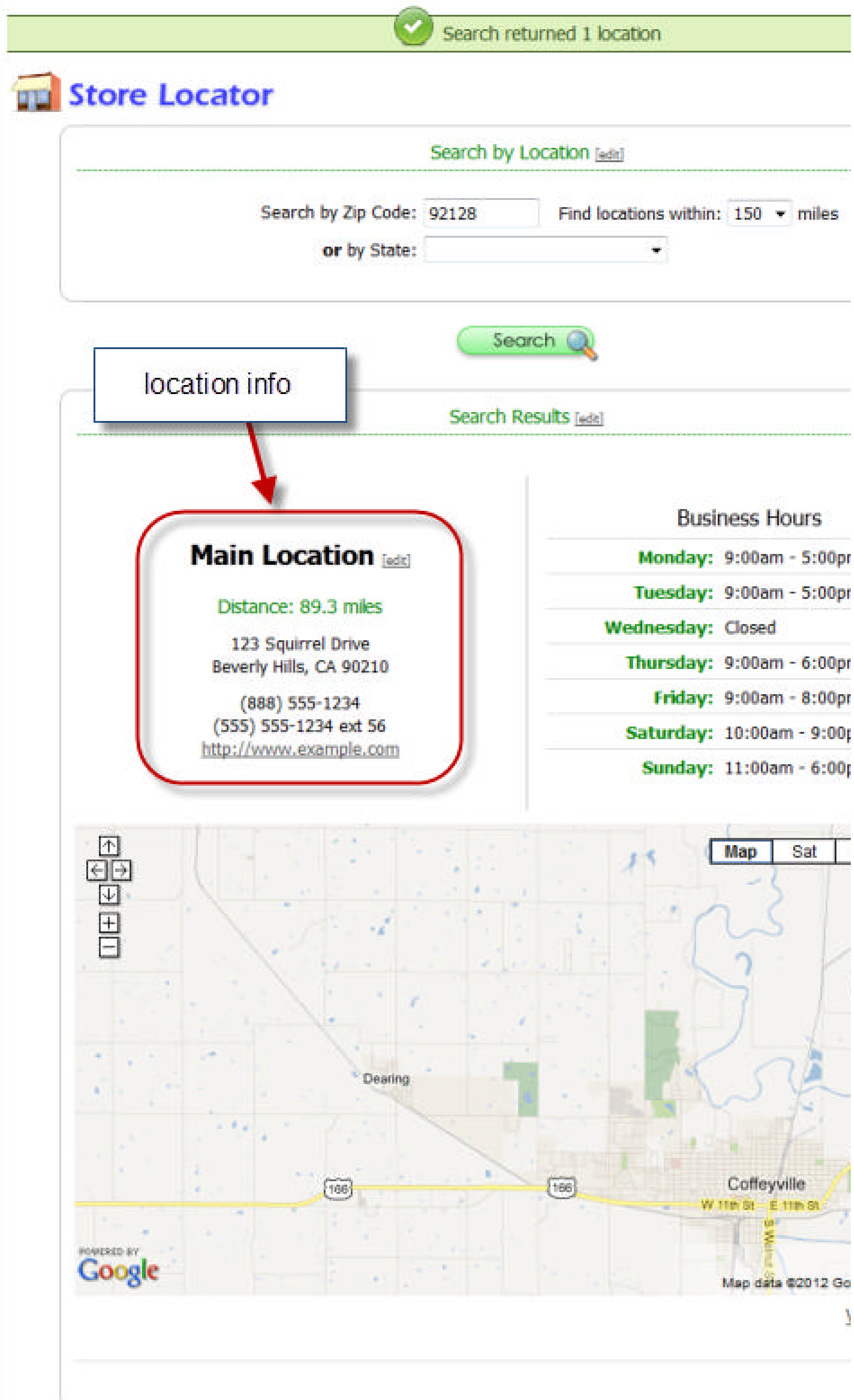
> **Please note:** the Store Locator module is currently only available to merchants in the United States. If you are interested in a version for use in another country, please contact us.
>
> The Store Locator module is sold separately. See **our pricing page (http://www.squirrelcart.com/pricing.php)** to order.

Some of the features include:

- Search by zip code or by state
- Approximate distance is returned when searching by zip code
- Store hours can be displayed with results if enabled
- Google maps can be displayed with results if enabled
- Location phone number(s) can be displayed if enabled
- Control the store locator page header and footer

- Control the form field labels and instructions
- Uses the built in retail store locations already present in your Squirrelcart database

Store Locator Page Breakdown


Search returned 1 location
Store Locator
Search by Location [edit]
Search by Zip Code: 92128
Find locations within: 150 miles
or by State:
Search
location info
Search Results [edit]
Main Location [edit]
Distance: 89.3 miles
123 Squirrel Drive
Beverly Hills, CA 90210
(888) 555-1234
(555) 555-1234 ext 56
http://www.example.com
Business Hours
Monday: 9:00am - 5:00pr
Tuesday: 9:00am - 5:00pr
Wednesday: Closed
Thursday: 9:00am - 6:00pr
Friday: 9:00am - 8:00pr
Saturday: 10:00am - 9:00
Sunday: 11:00am - 6:00
Map
Sat
Dearing
Coffeyville
166
POWERED BY Google
Map data ©2012 Go

10.11.2 Store Locator - Viewing and Linking To

Overview

This page explains how to view your store locator page. It also explains how to link to your store locator page from your storefront page.

URL to your Store Locator Page

Squirrelcart has built in features to link to your store locator page, which are described in the sections below. If you prefer to have the URL so you can link to that page yourself, the default query string URL is:

```
http://www.example.com/store.php?sl=1
```

If you are using our **SEO URLs feature (Section 6.12.3)**, the default URL is:

```
http://www.example.com/store.php/store-locator
```

If you are using our **SEO URLs (Advanced) feature (Section 6.12.3)** to hide your storefront page from URLs, the URL is:

```
http://www.example.com/store-locator
```

Linking to Your Store Locator Page

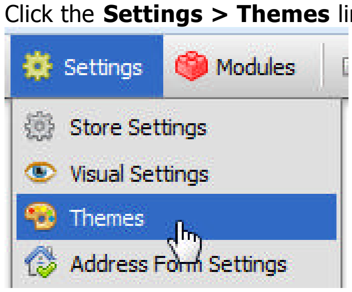
If you do not already have a link to your store locator page, you will need to add one in the control panel.

Adding a Link to Your Store Locator Page

You can add a link to your store locator page using Squirrelcart's Links feature. For more information on this feature, please see the **Customizing > Themes > Links** section of this documentation.

Adding a link to your storefront page is a two part process. First, you must create the Link record to define the link itself. Then, you must add that link to your storefront page.

1. Click the **Settings > Themes** link in your control panel:



2. Click the **Links** link. A table will appear showing all the Link records in your database.

3. You may already have a *Store Locator* Links record in the table. If you see one, click anywhere on it's row to edit it. If you do not see one, click the Add New button to open a new record.

4. Set the **Name** field to **Store Locator**

5. If you want the label to read something other than **Store Locator**, enter a different value in the **Label** field, otherwise leave that field blank.

6. Set the **Link To** field to **store locator page**

7. Click the Save Changes button.

8. Now that you have created the link record for your store locator page, you will need to add it to your storefront page. **This topic (Section 9.3.11.3)** explains how to do this.

> If you have trouble getting your store locator page link to appear, **contact our support department (http://www.squirrelcart.com/support.php)** and we can assist you.

10.11.3 Store Locator - Configuration

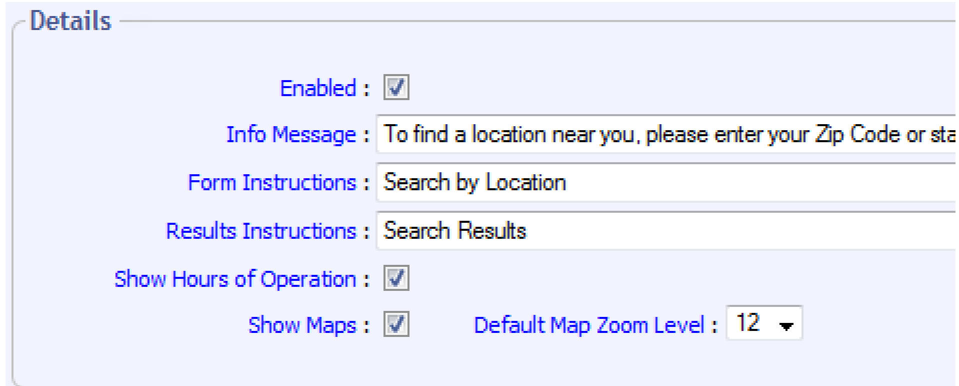
Overview

The store locator page provided by Squirrelcart's store locator module is highly configurable via your control panel. To adjust your settings, click the **Modules > Store Locator > Settings** link in your control panel.

Use the guide below when configuring your store locator page.

> As with many features of Squirrelcart, if you are logged in as store admin you will find [edit] links next to some elements of your store locator page. Clicking those links will take you to the record that controls that element for quick editing.

Details



Enabled

This field is used to enable or disable this module. If you suspect a problem or need to take the module offline for any reason, uncheck this field.

Info Message

This text appears at the top of your store locator page, in an info message box.

Form Instructions

This appears above the form to instruct the customer.

Results Instruction

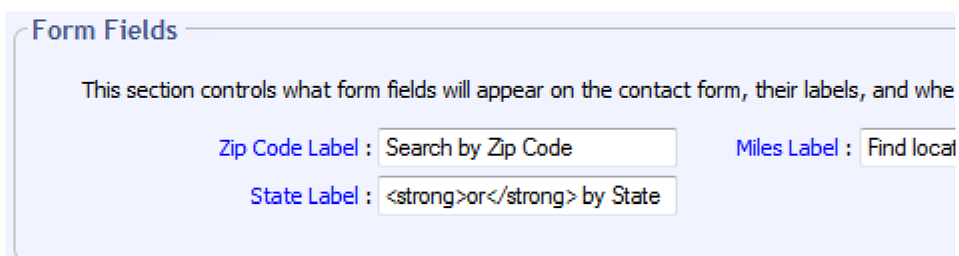
This appers directly above the results, after a search is performed.

Show Hours of Operation
When checked, hours of operation will appear for your locations if they are entered on their respective Location records.

Show Maps
When checked, a Google map will appear for your retail store locations that have valid address information assigned to them.

Default Map Zoom Level
When **Show Maps** is enabled, this field controls the default zoom level of the map. The lower the number, the further out the zoom level is.

Form Fields



This fieldset controls the labels for the fields on your store locator form.

Page Header and Page Footer

These rich text fields allow you to add optional header and footer text to the top and bottom of the store locator page.

Search Engine Settings

This section works just like our other search engine settings for products, categories, links, etc...

Title

This is used for the contact page's <title /> tag, and title meta tag.

Keywords

This is used for the contact page's keywords meta tag.

Description

This is used for the contact page's description meta tag.

10.11.4 Store Locator - Adding Locations

Adding Locations

Squirrelcart has a built-in Locations feature which allows you to specify locations. The store locator module uses locations that are designated as retail stores.

For information on working with locations, see these topics:

Locations - Overview (Section 6.9.1)

Locations - Creating and Modifying (Section 6.9.2)

10.12 Testimonials

10.12.1 Storefront Features

10.12.1.1 Navigation Block

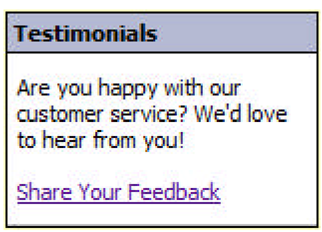
Overview

By default, when the Testimonials module is enabled a Testimonials navigation block will appear in your left navigation.

The appearance of this block is controlled by the template files starting with **testimonials_nav*.**

Clicking the link labeled **see what others are saying...** OR clicking any testimonial speech bubble will take the customer to your **Testimonials Page (Section 10.12.1.2)**.

When no testimonials have been written yet, the block will look like this:



The template file controlling this alternate version of the nav block is **testimonials_nav_empty.tpl.php.** When the customer clicks the link, they will be taken to the **Testimonials Form (Section 10.12.1.3)** to submit a new testimonial.

Settings

Settings to control the Testimonials navigation block can be found on your **Testimonials Settings (Section 10.12.2.2)** page.

Removing Nav Block

To remove this navigation block from your storefront page, follow the instructions in the topic **Customizing > Themes > Navigation > Navigation Blocks > Removing from Navigation (Section 9.3.10.4)**.

If you do remove this nav block, you may want to add your own link to your Testimonials page. The default URL for that page is:

```
http://www.example.com/store.php?testimonials[action]=read
```

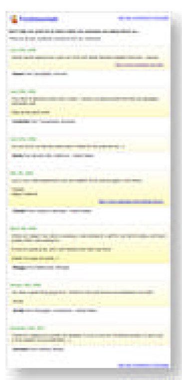
The SEO URL for the same page is:

```
http://www.example.com/store.php/testimonials
```

10.12.1.2 Testimonials Page

Overview

The Testimonials Page shows all approved testimonials from your customers.



Customers may add their own testimonial from this page by clicking the link labeled **add your own comments to this page!**

Templates

testimonials.tpl.php - controls the entire page

testimonial.tpl.php - controls one testimonial on the page

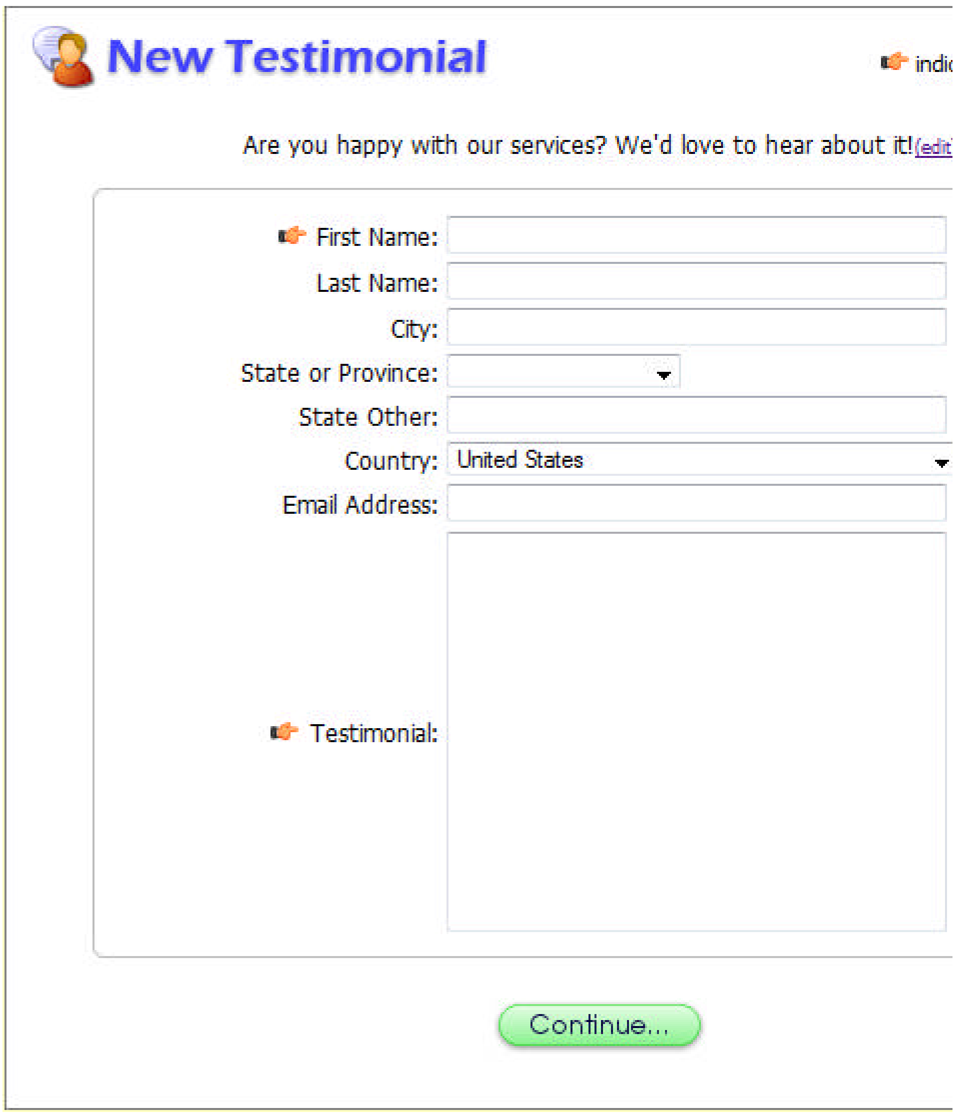
Settings

Settings controlling this page can be found on your Testimonials Settings page, in the field set **Testimonials Page.**

10.12.1.3 Testimonial Form

Overview

The testimonial form is used by your customers to submit new testimonials. This page is reached by clicking the **add your comments to this page** link on the **Testimonials Page (Section 10.12.1.2)**.



If your customer is logged in when they open the Testimonail Form page, most of the fields on the form will be pre-populated with their account information.

You can enable human verifcation for this form via the instructions on the **Human Verification page (Section 8.4)**.

Settings

From your **Testimonials Settings (Section 10.12.2.2)** page, you can control which fields appear on this form, which fields are required, and the header message.

Templates

testimonials_write.tpl.php - controls the apperance of the Testimonials Form page

testimonials_write_thanks.tpl.php - controls the apperance of the thank you page seen after submitting the testimonial form

10.12.2 Control Panel

10.12.2.1 Moderation

10.12.2.1.1 Testimonials - Moderation - Overview

Overview

Squirrelcart allows you to moderate testimonials before they can be seen in your storefront. This allows you to read through a testimonial to ensure it does not contain profanity, or objectionable content.

Moderation Process

Testimonials will not appear on your Testimonials Page until they are marked as approved. When moderation is disabled, Squirrelcart automatically approves testimonials as they are submitted. With moderation enabled (default setting), you must mark them as approved before they will appear in your storefront.

10.12.2.1.2 Enabling and Disabling Testimonial Moderation

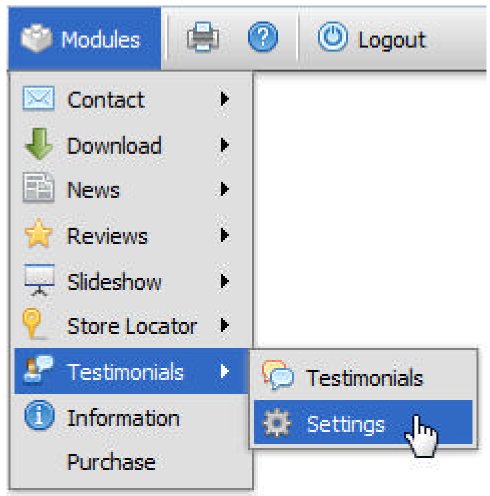
Overview

Moderation is enabled by default. The process for enabling and disabling moderation is the same.

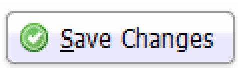
Instructions

1. Login to your control panel

2. Click the testimonial settings menu link



3. To enable moderation, make sure the **Moderation** field is checked. To disable moderation, uncheck the same field.

4. Click 

> There are settings on your Testimonials Settings page specific to moderation. Those settings are discussed in the "**Modules > Testimonials > Control Panel > Settings (Section 10.12.2.2)**" topic.

10.12.2.1.3 Designating Moderators

Overview

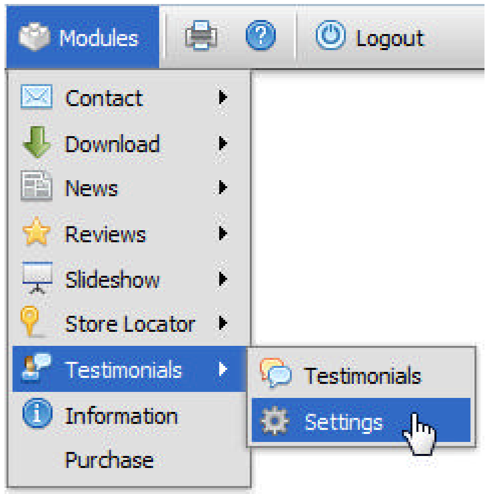
In Squirrelcart, designating someone as a "Moderator" will cause pending testimonial emails to be sent to them. It will not provide any special access to that person. For this reason, moderators should also be placed in the **Store Admin** group if they are not already a member.

Designating Moderators

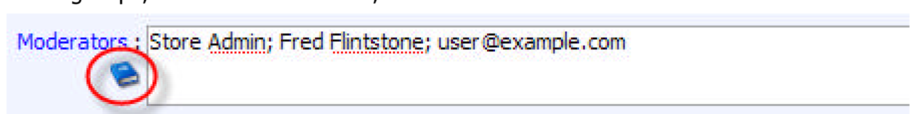
By default, all members of the **Store Admin** group are automatically moderators. You should only need to follow this process if you want to add additional moderators, or remove existing ones.

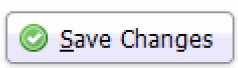
1. Login to your control panel

2. Open the Testimonials Settings page:



3. Enter groups, individual customers, or email addresses to the **Moderators** field:



4. Click 

10.12.2.1.4 How to Moderate Testimonials

Overview

This page explains how to moderate a testimonial. Testimonials will only appear in your storefront when they've been approved.

Testimonial Approval

Each testimonial has an "approved" field which must be checked for the testimonial to be seen in your store.

The process of moderation involves setting this field. There are a few ways to do so outlined below.

How to Moderate Testimonials via Email

If **moderation is enabled (Section 10.12.2.1.2)** in your control panel, a pending testimonial email will be sent to all **moderators (Section 10.12.2.1.3)** (everyone in the **Store Admin** group by default). At the bottom of that email you will find a yellow box with 3 moderation options:

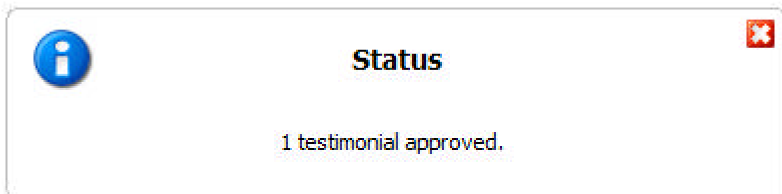
Approving a Testimonial via Email

1. To approve a testimonial, click the **[approve]** moderation link in the pending testimonial email.

2. If you are not logged in as a store admin, you will be prompted to do so.

> If you login with the **remember me** option checked, you will not be prompted to login the next time you moderate a testimonial.

3. You will be presented with a dialog box similar to this one:



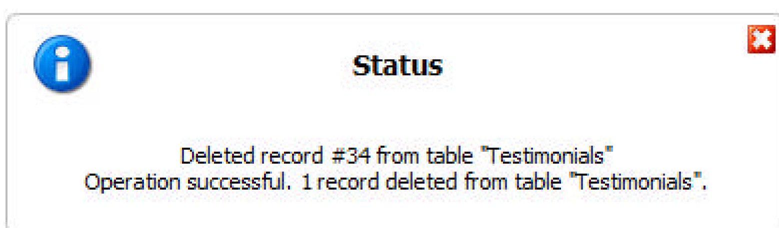
Deleting a Testimonial via Email

1. To delete a testimonial, click the **[delete]** moderation link in the pending testimonial email.

2. If you are not logged in as a store admin, you will be prompted to do so.

> If you login with the **remember me** option checked, you will not be prompted to login the next time you moderate a review.

3. You will be presented with a dialog box similar to this one:



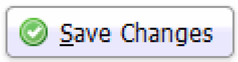
Edit a Testimonial via Email

The **[edit]** option is discussed in detail in the topic "**Modules > Reviews > Control Panel > Editing a Testimonial (Section 10.12.2.4)**", under the **Method 2** heading.

How to Approve a Single Testimonial in Your Control Panel

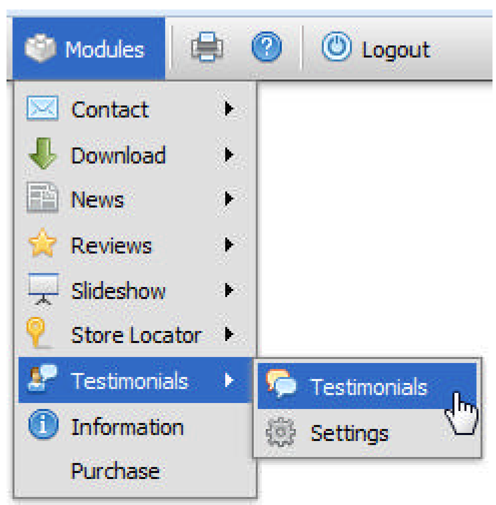
1. **Open the testimonial record (Section 10.12.2.3)** you wish to moderate in your control panel

2. To approve the testimonial, check the **Approved** field

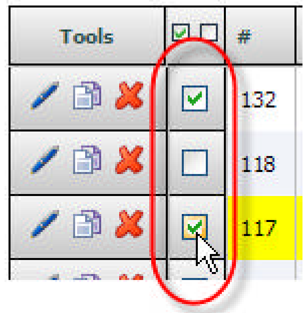
3. Click 

How to Approve Mutliple Testimonials in Your Control Panel

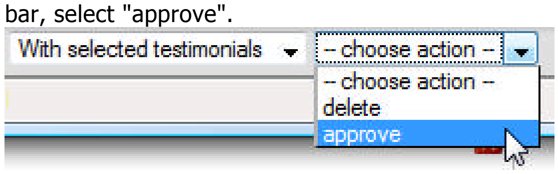
1. Open the testimonials table in your control panel



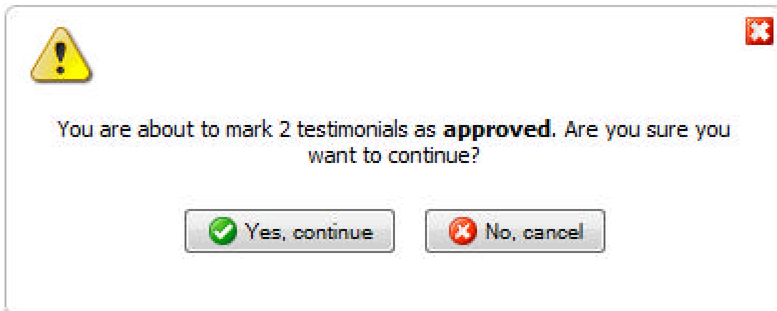
2. Select the testimonials you wish to moderate using the checkboxes in the selection column



3. Using the record action fields in the bottom left hand corner of Squirrelcart's status bar, select "approve".

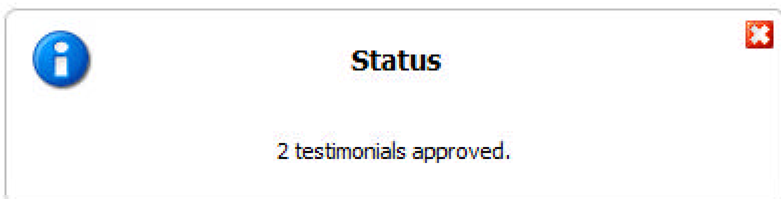


4. You will be presented with a dialog box similar to this:



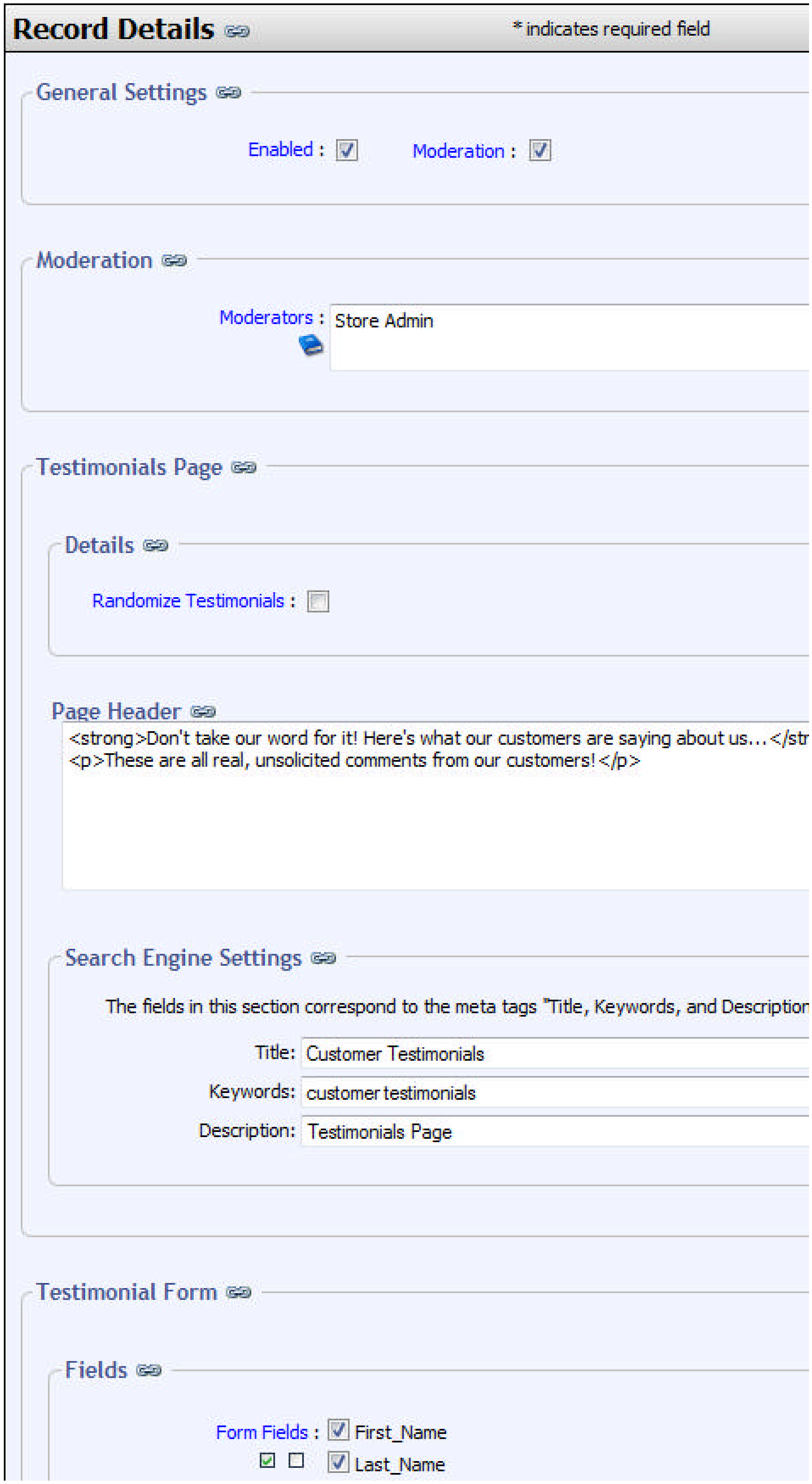
5. Click the button labeled **Yes, continue**

6. The testimonials will be updated and you will see a dialog box similar to this:



10.12.2.2 Testimonials Settings

Overview



Record Details
* indicates required field
General Settings
Enabled :
Moderation :
Moderation
Moderators :
Store Admin
Testimonials Page
Details
Randomize Testimonials :
Page Header
<strong>Don't take our word for it! Here's what our customers are saying about us...</str
<p>These are all real, unsolicited comments from our customers!</p>
Search Engine Settings
The fields in this section correspond to the meta tags "Title, Keywords, and Descriptior
Title: Customer Testimonials
Keywords: customer testimonials
Description: Testimonials Page
Testimonial Form
Fields
Form Fields :
First_Name
Last_Name

General Settings

Enabled: enables or disables the review module

Moderation: turns the **Moderation feature ({71DD4A0A-124C-4FEB-9B89-B8B808481002})** on and off

Moderation

Moderators: any group, customer account, or email address added to this field will receive moderatin emails. This is discussed in more detail in the "**Modules > Reviews > Control Panel > Moderation > Designating Moderators (Section 10.10.2.1.3)**" topic.

Testimonials Page

Details

Randomize Testimonials - check this field to randomize the order of testimonials on your testimonials page. When unchecked, they will be ordered by date, descending (newest first).

Page Header - header message for the top of the page

Search Engine Settings

Search engine settings ({D9A9C711-5FA2-4C27-8404-F203B7D16118}) for the Testimonials Page.

Title

Keywords

Description

Testimonial Form

Fields

Form Fields - controls which fields appear on the testimonial form

Required Form Fields - controls which fields are required in the testimonial form

Page Header - controls what appears at the top of the page

Search Engine Settings

Search engine settings ({D9A9C711-5FA2-4C27-8404-F203B7D16118}) for the Testimonials Form page.

Title

Keywords

Description

Navigation Block

Randomize Testimonials - check this field to randomize the order of testimonials in your testimonials navigation block. When unchecked, they will be ordered by date, descending (newest first).

 # Testimonials - controls the number of testimonials that will appear in the navigation block

 # Chars per Testimonial - controls the number of characters shown for each testimonial before truncated

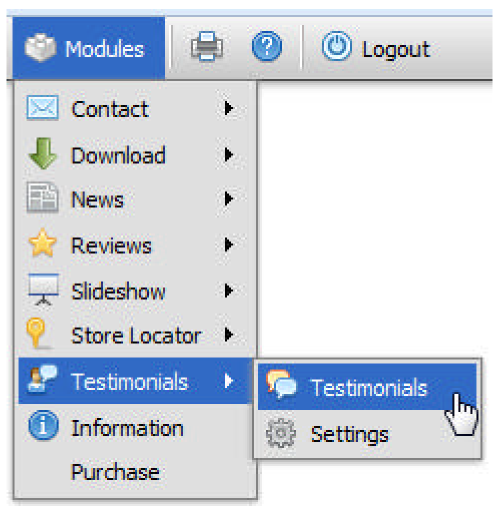
10.12.2.3 Viewing Testimonials

Overview

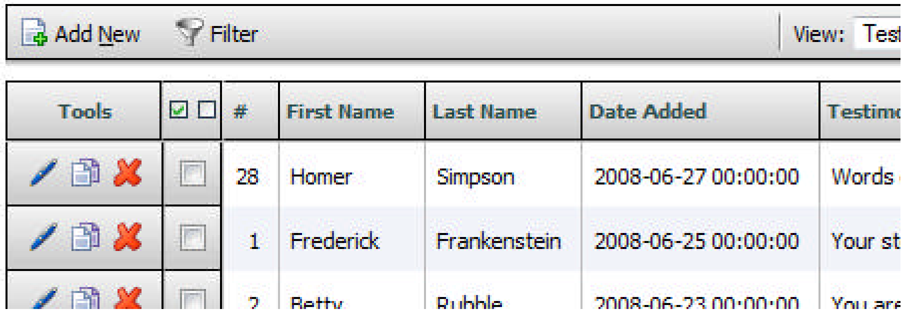
Testimonials can be seen in your control panel as follows:

1. Login as store admin

2. In your control panel, click the Testimonials link:



3. You will be presented with the Testimonials table:



10.12.2.4 Editing a Testimonial

Overview

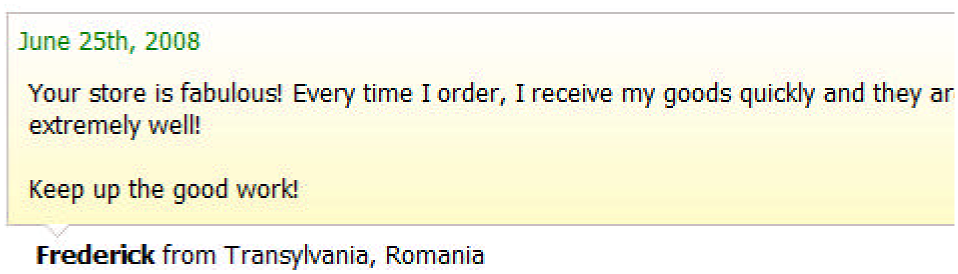
If you need to edit a customer's testimonial (to correct typos, etc...), you can do so in your control panel.

Instructions

There are 3 ways to open a testimonial for editing. All of them require that you first login as store admin.

Method 1

Click the **(edit)** link in the upper right hand corner of the testimonial bubble in your storefront:

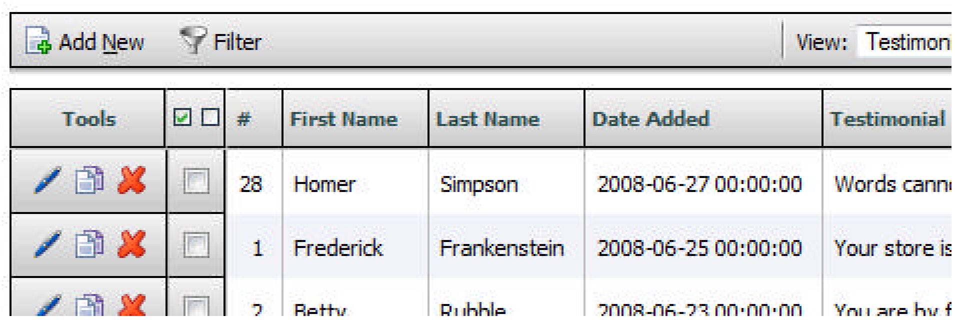


Method 2

If moderation is enabled, you will receive an email when a testimonial is submitted. Clicking the **[edit]** link will open a testimonial in edit mode:

Method 3

Clicking anywhere on a testimonial record's row, or on the pen icon at the beginning of it's row in your control panel will open a testimonial in edit mode:



Record Overview

Once the testimonial record is opened in edit mode, the record will look something like the image below.


Record Details
* indicates required field
Details
Approved :
First Name: Frederick
Last Name: Frankenstein
Company:
Street: 1 Castle Hill
Street 2:
City: Transylvania
State or Province: Other
State Other:
Postal Code: 90210
Country: Romania
Email Address: frederick@example.com
Phone: 555-444-3333
URL:
Date Added: Jun 25, 2008 12:00 am
Testimonial: Your store is fabulous! Every time I order, I receive my go
are packaged extremely well!
Keep up the good work!
Save Changes
Delete Record

11 Third Party Scripts

11.1 Third Party Scripts - Overview

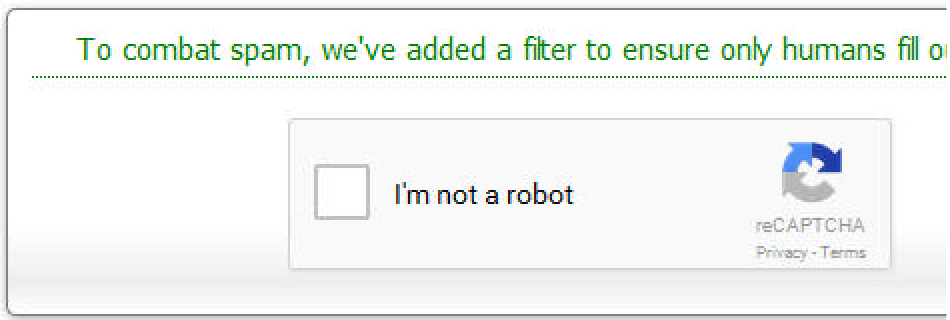
Overview

Squirrelcart has built in support for some popular 3rd party scripts. This section explains those scripts in detail.

11.2 reCaptcha

Overview

reCaptcha is a human verification script created by the original creator of the captcha concept.



It can be used to ensure only humans (instead of spam bots) fill out our forms. For more information on using reCaptcha in Squirrelcart, see the **Human Verification topic (Section 8.4)**.

11.3 UniTip

Overview

Squirrelcart has a tooltip feature to display information related to certain items when you move your mouse over them. We use the UniTip library by UnitInteractive.com for this feature. To read more about this feature, see the **Tooltips topic (Section 7.11)**.

11.4 Magnific Popup

Overview

Magnific Popup is a lightbox script similar to Slimbox and . You can read more about it **here (http://dimsemenov.com/plugins/magnific-popup/)**. It is used to open an image in a popup that is not a separate browser window but instead overlayed on the current page. This provides the benefit of working regardless of popup blocker settings.

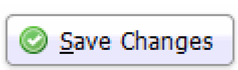
The script also grays out the rest of the page to give emphasis to the popup being viewed.

Squirrelcart uses this feature to display large images, such as when you click a regular product image on a product's page:

Enabling and Disabling

1. Open the **Store Settings (Section 6.1)** page in your control panel

2. To enable, check the **Magnific Popup** field in the **3rd Party Script Support** field set. To disable, uncheck the same field.

3. Click 

Testing

1. Assign an image for the **Image** and **Large Image** fields on a product record.

2. Go to your storefront page, and click on that product to open its detail page

3. Click on the regular size image, which should open the larger image using this feature as shown in the pic above

Using Magnific Popup in Your Own Code

Any link (anchor tag) that links to an image file can be easily converted to open that image using Magnific Popup.

For a Single Image

Code like this will open an image in a regular browser window:

```
<a href="my_image.jpg">click hear to see my image</a>
```

To open that same image via Magnific Popup, add a **rel** attribute set to **lightbox**:

```
<a rel="lightbox" href="my_image.jpg">click hear to see my
image</a>
```

For a Set of Related Images

Slimbox allows you to associate related image links with each other. When one is opened via Magnific Popup, navigation links appear within the Magnific Popup window to move back and forth between all related images. For example, say you have 3 images of cats that you want people to be able to move back and forth between in the same Magnific Popup window:

```
<a href="fluffy.jpg">Fluffy</a>
<a href="mittens.jpg">Mittens</a>
<a href="scratchy.jpg">Scratchy</a>
```

To accomplish this, you just need to come up with a name for the set. In this example, the name will be **cats**. Add a rel attribute to all 3 anchor tags set to **lightbox[cats]**:

```
<a rel="lightbox[cats]" href="fluffy.jpg">Fluffy</a>
<a rel="lightbox[cats]" href="mittens.jpg">Mittens</a>
<a rel="lightbox[cats]" href="scratchy.jpg">Scratchy</a>
```

Magnific Popup will treat all 3 images as a set and allow the viewer to browse back and forth between them.

For Additional Images of a Product

This section won't make sense if you didn't read the examples above. When a product has a regular and a large image specified on its record, Squirrelcart makes the regular image a link to the larger one, and uses Magnific Popup to open that larger image as explained at the top of this page. The rel attribute for that link is set as follows:

```
<a href="sc_images/products/271_large_image.jpg" rel="lightbox
[product-271]">
     <img src="sc_images/products/271_image.jpg" height="200"
width="200">
</a>
```

If you wish to add additional images to the product's description, you can create links in the product's description field and add a special rel attribute to them set to **lightbox [product-PROD_RN].** For example, if in addition to the normal large product image that Squirrelcart displays via Magnific Popup, you wish to add a "front view" and a "back view" image so Magnific Popupwill show the large, front, and back images as a set. To accomplish that, add the code to link to those additional images to the product's description field as follows:

```
<a href="sc_images/products/271_front_view_large.jpg"
rel="lightbox[product-PROD_RN]">
     <img src="sc_images/products/271_front_view_small.jpg"
height="100" width="100">
</a>
<a href="sc_images/products/271_back_view_large.jpg"
rel="lightbox[product-PROD_RN]">
     <img src="sc_images/products/271_back_view_small.jpg"
height="100" width="100">
</a>
```

Squirrelcart will automatically change the text **PROD_RN** in the rel attribute on the fly to the value of the product's record number.

11.5 FCKEditor

Overview

Squirrelcart uses FCKEditor (provided by **FCKEditor.net (http://www.fckeditor.net/)**) for it's rich text editor feature. See the **Rich Text Editor topic (Section 4.10)** for more information.

12 Upgrading

12.1 Upgrading - Overview

Overview

This section describes in detail how to upgrade a Squirrelcart installation to the version that was released at the time that this documentation was written. It is recommended that you read this section in it's entirety before attempting an upgrade. The topics in this section should be followed in the order that they appear.

> Lighthouse Development (the makers of Squirrelcart) offer upgrade services. Please see this page for more information:
>
> **http://www.squirrelcart.com/upgrade-service**

12.2 Step 1: Preparation

1. Read all the topics in the **Upgrading** section of the documentation before attempting an upgrade.

2. Open the **Upgrading > Additional Resources > Version Notes** section of this documentation, and see if there are topics listed for any versions released after the version you are upgrading from - up to and including the version you are upgrading to. Versions are released in numerical order. If you find pages for those versions, read each one in order from oldest to newest before starting. If an upgrade requires special attention for particular versions, we will address it in those topics.

   Example:

   If you are upgrading from version 2.4.0 to 3.0.0, look in the Version Notes section mentioned above for any topics corresponding to versions numbered after your current version 2.4.0, up to and including the version you are upgrading to (3.0.0). If you find pages named 2.4.2, 2.5.0, and 3.0.0, read all of them in that order before starting your upgrade.

3. You will need your *FTP* hostname, username, and password. Make sure you have these available.

4. Determine your current version of Squirrelcart.

   Your version can be determined by logging into the **control panel (Section 3)**. The version number can be seen in the **toolbar (Section 3)**, on the right hand side.

5. Determine your store's **default theme (Section 9.3.4)**

   Open your **Visual Settings (Section 6.2)** page and scroll down to the **Default**

Theme field. This field shows the theme that your cart is using by default. If it is set to **Squirrelcart**, your store is not using a custom theme by default.

6. Backup your current installation

   It is critical that you have a good backup of your current installation before attempting an upgrade. Squirrelcart's Installation / Upgrade script will give you the opportunity to backup your database before upgrading it. Follow the instructions in the **Backup** section of the documentation to backup your files.

7. Download the latest version of Squirrelcart or Squirrelcart PRO from our Downloads page and save it on your computer. The download is a .zip file.

8. Squirrelcart PRO includes all of our PRO modules. If you purchased any modules separately for regular Squirrelcart, download their latest version zip files from our Downloads page.

9. Extract the .zip files you downloaded. If you don't know how to extract a zip file, try searching for "how to extract a zip file" in your favorite search engine.

10. Notify customers that your store is being upgraded

    During the upgrade process, your store will be unavailable for a short time. We recommend that you put a notice on your website indicating that the store is in the process of an upgrade. Here are 2 ways you can do this:

If your *storefront* page is named **index.php -**
Create a file called **index.htm**, and put your message in this file. On most servers, this will override the **index.php** file, and the customers will see the offline message when visiting your site.

If your storefront page is not named **index.php** -
Rename your storefront file, for example, to store2.php. Create a new page with the same name as your original storefront page, and place your upgrade message in that file.

12.3 Step 2: Upgrading Your Files

Overview

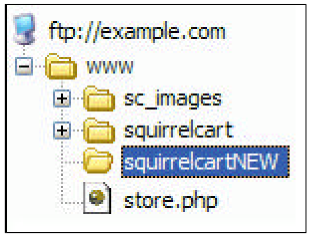
In order to upgrade Squirrelcart, you will need to upload the files for the new version. This explains how.

> ⚠ Squirrelcart's Installation / Upgrade script will give you the opportunity to import information from your old configuration file into the new one. Never copy or move your old configuration file (config.php) to the new installation. You may miss some new variables or code changes that could cause problems with your installation.

Steps

1. Open your *FTP* client

2. Create a folder called **squirrelcartNEW** in the same location that your squirrelcart folder currently resides.

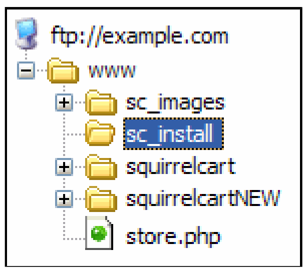


3. Upload new squirrelcart files:

   Upload the contents of the folder named **squirrelcart** from the distribution to the **squirrelcartNEW** folder.

4. Upload Installation Directory:

   Upload the **sc_install** folder from the distribution to the same location as **squirrelcartNEW**.



5. Upload store.php (Required when upgrading from v2.x to v3x or newer):

   If you have never made changes to **Storefront Page - store.php (Section 9.2)** on your site prior to this upgrade:

   - rename to **store.old**
   - upload **store.php** to the same location

   Your storefront page may not be named **store.php** if you renamed it.

6. Copy custom theme (optional):

   If you were using a custom theme as your default theme, copy it's folder from **squirrelcart/themes/** to **squirrelcartNEW/themes**. You can determine if you are using a custom theme by following the "Determine your store's default theme" item in the **Preparation (Section 12.2)** topic in this section.

   Version 2.x themes (and their templates) are NOT compatible with version 3.x. If you are upgrading from version 2.x do not upload your custom theme to v3.x as it won't be compatible.

7. Upload modules if needed:

   If you downloaded any modules in "Step 1: Preparation", upload each module's folder to your **squirrelcartNEW/modules** folder. For example, if you downloaded the QuickTotal module, upload it's **quick_total** folder, as in: **squirrelcartNEW/modules/quick_total**

8. Rename **squirrelcart** folder:

   Rename your old **squirrelcart** folder on your server to **squirrelcartOLD**.

9. Rename **squirrelcartNEW**:

   Rename your **squirrelcartNEW** folder on your server to **squirrelcart**.

12.4 Step 3: Installation and Upgrade Script

Overview

To complete your upgrade, you will need to update your configuration file, upgrade your database, and set permissions (if needed). This is all accomplished using Squirrelcart's Installation / Upgrade script.

Because every installation is unique, there is no single way to explain the upgrade process that will work for everyone. We will provide a walkthrough of a typical upgrade below. When you run the Installation / Upgrade script, be sure to read each page carefully and follow the instructions shown.

> If you encounter problems setting permissions during the installation script process, you may be instructed to modify your configuration file and/or set permissions manually. If you see a message instructing you to do so, you can find topics to assist you in the **Installation > Additional Resources** section of this documentation.

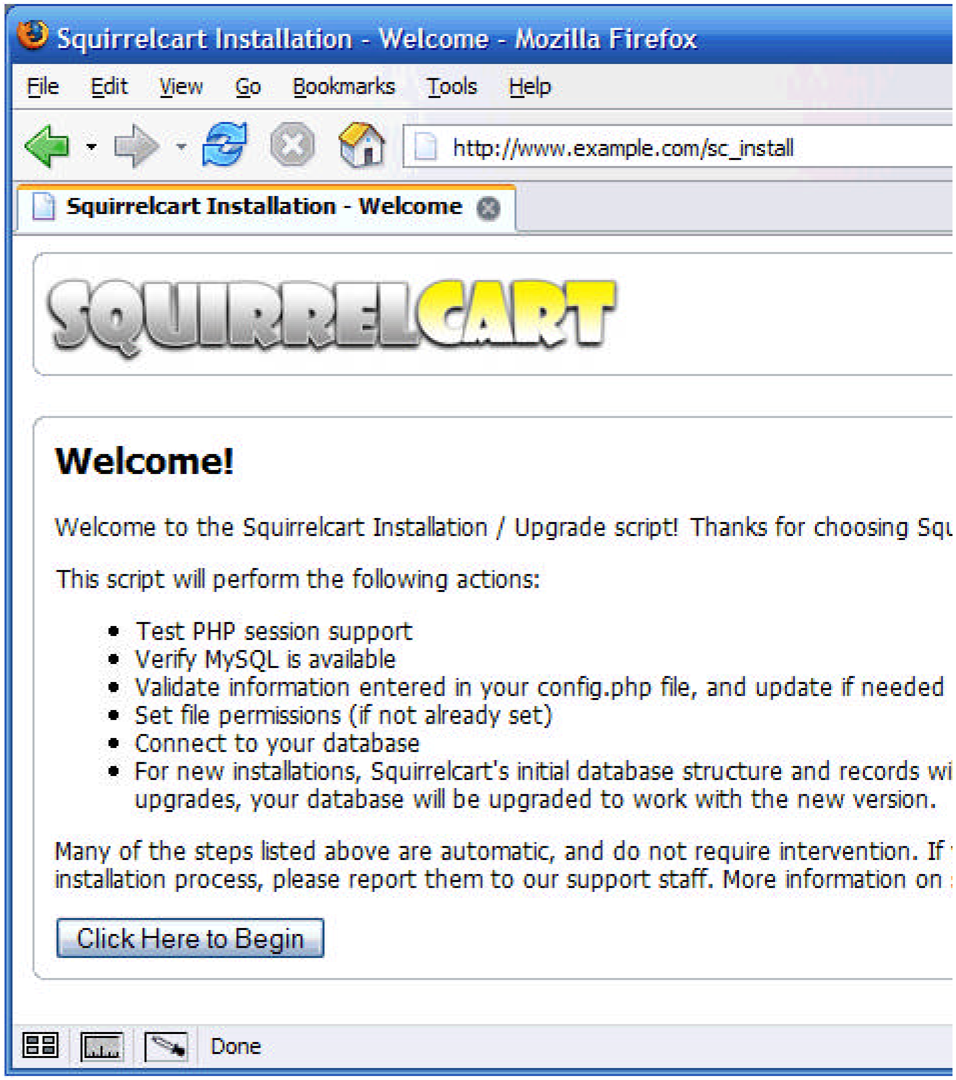
Launching the Installation / Upgrade Script

To open the installation script, open your browser and go to the URL that represents the location that you uploaded the sc_install folder to:

http://www.example.com/sc_install/

> If permissions need to be set, the installation script may prompt you for your FTP authentication information. For this reason, if you have access to your website using a secure URL, we recommend that you use that URL for the installation process: https://www.example.com/sc_install

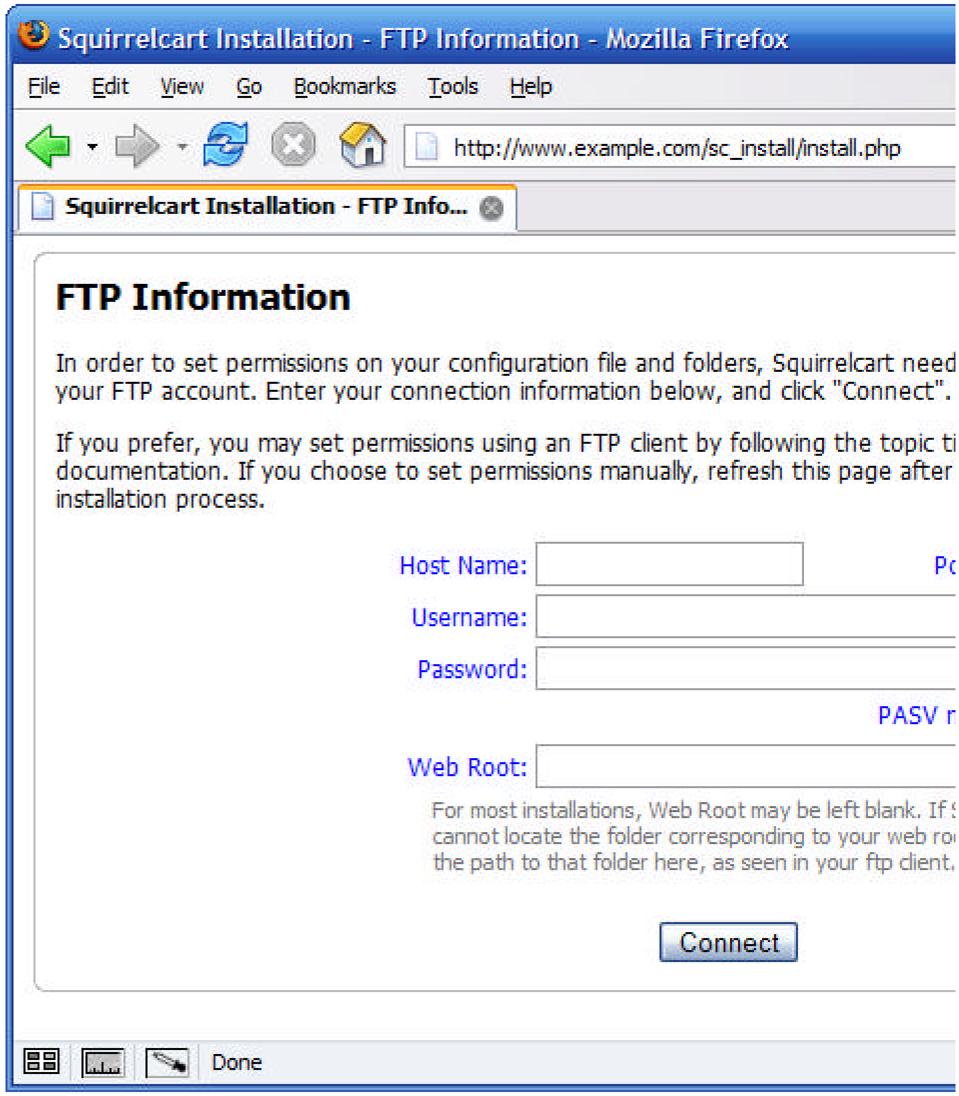
You will need to replace "example.com" with your domain name. You should then see the welcome screen.



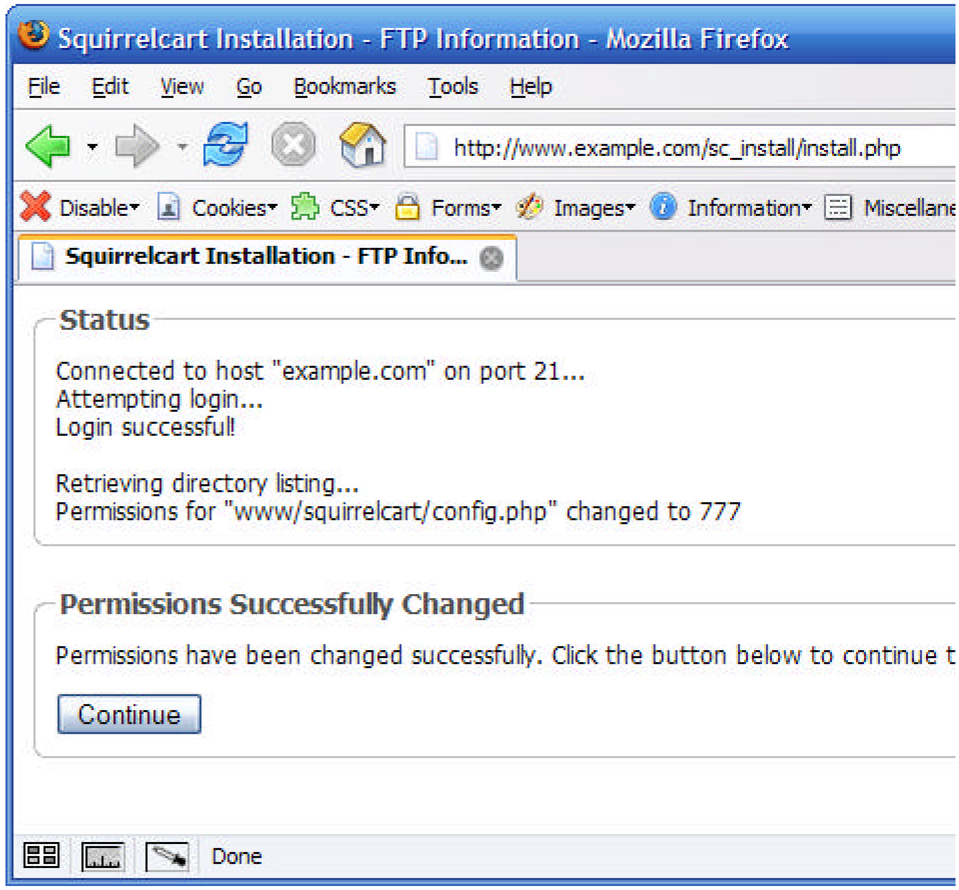
You will then need to click the **Click Here to Begin** button, and follow the instructions. We will provide an example walkthrough below.

Installation Script Walkthrough

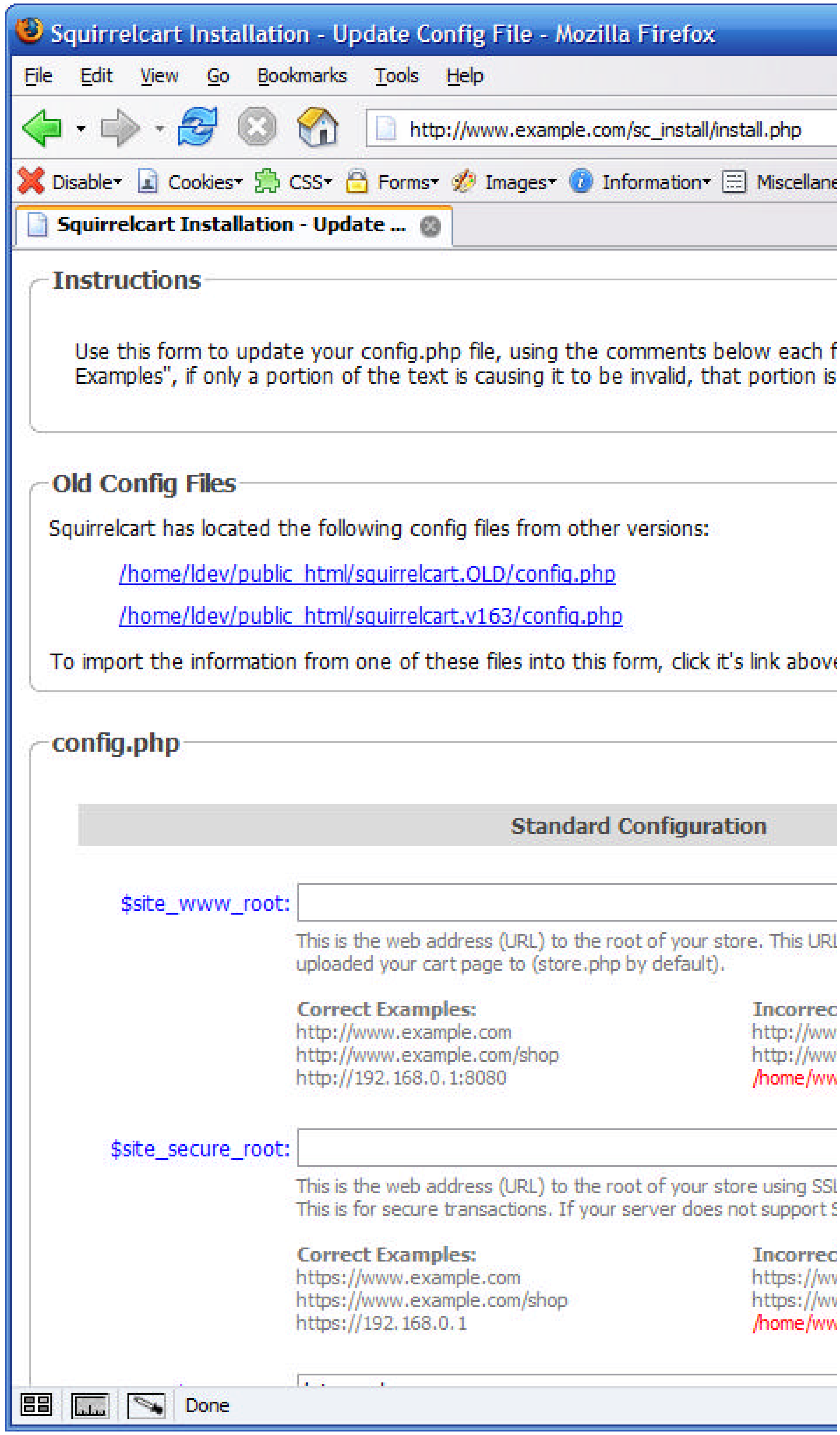
After clicking the **Click Here to Begin** button, the installation script will find your **squirrelcart/config.php** file. If you did not modify it manually, the installation script will detect that it needs to be updated. The script then checks to see if it has permissions to write to the file. If it does not, you will see the following screen.



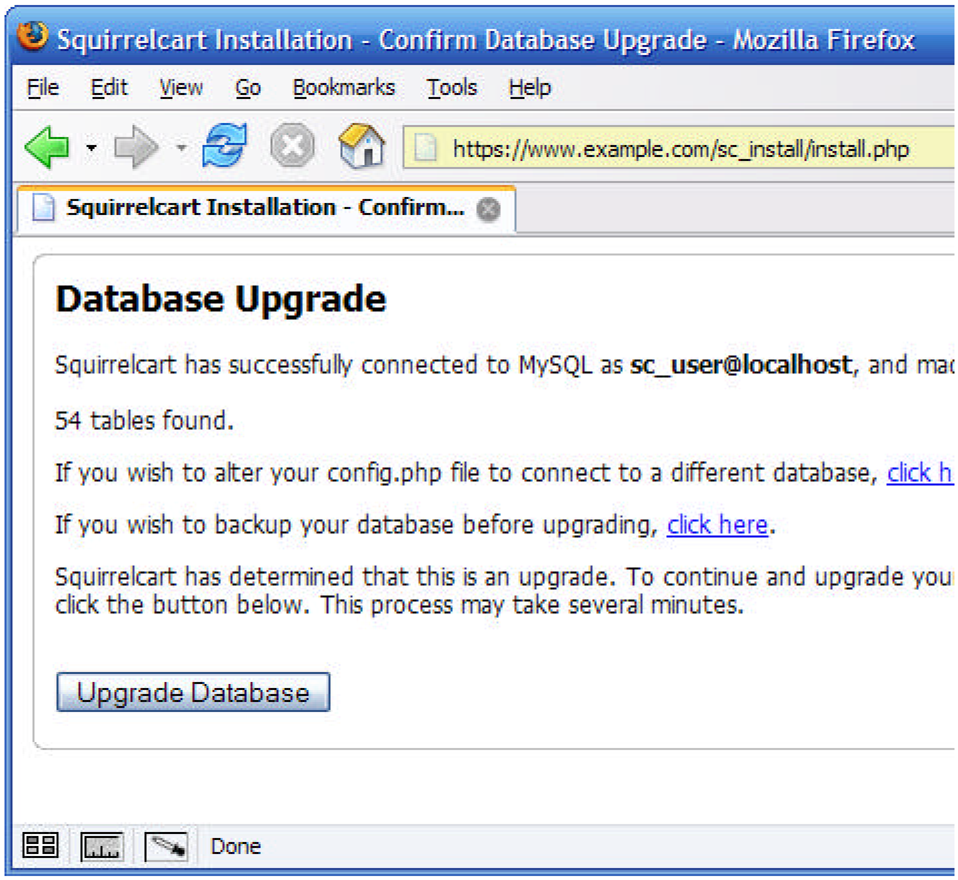
If you see this screen, follow the instructions and click **Connect**. If the information you entered was correct, you should see something like this:



Click **Continue** and you should be taken to the configuration file form:

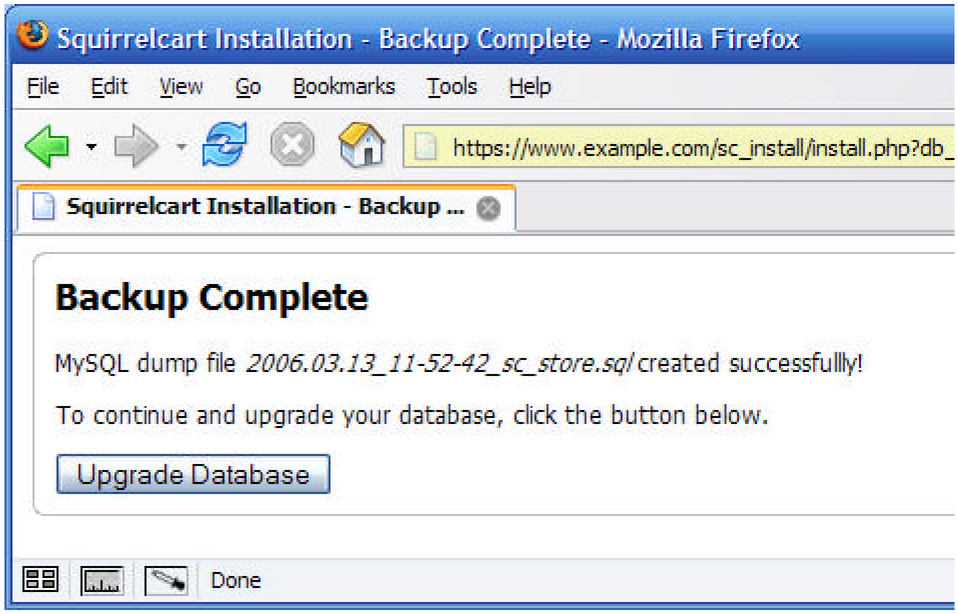


Because this is an upgrade and you renamed your old squirrelcart folder, the installation script should detect the prior installation, and show you a link to import your old config.php file information, as seen in the **Old Config Files** section in the screenshot above. Click on the file that you want to import, and the page will refresh with the fields populated from your prior installation. Then fill out the remaining fields using the examples provided as a guide, and click **Save Changes**. If any of the values you entered fail validation, you will be prompted to correct them. Once the configuration information you entered is submitted successfully, the installation process will modify your configuration file with the new values, and you will then see the page below.

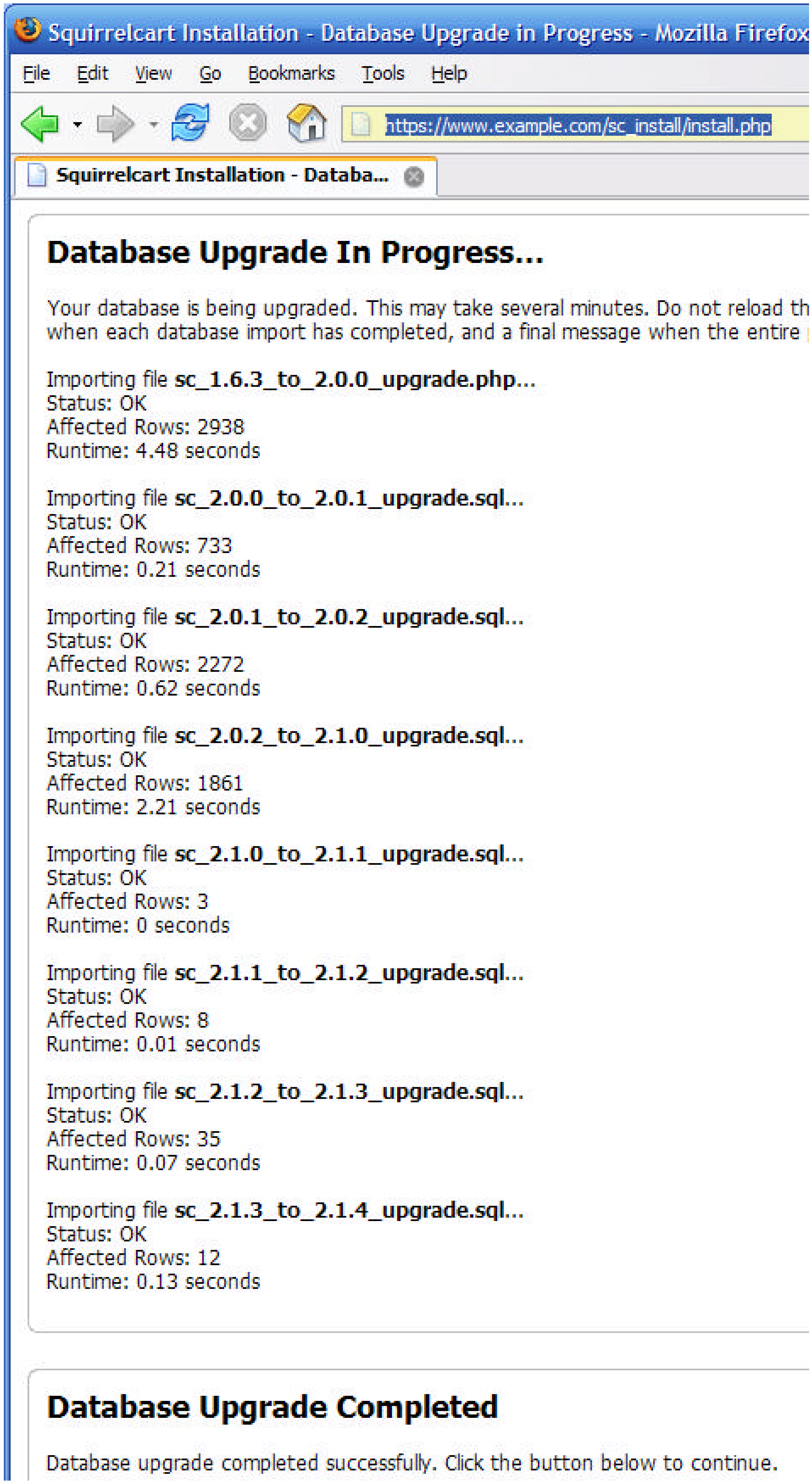


> The page above is only shown when the database you are connected to contains Squirrelcart tables from an older version. If the heading on your page reads **Database Installation**, you've accidentally connected to an empty database.

This page displays the current version of your cart, and the version you will be upgrading to. We recommend that you make a backup of your database prior to upgrading it. To do so, click the link shown above in the line that reads "If you wish to backup your database, click here". After clicking that link, you should see the following page.

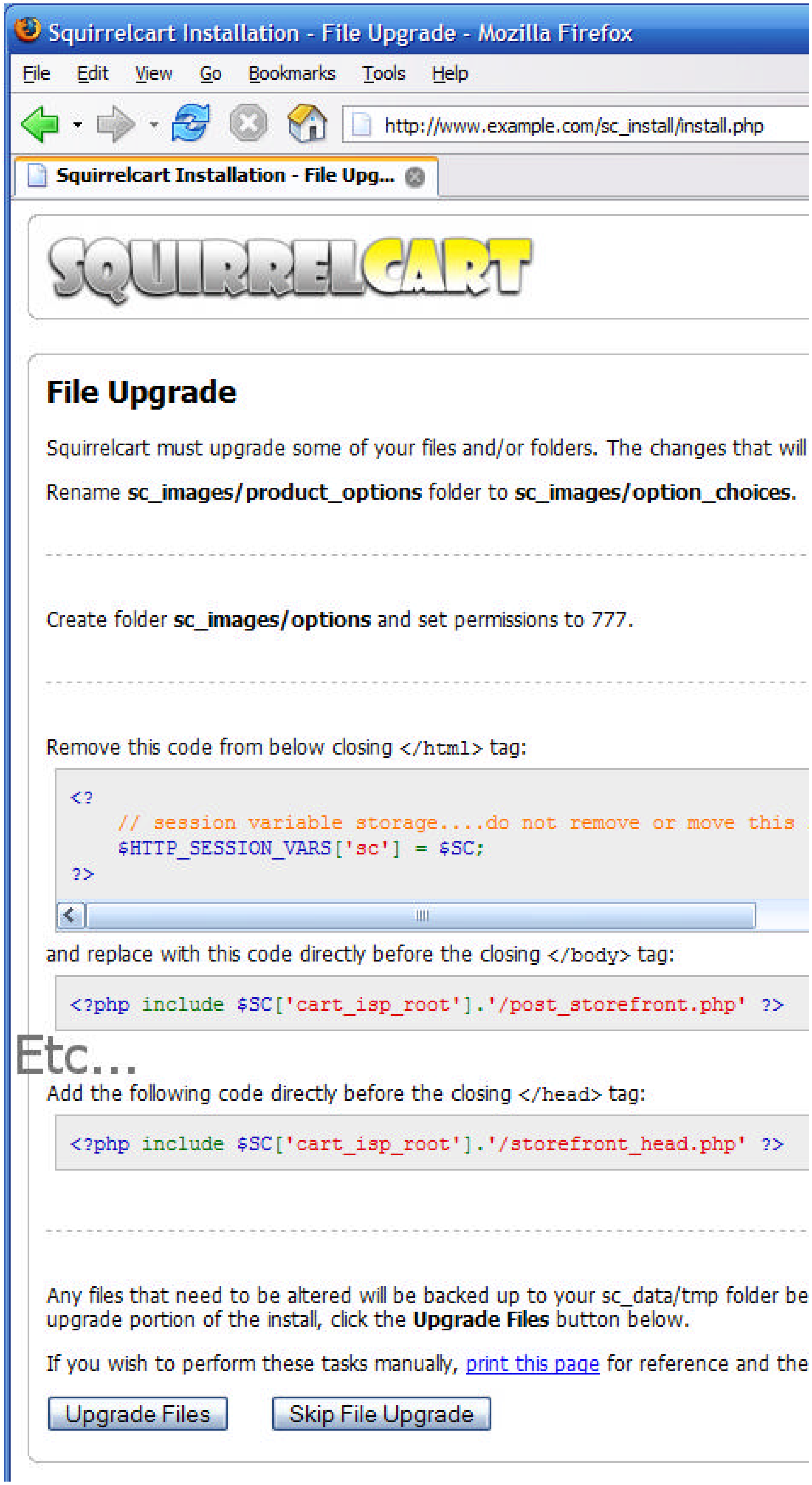


Click **Upgrade Database** to continue.

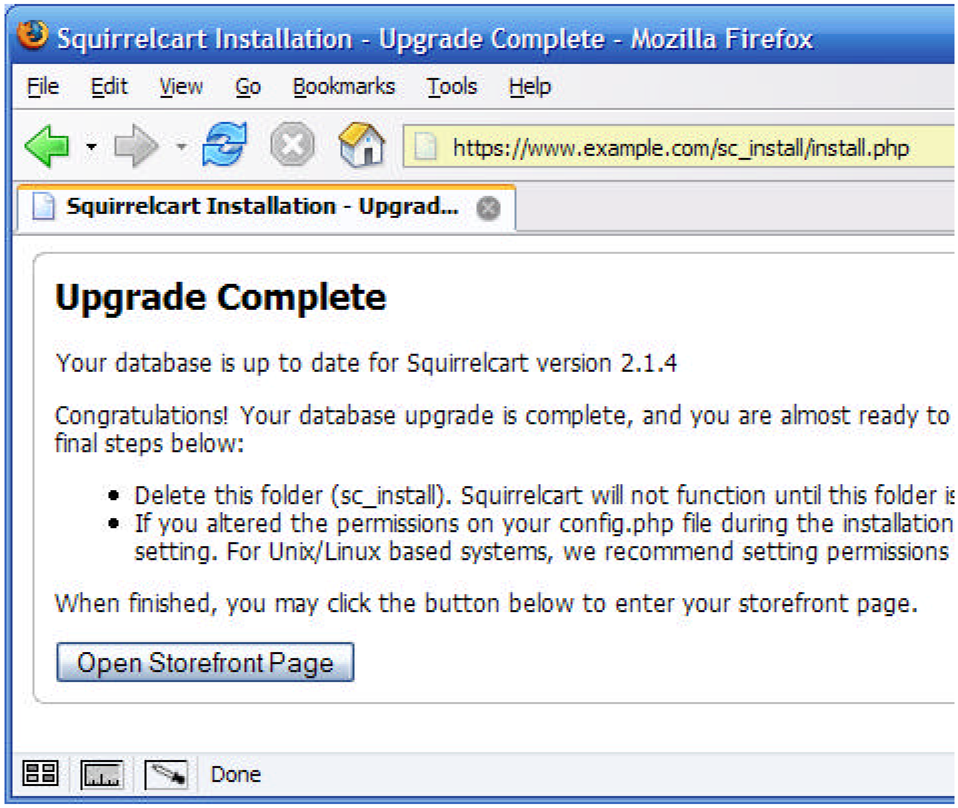

Squirrelcart Installation - Database Upgrade in Progress - Mozilla Firefox
File Edit View Go Bookmarks Tools Help
https://www.example.com/sc_install/install.php
Squirrelcart Installation - Databa...
Database Upgrade In Progress...
Your database is being upgraded. This may take several minutes. Do not reload th
when each database import has completed, and a final message when the entire
Importing file sc_1.6.3_to_2.0.0_upgrade.php...
Status: OK
Affected Rows: 2938
Runtime: 4.48 seconds
Importing file sc_2.0.0_to_2.0.1_upgrade.sql...
Status: OK
Affected Rows: 733
Runtime: 0.21 seconds
Importing file sc_2.0.1_to_2.0.2_upgrade.sql...
Status: OK
Affected Rows: 2272
Runtime: 0.62 seconds
Importing file sc_2.0.2_to_2.1.0_upgrade.sql...
Status: OK
Affected Rows: 1861
Runtime: 2.21 seconds
Importing file sc_2.1.0_to_2.1.1_upgrade.sql...
Status: OK
Affected Rows: 3
Runtime: 0 seconds
Importing file sc_2.1.1_to_2.1.2_upgrade.sql...
Status: OK
Affected Rows: 8
Runtime: 0.01 seconds
Importing file sc_2.1.2_to_2.1.3_upgrade.sql...
Status: OK
Affected Rows: 35
Runtime: 0.07 seconds
Importing file sc_2.1.3_to_2.1.4_upgrade.sql...
Status: OK
Affected Rows: 12
Runtime: 0.13 seconds
Database Upgrade Completed
Database upgrade completed successfully. Click the button below to continue.

If you encounter an error during the upgrade process, read the **Upgrading > Additional Resources > Database Upgrade Failure (Section 12.6.1)** topic in this documentation before continuing.

After upgrading your database, click the **Continue** button. If the new version requires changes to any files (your storefront page) or folders (image folders, folders inside the sc_data folder, etc...), you may see a page similar to the one below:


Squirrelcart Installation - File Upgrade - Mozilla Firefox
File Edit View Go Bookmarks Tools Help
http://www.example.com/sc_install/install.php
Squirrelcart Installation - File Upg...
SQUIRRELCART
File Upgrade
Squirrelcart must upgrade some of your files and/or folders. The changes that will
Rename sc_images/product_options folder to sc_images/option_choices.
Create folder sc_images/options and set permissions to 777.
Remove this code from below closing </html> tag:
<?
// session variable storage....do not remove or move this
$HTTP_SESSION_VARS['sc'] = $SC;
?>
and replace with this code directly before the closing </body> tag:
<?php include $SC['cart_isp_root'].'/post_storefront.php' ?>
Etc...
Add the following code directly before the closing </head> tag:
<?php include $SC['cart_isp_root'].'/storefront_head.php' ?>
Any files that need to be altered will be backed up to your sc_data/tmp folder be
upgrade portion of the install, click the Upgrade Files button below.
If you wish to perform these tasks manually, print this page for reference and the
Upgrade Files
Skip File Upgrade

The list of tasks that will be performed will vary depending on your prior version of Squirrelcart. Read the instructions, and click one of the buttons. After completing the file upgrade portion of the installation, you should see the following page.



Follow the instructions provided, and click the **Open Storefront Page.**

12.5 Step 4: Testing

Testing your upgraded Squirrelcart install is the same as testing after a new installation. Please see the **Installation > Testing (Section 2.8)** topic in this documentation for more information. If you encounter a problem in the storefront, it may be a result of template changes. See the **Upgrading > Additional Resources > General Troubleshooting (Section 12.6.2)** topic in this documentation for more assistance.

Upgrading Modules

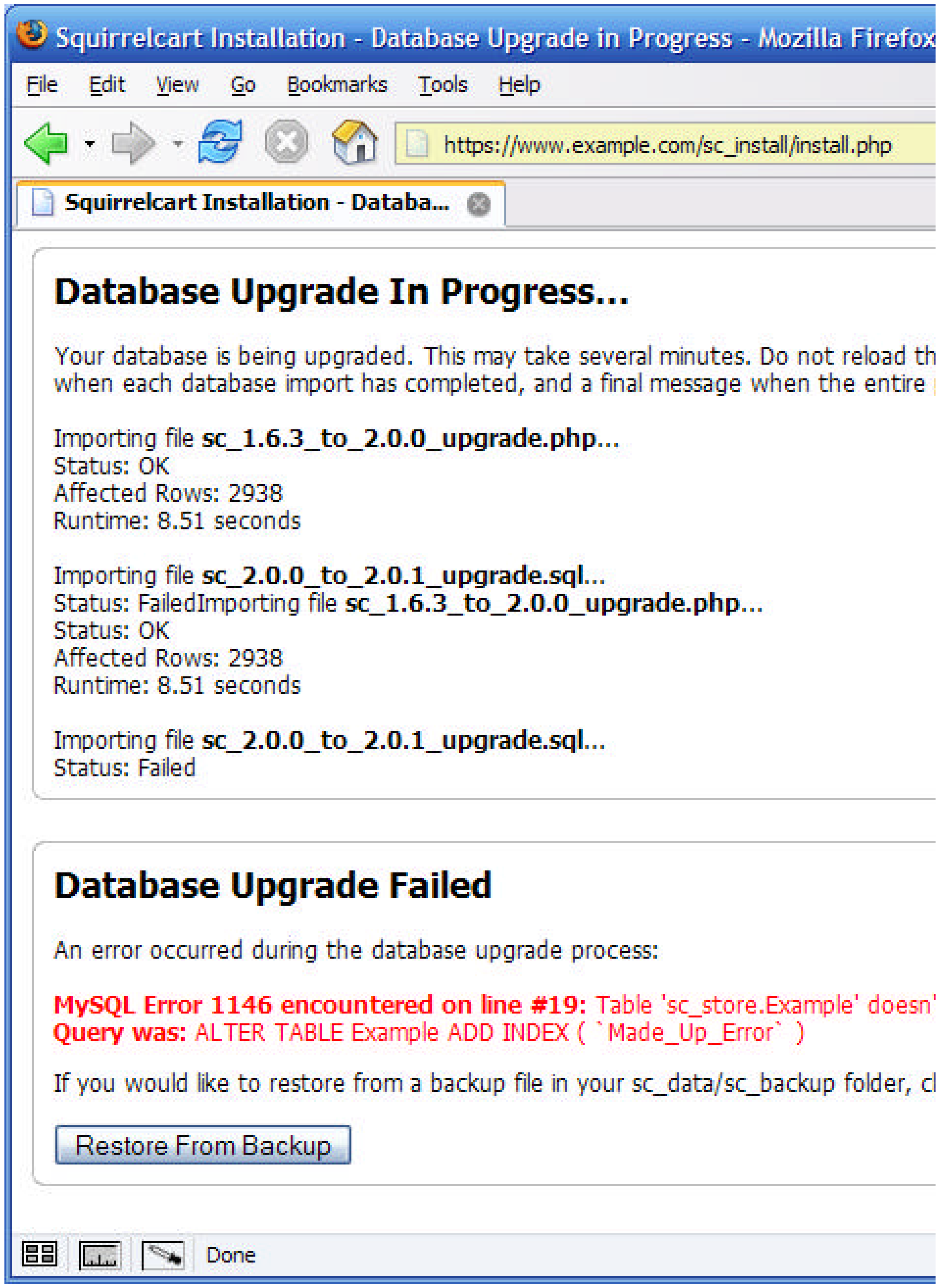
If you are using any modules, the first time you login to the Squirrelcart control panel after the upgrade, they will be upgraded automatically if needed.

12.6 Additional Resources

12.6.1 Database Upgrade Failure

Overview

If you receive a **Database Upgrade Failed** error during the Installation / Upgrade script process, use this topic as a guide to report the problem and get back up and running. A generic error is shown below to demonstrate what a database upgrade failure may look like:

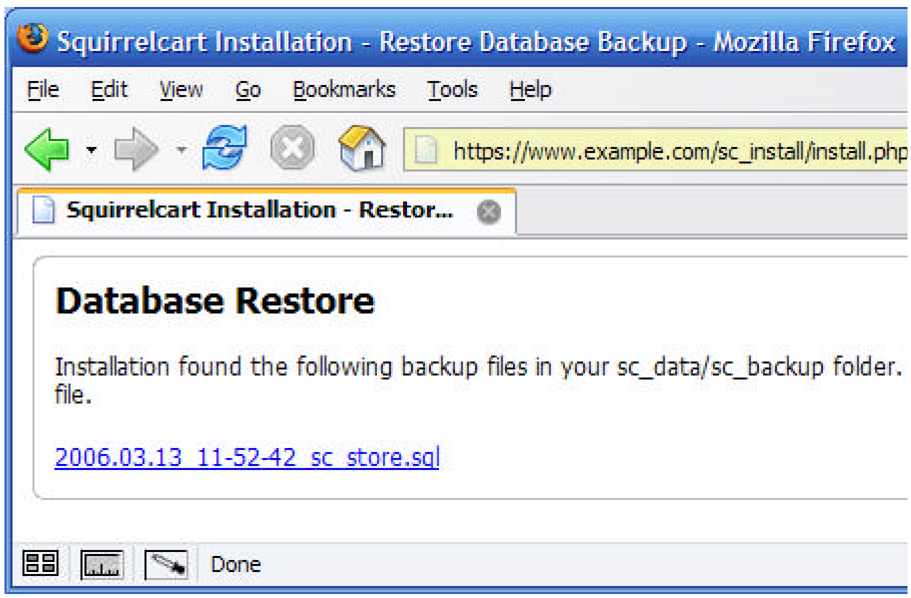


Steps to Resolve Problem

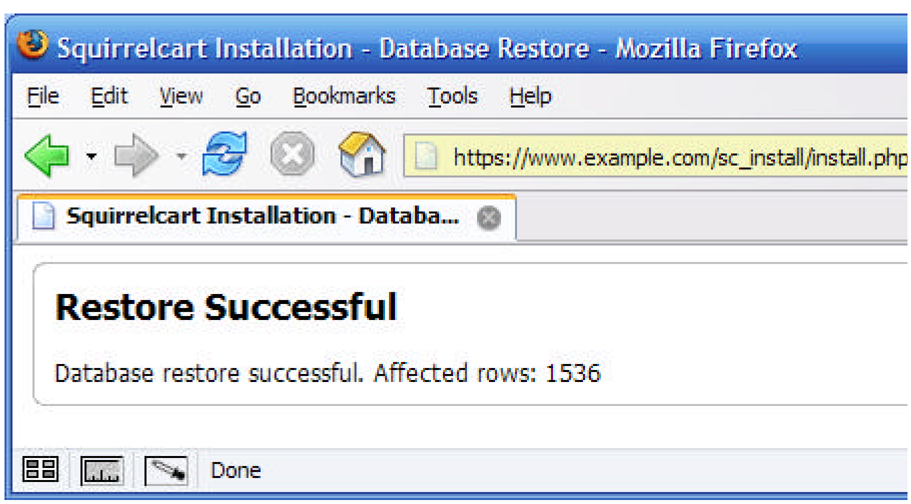
1. Locate the error message seen in red (as in the example above). Select that text, and copy it to your clipboard.

2. Open a helpdesk ticket with our support staff, and paste the error message into the ticket. Information on our helpdesk can be found on our support page: **http://www.squirrelcart.com/support.php**

3. After submitting your support request, click the **Restore From Backup** button. You should see a page similar to the following:



4. Click the filename corresponding to your backup. You should then see something like this:



5. Your database is now back to the way it was prior to the upgrade. If you need to get your store back up and running immediately:

   - Rename the **squirrelcart** folder to **squirrelcartNEW**
   - Rename your **squirrelcartOLD** folder to **squirrelcart**
   - Rename the **sc_install** folder to **sc_installOLD**
   - If you uploaded new versions of store.php and home.php, rename those to store.php.NEW and home.php.NEW, and restore your backup copies of these files.

   After this, your store should be back to it's pre-upgrade state. Leave the folders in place so that you can continue your upgrade again without having to upload new files.

12.6.2 General Troubleshooting

If you are getting unexpected results after an upgrade, read through all the upgrade steps and make sure you didn't overlook anything. Here are some common pitfalls to watch for:

Don't copy your old config.php file

It may seem easier to copy your old config file into your newly upgraded Squirrelcart installation. This can cause problems if we have added parameters between versions.

Are Squirrelcart master theme files untouched?

The theme named **Squirrelcart** located in **squirrelcart/themes/squirrelcart** is the master theme. Squirrelcart relies heavily on the templates in this theme, and they should never be modified in their existing locations. If you have modified template files in your **squirrelcart/themes/squirrelcart** folder, you will need to upload the folder again, from the distribution of the version you are upgrading to.

Have any template files changed?

We make modifications to some of the template files with each release. If a template file has been updated in the release you upgraded to, and you have that same template file in your default custom theme, Squirrelcart will use your older custom version of that template file. This is explained in the **Customizing > Advanced > Templates ({44D40EA0-25A6-49E0-BF54-88B00E0C82E4})** topic. This will result in those changes not being present in the upgraded installation, and can cause unexpected problems. If you are having problems after an upgrade, try **changing your default theme (Section 9.3.4)** to **Squirrelcart**. If the problem goes away, then it is due to an older template file in your custom theme. You should then compare your custom template files to the new ones in **squirrelcart/themes/squirrelcart** and update your custom templates accordingly.

12.6.3 Version Notes

12.6.3.1 v2.5.0

Overview

This page has been written as a guide to aid you in upgrading your site from a 2.0.0 - 2.4.x version to v2.5.0 and after. Please read this page in its entirety before attempting to upgrade.

Cybersource

If you are using Cybersource as your payment gateway, you will need to go through the setup instructions again for Cybersource after upgrading to Squirrelcart version 2.5.0 and newer. You can find those instructions **here ({4148755E-D99A-4DB2-96F1-9C9D351BED6A})**. When you do so, make sure you generate and download a new HOP script per the instructions, as Squirrelcart v2.5.0 and newer uses functions not found in older HOP files.

Setting Changes

Some fields controlling emails on your **Store Settings (Section 6.1)** page have changed. The upgrade script will copy all the data over to the newer fields. A new required field named **Default From Email** will be set to the value you had specified for the **Customer Service Email** field prior to upgrading. If that field was not set, or was set to the default example address of **sales@example.com**, you should login to your control panel after the upgrade is complete and set the **Default From Email** field to a valid email address on your domain.

12.6.3.2 v2.6.0

Overview

This page has been written as a guide to aid you in upgrading your site from a 2.0.0 - 2.5.x version to v2.6.0 and after. Please read this page in its entirety before attempting to upgrade.

SEO URLs

Squirrelcart v2.6.0 includes support for the new Testimonials module. If you are using our **SEO URL feature (Section 6.12.3)** with an .htaccess file, you will need to update that file if you are using this module.

If your .htaccess file looks like this:

```
RewriteEngine On
RewriteRule ^(products|categories|news|reviews)/?(.*)$
store.php/$1/$2 [L]
```

Change it as follows, adding "|testimonials":

```
RewriteEngine On
RewriteRule ^(products|categories|news|reviews|testimonials)/?
```

```
(.*)$ store.php/$1/$2 [L]
```

If your .htaccess file looks like this:

```
<Files ~ "categories|products|news|reviews">
ForceType application/x-httpd-php
</Files>
```

Change it as follows (adding "|testimonials"):

```
<Files ~ "categories|products|news|reviews|testimonials">
ForceType application/x-httpd-php
</Files>
```

12.6.3.3 v3.0.0

Overview

This page has been written as a guide to aid you in upgrading your site from a 2.x version to v3.0.0 and after. Please read this page in its entirety before attempting to upgrade.

Offline Processing

As of version 3.0.0 the offline processing feature is no longer availabe in Squirrelcart. Read **this forum thread (http://www.ldev.com/forums/showthread.php?t=5502)** for more information. If you are using offline processing, you should make plans to use a payment gateway or another payment option such as PayPal before upgrading to version 3.0.0.

SEO URL changes

If you are using our SEO URLs (advanced) feature explained in the section of the same name on this **page (Section 6.12.3)**, you'll need to update your .htaccess file to account for pages created by linking to content records.

1. Open your .htaccess file in an editor

2. If you find a section like this:

   ```
   RewriteEngine On
   RewriteRule ^
   (products|categories|news|reviews|testimonials)/?(.*)$
   store.php/$1/$2 [L]
   ```

   Add `|`**content** inside the first set of parentheses, at the very end:

   ```
   RewriteEngine On
   ```

```
RewriteRule ^
(products|categories|news|reviews|testimonials|content)/?
(.*)$ store.php/$1/$2 [L]
```

3. If you find a section like this:

```
<Files ~ "categories|products|news|reviews|testimonials">
ForceType application/x-httpd-php
</Files>
```

   Add **`|content`** inside the quotes, directly before the last quote:

```
<Files ~
"categories|products|news|reviews|testimonials|content">
ForceType application/x-httpd-php
</Files>
```

4. Save the file

Theme and Template Changes

In version 3.0.0, the template files have been completely rewritten:

- We've consolidated many template files, dropping the number of templates from 177 to just over 100. This should make it much easier to locate template files for modification.
- Templates have been rewritten to validate as XHTML 1.0 transitional, and CSS 2.1
- Changes to CSS were made to allow for much more control over the appearance of your store
- HTML is written to be more symantic
- Table tags are no longer used to control layout. They are only used for tabular data as intended
- Most theme images have been renamed, and are now in PNG format. Many of those PNG images use alpha transparency making them look good regardless of the background color behind them.

Important!

As a result of these changes, templates from version 2.x and 1.x are not compatible with version 3.0.0. When upgrading from v2.x to v3.x, your theme will be set to the default Squirrelcart theme. If you wish to match the design you had previously, you'll need to make those changes over again using the new templates as a guide. See the **Customizing** section of this documentation for more information.

12.6.3.4 v3.3.0

Overview

This page has been written as a guide to aid you in upgrading your site from v3.0.0 to v3.3.0 and after. Please read this page in its entirety before attempting to upgrade.

SEO URL changes

If you are using our SEO URLs (advanced) feature and are upgrading to Squirrelcart PRO v3.3.0 or newer, you'll need to update your .htaccess file to add support for the new Contact module.

1. Open your .htaccess file in an editor

2. If you find a section like this:

```
RewriteEngine On
RewriteRule ^
(products|categories|content|news|reviews|testimonials)/?
(.*)$ store.php/$1/$2 [L]
```

   Add **|contact** inside the first set of parentheses, at the very end:

```
RewriteEngine On
RewriteRule ^
(products|categories|content|news|reviews|testimonials|contac
(.*)$ store.php/$1/$2 [L]
```

3. If you find a section like this:

```
<Files ~
"categories|products|content|news|reviews|testimonials">
ForceType application/x-httpd-php
</Files>
```

   Add **|content** inside the quotes, directly before the last quote:

```
<Files ~
"categories|products|content|news|reviews|testimonials|contac
ForceType application/x-httpd-php
</Files>
```

4. Save the file

Theme and Template Changes

If you are using a custom version of any of the below template files, make the changes outlined for the custom version of that file inside your custom theme folder (Example: **squirrelcart/themes/YOURTHEMENAME)**. If you are not using a custom version of that file you do not need to make any changes. This section is a guide only. If a v3.3.0 template file has a lot of changes, you are probably better off reverting to the default version by removing your custom version of the same file.

checkout_view.tpl.php

1. Locate this code:

```
<?php foreach($Item['Option_Details'] as $Option_Detail): ?
>
 <li class="<?php print $Option_Detail['Alt'] ?>">
  <label><?php print $Option_Detail['Name'] ?>:</label> <?
php print $Option_Detail['Value'] ?>
 </li>
<?php endforeach; ?>
```

2. Replace it with this:

```
<?php foreach($Item['Option_Details'] as $Option_Detail): ?
>
 <li class="<?php print $Option_Detail['Alt'] ?>">
  <label>
   <?php if ($Option_Detail['Qty_Allow'] && !$Option_Detail
['Allow_Multiples']):?>
    (<?php print $Option_Detail['Quantity']?>)
   <?php endif; ?>
   <?php print $Option_Detail['Name'] ?>:
  </label>
  <?php if (count($Option_Detail['Value']) > 1):?>
   <ul class="opt_detail_values">
    <?php foreach($Option_Detail['Value'] as
$Option_Detail_Value):?>
     <li>
      <?php if ($Option_Detail_Value['Quantity']): ?>
       (<?php print $Option_Detail_Value['Quantity']?>)
      <?php endif; ?>
      <?php print $Option_Detail_Value['Value'] ?>
      <?php if ($Option_Detail_Value['Price']): ?>
       @ <?php print sc_price($Option_Detail_Value
['Price']) ?>
      <?php endif; ?>
     </li>
    <?php endforeach;?>
   </ul>
  <?php else: ?>
   <?php if ($Option_Detail['Value'][0]['Quantity'] > 1 &&
$Option_Detail['Allow_Multiples']): ?>
    (<?php print $Option_Detail['Value'][0]['Quantity']?>)
   <?php endif; ?>
   <?php print $Option_Detail['Value'][0]['Value'] ?>
   <?php if ($Option_Detail['Value'][0]['Price'] &&
$Option_Detail['Value'][0]['Quantity'] > 1 &&
$Option_Detail['Allow_Multiples']): ?>
    @ <?php print sc_price($Option_Detail['Value'][0]
['Price']) ?>
   <?php endif; ?>
```

```
  <?php endif;?>
 </li>
<?php endforeach; ?>
```

3. Locate this code:

```
<?php foreach($Item['Option_Names'] as $Option_Name): ?>
 <a class="opt_col_name" href="<?php print $Item['URL'] ?>"
title="click to modify options"><?php print $Option_Name ?
>:</a>
<?php endforeach; ?>
```

4. Replace it with this:

```
<?php foreach($Item['Option_Details'] as $Option_Detail):
if ($Option_Detail['Show_in_Column']): ?>
 <a class="opt_col_name <?php print $Option_Detail
['Tooltip_Class']?>" href="<?php print $Item['URL'] ?>"
  title="
   <?php if ($Option_Detail['Show_Tooltip']): ?>
    <?php if ($Option_Detail['Tooltip_Show_Qty'] && count
($Option_Detail['Value']) == 1):?>
     (<?php print $Option_Detail['Quantity']?>) <?php print
$Option_Detail['Name']?> @ <?php print sc_price
($Option_Detail['Price']/$Option_Detail
['Quantity'],'txt') ?> each<br/><br/>
    <?php endif;?>
    <?php print $Option_Detail['Tooltip_Text'] ?>
   <?php else: ?>
    click here to modify
   <?php endif; ?>
  "
 >
  <?php if ($Option_Detail['Qty_Allow'] && !$Option_Detail
['Allow_Multiples']):?>
   (<?php print $Option_Detail['Quantity']?>)
  <?php endif; ?>
  <?php print $Option_Detail['Name'] ?>:
 </a>
<?php endif; endforeach; ?>
```

featured_product.tpl.php

1. Locate this code:

```
<?php if ($Options): ?>
```

2. Replace it with this:

```
<?php if ($Options || $Agreements): ?>
```

product_detail.tpl.php

1. Locate this code:

```
<div class="prod_detail <?php print $Discount_Class ?>">
```

2. Replace it with this:

```
<div class="prod_detail <?php print $Extra_Classes ?>">
```

style_main.css.php

1. Locate this code:

```
.breadcrumb_nav,
.nav_link_container ul,
.nav_link_container ol,
.checkout ul,
.order_detail ul,
.sc_form ul {
 list-style: none;
 margin: 0;
 padding: 0;
}
```

2. Replace it with this:

```
.breadcrumb_nav,
.nav_link_container ul,
.nav_link_container ol,
.checkout ul,
.order_detail ul,
.sc_form ul,
.select_multi {
 list-style: none;
 margin: 0;
 padding: 0;
}
```

3. Locate this code:

```
/* div containing file upload restrictions */
.opt_restrictions_list {
 width: 120px;
 border-left: silver solid 1px;
 padding-top: 3px;
 padding-left: 5px;
 color: gray;
 float: left;
 clear: right;
}
```

4. Add this below it:

```
.opt_txtlimits {
     color: gray;
```

```
}

.opt_chars_left {
     display: none;
}

.opt_chars_left span {
     vertical-align: middle;
}

.opt_qty td {
     padding-top: 0px;
     vertical-align: top;
}
.prod_options .opt_qty td.opt_instruction {
     padding-top: 2px;
}
.opt_qty .opt_field input,
.opt_qty_field {
     width: 30px;
}

.opt_qty:hover .opt_qty_arrow {
     position: absolute;
     z-index: 1;
     display: block;
     width: 7px;
     height: 20px;
     background: url(<?php print sc_img
('option_qty_arrow','dyn')?>) no-repeat top;
     margin-top: -12px;
     margin-left: 14px;
}

/* This controls the spacing between each option */
.opt_leading td {
     font-size: 1px;
     height: 5px;
}

/* This controls the spacing between each option, ONLY when
there is at least one option with a qty field present */
.opt_qty_present .opt_leading td {
     height: 20px;
}
```

5. Locate this code:

```
.cart_table .opt_detail li.alt label {
      color: #008000;
}
```

6. Add this below it:

```
ul.opt_detail_values {
     margin-left: 10px;
}

.opt_detail .opt_detail_values li {
     background: none;
     border: none;
```

```
     padding: 0;
}
```

7. Locate this code:

```
#print_friendly img {
    margin-bottom: -2px;
}
```

8. Replace it with this:

```
#print_friendly img {
     vertical-align: middle;
}
```

9. Add this to the very bottom of the file:

```
.subcategories {
     margin-top: 30px;
}

.subcategories .box_row {
     margin-bottom: 30px;
}

.subcategory_img {
     display: block;
     margin: 0 auto;
}
```

subcategory.tpl.php

1. Locate this code:

```
<a class="tip" href="<?php print $URL ?>" title="<?php
print $Tooltip ?>"><?php print $Content_Name ?></a>
```

2. Replace it with this:

```
<a class="tip" href="<?php print $URL ?>" title="<?php
print $Tooltip ?>">
  <?php if ($Thumbnail_Image): ?>
   <img class="subcategory_img" src="<?php print
$Thumbnail_Image['dyn'] ?>" width="<?php print
$Thumbnail_Image['width'] ?>" height="<?php print
$Thumbnail_Image['height'] ?>" alt="<?php print
$Thumbnail_Image['alt'] ?>" title="" />
  <?php endif; ?>
  <?php print $Content_Name ?>
 </a>
```

Templates we recommend reverting

These template files have significantly changed. If you have customized these templates, we recommend you copy the new versions into your custom theme and make your customizations over again if needed. If you do not need your customizations, deleting your custom version of the template file will cause Squirrelcart to use the new version of that same template file.

- option_text.tpl.php
- option_textarea.tpl.php
- options.tpl.php
- order_detail.tpl.php
- order_detail_printable.tpl.php
- order_email_customer_html.tpl.php
- order_email_customer_text.tpl.php
- order_email_merchant_html.tpl.php
- order_email_merchant_text.tpl.php

12.6.3.5 v3.4.0

Overview

This page has been written as a guide to aid you in upgrading your site from v3.0.0 to v3.4.0 and after. Please read this page in its entirety before attempting to upgrade.

FedEx Web Services

FedEx Ship Manager Direct has been replaced by FedEx Web Services. If you are upgrading from a version prior to v3.3.7 and have FedEx Ship Manager Direct enabled, you will need to follow the **instructions for enabling FedEx Web Services (Section 6.6.9)** after your upgrade is completed.

Theme and Template Changes

If you are using a custom version of any of the below template files, make the changes outlined for the custom version of that file inside your custom theme folder (Example: **squirrelcart/themes/YOURTHEMENAME)**. If you are not using a custom version of that file you do not need to make any changes. This section is a guide only. If a v3.4.0 template file has a lot of changes, you are probably better off reverting to the default version by removing your custom version of the same file.

account_choice.tpl.php

1. Locate this code towards the top of the file:

```
<div class="acct_choice_new">
 <div class="inner">
  <img src="<?php print $New_Image['dyn'] ?>" width="<?php
print $New_Image['width'] ?>" height="<?php print
$New_Image['height'] ?>" alt="New Account" />
  <h4><a href="<?php print $New_Account_URL ?>">Click here
```

```
to create a free user account!</a></h4>
  <p>Why create an account? With a user account you can
view your order history, check shipment status, and make
future
  purchases without having to type your address each
time.</p>
 </div>
</div>
```

2. Directly before that code, add this:

```
<?php if ($Show_New_Account): ?>
```

3. Directly after that code, add this:

```
<?php endif; ?>
```

4. Locate this line:

```
<?php if (!$Allow_Skip): ?>
```

5. Change that line to:

```
<?php if (!$Allow_Skip && $Show_New_Account): ?>
```

account_options_nav.tpl.php

1. Locate this code:

```
<li><a class="<?php print $New_Account_Class?>" href="<?php
print $New_Account_URL?>" >Get an Account</a></li>
```

2. Change to:

```
<?php if ($Show_Create_Account_Link): ?>
    <li><a class="<?php print $New_Account_Class?>"
href="<?php print $New_Account_URL?>" >Get an
Account</a></li>
<?php endif; ?>
```

category.tpl.php

1. Locate this code:

```
<option value="price_lowest"  <?php print $sort_selected
['price_lowest']?> >regular price (lowest)</option>
```

2. Add this directly above:

```
<?php if ($cat_rn == 4):?>
    <option value="purchase_desc"  <?php print
$sort_selected['purchase_desc']?> >date purchased (most
recent)</option>
    <option value="purchase_asc"  <?php print
$sort_selected['purchase_asc']?> >date purchased (oldest)
</option>
<?php endif;?>
```

checkout_pay_order_summary.tpl.php

If you are using VAT (used in the European Union), we recommend reverting this template (delete it from your custom theme folder if present).

checkout_view.tpl.php

If using VAT (used in the European Union), we recommend reverting this template (delete it from your custom theme folder if present). If not using VAT, here are the recommended changes for this template:

1. Locate this line:

```
<div class="you_save">You save <?php print sc_price($Item
['Savings_Amount']) ?> (<?php print $Item
['Savings_Percent'] ?>%)!</div>
```

2. Replace with:

```
<div class="you_save">
 You save <?php print sc_price($Item['Savings_Amount']) ?>
(<?php print $Item['Savings_Percent'] ?>%)!
 <div class="discount_info">
  <?php if ($Item['Coupon_Code']): ?>
   <span class="item_coupon_code">Code: <?php print $Item
['Coupon_Code'] ?></span>
  <?php endif; ?>
  <?php if (sc_is_admin()): ?>
   <span class="discount_rn">
    Discount #<?php print $Item['Discount_Number'] ?>
   </span>
  <?php endif; ?>
 </div>
</div>
```

3. Locate this line:

```
<h3><?php print $Discount['Name']?></h3>
```

4. Add this above it:

```
<div class="order_discount_info">
 <?php if ($Discount['Coupon']): ?>
  Code: <strong><?php print $Discount['Coupon'] ?
></strong><br/>
 <?php endif; ?>
 <?php if (sc_is_admin()): ?>
  Discount #<?php print $Discount['record_number'] ?>
 <?php endif;?>
</div>
```

option_checkbox.tpl.php

1. Find this:

```
<?php print $Option_Field_Name?>
```

2. Replace with:

```
<?php print $Option_Field_ID?>
```

option_file.tpl.php

If you are using a custom version of this temlate file, we recommend reverting this file (delete it from your custom theme folder if present).

option_radio.tpl.php

1. Find this line:

```
<input class="qt_price-<?php print $Price_Attribute?>
qt_price_point-<?php print $Price_Point?>" type="radio"
name="<?php print $Option_Field_Name?>" id="<?php print
$Option_Field_Name.'-'.$i ?>" value="<?php print
$Choice_Value?>" <?php print $Choice_Selected?> /><span><?
php print $Choice_Text?></span>
```

2. Replace with:

```
<input class="qt_price-<?php print $Price_Attribute?>
qt_price_point-<?php print $Price_Point?>" type="radio"
name="<?php print $Option_Field_Name?>" id="<?php print
```

```
$Option_Field_ID ?>" value="<?php print $Choice_Value?>" <?
php print $Choice_Selected?> /><span><?php print
$Choice_Text?></span>
```

option_select.tpl.php

1. Find this line:

```
<select class="<?php print $Error_Class?>" name="<?php
print $Option_Field_Name?>" >
```

2. Replace with:

```
<select class="<?php print $Error_Class?>" id="<?php print
$Option_Field_ID ?>" name="<?php print $Option_Field_Name?
>" >
```

option_text.tpl.php

1. Find all occurrences of this:

```
id="$Option_Field_Name
```

2. Replace with:

```
id="$Option_Field_ID
```

Do NOT replace occurrences of: **name="$Option_Field_Name"**

option_textarea.tpl.php

1. Find all occurrences of this:

```
id="$Option_Field_Name
```

2. Replace with:

```
id="$Option_Field_ID
```

3. Find this line:

```
<textarea name="<?php print $Option_Field_Name?>" class="<?
```

```
php print $Error_Class?> qt_price-<?php print
$Price_Attribute?> qt_price_point-<?php print $Price_Point?
>" id="<?php print $Option_Field_Name?>"  rows="10"
cols="30" style="width: <?php print $Choice_Width?>px;
height: <?php print $Choice_Height?>px;" ><?php print
$Choice_Value?></textarea>
```

4. Replace with:

```
<textarea name="<?php print $Option_Field_Name?>" class="<?
php if ($Max_Length) print 'maxlength ' ?><?php print
$Error_Class?> qt_price-<?php print $Price_Attribute?>
qt_price_point-<?php print $Price_Point?>" id="<?php print
$Option_Field_ID ?>"  rows="10" cols="30" style="width: <?
php print $Choice_Width?>px; height: <?php print
$Choice_Height?>px;" ><?php print $Choice_Value?
></textarea>
```

order_detail.tpl.php

1. Find this line:

```
<div class="you_save">You save <?php print sc_price($Item
['Savings_Amount']) ?> (<?php print $Item
['Savings_Percent'] ?>%)!</div>
```

2. Replace with:

```
<div class="you_save">
You save <?php print sc_price($Item['Savings_Amount']) ?>
(<?php print $Item['Savings_Percent'] ?>%)!
<div class="discount_info">
<?php if ($Item['Coupon_Code']): ?>
<span class="item_coupon_code">Code: <?php print $Item
['Coupon_Code'] ?></span>
<?php endif; ?>
<?php if (sc_is_admin()): ?>
<span class="discount_rn">
Discount #<?php print $Item['Discount_Number'] ?>
</span>
<?php endif; ?>
</div>
</div>
```

3. Find this line:

```
VAT (Value Added Tax):<br />
```

4. Replace with:

```
<div class="vat">VAT (Value Added Tax) included:</div>
```

5. Find this line:

```
<?php print sc_price($VAT_Total) ?><br />
```

6. Replace with:

```
<div class="vat"><?php print sc_price($VAT_Total) ?></div>
```

7. Find this code:

```
<h3><?php print $Discount['Name']?></h3>
<?php if ($Discount['Image']): ?>
 <img class="discount_img" src="<?php print $Discount
['Image']['dyn'] ?>" width="<?php print $Discount['Image']
['width'] ?>" height="<?php print $Discount['Image']
['height'] ?>" alt="<?php print $Discount['Image']['alt'] ?
>" />
<?php endif; ?>
<?php print $Discount['Description'] ?>
<div class="total_svgs">Total savings with this discount:
<?php print sc_price($Discount['Savings_Amt']) ?>!</div>
```

8. Replace with:

```
<div class="order_discount_info">
 <?php if ($Discount['Coupon']): ?>
  Code: <strong><?php print $Discount['Coupon'] ?
></strong><br/>
 <?php endif; ?>
 <?php if (sc_is_admin()): ?>
  Discount #<?php print $Discount['record_number'] ?>
 <?php endif;?>
</div>
<h3><?php print $Discount['Name']?></h3>
<div class="total_svgs">
 Total savings with this discount: <?php print sc_price
($Discount['Savings_Amt']) ?> (<?php print $Discount
['Savings_Percent'] ?>%)!
</div>
```

order_detail_admin.tpl.php

1. Find this code:

```
Customer saved <?php print sc_price($Item
['Savings_Amount']) ?> (<?php print $Item
['Savings_Percent'] ?>%)!
<?php if ($Item['Coupon_Code']): ?>
<br/>Coupon code used: <?php print $Item['Coupon_Code'] ?>
<?php endif; ?>
```

2. Replace with:

```
You save <?php print sc_price($Item['Savings_Amount']) ?>
(<?php print $Item['Savings_Percent'] ?>%)!
<div class="discount_info">
 <?php if ($Item['Coupon_Code']): ?>
  <span class="item_coupon_code">Code: <?php print $Item
['Coupon_Code'] ?></span>
 <?php endif; ?>
 <?php if (sc_is_admin()): ?>
  <a class="discount_rn" href="<?php SC_CP_PAGE_HTTP ?>?
edit_records=1&amp;table=Discounts&amp;selected_record_number
php print $Item['Discount_Number'] ?>">
   Discount #<?php print $Item['Discount_Number'] ?>
  </a>
 <?php endif; ?>
</div>
```

3. Find this line:

```
VAT (Value Added Tax):<br />
```

4. Replace with:

```
<div class="vat">VAT (Value Added Tax) included:</div>
```

5. Find this line:

```
<?php print sc_price($VAT_Total) ?><br />
```

6. Replace with:

```
<div class="vat"><?php print sc_price($VAT_Total) ?></div>
```

7. Find this code:

```
<h3><?php print $Discount['Name']?></h3>
<?php if ($Discount['Image']): ?>
 <img class="discount_img" src="<?php print $Discount
['Image']['dyn'] ?>" width="<?php print $Discount['Image']
['width'] ?>" height="<?php print $Discount['Image']
['height'] ?>" alt="<?php print $Discount['Image']['alt'] ?
>" />
<?php endif; ?>
<?php print $Discount['Description'] ?>
<div class="total_svgs">Total savings with this discount:
<?php print sc_price($Discount['Savings_Amt']) ?>!</div>
```

8. Replace with:

```
<div class="order_discount_info">
 <?php if ($Discount['Coupon']): ?>
  Code: <strong><?php print $Discount['Coupon'] ?
```

```
></strong><br/>
 <?php endif; ?>
 <?php if (sc_is_admin()): ?>
  <a href="<?php SC_CP_PAGE_HTTP ?>?
edit_records=1&amp;table=Discounts&amp;selected_record_number=
php print $Discount['record_number'] ?>">
   Discount #<?php print $Discount['record_number'] ?>
  </a>
 <?php endif;?>
</div>
<h3><?php print $Discount['Name']?></h3>
<div class="total_svgs">
 Total savings with this discount: <?php print sc_price
($Discount['Savings_Amt']) ?> (<?php print $Discount
['Savings_Percent'] ?>%)!
</div>
```

order_detail_printable.tpl.php

1. Locate this code towards the top of the file:

```
body {
 background-color: #fff;
 background-image: none;
}

.vcard_button {
 display: none;
}
```

2. Change to:

```
body {
  background-color: #fff;
  background-image: none;
  font: 12px Tahoma, Geneva, sans-serif;
}

.address_box h4,
.address_box address,
#sc th {
 font: 12px Tahoma, Geneva, sans-serif;
 padding: 4px;
 height: auto;
}

.address_box address {
 padding: 4px;
 margin: 0;
 font-size: 12px;
}

.address_boxes .bill {
 margin-right: 12px;
}
```

```
.cart_table a.prod_name {
 font-size: 12px;
}

.cart_table_outer {
 padding: 0;
}

.vcard_button,
.addr_footer,
.addr_edit,
#print_friendly {
 display: none;
}
```

order_email_customer_html.tpl.php

1. Locate this code:

```
body {
 background-color: #fff;
 background-image: none;
}
```

2. Change to:

```
body {
 background-image: url(<?php print SC_STORE_DIR ?
>/squirrelcart/images/blank.gif);
 background-color: #fff;
}
```

3. Locate this code:

```
Customer saved <?php print sc_price($Item
['Savings_Amount']) ?> (<?php print $Item
['Savings_Percent'] ?>%)!
<?php if ($Item['Coupon_Code']): ?>
<br/>Coupon code used: <?php print $Item['Coupon_Code'] ?>
<?php endif; ?>
```

4. Change to:

```
You save <?php print sc_price($Item['Savings_Amount']) ?>
(<?php print $Item['Savings_Percent'] ?>%)!
<div class="discount_info">
 <?php if ($Item['Coupon_Code']): ?>
  <span class="item_coupon_code">Code: <?php print $Item
['Coupon_Code'] ?></span>
 <?php endif; ?>
 <?php if (sc_is_admin()): ?>
  <span class="discount_rn">
   Discount #<?php print $Item['Discount_Number'] ?>
```

```
  </span>
 <?php endif; ?>
</div>
```

5. Locate this code:

```
VAT (Value Added Tax):<br />
```

6. Change to:

```
<div class="vat">VAT (Value Added Tax) included:</div>
```

7. Locate this code:

```
<?php print sc_price($VAT_Total) ?><br />
```

8. Change to:

```
<div class="vat"><?php print sc_price($VAT_Total) ?></div>
```

9. Locate this code:

```
<h3><?php print $Discount['Name']?></h3>
<?php if ($Discount['Image']): ?>
 <img class="discount_img" src="<?php print $Discount
['Image']['dyn'] ?>" width="<?php print $Discount['Image']
['width'] ?>" height="<?php print $Discount['Image']
['height'] ?>" alt="<?php print $Discount['Image']['alt'] ?
>" />
<?php endif; ?>
<?php print $Discount['Description'] ?>
<div class="total_svgs">Total savings with this discount:
<?php print sc_price($Discount['Savings_Amt']) ?>!</div>
```

10. Change to:

```
<div class="order_discount_info">
 <?php if ($Discount['Coupon']): ?>
  Code: <strong><?php print $Discount['Coupon'] ?
></strong><br/>
 <?php endif; ?>
 <?php if (sc_is_admin()): ?>
  Discount #<?php print $Discount['record_number'] ?>
 <?php endif;?>
</div>
<h3><?php print $Discount['Name']?></h3>
<div class="total_svgs">
 Total savings with this discount: <?php print sc_price
($Discount['Savings_Amt']) ?> (<?php print $Discount
['Savings_Percent'] ?>%)!
</div>
```

order_email_customer_text.tpl.php

1. Locate this code:

```
VAT total: <?php print sc_price($VAT_Total, 'text') ?>
```

2. Change to:

```
VAT total (included): <?php print sc_price($VAT_Total,
'text') ?>
```

3. Locate this code:

```
(<?php print $Item['Quantity'] ?>) <?php print $Item
['Name'] ?><?php if (!$Item['Hide_Base_Price']):?> @ <?php
print sc_price($Item['Base_Price'], 'text') ?><?php endif;?
>
```

4. Change to:

```
(<?php print $Item['Quantity'] ?>) <?php print $Item
['Name'] ?><?php if (!$Item['Hide_Base_Price']):?> @ <?php
print sc_price($Item['Base_Price'], 'text') ?><?php endif;?
><?php if($Item['Savings_Amount']):?> (<?php print $Item
['Savings_Percent'] ?>% off<?php if ($Item
['Coupon_Code']): ?>, code <?php print $Item
['Coupon_Code'] ?><?php endif; ?>)<?php endif;?>
```

5. Locate this code:

```
Email: <?php print $Bill_Email_Address ?>
```

6. Add this after:

```
<?php if (!empty($Discounts)): $Discount = $Discounts[0]; ?
>
Order Based Discounts
--------------------------------
<?php print $Discount['Name']?>
Total savings with this discount: <?php print sc_price
($Discount['Savings_Amt'], 'text') ?> (<?php print
$Discount['Savings_Percent'] ?>%)
<?php if ($Discount['Coupon']): ?>Code: <?php print
$Discount['Coupon'] ?><?php endif; ?>
<?php endif; ?>
```

order_email_merchant_html.tpl.php

1. Locate this code:

```
body {
 background-color: #fff;
 background-image: none;
}
```

2. Change to:

```
body {
 background-image: url(<?php print SC_STORE_DIR ?
>/squirrelcart/images/blank.gif);
 background-color: #fff;
}
```

3. Locate this code:

```
Customer saved <?php print sc_price($Item
['Savings_Amount']) ?> (<?php print $Item
['Savings_Percent'] ?>%)!
<?php if ($Item['Coupon_Code']): ?>
<br/>Coupon code used: <?php print $Item['Coupon_Code'] ?>
<?php endif; ?>
```

4. Change to:

```
You save <?php print sc_price($Item['Savings_Amount']) ?>
(<?php print $Item['Savings_Percent'] ?>%)!
<div class="discount_info">
 <?php if ($Item['Coupon_Code']): ?>
  <span class="item_coupon_code">Code: <?php print $Item
['Coupon_Code'] ?></span>
 <?php endif; ?>
 <?php if (sc_is_admin()): ?>
  <span class="discount_rn">
   Discount #<?php print $Item['Discount_Number'] ?>
  </span>
 <?php endif; ?>
</div>
```

5. Locate this line:

```
VAT (Value Added Tax):<br />
```

6. Change to:

```
<div class="vat">VAT (Value Added Tax) included:</div>
```

7. Locate this line:

```
<?php print sc_price($VAT_Total) ?><br />
```

8. Change to:

```
<div class="vat"><?php print sc_price($VAT_Total) ?></div>
```

9. Locate this code:

```
<div class="cart_discount <?php print $Discount
['Instance'] ?>">
 <h3><?php print $Discount['Name']?></h3>
 <?php if ($Discount['Image']): ?>
  <img class="discount_img" src="<?php print $Discount
['Image']['dyn'] ?>" width="<?php print $Discount['Image']
['width'] ?>" height="<?php print $Discount['Image']
['height'] ?>" alt="<?php print $Discount['Image']['alt'] ?
>" />
 <?php endif; ?>
 <?php print $Discount['Description'] ?>
 <div class="total_svgs">Total savings with this discount:
<?php print sc_price($Discount['Savings_Amt']) ?>!</div>
</div>
```

10. Change to:

```
<div class="order_discount_info">
 <?php if ($Discount['Coupon']): ?>
  Code: <strong><?php print $Discount['Coupon'] ?
></strong><br/>
 <?php endif; ?>
 <?php if (sc_is_admin()): ?>
  Discount #<?php print $Discount['record_number'] ?>
 <?php endif;?>
</div>
<h3><?php print $Discount['Name']?></h3>
<div class="total_svgs">
 Total savings with this discount: <?php print sc_price
($Discount['Savings_Amt']) ?> (<?php print $Discount
['Savings_Percent'] ?>%)!
</div>
```

order_email_merchant_text.tpl.php

1. Locate this code:

```
VAT total: <?php print sc_price($VAT_Total, 'text') ?>
```

2. Change to:

```
VAT total (included): <?php print sc_price($VAT_Total,
'text') ?>
```

3. Locate this line:

```
(<?php print $Item['Quantity'] ?>) <?php print $Item
['Name'] ?><?php if (!$Item['Hide_Base_Price']):?> @ <?php
print sc_price($Item['Base_Price'], 'text') ?><?php endif;?
>
```

4. Change to:

```
(<?php print $Item['Quantity'] ?>) <?php print $Item
['Name'] ?><?php if (!$Item['Hide_Base_Price']):?> @ <?php
print sc_price($Item['Base_Price'], 'text') ?><?php endif;?
><?php if($Item['Savings_Amount']):?> (<?php print $Item
['Savings_Percent'] ?>% off<?php if ($Item
['Coupon_Code']): ?>, code <?php print $Item
['Coupon_Code'] ?><?php endif; ?>)<?php endif;?>
```

5. Locate this code:

```
Payment Info
--------------------------------
```

6. Add this before it:

```
<?php if (!empty($Discounts)): $Discount = $Discounts[0]; ?
>
Order Based Discounts
--------------------------------
<?php print $Discount['Name']?>
Total savings with this discount: <?php print sc_price
($Discount['Savings_Amt'], 'text') ?> (<?php print
$Discount['Savings_Percent'] ?>%)
<?php if ($Discount['Coupon']): ?>Code: <?php print
$Discount['Coupon'] ?><?php endif; ?>
Discount #<?php print $Discount['record_number']?>
<?php endif; ?>
```

product_detail.tpl.php

1. Locate this code towards the top of the file:

```
<?php print sc_msg($Add_to_Cart_Message,'success') ?>
```

2. Add this before it:

```
<?php if ($_GET['patc']) print sc_msg('To purchase this
item, choose your options below and click <strong>Add to
Cart</strong>') ?>
```

3. Locate this line:

```
<div class="prod_section buy_now">
```

4. Add this before it:

```
<?php if ($Show_Pricing): ?>
```

5. Locate this code:

```
<h2>Buy Now!</h2>
```

6. Change to:

```
<h2>
 <?php if ($Allow_Purchase):?>
  Buy Now!
 <?php else: ?>
  Pricing
 <?php endif; ?>
</h2>
```

7. Locate this line:

```
<span class="qty_label">Quantity: </span><input class="qty"
type="text" id="quantity" name="quantity" value="<?php
print $Quantity_Value?>" />
```

8. Change to:

```
<span class="qty_label">Quantity: </span><input class="qty
<?php print $Qty_Class ?>" type="text" id="<?php print
$ID_Prefix ?>quantity" name="quantity" value="<?php print
$Quantity_Value?>" />
```

9. Locate this code towards the bottom of the file:

```
    <?php endforeach; ?>
   </div>
  <?php endif; ?>

  <?php print $Reviews?>
 </form>
</div>
```

10. Change to:

```
     <?php endforeach; ?>
    </div>
   <?php endif; ?>
  <?php endif; ?>
 </form>
```

```
 <?php print $Reviews?>

 <?php print $Related_Products?>

 <?php print $Also_Ordered_Products?>
</div>
```

product_thumbnail.tpl.php

1. Locate this code:

```
<div class="prod_thumb <?php print $Discount_Class ?>">
```

2. Change to:

```
<div class="prod_thumb <?php print $Extra_Classes ?>">
```

3. Locate this code:

```
<?php if ($Discount_Class): ?>
 <?php if ($Show_Regular_Price): ?>
  <div class="regular_price">
   <?php print $Regular_Price_Label?> <?php print sc_price
($Regular_Price) ?>
  </div>
 <?php endif; ?>
 <div class="sale_price">
  <span class="sale_price_inner">
   <?php print $Price_Label?> <?php print sc_price
($Base_Price) ?>
  </span>
 </div>
<?php elseif ($Base_Price): ?>
 <div class="prod_price">
  <?php print $Price_Label?> <?php print sc_price
($Base_Price) ?>
 </div>
<?php endif; ?>
```

4. Change to:

```
<?php if ($Show_Pricing): ?>
 <?php if ($Discount_Class): ?>
  <?php if ($Show_Regular_Price): ?>
   <div class="regular_price">
    <?php print $Regular_Price_Label?> <?php print sc_price
($Regular_Price) ?>
   </div>
  <?php endif; ?>
  <div class="sale_price">
   <span class="sale_price_inner">
    <?php print $Price_Label?> <?php print sc_price
```

```
($Base_Price) ?>
   </span>
  </div>
 <?php elseif ($Base_Price): ?>
  <div class="prod_price">
   <?php print $Price_Label?> <?php print sc_price
($Base_Price) ?>
  </div>
 <?php endif; ?>
<?php endif; ?>
```

5. Locate this code:

```
</form>
```

6. Add this before:

```
<?php if ($Allow_Purchase && $Show_Add_to_Cart): ?>
 <div class="valign_middle qty_box">
  <input type="hidden" id="<?php print $ID_Prefix ?
>quantity" name="quantity" value="1" />
  <a href="<?php print $Pre_Add_to_Cart_URL ?>"
id="add_to_cart_link<?php print $Form_ID ?>" class="<?php
print $Add_to_Cart_Class ?> btn co_btn_disabled" <?php if
(!$Opts_not_Shown): ?>onclick="document.getElementById
('add_to_cart_form_<?php print $Form_ID?>').submit();
return false"<?php endif;?>></a>
  <noscript>
   <input class="co_btn" type="submit" name="no_script
[add_to_cart_btn]" value="<?php print $Add_to_Cart_Text ?
>" />
  </noscript>
  <script type="text/javascript">
   var addToCartLink = document.getElementById
('add_to_cart_link<?php print $Form_ID ?>');
   if (addToCartLink) addToCartLink.className =
addToCartLink.className.replace('co_btn_disabled','');
  </script>
 </div>
<?php endif; ?>
```

ship_notify_email_html.tpl.php

1. Change this:

```
body {
 background-color: #fff;
}
```

2. To this:

```
body {
 background-image: url(<?php print SC_STORE_DIR ?
>/squirrelcart/images/blank.gif);
```

```
 background-color: #fff;
}
```

store_main.tpl.php

1. Change this:

```
<body onload="scOnLoad()">
```

2. To this:

```
<body>
```

style_main.css.php

1. Change this:

```
#sc_footer {
 clear: left;
}
```

2. To this:

```
#sc_footer {
 clear: both;
}
```

3. Find this:

```
/* surrounds name of category and image */
.cat_label_outer {
```

4. Add this above it:

```
.category_detail {
 overflow: hidden;
}
```

5. Find this:

```
.subcat_count {
 margin-top: 10px;
}
```

6. Add this below:

```
.subcategory_img {
 display: block;
```

```
 margin: 0 auto;
}
```

7. Find this:

```
.prod_detail.discounted .prod_price {
```

8. Add this above:

```
.related_products .prod_price {
 font-size: 12px;
 font-weight: bold;
 margin-bottom: 0;
}

.prod_detail.discounted .prod_thumb .prod_price {
 background: none;
}
```

9. Find this:

```
.opt_chars_left {
```

10. Add this above:

```
.opt_var_price {
 width: 50px;
 margin: 0 2px;
}
```

11. Find this:

```
a.update_cart2_btn {
```

12. Add this above:

```
a.multi_add_to_cart_btn {
 background-image: url(<?php print sc_img
('btn_multi_add_to_cart','dyn') ?>);
 width: <?php print sc_img
('btn_multi_add_to_cart','width') ?>px;
 height: <?php print sc_img
('btn_multi_add_to_cart','height') ?>px;
 display: block;
 <?php if ($SC['browser']['browser'] == 'fx' && $SC
['browser']['maj_ver'] < 3.0): ?>
 display:-moz-inline-box;
 <?php endif; ?>
 margin: 5px auto;
}

a.more_detail_btn {
 background-image: url(<?php print sc_img
('btn_more_detail','dyn') ?>);
 width: <?php print sc_img('btn_more_detail','width') ?>px;
 height: <?php print sc_img('btn_more_detail','height') ?
>px;
```

```
 display: inline-block;
 <?php if ($SC['browser']['browser'] == 'fx' && $SC
['browser']['maj_ver'] < 3.0): ?>
 display:-moz-inline-box;
 <?php endif; ?>
 margin-top: 2px;
}
```

13. Find this:

```
.acct_choice_login {
 width: 50%;
 float: right;
}

.acct_choice_login .inner {
 border-left: silver solid 1px;
 position: relative;
}
```

14. Change to:

```
<?php if ($SC['settings']['Account_Creation_Enabled']): ?>
.acct_choice_login {
 width: 50%;
 float: right;
}

.acct_choice_login .inner {
 border-left: silver solid 1px;
 position: relative;
}
<?php endif; ?>
```

15. Add this to the bottom of the file:

```
.ship_disclaimer {
     margin-top: 15px;
     font-size: 11px;
     padding-left: 6px;
     color: #808080;
}

.order_discount_info {
     float: right;
     text-align: right;
}

 .discount_info {
     font-weight: normal;
     color: #7f7f7f;
}

.item_coupon_code {
     padding-right: 20px;
}

.vat {
 color: #8f8f8f;
}
```

```
/*********************************
 Products via a table view
*********************************/
.cat_products_table {
 border: black solid 1px;
 width: 100%;
 margin: 10px 0;
}

.cat_products_table td,
.cat_products_table th {
 text-align: left;
 border-bottom: silver solid 1px;
 vertical-align: top;
 padding: 5px;
}
.cat_products_table tbody td {
 padding: 10px;
}

.cat_products_table td.prod_name_td {
 width: 31%;
}
.cat_products_table td.price_td {
 width: 20%;
}
.cat_products_table td.opts {
 width: 49%;
}

.cat_products_table th.last {
 text-align: right;
}
.cat_products_table table td,
.cat_products_table table th {
 padding: 0;
 border: 0;
}
.cat_products_table .prod_name_td,
.cat_products_table .price_td {
 border-right: silver solid 1px;
}
.cat_products_table .opts {
 text-align: right;
}
.cat_products_table .prod_options table {
 margin-right: 0;
}
.cat_products_table .prod_options {
 margin: 0;
}
.cat_products_table a.prod_thumb_img {
 margin: 0;
}
.cat_products_table .rv_small_rating {
 margin: 0;
}
.cat_products_table .qty {
 width: 35px;
}
.cat_products_table .prod_name {
 margin-bottom: 5px;
}
```

```
.cat_products_table .agree {
 margin-right: 0;
 margin-bottom: 5px;
 margin-top: 0;
}
.cat_products_table .agree_text {
 margin-right: 0;
 padding: 0;
}
.cat_products_table .agree_print {
 margin-right: 5px;
}
.cat_products_table .agree h3 {
 font-size: inherit;
 margin-top: 0;
 margin-bottom: 2px;
}
.cat_products_table .error td {
 border: #7f1717 solid 1px;
 border-width: 1px 0;
}
.cat_products_table .error .inner {
 position: relative;
}
.cat_products_table .error .arrow {
 position: absolute;
 bottom: -22px;
 left: 50%;
 display: block;
 width: 23px;
 height: 12px;
 margin: 0 auto;
 background: url(<?php print sc_img
('red_error_arrow','dyn')?>) no-repeat;
}
.cat_products_table .sc_msg.info {
 margin: 0;
 font-size: 12px;
}
.cat_products_table .sc_msg.info img {
 display: none;
}
.cat_products_table .required_instructions,
.cat_products_table .missing_instructions {
 display: none;
}
.category_as_table .req_missing_instructions {
 text-align: center;
 margin-top: 10px;
}

#sc .account_options_restricted {
 margin-top: 40px;
 width: 500px;
}

.sc_restricted #login_form {
 width: 185px;
 margin: 0 auto 70px auto;
}

.sc_restricted .username,
.sc_restricted .password {
 display: block;
```

```
 width: 100%;
}

.sc_restricted .login_btn {
 margin: 0 auto;
}

.sc_restricted .nav_links {
 text-align: center;
}

.sc_restricted .nav_links li {
 display: inline-block;
 margin-left: 20px;
}

.sc_restricted .nav_links li:first-child {
 margin-left: 0;
}

.sc_restricted .nav_links a {
 text-decoration: none;
}

.email_admin_opts {
 background-color: #fcfc8d;
 border: black solid 1px;
 font-size: 12px;
 padding: 10px;
}

.checkout_done .boxc {
 margin-bottom: 40px;
}
```

style_variant2_1024.css.php

1. Find this:

```
#sc_inner {
 margin: 0 auto;
 position: relative;
 width: 980px; /* fits well inside 1024 with a little room
on the sides */
}
```

2. Change to:

```
#sc_inner {
 margin: 0 auto;
 position: relative;
 width: 980px; /* fits well inside 1024 with a little room
on the sides */
 overflow: hidden;
}
```

12.6.3.6 v3.5.0

Overview

This page has been written as a guide to aid you in upgrading your site from v3.0.0 to v3.5.0 and after. Please read this page in its entirety before attempting to upgrade.

UPS Online Tools

If you were previously registered for UPS Online Tools, it has been replaced by UPS Developer Kit and requires that you register again. **See this page (Section 6.6.10)** for instructions.

SEO URL changes

If you are using our SEO URLs (advanced) feature and are upgrading to Squirrelcart PRO v3.5.0 or newer, you'll need to update your .htaccess file to add support for the Downloads and Store Locator modules. This is only needed if you are using those modules.

1. Open your .htaccess file in an editor

2. If you find a section like this:

```
RewriteEngine On
RewriteRule ^
(products|categories|content|news|reviews|testimonials|contac
(.*)$ store.php/$1/$2 [L]
```

   Add **|downloads|store-locator** inside the first set of parentheses, at the very end:

```
RewriteEngine On
RewriteRule ^
(products|categories|content|news|reviews|testimonials|contac
-locator)/?(.*)$ store.php/$1/$2 [L]
```

3. If you find a section like this:

```
<Files ~
"categories|products|content|news|reviews|testimonials|contac
ForceType application/x-httpd-php
</Files>
```

   Add |**content** inside the quotes, directly before the last quote:

```
<Files ~
"categories|products|content|news|reviews|testimonials|contac
-locator">
ForceType application/x-httpd-php
</Files>
```

4. Save the file

Theme and Template Changes

If you are using a custom version of any of the below template files, make the changes outlined for the custom version of that file inside your custom theme folder (Example: **squirrelcart/themes/YOURTHEMENAME)**. If you are not using a custom version of that file you do not need to make any changes. This section is a guide only. If a v3.5.0 template file has a lot of changes, you are probably better off reverting to the default version by removing your custom version of the same file.

account_form.tpl.php

1. Locate this code:

```
<?php print $News_Groups?>
```

2. Directly after that code, add this:

```
<?php if (!empty($Agreements)): ?>
 <div class="terms">
  <img class="sc_header" src="<?php print $Terms_Image
['dyn'] ?>" alt="Terms & Conditions" width="<?php print
$Terms_Image['width'] ?>" height="<?php print $Terms_Image
['height'] ?>">
  <?php foreach($Agreements as $Agreement): ?>
   <div class="boxc">
    <fieldset>
     <h3><?php print $Agreement['Display_Name'] ?></h3>
     <div class="agree_text">
      <?php print $Agreement['Agreement']?>
     </div>
     <div class="agree_print">
      <a target="_blank" href="<?php print $Agreement
['Print_URL'] ?>">Print Agreement</a>
     </div>
     <div class="agree_fld valign_middle">
      I agree <input class="check" type="checkbox" name="<?
php print $Agreement['Field_Name'] ?>" <?php print
$Agreement['Checked'] ?> />
     </div>
    </fieldset>
    <!--  below is for rounded corners -->
    <b class="cn tr"></b><b class="cn br"></b><b class="cn
tl"></b><b class="cn bl"></b>
   </div>
  <?php endforeach; ?>
 </div>
```

```
<?php endif; ?>
```

checkout_address_form.tpl.php

1. Locate this code:

```
<a href="#" id="continue_btn_link" class="continue_btn btn
co_btn_disabled" onclick="document.getElementById
('address_form').submit(); return false;"></a>
```

2. Add this before it:

```
<?php if (!empty($Agreements)): ?>
 <div class="terms">
  <img class="sc_header" src="<?php print $Terms_Image
['dyn'] ?>" alt="Terms & Conditions" width="<?php print
$Terms_Image['width'] ?>" height="<?php print $Terms_Image
['height'] ?>">
  <?php foreach($Agreements as $Agreement): ?>
   <div class="boxc">
    <fieldset>
     <h3><?php print $Agreement['Display_Name'] ?></h3>
     <div class="agree_text">
      <?php print $Agreement['Agreement']?>
     </div>
     <div class="agree_print">
      <a target="_blank" href="<?php print $Agreement
['Print_URL'] ?>">Print Agreement</a>
     </div>
     <div class="agree_fld valign_middle">
      I agree <input class="check" type="checkbox" name="<?
php print $Agreement['Field_Name'] ?>" <?php print
$Agreement['Checked'] ?> />
     </div>
    </fieldset>
    <!--  below is for rounded corners -->
    <b class="cn tr"></b><b class="cn br"></b><b class="cn
tl"></b><b class="cn bl"></b>
   </div>
  <?php endforeach; ?>
 </div>
<?php endif; ?>
```

checkout_pay.tpl.php

1. Locate this code:

```
<?php print $reCAPTCHA_HTML?>
```

2. Add this directly above:

```
<?php if (!empty($Agreements)): ?>
 <div class="terms">
  <img class="sc_header" src="<?php print $Terms_Image
```

```
['dyn'] ?>" alt="Terms & Conditions" width="<?php print
$Terms_Image['width'] ?>" height="<?php print $Terms_Image
['height'] ?>">
  <?php foreach($Agreements as $Agreement): ?>
   <div class="boxc">
    <fieldset>
     <h3><?php print $Agreement['Display_Name'] ?></h3>
     <?php if ($Agreement['Product_Names']):?>
      <div class="agree_details">
       This agreement applies to the following product(s):
       <?php print implode(', ',$Agreement
['Product_Names'])?>
      </div>
     <?php endif; ?>
     <div class="agree_text">
      <?php print $Agreement['Agreement']?>
     </div>
     <div class="agree_print">
      <a target="_blank" href="<?php print $Agreement
['Print_URL'] ?>">Print Agreement</a>
     </div>
     <div class="agree_fld valign_middle">
      I agree <input class="check" type="checkbox" name="<?
php print $Agreement['Field_Name'] ?>" <?php print
$Agreement['Checked'] ?> />
     </div>
    </fieldset>
    <!--  below is for rounded corners -->
    <b class="cn tr"></b><b class="cn br"></b><b class="cn
tl"></b><b class="cn bl"></b>
   </div>
  <?php endforeach; ?>
 </div>
<?php endif; ?>
```

checkout_pay_order_summary.tpl.php

If you are using VAT (used in the European Union), we recommend reverting this template (delete it from your custom theme folder if present).

1. Locate this code:

```
<?php if ($Handling_Total): ?>
 Handling Fee:<br />
<?php endif; ?>
```

2. Add this below it:

```
<?php foreach ($Other_Fees as $Other_Fee): ?>
 <?php if ($Other_Fee['Details_URL']): ?>
  <a class="ship_detail_popup tip" href="<?php print
$Other_Fee['Details_URL']?>" title="<?php print $Other_Fee
['Description']?>"><?php print $Other_Fee['Label'] ?
></a>:<br />
 <?php else: ?>
  <?php print $Other_Fee['Label'] ?>:<br />
 <?php endif;?>
<?php endforeach; ?>
```

3. Locate this code:

```
<?php if ($Handling_Total): ?>
 <?php print sc_price($Handling_Total) ?><br />
<?php endif; ?>
```

4. Add this below it:

```
<?php foreach ($Other_Fees as $Other_Fee): ?>
 <?php print sc_price($Other_Fee['Amount']) ?><br />
<?php endforeach; ?>
```

checkout_view.tpl.php

1. Locate this code:

```
<?php if ($Handling_Total): ?>
 Handling Fee:<br />
<?php endif; ?>
```

2. Add this below it:

```
<?php foreach ($Other_Fees as $Other_Fee): ?>
 <?php if ($Other_Fee['Details_URL']): ?>
  <a class="ship_detail_popup tip" href="<?php print
$Other_Fee['Details_URL']?>" title="<?php print $Other_Fee
['Description']?>"><?php print $Other_Fee['Label'] ?
></a>:<br />
 <?php else: ?>
  <?php print $Other_Fee['Label'] ?>:<br />
 <?php endif;?>
<?php endforeach; ?>
```

3. Locate this code:

```
<?php if ($Handling_Total): ?>
 <?php print sc_price($Handling_Total) ?><br />
<?php endif; ?>
```

4. Add this below it:

```
<?php foreach ($Other_Fees as $Other_Fee): ?>
 <?php print sc_price($Other_Fee['Amount']) ?><br />
<?php endforeach; ?>
```

order_detail.tpl.php
order_detail_admin.tpl.php
order_email_customer_html.tpl.php
order_email_merchant_html.tpl.php

For all four of the above templates, the changes are the same with the exception of #1 and #2 below which are only for order_detail.tpl.php.

1. For order_detail.tpl.php ONLY - Find this line:

```
<a href="<?php print $Shipping_Details_URL ?>"
class="ship_detail_popup" target="_blank" >Shipping
total:</a><br/>
```

2. For order_detail.tpl.php ONLY - Replace with:

```
<a href="<?php print $Shipping_Details_URL ?>"
class="ship_detail_popup tip" target="_blank" title="<?php
print $Shipping_Details_Truncated ?>">Shipping
total:</a><br/>
```

3. Find this code:

```
<?php if ($Handling_Total): ?>
 Handling Fee:<br />
<?php endif; ?>
```

4. Add this below it:

```
<?php foreach ($Other_Fees as $Other_Fee): ?>
 <?php if ($Other_Fee['Details_URL']): ?>
  <a class="ship_detail_popup tip" href="<?php print
$Other_Fee['Details_URL']?>" title="<?php print $Other_Fee
['Description']?>"><?php print $Other_Fee['Label'] ?
></a>:<br />
 <?php else: ?>
  <?php print $Other_Fee['Label'] ?>:<br />
 <?php endif;?>
<?php endforeach; ?>
```

5. Find this code:

```
<?php if ($Handling_Total): ?>
 <?php print sc_price($Handling_Total) ?><br />
<?php endif; ?>
```

6. Add this below it:

```
<?php foreach ($Other_Fees as $Other_Fee): ?>
 <?php print sc_price($Other_Fee['Amount']) ?><br />
<?php endforeach; ?>
```

order_email_customer_text.tpl.php
order_email_merchant_text.tpl.php

Both of these templates require the same changes.

1. Find this line:

```
<?php if ($VAT_Total): ?>
```

2. Add this above it:

```
<?php foreach ($Other_Fees as $Other_Fee): ?>
<?php print $Other_Fees['Label'].': '.sc_price($Other_Fee
['Amount'], 'text') ?>
<?php endforeach; ?>
```

3. Find this line:

```
if ($Option_Detail_Value['Price']) print " @ ".sc_price
($Option_Detail_Value['Price'],'text');
```

4. Replace with:

```
if ($Option_Detail_Value['Price'] > 0) print " @ ".sc_price
($Option_Detail_Value['Price'],'text');
```

5. Find this line:

```
if ($Option_Detail['Value'][0]['Price']) print " @
".sc_price($Option_Detail['Value'][0]['Price'],'text');
```

6. Replace with:

```
if ($Option_Detail['Value'][0]['Price'] > 0) print " @
".sc_price($Option_Detail['Value'][0]['Price'],'text');
```

product_detail.tpl.php

1. Find this line:

```
<div class="agree <?php print $Agreement['Instance']?>"
style="width: <?php print $Agreement['Width'] ?>px;">
```

2. Change to:

```
<div class="agree <?php print $Agreement['Instance']?>">
```

3. Find this line:

```
<div class="agree_text" style="width: <?php print
$Agreement['Width'] ?>px; height: <?php print $Agreement
['Height'] ?>px">
```

4. Change to:

```
<div class="agree_text">
```

product_thumbnail.tpl.php

1. Find this line:

```
<a href="<?php print $Pre_Add_to_Cart_URL ?>"
id="add_to_cart_link<?php print $Form_ID ?>" class="<?php
print $Add_to_Cart_Class ?> btn co_btn_disabled" <?php if
(!$Opts_not_Shown): ?>onclick="document.getElementById
('add_to_cart_form_<?php print $Form_ID?>').submit();
return false"<?php endif;?>></a>
```

2. Change to:

```
<a href="<?php print $Pre_Add_to_Cart_URL ?>"
rel="nofollow" id="add_to_cart_link<?php print $Form_ID ?>"
class="<?php print $Add_to_Cart_Class ?> btn
co_btn_disabled" <?php if (!$Opts_not_Shown): ?
>onclick="document.getElementById('add_to_cart_form_<?php
print $Form_ID?>').submit(); return false"<?php endif;?
>></a>
```

style_main.css.php

1. Find this:

```
.agree {
 margin: 15px auto;
}
```

2. Change to this:

```
.agree {
 margin: 15px auto;
 width: 350px;
}
```

3. Find this:

```
.agree_text {
 text-align: left;
 border: black solid 1px;
 overflow: auto;
 padding: 5px;
 background-color: #ececec;
 margin: 0 auto;
 width: 350px;
 height: 150px;
}
```

4. Change to:

```
.agree_text {
 text-align: left;
 border: black solid 1px;
 overflow: auto;
 padding: 5px;
 background-color: #ececec;
 margin: 0 auto;
 width: 350px;
 height: 200px;
}
```

5. Find this:

```
.ship_rates {
 float: left;
}
```

6. Change to this:

```
.ship_rates {
 float: left;
 width: 500px;
}
```

7. Find this:

```
#check_number {
 width: 50px;
}
```

8. Add this below it:

```
.terms .agree_text {
 width: auto;
 margin: 0 20px;
}

.terms .agree_fld {
 text-align: center;
 font-size: 14px;
}

.terms .agree_print {
 margin-right: 25px;
}

.terms .agree_details {
 color: gray;
 margin: 0 20px 10px 20px;
}

.account_form .terms .sc_header {
 margin-left: -35px;
}
```

12.6.3.7 v4.0.0

Overview

This page has been written as a guide to aid you in upgrading your site from v3.0.0 to v4.0.0 and after. Please read this page in its entirety before attempting to upgrade.

FedEx Web Services

In prior versions, we used a library called NuSOAP for communication with FedEx Web Services. As of version 4.0.0 we use the built-in PHP SOAP extension. If that extension is not available on your server FedEx Web Services will no longer work until that extension is enabled.

To see if it is enabled:

1. Login as store admin

2. Open the phpinfo.php file in your browser, which is inside the squirrelcart folder.

   The URL will be like this (but with your domain name): http://www.example.com/squirrelcart/phpinfo.php

3. Search the page for SOAP. If not found, you do not have the extension installed.

SEO URL changes

If you are using our SEO URLs (advanced) feature and wish to use the new Social Sign On feature, you'll need to update your .htaccess file to add support for it.

1. Open your .htaccess file in an editor

2. If you find a section like this:

   ```
   RewriteEngine On
   RewriteRule ^
   (products|categories|content|news|reviews|testimonials|contac
   -locator)/?(.*)$ store.php/$1/$2 [L]
   ```

   Add **`|downloads|store-locator`** inside the first set of parentheses, at the very end:

   ```
   RewriteEngine On
   RewriteRule ^
   (products|categories|content|news|reviews|testimonials|contac
   -locator|auth)/?(.*)$ store.php/$1/$2 [L]
   ```

3. If you find a section like this:

```
<Files ~
"categories|products|content|news|reviews|testimonials|contac
-locator|auth">
ForceType application/x-httpd-php
</Files>
```

Add `|content` inside the quotes, directly before the last quote:

```
<Files ~
"categories|products|content|news|reviews|testimonials|contac
-locator">
ForceType application/x-httpd-php
</Files>
```

4. Save the file

Theme and Template Changes

If you are using a custom version of any of the below template files, make the changes outlined for the custom version of that file inside your custom theme folder (Example: **squirrelcart/themes/YOURTHEMENAME)**. If you are not using a custom version of that file you do not need to make any changes. This section is a guide only. If a v4.0.0 template file has a lot of changes, you are probably better off reverting to the default version by removing your custom version of the same file.

> If you are using a custom theme from version 3 and do not have the template file **squirrelcart/themes/store_main.tpl.php** inside your custom theme folder, we recommend copying that file to your custom theme folder in version 4, from your version 3.x backup. You'll find the file in your version 3 backup under **squirrelcart/themes/squirrelcart/**. By using this file, you will not have to make as many changes to get your older version 3 theme working in version 4.

product_detail.tpl.php

1. Find this line:

```
<?php print sc_msg($Out_of_Stock_Message) ?>
```

2. Add this after:

```
<?php if ($Sell_In_Increments > 1):?>
 <?php print sc_msg("This item must be purchased in
increments of $Sell_In_Increments.")?>
<?php endif;?>
```

3. Find this:

```
 <?php if ($Badge_Image): ?>
  <img class="badge" src="<?php print $Badge_Image['dyn'] ?
>" width="<?php print $Badge_Image['width'] ?>" height="<?
php print $Badge_Image['height'] ?>" alt="" />
 <?php endif; ?>
</div>
```

4. Add this after:

```
<?php if (!empty($Extra_Images)):?>
     <div class="xtra_imgs">
          <?php foreach($Extra_Images as $Extra_Image):?>
               <a href="<?php print $Extra_Image['dyn']?>"
rel="lightbox[product-<?php print $record_number ?>]"
target="_blank">
                    <img src="<?php print $Extra_Image
['thumb_dyn'] ?>" alt="<?php print $Extra_Image['alt'] ?
>" />
               </a>
          <?php endforeach;?>
     </div>
<?php endif;?>
```

store_home.tpl.php

1. Find this line:

```
<?php if (isset($SC['msg_generic'])):?>
```

2. Change to:

```
<?php if ($Status_Message):?>
```

3. Find this line:

```
<?php print $SC['msg_generic'] ?>
```

4. Change to this:

```
<?php print $Status_Message ?>
```

store_main.tpl.php

1. Find this line:

```
<body>
```

2. Change to:

```
<body class="<?php print $SC_Body_Classes?>">
```

3. Find this line:

```
<div id="sc" class="cols<?php print $num_columns?>">
```

4. Change to:

```
<div id="sc" class="<?php print $SC_Classes ?>
btn_wait_toggle">
```

style_main.css.php

1. Find this:

```
.nav_block_title {
 border-bottom: gray solid 1px;
 padding: 3px;
 margin-bottom: 10px;
 font-size: 16px;
}
```

2. Change to this:

```
.nav_block h2.sc_title,
.nav_block_title {
 border-bottom: gray solid 1px;
 padding: 3px;
 margin: 0 0 10px 0;
 font-size: 16px;
 font-weight: normal;
}
```

3. Find all occurrences of this selector:

```
.sc_content h1
```

4. Change to:

```
.sc_content h1, .sc_content h2.sc_title
```

Note: The ".sc_content h1" selector also appears in the old style_variant1_COLOR.css.php files. If you are using one of these stylesheets, you'll need to make the same change to it as well.

5. Find this:

```
.acct_choice .inner,
.acct_choice_skip {
    padding: 15px;
}
```

6. Change to:

```
.acct_choice .inner,
.acct_choice_skip {
    padding: 0 15px 15px 15px;
}
```

7. Find this:

```
.acct_choice .or {
    position: absolute;
    top: -12px;
    left: 50%;
    margin-left: -13px;
    <?php if ($SC['browser']['browser'] == 'ie' && $SC
['browser']['maj_ver'] <= 6.0): ?>
        /* fixes an IE bug */
        left: 0px;
    <?php endif; ?>
}
```

8. Change to:

```
.acct_choice .or {
 position: absolute;
 top: -12px;
 left: 50%;
 margin-left: -15px;
 display: inline-block;
 width: 27px;
 height: 27px;
 line-height: 24px;
 border: silver solid 2px;
 border-radius: 50%;
 font-weight: bold;
 font-size: 1.1em;
 color: #000;
 background: #fff;
}
```

9. Find this:

```
.acct_choice label {
 font-size: 12px;
 color: gray;
}
```

10. Change to:

```
.acct_choice label {
    color: gray;
    display: inline-block;
    text-align: right;
    width: 65px;
    white-space: nowrap;
}
.acct_choice .login_with_both label {
    width: 60px;
```

```
}
```

11. Find this:

```
.required_notice {
    float: right;
    margin-top: 5px;
}
```

12. Change to:

```
.required_notice {
    text-align: center;
    margin: -5px 0 15px 0;
    color: <?php print $ini['linkColor']?>;
    display: block;
}
```

13. Add this to the end of the file:

```
.xtra_imgs {
    overflow: hidden;
    width: 100%;
}
.xtra_imgs a {
   display: block;
   width: <?php print $SC['settings']
['Extra_Image_Thumb_Width']?>px;
   height: <?php print $SC['settings']
['Extra_Image_Thumb_Height']?>px;
   overflow: hidden;
   float: left;
   border: silver solid 1px;
   text-decoration: none;
   margin-right: 10px;
   margin-bottom: 10px;
}
.xtra_imgs a:hover {
   border-color: #000;
}

#sc .li_opt.qty_row td {
   border-bottom-style: dotted;
}

#sc .opt_li_row.qty_row td {
   border-top: 0;
   border-right: 0;
}

.acct_choice h4 a {
   color: blue;
}

.acct_choice_skip h2 {
   vertical-align: middle;
   margin-right: 15px;
   padding-top: 10px;
}
```

```
#sc .btn_empty_no,
#sc .btn_empty_no:hover,
#sc .btn_empty_yes,
#sc .btn_empty_yes:hover {
   color: inherit;
   background: #AED2F6;
   border: gray solid 1px;
   border-radius: 12px;
   margin: 50px 0;
   padding: 3px 10px;
   box-shadow: 0 2px 5px rgba(0,0,0,.2);
}

#sc .btn_same_as_billing {
   margin-left: auto !important;
   margin-top: auto !important;
}
```

14. If you have any of the following files in your custom theme folder, we recommend renaming to *.OLD or moving them, which will cause the default versions of these templates to be used:

    - account_choice.tpl.php
    - account_form.tpl.php
    - account_options_nav.tpl.php
    - account_options_restricted.tpl.php
    - forgot_password_email.tpl.php
    - forgot_password_email_htm.tpl.php

There are many other changes that were made to stylesheets in version 4, but the above changes should be all that is necessary to get an older version 3 theme working.

12.6.3.8 v4.1.0

Overview

This page has been written as a guide to aid you in upgrading your site to v4.1.0 and after. Please read this page in its entirety before attempting to upgrade.

Theme and Template Changes

If you are using a custom version of any of the below template files, make the changes outlined for the custom version of that file inside your custom theme folder (Example: **squirrelcart/themes/YOURTHEMENAME)**. If you are not using a custom version of that file you do not need to make any changes. This section is a guide only. If a v4.1.0 template file has a lot of changes, you are probably better off reverting to the default version by removing your custom version of the same file.

product_detail.tpl.php

1. Find this line:

```
<div class="prod_img">
```

2. Change to:

```
<?php if ($Slideshow):?>
 <div class="prod_img">
  <?php print $Slideshow?>
  <?php if ($Badge_Image): ?>
   <img class="badge" src="<?php print $Badge_Image
['dyn'] ?>" width="<?php print $Badge_Image['width'] ?>"
height="<?php print $Badge_Image['height'] ?>" alt="" />
  <?php endif; ?>
 </div>
<?php else:?>
 <div class="prod_img_outer" style="width: <?php print
$Image['width']?>px;">
  <div class="prod_img">
```

3. Find this:

```
<?php if (!empty($Extra_Images)):?>
 <div class="xtra_imgs">
  <?php foreach($Extra_Images as $Extra_Image):?>
   <a href="<?php print $Extra_Image['dyn']?>"
rel="lightbox[product-<?php print $record_number ?>]"
target="_blank">
    <img src="<?php print $Extra_Image['thumb_dyn'] ?>"
alt="<?php print $Extra_Image['alt'] ?>" />
   </a>
  <?php endforeach;?>
 </div>
<?php endif;?>
```

4. Add this after:

```
</div>
<?php endif;?>
```

style_main.css.php

1. Add this to the bottom of the file:

```
.prod_img_outer {
 float: left;
 margin-right: 20px;
}
```

12.6.3.9 v4.2.0

Overview

This page has been written as a guide to aid you in upgrading your site to v4.2.0 and after. Please read this page in its entirety before attempting to upgrade.

Theme and Template Changes

If you are using a custom version of any of the below template files, make the changes outlined for the custom version of that file inside your custom theme folder (Example: **squirrelcart/themes/YOURTHEMENAME)**. If you are not using a custom version of that file you do not need to make any changes. This section is a guide only. If a v4.2.0 template file has a lot of changes, you are probably better off reverting to the default version by removing your custom version of the same file.

category_as_table.tpl.php

1. Find this line:

```
<div class="form_btns">
```

2. Change to:

```
<div class="form_btns multi_add_footer">
```

checkout_view.tpl.php AND
order_detail.tpl.php AND
order_detail_admin.tpl.php AND
order_email_customer_html.tpl.php AND
order_email_merchant_html.tpl.php

1. Find this:

```
<?php foreach($Items as $Item): ?>
 <tr>
```

2. Change to:

```
<?php foreach($Items as $Item): ?>
 <tr class="<?php print $Item['Row_Class']?>">
```

product_detail.tpl.php

1. Find this:

```
<?php print sc_msg($Add_to_Cart_Message,'success') ?>
```

2. Add this before:

```
<?php if ($Parent_Product_URL) print sc_msg("You are
viewing an add-on for
<strong>$Parent_Product_Name</strong>. <a
href=\"$Parent_Product_URL\">Click here to
return</a>.",'info') ?>
```

3. Find this:

```
<?php if ($Show_Pricing): ?>
```

4. Add this after:

```
<?php print $Add_On_Products?>
```

style_main.css.php

1. Add this to the bottom of the file:

```
/********************************
   Add On Products
********************************/
.add_on_products .cat_products {
   display: table;
   width: 100%;
}

.add_on_products .cat_products .box_row {
   display: table-row;
}

#sc .add_on_products .box_outer {
   float: none;
   display: table-cell;
   border: silver dotted 1px;
   border-width: 1px 0 0 1px;
   vertical-align: middle;
}

#sc .add_on_products .box_outer.has_msg {
   vertical-align: top;
}

#sc .add_on_products .box_outer:first-child {
   border-left: 0;
}

#sc .add_on_products .box_row:first-child .box_outer {
   border-top: 0;
}

.add_on_products .box_inner {
   padding: 10px 0 20px 0;
}

.add_on_products .required_instructions {
```

```
   display: none;
}

.add_on_products .prod_name a:first-child:after {
   content:"";
   width: 16px;
   height: 16px;
   background: url(<?php print sc_img('zoom_in','dyn')?>)
no-repeat;
   display: inline-block;
   vertical-align: middle;
   margin-left: 7px;
}

.add_on_products .sc_msg {
   text-align: left;
   font-size: 1em;
   border-width: 1px;
padding: 7px 3px 7px 42px;
margin: 10px;
   border: 0px;
border-radius: 5px;
}

.add_on_products .sc_msg img {
   width: 24px;
   height: 24px;
   top: 3px;
}

.add_on_products .sc_msg p {
   margin: 0;
}

.qty_check {
   border: #EDEEEF solid 2px;
   border-radius: 15px;
   padding: 5px 15px;
   display: inline-block;
   cursor: pointer;
}

.qty_check:hover {
   border-color: #A7D0E8;

}

.qty_check * {
   vertical-align: middle;
   cursor: pointer;
}

#sc .qty_check input {
   width: auto;
   margin: 0 0 0 10px;
}

.addon_prefix {
   font-weight: bold;
   margin-right: 5px;
}

tr.addon .td1 {
   padding-left: 30px;
```

```
   padding-right: 15px;
}

tr.addon .prod_name {
   margin-top: 10px;
}

tr.addon .item_btns {
   display: none;
}

/*
   Triangle pointing up to indicate add-on belongs to
parent above
   We will only do this if page BG is white, else it looks
bad
*/
<?php if (strtolower($ini['pageBgColor']) == '#fff' ||
strtolower($ini['pageBgColor'] == '#ffffff')):?>
   tr.addon .prod_name_desc:before {
      content: "";
      width: 0px;
      height: 0px;
      border-style: solid;
      border-width: 0 20px 20px 20px;
      border-color: rgba(255,255,255,0) rgba(255,255,255,0)
<?php print $ini['pageBgColor']?> rgba(255,255,255,0);
      position: absolute;
      margin: -25px 0 0 15px;
      z-index: 2;
   }
   /* This simulats a border around above triangle */
   tr.addon .td1:before {
      content: "";
      width: 0px;
      height: 0px;
      border-style: solid;
      border-width: 0 21px 21px 21px;
      border-color: rgba(255,255,255,0) rgba(255,255,255,0)
<?php print $ini['rowBorderColor']?> rgba(255,255,255,0);
      position: absolute;
      margin: -26px 0 0 14px;
      z-index: 1;
   }
   /*
      The use of rgba above is to solve a grey border
problem that occurs only in Firefox.
      rgba doesn't work in IE <= 8, so we need to use
transparent instead
   */
   <?php if ($SC['browser']['browser'] == 'ie' && $SC
['browser']['maj_ver'] <= 8.0): ?>
      tr.addon .prod_name_desc:before {
         border-color: transparent transparent <?php print
$ini['pageBgColor']?> transparent;
      }

      tr.addon .td1:before {
         border-color: transparent transparent <?php print
$ini['rowBorderColor']?> transparent;
      }
   <?php endif;?>
<?php endif;?>
```

12.6.3.10 v4.3.0

Overview

This page has been written as a guide to aid you in upgrading your site to v4.3.0 and after. Please read this page in its entirety before attempting to upgrade.

Group Changes

If you created a group that has a record_number between 2 and 14 (inclusive), the upgrade script will automatically change the record number of the group, increasing it by 500. This will not affect any code built-into Squirrelcart, and users will still be correctly detected as being members of these groups. However, if you have any custom PHP code written to reference these groups, it may need to be updated to use the new group record number.

Theme and Template Changes

If you are using a custom version of any of the below template files, make the changes outlined for the custom version of that file inside your custom theme folder (Example: **squirrelcart/themes/YOURTHEMENAME)**. If you are not using a custom version of that file you do not need to make any changes. This section is a guide only. If a v4.3.0 template file has a lot of changes, you are probably better off reverting to the default version by removing your custom version of the same file.

account_email_customer_html.tpl.php
account_email_customer_text.tpl.php
account_email_merchant_html.tpl.php
account_email_merchant_text.tpl.php
forgot_password_email.tpl.php
forgot_password_email_htm.tpl.php

These templates no longer exist as of version 4.3.0. The content of these messages is now controlled by the records found in the **Automatic Emails (Section 7.7)** table.

order_email_merchant_html.tpl.php -----> RENAMED TO:
order_email_staff_html.tpl.php
order_email_merchant_text.tpl.php ------> RENAMED TO:
order_email_staff_text.tpl.php
order_email_customer_html.tpl.php
order_email_customer_text.tpl.php

These templates no longer include an opening HTML or BODY tag, a greeting, a closing, or a title. They are now used only to control the order detail portion of these messages.

If you have customized these templates, we recommend reverting to the default versions by deleting or renaming your custom copies of these files.

You can customize the content above and below the order detail for these emails in the **Automatic Emails (Section 7.7)** table.

If you need to add any custom HTML that would normally appear inside the HEAD tag, that is now done in the email_html.tpl.php template file, which is used for all HTML formatted emails.

ship_notify_email_html.tpl.php
ship_notify_email_text.tpl.php

These templates no longer include an opening HTML or BODY tag, a greeting, a closing, or a title. They are now used only to control the center content of these messages, which contains tracking information. If you have customized these templates, we recommend reverting to the default versions by deleting or renaming your custom copies of these files.

You can customize the content above and below the tracking information for these emails in the **Automatic Emails (Section 7.7)** table.

If you need to add any custom HTML that would normally appear inside the HEAD tag, that is now done in the email_html.tpl.php template file, which is used for all HTML formatted emails.

order_detail.tpl.php

1. Find this:

```
<a href="<?php print $Status['URL'] ?>" target="_blank"
class="order_status_popup"><?php print $Status['Name'] ?
></a>
```

2. Change to:

```
<a title="click for more info" href="<?php print $Status
['URL'] ?>" target="_blank" class="order_status_popup tip
<?php if($Status['Note']):?>order_status_note<?php endif;?
>"><?php print $Status['Name'] ?></a>
```

order_history.tpl.php

1. Find this:

```
<a class="order_status_popup" href="<?php print $Order
['Status_URL'] ?>" target="_blank"><?php print $Order
['Status'] ?></a>
```

2. Change to:

```
<a title="click for more info" class="order_status_popup
tip <?php if ($Order['Status_Note']):?>order_status_note<?
php endif;?>" href="<?php print $Order['Status_URL'] ?>"
target="_blank"><?php print $Order['Status'] ?></a>
```

style_main.css.php

As of version 4.0, it is usually not necessary to modify this file. See the section about extending CSS **here (Section 9.3.14)** for more info.

If you have a modified version of this file in your custom theme folder, you'll need to make these changes:

1. Find this:

```
.sc_msg a {
 text-decoration: underline;
}
```

2. Change to:

```
#sc .sc_msg a {
 text-decoration: underline;
 color: inherit;
}
```

3. Find this:

```
.add_on_products .prod_name a:first-child:after {
```

4. Change to:

```
.add_on_products .prod_name a:first-child:after,
.order_status_note:after {
```

5. Add this to the bottom of the file:

```
.acct_notify_fields {
 margin: 15px 0;
 padding: 5px 15px;
 border-left: silver solid 1px;
}

.acct_notify_fields p {
 margin: 5px 0;
}
```

12.6.3.11 v4.4.0

Overview

This page has been written as a guide to aid you in upgrading your site to v4.4.0 and after. Please read this page in its entirety before attempting to upgrade.

Theme and Template Changes

If you are using a custom version of any of the below template files, make the changes outlined for the custom version of that file inside your custom theme folder (Example: **squirrelcart/themes/YOURTHEMENAME)**. If you are not using a custom version of that file you do not need to make any changes. This section is a guide only. If a v4.4.0 template file has a lot of changes, you are probably better off reverting to the default version by removing your custom version of the same file.

options.tpl.php

This file should be reverted, by deleting your custom copy, or renaming it to disable it. If you need to modify this file, copy it from "squirrelcart/themes/squirrelcart" (from the new version) into your theme folder before modifying it.

order_detail_admin.tpl.php

1. Find this:

```
<?php if (empty($_REQUEST['print_order'])): ?>
   <button id="print_friendly" type="button"
onclick="window.open('<?php print $Print_Friendly_URL?
>&cp=1')"><img src="<?php print $Printer_Image['dyn'] ?>"
width="<?php print $Printer_Image['width'] ?>" height="<?
php print $Printer_Image['height'] ?>" alt="" /> Printer
Friendly</button>
   <?php print $vCard_Button ?>
<?php else: ?>
   <button id="print_friendly" type="button"
onclick="window.print()"><img src="<?php print
$Printer_Image['dyn'] ?>" width="<?php print $Printer_Image
['width'] ?>" height="<?php print $Printer_Image
['height'] ?>" alt="" /> Print Order</button>
<?php endif; ?>

<h2>Order #<?php print $Order_Number?></h2>
```

2. Change to:

```
<?php if ($State == 4):?>
   <?php if (empty($_REQUEST['print_order'])): ?>
      <button id="print_friendly" type="button"
onclick="window.open('<?php print $Print_Friendly_URL?
>&cp=1')"><img src="<?php print $Printer_Image['dyn'] ?>"
width="<?php print $Printer_Image['width'] ?>" height="<?
php print $Printer_Image['height'] ?>" alt="" /> Printer
Friendly</button>
      <?php print $vCard_Button ?>
```

```
   <?php else: ?>
      <button id="print_friendly" type="button"
onclick="window.print()"><img src="<?php print
$Printer_Image['dyn'] ?>" width="<?php print $Printer_Image
['width'] ?>" height="<?php print $Printer_Image
['height'] ?>" alt="" /> Print Order</button>
   <?php endif; ?>
<?php endif;?>

<?php if ($State == 4):?>
   <h2>Order #<?php print $Order_Number?></h2>
<?php elseif($State == 1):?>
   <h2>Active Cart #<?php print $record_number?></h2>
<?php elseif($State == 2):?>
   <h2>Inactive Cart #<?php print $record_number?></h2>
<?php endif;?>
```

style_main.css.php

As of version 4.0, it is usually not necessary to modify this file. See the section about extending CSS **here** **(Section 9.3.14)** for more info.

If you have a modified version of this file in your custom theme folder, you'll need to make these changes:

1. Find this:

```
.xtra_imgs a {
 display: block;
 width: <?php print $SC['settings']
['Extra_Image_Thumb_Width']?>px;
 height: <?php print $SC['settings']
['Extra_Image_Thumb_Height']?>px;
 overflow: hidden;
 float: left;
 border: silver solid 1px;
 text-decoration: none;
 margin-right: 10px;
 margin-bottom: 10px;
}
```

2. Remove the **width** attribute line as follows:

```
.xtra_imgs a {
 display: block;
 height: <?php print $SC['settings']
['Extra_Image_Thumb_Height']?>px;
 overflow: hidden;
 float: left;
 border: silver solid 1px;
 text-decoration: none;
 margin-right: 10px;
 margin-bottom: 10px;
}
```

12.6.3.12 v4.5.0

Overview

This page has been written as a guide to aid you in upgrading your site to v4.5.0 and after. Please read this page in its entirety before attempting to upgrade.

Slimbox Changes

As of Squirrelcart version 4.5.0, we have changed our HTML slightly to be compliant with HTML 5. The free Slimbox script that was included with earlier versions of Squirrelcart rely on a **rel** attribute on your <a/> tags:

```
<a
href="http://www.example.com/sc_images/products/447_large_image.j
rel="lightbox[product-533]" target="_blank" title="Add-On
Products Example">click for larger image</a>
```

The **rel** attribute is not valid in HTML 5. To comply with HTML 5 standards, this attribute has been changed to **data-rel** as follows:

```
<a
href="http://www.example.com/sc_images/products/447_large_image.j
data-rel="lightbox[product-533]" target="_blank" title="Add-On
Products Example">click for larger image</a>
```

Squirrelcart will automatically make that change to any built-in templates that use Slimbox. If you have customized versions of templates using this attribute, you will need to change **rel="lightbox...** to **data-rel="lightbox...** for them to continue working in version 4.5.0. The following built-in templates from version 4.4.7 and earlier use this attribute. Any custom versions of these templates will need to be updated as explained above:

- featured_product.tpl.php
- product_detail.tpl.php
- product_detail_add-on.tpl.php

Theme and Template Changes

If you are using a custom version of any of the below template files, make the changes outlined for the custom version of that file inside your custom theme folder (Example: **squirrelcart/themes/YOURTHEMENAME)**. If you are not using a custom version of that file you do not need to make any changes. This section is a guide only. If a v4.5.0 template file has a lot of changes, you are probably better off reverting to the default version by removing your custom version of the same file.

account_form.tpl.php

Version 4.5.0 adds support for including a Birthday field on the account form. If you wish to use this field, make these changes:

1. Find this:

```
<?php if ($Show_VAT_Registration): ?>
```

2. Add this above that line:

```
<?php if ($Show_Birthday): ?>
 <li>
  <label>
   <?php print $Birthday_Icon ?><?php print
$Birthday_Label ?>:
  </label>
  <div class="fields_box_field">
   <select id="BirthdayMonth" class="bdayMonth <?php print
$BirthdayMonth_Class ?>" name="acct[Birthday][Month]">
    <option></option>
    <option value="01" <?php if ($acct['Birthday']['Month']
== '01') print $selected ?>>January</option>
    <option value="02" <?php if ($acct['Birthday']['Month']
== '02') print $selected ?>>February</option>
    <option value="03" <?php if ($acct['Birthday']['Month']
== '03') print $selected ?>>March</option>
    <option value="04" <?php if ($acct['Birthday']['Month']
== '04') print $selected ?>>April</option>
    <option value="05" <?php if ($acct['Birthday']['Month']
== '05') print $selected ?>>May</option>
    <option value="06" <?php if ($acct['Birthday']['Month']
== '06') print $selected ?>>June</option>
    <option value="07" <?php if ($acct['Birthday']['Month']
== '07') print $selected ?>>July</option>
    <option value="08" <?php if ($acct['Birthday']['Month']
== '08') print $selected ?>>August</option>
    <option value="09" <?php if ($acct['Birthday']['Month']
== '09') print $selected ?>>September</option>
    <option value="10" <?php if ($acct['Birthday']['Month']
== '10') print $selected ?>>October</option>
    <option value="11" <?php if ($acct['Birthday']['Month']
== '11') print $selected ?>>November</option>
    <option value="12" <?php if ($acct['Birthday']['Month']
== '12') print $selected ?>>December</option>
   </select>
   <select id="BirthdayDay" class="<?php print
$BirthdayDay_Class ?>" name="acct[Birthday][Day]">
    <option></option>
    <option <?php if ($acct['Birthday']['Day'] == '01')
print $selected ?>>01</option>
    <option <?php if ($acct['Birthday']['Day'] == '02')
print $selected ?>>02</option>
    <option <?php if ($acct['Birthday']['Day'] == '03')
print $selected ?>>03</option>
    <option <?php if ($acct['Birthday']['Day'] == '04')
print $selected ?>>04</option>
    <option <?php if ($acct['Birthday']['Day'] == '05')
print $selected ?>>05</option>
    <option <?php if ($acct['Birthday']['Day'] == '06')
print $selected ?>>06</option>
    <option <?php if ($acct['Birthday']['Day'] == '07')
print $selected ?>>07</option>
    <option <?php if ($acct['Birthday']['Day'] == '08')
print $selected ?>>08</option>
```

```
    <option <?php if ($acct['Birthday']['Day'] == '09')
print $selected ?>>09</option>
    <option <?php if ($acct['Birthday']['Day'] == '10')
print $selected ?>>10</option>
    <option <?php if ($acct['Birthday']['Day'] == '11')
print $selected ?>>11</option>
    <option <?php if ($acct['Birthday']['Day'] == '12')
print $selected ?>>12</option>
    <option <?php if ($acct['Birthday']['Day'] == '13')
print $selected ?>>13</option>
    <option <?php if ($acct['Birthday']['Day'] == '14')
print $selected ?>>14</option>
    <option <?php if ($acct['Birthday']['Day'] == '15')
print $selected ?>>15</option>
    <option <?php if ($acct['Birthday']['Day'] == '16')
print $selected ?>>16</option>
    <option <?php if ($acct['Birthday']['Day'] == '17')
print $selected ?>>17</option>
    <option <?php if ($acct['Birthday']['Day'] == '18')
print $selected ?>>18</option>
    <option <?php if ($acct['Birthday']['Day'] == '19')
print $selected ?>>19</option>
    <option <?php if ($acct['Birthday']['Day'] == '20')
print $selected ?>>20</option>
    <option <?php if ($acct['Birthday']['Day'] == '21')
print $selected ?>>21</option>
    <option <?php if ($acct['Birthday']['Day'] == '22')
print $selected ?>>22</option>
    <option <?php if ($acct['Birthday']['Day'] == '23')
print $selected ?>>23</option>
    <option <?php if ($acct['Birthday']['Day'] == '24')
print $selected ?>>24</option>
    <option <?php if ($acct['Birthday']['Day'] == '25')
print $selected ?>>25</option>
    <option <?php if ($acct['Birthday']['Day'] == '26')
print $selected ?>>26</option>
    <option <?php if ($acct['Birthday']['Day'] == '27')
print $selected ?>>27</option>
    <option <?php if ($acct['Birthday']['Day'] == '28')
print $selected ?>>28</option>
    <option id="BirthdayDay29" <?php if ($acct['Birthday']
['Day'] == '29') print $selected ?>>29</option>
    <option id="BirthdayDay30" <?php if ($acct['Birthday']
['Day'] == '30') print $selected ?>>30</option>
    <option id="BirthdayDay31" <?php if ($acct['Birthday']
['Day'] == '31') print $selected ?>>31</option>
   </select>
   <select id="BirthdayYear" class="<?php print
$BirthdayYear_Class ?>" name="acct[Birthday][Year]">
    <option></option>
    <?php foreach($Birthday_Year_Options as
$Birthday_Year_Option):?>
     <option <?php if($Birthday_Year_Option == $acct
['Birthday']['Year']) print $selected ?>><?php print
$Birthday_Year_Option?></option>
    <?php endforeach;?>
   </select>
  </div>
 </li>
<?php endif; ?>
```

account_options_nav.tpl.php

1. Change this:

```
<?php if ($Remember_Me_Enabled): ?>
 <div class="valign_middle remember_me_outer">
  <a class="tip" title="This will keep you logged in if you
close your browser (until you logout).">
   <label for="remember_me" >Remember me </label><input
name="remember_me" id="remember_me" type="checkbox"
value="1" <?php if ($Remember_Me_Default): ?
>checked="checked"<?php endif;?> />
  </a>
 </div>
<?php endif; ?>
```

2. To:

```
<?php if ($Remember_Me_Enabled): ?>
 <div class="valign_middle remember_me_outer tip"
title="This will keep you logged in if you close your
browser (until you logout).">
  <label for="remember_me" >Remember me </label><input
name="remember_me" id="remember_me" type="checkbox"
value="1" <?php if ($Remember_Me_Default): ?
>checked="checked"<?php endif;?> />
 </div>
<?php endif; ?>
```

checkout_address_form.tpl.php

Version 4.5.0 adds support for including a Birthday field on the checkout address form. If you wish to use this field, make these changes:

1. Find this:

```
<?php if ($Show_Update_Account): ?>
```

2. Add this above that line:

```
<?php if ($Show_Bill_Birthday): ?>
 <li>
  <label>
   <?php print $Bill_Birthday_Icon ?><?php print
$Bill_Birthday_Label ?>:
  </label>
  <div class="fields_box_field">
   <select id="Bill_BirthdayMonth" class="bdayMonth <?php
print $Bill_BirthdayMonth_Class ?>" name="address
[Bill_Birthday][Month]">
    <option></option>
    <option value="01" <?php if ($address['Bill_Birthday']
['Month'] == '01') print $selected ?>>January</option>
    <option value="02" <?php if ($address['Bill_Birthday']
['Month'] == '02') print $selected ?>>February</option>
    <option value="03" <?php if ($address['Bill_Birthday']
['Month'] == '03') print $selected ?>>March</option>
```

```
    <option value="04" <?php if ($address['Bill_Birthday']
['Month'] == '04') print $selected ?>>April</option>
    <option value="05" <?php if ($address['Bill_Birthday']
['Month'] == '05') print $selected ?>>May</option>
    <option value="06" <?php if ($address['Bill_Birthday']
['Month'] == '06') print $selected ?>>June</option>
    <option value="07" <?php if ($address['Bill_Birthday']
['Month'] == '07') print $selected ?>>July</option>
    <option value="08" <?php if ($address['Bill_Birthday']
['Month'] == '08') print $selected ?>>August</option>
    <option value="09" <?php if ($address['Bill_Birthday']
['Month'] == '09') print $selected ?>>September</option>
    <option value="10" <?php if ($address['Bill_Birthday']
['Month'] == '10') print $selected ?>>October</option>
    <option value="11" <?php if ($address['Bill_Birthday']
['Month'] == '11') print $selected ?>>November</option>
    <option value="12" <?php if ($address['Bill_Birthday']
['Month'] == '12') print $selected ?>>December</option>
   </select>
   <select id="Bill_BirthdayDay" class="<?php print
$Bill_BirthdayDay_Class ?>" name="address[Bill_Birthday]
[Day]">
    <option></option>
    <option <?php if ($address['Bill_Birthday']['Day'] ==
'01') print $selected ?>>01</option>
    <option <?php if ($address['Bill_Birthday']['Day'] ==
'02') print $selected ?>>02</option>
    <option <?php if ($address['Bill_Birthday']['Day'] ==
'03') print $selected ?>>03</option>
    <option <?php if ($address['Bill_Birthday']['Day'] ==
'04') print $selected ?>>04</option>
    <option <?php if ($address['Bill_Birthday']['Day'] ==
'05') print $selected ?>>05</option>
    <option <?php if ($address['Bill_Birthday']['Day'] ==
'06') print $selected ?>>06</option>
    <option <?php if ($address['Bill_Birthday']['Day'] ==
'07') print $selected ?>>07</option>
    <option <?php if ($address['Bill_Birthday']['Day'] ==
'08') print $selected ?>>08</option>
    <option <?php if ($address['Bill_Birthday']['Day'] ==
'09') print $selected ?>>09</option>
    <option <?php if ($address['Bill_Birthday']['Day'] ==
'10') print $selected ?>>10</option>
    <option <?php if ($address['Bill_Birthday']['Day'] ==
'11') print $selected ?>>11</option>
    <option <?php if ($address['Bill_Birthday']['Day'] ==
'12') print $selected ?>>12</option>
    <option <?php if ($address['Bill_Birthday']['Day'] ==
'13') print $selected ?>>13</option>
    <option <?php if ($address['Bill_Birthday']['Day'] ==
'14') print $selected ?>>14</option>
    <option <?php if ($address['Bill_Birthday']['Day'] ==
'15') print $selected ?>>15</option>
    <option <?php if ($address['Bill_Birthday']['Day'] ==
'16') print $selected ?>>16</option>
    <option <?php if ($address['Bill_Birthday']['Day'] ==
'17') print $selected ?>>17</option>
    <option <?php if ($address['Bill_Birthday']['Day'] ==
'18') print $selected ?>>18</option>
    <option <?php if ($address['Bill_Birthday']['Day'] ==
'19') print $selected ?>>19</option>
    <option <?php if ($address['Bill_Birthday']['Day'] ==
'20') print $selected ?>>20</option>
    <option <?php if ($address['Bill_Birthday']['Day'] ==
```

```
'21') print $selected ?>>21</option>
    <option <?php if ($address['Bill_Birthday']['Day'] ==
'22') print $selected ?>>22</option>
    <option <?php if ($address['Bill_Birthday']['Day'] ==
'23') print $selected ?>>23</option>
    <option <?php if ($address['Bill_Birthday']['Day'] ==
'24') print $selected ?>>24</option>
    <option <?php if ($address['Bill_Birthday']['Day'] ==
'25') print $selected ?>>25</option>
    <option <?php if ($address['Bill_Birthday']['Day'] ==
'26') print $selected ?>>26</option>
    <option <?php if ($address['Bill_Birthday']['Day'] ==
'27') print $selected ?>>27</option>
    <option <?php if ($address['Bill_Birthday']['Day'] ==
'28') print $selected ?>>28</option>
    <option id="BillBirthdayDay29" <?php if ($address
['Bill_Birthday']['Day'] == '29') print $selected ?
>>29</option>
    <option id="BillBirthdayDay30" <?php if ($address
['Bill_Birthday']['Day'] == '30') print $selected ?
>>30</option>
    <option id="BillBirthdayDay31" <?php if ($address
['Bill_Birthday']['Day'] == '31') print $selected ?
>>31</option>
   </select>
   <select id="Bill_BirthdayYear" class="<?php print
$Bill_BirthdayYear_Class ?>" name="address[Bill_Birthday]
[Year]">
    <option></option>
    <?php foreach($Bill_Birthday_Year_Options as
$Bill_Birthday_Year_Option):?>
     <option <?php if($Bill_Birthday_Year_Option ==
$address['Bill_Birthday']['Year']) print $selected ?>><?php
print $Bill_Birthday_Year_Option?></option>
    <?php endforeach;?>
   </select>
  </div>
 </li>
<?php endif; ?>
```

3. Find this:

```
<?php if ($Show_Ship_VAT_Registration): ?>
```

4. Add this above that line:

```
<?php if ($Show_Ship_Birthday): ?>
<li>
 <label>
  <?php print $Ship_Birthday_Icon ?><?php print
$Ship_Birthday_Label ?>:
 </label>
 <div class="fields_box_field">
  <select id="Ship_BirthdayMonth" class="bdayMonth <?php
print $Ship_BirthdayMonth_Class ?>" name="address
[Ship_Birthday][Month]">
   <option></option>
   <option value="01" <?php if ($address['Ship_Birthday']
['Month'] == '01') print $selected ?>>January</option>
   <option value="02" <?php if ($address['Ship_Birthday']
['Month'] == '02') print $selected ?>>February</option>
```

```
   <option value="03" <?php if ($address['Ship_Birthday']
['Month'] == '03') print $selected ?>>March</option>
   <option value="04" <?php if ($address['Ship_Birthday']
['Month'] == '04') print $selected ?>>April</option>
   <option value="05" <?php if ($address['Ship_Birthday']
['Month'] == '05') print $selected ?>>May</option>
   <option value="06" <?php if ($address['Ship_Birthday']
['Month'] == '06') print $selected ?>>June</option>
   <option value="07" <?php if ($address['Ship_Birthday']
['Month'] == '07') print $selected ?>>July</option>
   <option value="08" <?php if ($address['Ship_Birthday']
['Month'] == '08') print $selected ?>>August</option>
   <option value="09" <?php if ($address['Ship_Birthday']
['Month'] == '09') print $selected ?>>September</option>
   <option value="10" <?php if ($address['Ship_Birthday']
['Month'] == '10') print $selected ?>>October</option>
   <option value="11" <?php if ($address['Ship_Birthday']
['Month'] == '11') print $selected ?>>November</option>
   <option value="12" <?php if ($address['Ship_Birthday']
['Month'] == '12') print $selected ?>>December</option>
  </select>
  <select id="Ship_BirthdayDay" class="<?php print
$Ship_BirthdayDay_Class ?>" name="address[Ship_Birthday]
[Day]">
   <option></option>
   <option <?php if ($address['Ship_Birthday']['Day'] ==
'01') print $selected ?>>01</option>
   <option <?php if ($address['Ship_Birthday']['Day'] ==
'02') print $selected ?>>02</option>
   <option <?php if ($address['Ship_Birthday']['Day'] ==
'03') print $selected ?>>03</option>
   <option <?php if ($address['Ship_Birthday']['Day'] ==
'04') print $selected ?>>04</option>
   <option <?php if ($address['Ship_Birthday']['Day'] ==
'05') print $selected ?>>05</option>
   <option <?php if ($address['Ship_Birthday']['Day'] ==
'06') print $selected ?>>06</option>
   <option <?php if ($address['Ship_Birthday']['Day'] ==
'07') print $selected ?>>07</option>
   <option <?php if ($address['Ship_Birthday']['Day'] ==
'08') print $selected ?>>08</option>
   <option <?php if ($address['Ship_Birthday']['Day'] ==
'09') print $selected ?>>09</option>
   <option <?php if ($address['Ship_Birthday']['Day'] ==
'10') print $selected ?>>10</option>
   <option <?php if ($address['Ship_Birthday']['Day'] ==
'11') print $selected ?>>11</option>
   <option <?php if ($address['Ship_Birthday']['Day'] ==
'12') print $selected ?>>12</option>
   <option <?php if ($address['Ship_Birthday']['Day'] ==
'13') print $selected ?>>13</option>
   <option <?php if ($address['Ship_Birthday']['Day'] ==
'14') print $selected ?>>14</option>
   <option <?php if ($address['Ship_Birthday']['Day'] ==
'15') print $selected ?>>15</option>
   <option <?php if ($address['Ship_Birthday']['Day'] ==
'16') print $selected ?>>16</option>
   <option <?php if ($address['Ship_Birthday']['Day'] ==
'17') print $selected ?>>17</option>
   <option <?php if ($address['Ship_Birthday']['Day'] ==
'18') print $selected ?>>18</option>
   <option <?php if ($address['Ship_Birthday']['Day'] ==
'19') print $selected ?>>19</option>
   <option <?php if ($address['Ship_Birthday']['Day'] ==
```

```
'20') print $selected ?>>20</option>
   <option <?php if ($address['Ship_Birthday']['Day'] ==
'21') print $selected ?>>21</option>
   <option <?php if ($address['Ship_Birthday']['Day'] ==
'22') print $selected ?>>22</option>
   <option <?php if ($address['Ship_Birthday']['Day'] ==
'23') print $selected ?>>23</option>
   <option <?php if ($address['Ship_Birthday']['Day'] ==
'24') print $selected ?>>24</option>
   <option <?php if ($address['Ship_Birthday']['Day'] ==
'25') print $selected ?>>25</option>
   <option <?php if ($address['Ship_Birthday']['Day'] ==
'26') print $selected ?>>26</option>
   <option <?php if ($address['Ship_Birthday']['Day'] ==
'27') print $selected ?>>27</option>
   <option <?php if ($address['Ship_Birthday']['Day'] ==
'28') print $selected ?>>28</option>
   <option id="ShipBirthdayDay29" <?php if ($address
['Ship_Birthday']['Day'] == '29') print $selected ?
>>29</option>
   <option id="ShipBirthdayDay30" <?php if ($address
['Ship_Birthday']['Day'] == '30') print $selected ?
>>30</option>
   <option id="ShipBirthdayDay31" <?php if ($address
['Ship_Birthday']['Day'] == '31') print $selected ?
>>31</option>
  </select>
  <select id="Ship_BirthdayYear" class="<?php print
$Ship_BirthdayYear_Class ?>" name="address[Ship_Birthday]
[Year]">
   <option></option>
   <?php foreach($Ship_Birthday_Year_Options as
$Ship_Birthday_Year_Option):?>
    <option <?php if($Ship_Birthday_Year_Option == $address
['Ship_Birthday']['Year']) print $selected ?>><?php print
$Ship_Birthday_Year_Option?></option>
   <?php endforeach;?>
  </select>
 </div>
</li>
<?php endif; ?>
```

checkout_pay.tpl.php

1. Change this:

```
<?php if ($GW_Connection_Method != "Server to Server" &&
$GW_Connection_Method): ?>
```

2. To:

```
<?php if ($GW_Connection_Method != "Store Hosted / Server
to Gateway" && $GW_Connection_Method): ?>
```

page_navigation.tpl.php

1. Find the last closing <div> tag at the end of the file:

```
</div>
```

2. Add this above it:

```
<?php if ($Number_of_Pages > 2):?>
 <a class="view_all" href="<?php print $View_All_URL ?
>">View All <?php print $Number_of_Products?> Item<?php
print $s?></a>
<?php endif;?>
```

product_detail.tpl.php

In addition to the Slimbox changes mentioned at the top of this page, you will need to make the following changes:

1. Change this:

```
<div class="prod_section buy_now">
```

2. To:

```
<div class="prod_section buy_now" <?php print
$SchemaOrg_Offer?>>
```

3. Change this:

```
<?php print $Price_Label?> <?php print sc_price
($Base_Price) ?>
```

4. To:

```
<?php print $Price_Label?> <span <?php print
$SchemaOrg_Price?>><?php print sc_price($Base_Price) ?
></span>
```

5. Find this:

```
<?php print $Reviews?>
```

6. Add this below it:

```
<?php if ($Show_Addl_Info):?>
 <div class="prod_section addtl">
  <h2>Additional Information</h2>

  <?php if ($Attachments):?>
   <div class="prod_attachments section">
    <h3>Attachments</h3>
    <ul class="reset">
```

```
      <?php foreach($Attachments as $Attachment):?>
       <li>
        <a href="<?php print $Attachment['URL']?>"
target="_blank">
         <span class="ficons">
          <?php if ($Attachment['Type_Img']):?>
           <img src="<?php print $Attachment['Type_Img']?>"
alt="<?php print $Attachment['Type']?>" />
          <?php endif;?>
          <span class="ftype"><?php print $Attachment
['Type']?></span>
         </span>
         <span><?php print $Attachment['Display_Name']?
></span>
         <span class="fsize">(<?php print $Attachment
['Size']?>)</span>
        </a>
       </li>
      <?php endforeach;?>
     </ul>
    </div>
   <?php endif;?>

   <?php if ($Show_Info):?>
    <div class="prod_data section">
     <h3>Product Data</h3>
     <ul class="reset">
      <?php if ($Brand):?>
       <li>
        <label>Brand:</label>
        <span><a href="<?print $Brand_URL?>"><?php print
$Brand ?></a></span>
       </li>
      <?php endif;?>
      <?php if ($Condition):?>
       <li>
        <label>Condition:</label>
        <span><?php print $Condition ?></span>
       </li>
      <?php endif;?>
      <?php if ($Product_Code):?>
       <li>
        <label>Product Code:</label>
        <span><?php print $Product_Code ?></span>
       </li>
      <?php endif;?>
      <?php if ($SKU):?>
       <li>
        <label>SKU:</label>
        <span><?php print $SKU ?></span>
       </li>
      <?php endif;?>
      <?php if ($GTIN13):?>
       <li>
        <label>GTIN 13:</label>
        <span><?php print $GTIN13 ?></span>
       </li>
      <?php endif;?>
      <?php if ($ISBN):?>
       <li>
        <label>ISBN:</label>
        <span><?php print $ISBN ?></span>
       </li>
      <?php endif;?>
```

```
      <?php if ($Model_No):?>
       <li>
        <label>Model #:</label>
        <span><?php print $Model_No ?></span>
       </li>
      <?php endif;?>
      <?php if ($Mnf_Name):?>
       <li>
        <label>Manufacturer:</label>
        <span><a href="<?print $Mnf_URL?>"><?php print
$Mnf_Name ?></a></span>
       </li>
      <?php endif;?>
      <?php if ($Mnf_Part_No):?>
       <li>
        <label>Mnf. Part #:</label>
        <span><?php print $Mnf_Part_No ?></span>
       </li>
      <?php endif;?>
     </ul>
    </div>
   <?php endif;?>
  </div>
<?php endif;?>
```

search_results.tpl.php

1. Change this:

```
<?php if ($Category_Options): ?>
 <li>
  <label>In:</label>
  <div class="fields_box_field">
   <select name="search[cat]">
    <option value="">All Categories</option>
    <?php print $Category_Options ?>
   </select>
  </div>
 </li>
<?php endif; ?>
```

2. To:

```
<?php if ($Category_Options): ?>
 <li>
  <label>In category:</label>
  <div class="fields_box_field">
   <select name="search[cat]">
    <option value="">All Categories</option>
    <?php print $Category_Options ?>
   </select>
  </div>
 </li>
<?php endif; ?>

<?php if ($Brand_Options): ?>
 <li>
  <label>Brand:</label>
  <div class="fields_box_field">
```

```
   <select name="search[brand]">
    <option value="">All Brands</option>
    <?php print $Brand_Options ?>
   </select>
  </div>
 </li>
<?php endif; ?>

<?php if ($Mnf_Options): ?>
 <li>
  <label>Manufacturers:</label>
  <div class="fields_box_field">
   <select name="search[mnf]">
    <option value="">All Manufacturers</option>
    <?php print $Mnf_Options ?>
   </select>
  </div>
 </li>
<?php endif; ?>
```

store_footer.tpl.php

1. Change this:

```
<a href="http://validator.w3.org/check?uri=referer"
title="Valid XHTML 1.0 Transitional - click to validate">
 <img src="<?php print $W3C_XHTML_Image['dyn'] ?>"
width="<?php print $W3C_XHTML_Image['width'] ?>" height="<?
php print $W3C_XHTML_Image['height'] ?>" alt="Valid XHTML
1.0 Transitional" />
</a>
```

2. To:

```
<a href="http://validator.w3.org/check?uri=referer"
title="Valid HTML 5 - click to validate">
 <img src="<?php print $W3C_HTML5_Image['dyn'] ?>"
width="<?php print $W3C_HTML5_Image['width'] ?>" height="<?
php print $W3C_HTML5_Image['height'] ?>" alt="Valid HTML
5" />
</a>
```

store_main.tpl.php
store_restricted.tpl.php

1. Change this:

```
<!DOCTYPE html PUBLIC "-//W3C//DTD XHTML 1.0
Transitional//EN" "http://www.w3.org/TR/xhtml1/DTD/xhtml1-
transitional.dtd">
<html xmlns="http://www.w3.org/1999/xhtml">
```

2. To:

```
<!DOCTYPE html>
```

```
<html <?php print $HTML_Attributes?>>
```

style_main.css.php

As of version 4.0, it is usually not necessary to modify this file. See the section about extending CSS **here** **(Section 9.3.14)** for more info.

If you have a modified version of this file in your custom theme folder, you'll need to make these changes:

1. Find this:

```
.select_multi {
```

2. Change to:

```
.select_multi,
ul.reset {
```

3. Find this:

```
.prod_img_outer {
```

4. Add this above it:

```
.prod_detail .addtl * {
 vertical-align: middle
}

.prod_detail .addtl li {
 padding: 7px 0;
}

.prod_detail .addtl li:nth-child(odd) {
 background-color: <?php print $ini['altRowBgColor']?>;
}
```

5. Find this:

```
.sc_search_results label {
 width: 80px;
}
```

6. Change to:

```
.sc_search_results label {
 width: 100px;
}
```

7. Find this:

```
.cart_table,
.cart_discounts,
```

```
.address_box,
.order_info_table {
 border: black solid 1px;
 margin-bottom: 15px;
 width: 100%;
 border-radius: <?php print $ini['borderRadius']?>;
 overflow: hidden;
 background: <?php print $ini['mainBgColor']?>;
}
```

8. Change to:

```
.cart_table,
.cart_discounts,
.address_box,
.order_info_table {
 border: black solid 1px;
 margin-bottom: 15px;
 border-radius: <?php print $ini['borderRadius']?>;
 overflow: hidden;
 background: <?php print $ini['mainBgColor']?>;
}

table.cart_table,
table.order_info_table,
table.order_history_table {
 width: 100%;
}
```

9. Find this:

```
#print_friendly img {
 vertical-align: middle;
}
```

10. Add this below it:

```
#order_ship_details p {
 margin-bottom: 0;
}

.print_friendly {
 page-break-before: always;
}

.print_friendly:first-of-type {
 page-break-before: auto;
}

.print_friendly h2 {
 margin-top: 0;
}

@media print {
 .sc_content {
  padding: 0;
 }
}
```

11. Add this to the bottom of the file:

```
.ficons {
 margin: 0 10px 0 0;
 height: 20px !important;
 display: inline-block;
 border-right: <?php print $ini['rowBorderColor']?> dotted
1px;
 padding: 0 5px 0 5px;
 width: 65px;
}

.ficons:before {
 content: '';
 display: inline-block;
 width: 12px;
 height: 16px;
 vertical-align: middle;
 background: url(<?php print sc_img
('download_arrow','dyn')?>) no-repeat;
}

.ftype {
 text-transform: uppercase;
}

.addtl .section {
 border: <?php print $ini['rowBorderColor'] ?> solid 1px;
 padding: 10px;
 margin-bottom: 20px;
 box-shadow: 0 0 2px #ddd;
 border-radius: 3px;
}

.addtl .section h3 {
 margin-top: 2px;
 padding-left: 5px;
 font-weight: normal;
}

.addtl .prod_data li {
 padding: 3px 3px 3px 5px;
}

.prod_data li * {
 vertical-align: middle;
}

.prod_data label {
 margin-right: 2px;
 display: inline-block;
 width: 20%;
 color: <?php print $ini['prodTitleColor']?>;
}
```

12.6.3.13 v5.0.0

Overview

This page has been written as a guide to aid you in upgrading your site to v5.0.0 and after. Please read this page in its entirety before attempting to upgrade.

> Lighthouse Development (the makers of Squirrelcart) offer upgrade services. Please see this page for more information:
>
> **http://www.squirrelcart.com/upgrade-service**
>
> Our standard upgrade service does not include updating custom theme templates. If you are interested in pricing to update your custom theme for version 5 please contact us:
>
> **http://www.squirrelcart.com/contact**

Slideshow Module

As of Squirrelcart version 5.0, the slideshow module is deprectated because the free script it relies upon is not responsive. This module is no longer part of Squirrelcart Pro.

We have updated the Slideshow to work with version 5. It will work as it did in prior versions but is not responsive.

If you were using the slideshow module prior to your upgrade to version 5, you will need to install the slideshow module separately. You can do this as follows:

1. Download the Slideshow module from our website

2. Unzip the file

3. Upload the **slideshow** folder to your Squirrelcart 5 **squirrelcart/modules** folder

   In future versions, this module is going to be replaced by built-in features that provide similar functionality. Version 5 has a built-in homepage slideshow that you can use for the homepage, which does not require the slideshow module.

   After upgrading, if you want your website to be responsive (mobile friendly) we recommend deleting any slideshows you created using this module.

PayPal Payments Pro Changes

As of Squirrelcart version 5.0.0, we no longer support communicating with PayPal Payments Pro using an API certificate file. If the **API Signature** field on your PayPal Payments Pro payment gateway record in the control panel is set to a filename like **paypal_cert_key.pem**, you will need to update your PayPal settings to use an API signature instead. See the setup instructions for **PayPal Payments Pro (Section 6.8.3.4.42)** for more info.

Category **Image of Name** Field Removed

The purpose of the **Image of Name** field on category records was to be able to use an image that represented the actual text of a category name. This was intended to give a way of making the text look a little nicer as compared to browser rendered text, so you could use your own fonts, shadows, etc...

Since that feature was added long ago, HTML and CSS has come a long way making it no longer necessary to use an image to make text look unique. Through the use of web fonts and CSS drop shadows, you can make text look more custom. This approach has a benefit of making the text readable by search engines. Using images in place of text has a negative impact in terms of SEO because search engines can't read text inside images.

With that in mind, the category "Image_of_Name" feature has been removed in version 5.0.0. You can still show images for each category (and for subcategories) using the other image fields on your category records.

If you want the name of the category to appear differently, you can tweak your CSS to change the colors of the category titles, to add a background image, etc...

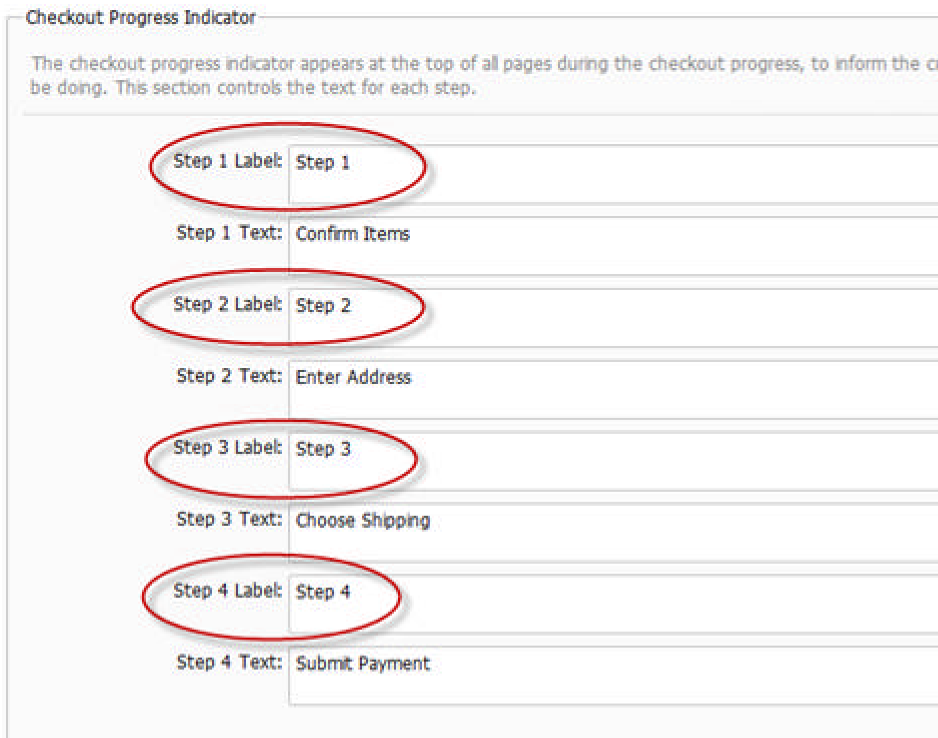
New Search Nav Block

Version 5 now includes responsive options to make your store look great on all devices. This includes a mobile menu that displays your nav blocks via a scrolling nav that appears when a menu icon is clicked on smaller screen devices.

We've added a new Search navigation block which appears as the first nav block in this nav for new installs. See **this page (Section 9.3.10.3)** for instructions on adding this nav block to your store.

Checkout Progress Indicator Changes

We recommend making the labels in the checkout progress indicator blank. That can be done on the **Visual Settings page (Section 6.2)** of the control panel:



Theme and Template Changes

If you are using a custom version of any of the below template files, make the changes outlined for the custom version of that file inside your custom theme folder (Example: **squirrelcart/themes/YOURTHEMENAME)**. If you are not using a custom version of that file you do not need to make any changes. This section is a guide only. If a v5.0.0 template file has a lot of changes, you are probably better off reverting to the default version by removing your custom version of the same file.

How to revert a template

If you have a custom version of a template listed below and do not wish to update it, you can revert it. Reverting a template causes the master version of that template to be used. To revert a template that is in your custom theme folder, rename or delete it. Template changes begin below:

account_choice.tpl.php

1. Find this:

```
<label>Remember me:</label><input type="checkbox"
name="acct_choice[login][remember]" <?php print
$Remember_Checked ?> />
```

2. Change to:

```
<input id="acct_choice_remember" type="checkbox"
class="sc_check" name="acct_choice[login][remember]" <?php
print $Remember_Checked ?> /><label
for="acct_choice_remember">Remember me</label>
```

3. Find this:

```
<h2><a href="<?php print $Skip_Account_URL ?>">Skip
Account</a></h2>
<a href="<?php print $Skip_Account_URL ?>">Click here to
continue without using an account.</a>
```

4. Change to:

```
<?php if ($Skip_With_Email):?>
 <h2>Skip Account</h2>
 <div class="acct_choice_skip_w_email">
  <label>To checkout as a guest, please provide your email
address.</label>
  <input id="acct_choice_email" name="acct_choice
[skip_email]" type="email" placeholder="Email Address"
value="<?php print $Acct_Choice_Email ?>" />
  <input type="submit" class="btn btn_continue"
name="acct_choice[skip_submit]" value="Continue as
Guest" />
 </div>
<?php else:?>
 <h2><a href="<?php print $Skip_Account_URL ?>">Skip
Account</a></h2>
 <a href="<?php print $Skip_Account_URL ?>">Click here to
continue without using an account.</a>
<?php endif;?>
```

also_ordered_products.tpl.php

1. Find this:

```
<?php foreach($Product_Rows as $Product_Row): ?>
 <div class="box_row <?php print $Product_Row['instance']?
>">
  <?php foreach($Product_Row['products'] as $Product): ?>
   <div class="box_outer <?php print $Product['instance'].'
'.$Product['box_width_class'] ?>">
    <div class="box_inner" style="<?php if ($Product
['height_difference']) print "margin-top: $Product
[height_difference]px" ?>">
     <?php print $Product['HTML'] ?>
    </div>
   </div>
  <?php endforeach; ?>
 </div>
<?php endforeach; ?>
```

2. Change to:

```
<?php foreach($Product_Rows as $Product_Row): ?>
```

```
 <?php foreach($Product_Row['products'] as $Product): ?>
  <div class="box_outer <?php print $Product_Row
['instance']?> <?php print $Product['instance'].'
'.$Product['box_width_class'] ?>">
   <div class="box_inner">
    <?php print $Product['HTML'] ?>
   </div>
  </div>
 <?php endforeach; ?>
<?php endforeach; ?>
```

breadcrumb_nav.tpl.php

1. Find this:

```
<li>
 <a class="crumb <?php print $Crumb['instance'] ?>"
href="<?php print $Crumb['URL'] ?>"><?php print $Crumb
['Link_Text'] ?></a>
</li>
<?php if ($Crumb['instance'] != 'last'): ?>
 <li class="crumb_sep"><?php print $Crumb_Separator ?></li>
<?php endif; ?>
```

2. Change to:

```
<li><a class="crumb <?php print $Crumb['instance'] ?>"
href="<?php print $Crumb['URL'] ?>"><?php print $Crumb
['Link_Text'] ?></a></li>
```

cart_options.tpl.php

1. Find first occurrenc of this:

```
<a class="btn btn_view_cart" href="<?php print
$View_Cart_URL ?>">View Cart</a>
```

2. Change to:

```
<?php if (!$Cart_Empty):?>
 <a class="btn btn_view_cart" href="<?php print
$View_Cart_URL ?>">View Cart</a>
<?php endif;?>
```

3. Find this:

```
<div class="cart_msg">Your shopping cart contains <br />the
following item(s):</div>
```

4. Change to:

```
<div class="cart_msg">Your shopping cart contains the
```

```
following:</div>
```

5. Find second occurrence of this (toward end of file):

```
<a class="btn btn_view_cart" href="<?php print
$View_Cart_URL ?>">View Cart</a>
```

6. Change to:

```
<div class="form_btns">
 <a class="btn btn_view_cart" href="<?php print
$View_Cart_URL ?>">View Cart</a>
</div>
```

categories_all.tpl.php

1. Delete this line:

```
<h1>Product Catalog</h1>
```

category_as_table.tpl.php

1. Find this:

```
<?php if ($Image_of_Name): ?>
 <a href="<?php print $URL ?>">
  <img src="<?php print $Image_of_Name['dyn'] ?>" width="<?
php print $Image_of_Name['width'] ?>" height="<?php print
$Image_of_Name['height'] ?>" alt="<?php print
$Image_of_Name['alt'] ?>" />
 </a>
 <?php print $Admin_Link ?>
<?php else: ?>
 <h2>
  <a href="<?php print $URL?>"><?php print $Content_Name ?
></a> <?php print $Admin_Link ?>
 </h2>
<?php endif; ?>
```

2. Change to:

```
<h1>
 <a href="<?php print $URL?>"><?php print $Content_Name ?
></a> <?php print $Admin_Link ?>
</h1>
```

3. Find this:

```
<div class="valign_middle req_missing_instructions">
 <?php print $SC['settings']['Required_Field_Indicator'] ?
><span> indicates a required field.</span>
 <?php print $SC['settings']['Missing_Field_Indicator'] ?
><span> indicates a missing field.</span>
```

```
</div>

<table class="cat_products_table order_info_table"
cellspacing="0">
```

4. Change to:

```
<table class="cat_products_table order_info_table">
```

5. Find this:

```
<?php if ($multi_add): ?>
```

6. Add this before it:

```
<div class="valign_middle req_missing_instructions req">
 required field
</div>
```

7. Find this:

```
<button class="btn btn_multi_add btn_bigger" type="submit"
id="add_to_cart_link<?php print $Form_ID ?>">Add Items to
Cart</a>
```

8. Change to:

```
<button class="btn btn_multi_add btn_bigger" type="submit"
id="add_to_cart_link<?php print $Form_ID ?>">Add Items to
Cart</button>
```

category_preview_box.tpl.php

1. Find this:

```
<img src="<?php print $Thumbnail_Image['dyn'] ?>" width="<?
php print $Thumbnail_Image['width'] ?>" height="<?php print
$Thumbnail_Image['height'] ?>" alt="<?php print
$Thumbnail_Image['alt'] ?>" title="" />
```

2. Change to:

```
<img class="<?php print $Img_Class ?>" src="<?php print
$Thumbnail_Image['dyn'] ?>" width="<?php print
$Thumbnail_Image['width'] ?>" height="<?php print
$Thumbnail_Image['height'] ?>" alt="<?php print
$Thumbnail_Image['alt'] ?>" title="" />
```

checkout.tpl.php

1. Find all 4 lines similar to this (Step_1 through Step_4):

```
<?php print $Step_1_Label ?><br/>
```

2. Remove to:

```
</br>
```

checkout_address_correct.tpl.php

1. Find this:

```
<?php if ($Address_Type):?>
 <h3><?php print $Address_Type?> Address</h3>
<?php else: ?>
 <h3>Address Type Unspecified</h3>
<?php endif;?>
```

2. Change to:

```
<?php if ($New_Address_Type):?>
 <?php if ($Address_Type):?>
  <h3><?php print $Address_Type?> Address</h3>
 <?php else: ?>
  <h3>Address Type Unspecified</h3>
 <?php endif;?>
<?php endif;?>
```

3. Find this:

```
<li class="<?php print $Street_2_Class ?>"><?php print
$Street?></li>
```

4. Change to:

```
<li class="<?php print $Street_2_Class ?>"><?php print
$Street_2?></li>
```

5. Find this:

```
<h3><?php print $New_Address_Type?> Address</h3>
```

6. Change to:

```
<?php if ($New_Address_Type):?>
   <h3><?php print $New_Address_Type?> Address</h3>
<?php endif;?>
```

7. Find this:

```
<li><?php print $New_Street?></li>
```

8. Change to:

```
<li><?php print $New_Street_2?></li>
```

checkout_pay_order_summary.tpl.php

1. Find this:

```
<h3>Your grand total is below. Need to make changes? <a
href="<?php print $Change_Order_URL ?>">Click
here</a>.</h3>
```

2. Add this below it:

```
<!-- Address block section -->
<?php if ($Show_Billing || $Show_Shipping): ?>
 <div class="address_boxes">
  <?php if ($Show_Billing): ?>
   <div class="address_box bill">
    <h4>Billing Address</h4>
    <address>
     <span class="addr_name"><?php print $Bill_First_Name ?
> <?php print $Bill_Last_Name ?></span><br/>
     <?php if ($Bill_Company || $Ship_Company): ?>
      <?php print $Bill_Company ?><br/>
     <?php endif; ?>
     <?php print $Bill_Street ?><br/>
     <?php if ($Ship_Street_2 || $Bill_Street_2): ?>
      <?php print $Bill_Street_2 ?><br/>
     <?php endif; ?>
     <?php print $Bill_City ?>, <?php print
$Bill_State_Abbrev ?> <?php print $Bill_Postal_Code ?><br/>
     <?php print $Bill_Country_Name ?><br/>
    </address>
    <div class="addr_footer">
     <a class="addr_edit tip" href="<?php print
$Edit_Address_URL ?>" title="edit address"></a>
    </div>
   </div>
  <?php endif; ?>
  <?php if ($Show_Shipping): ?>
   <div class="address_box ship">
    <h4>Shipping Address</h4>
    <address>
     <span class="addr_name"><?php print $Ship_First_Name ?
> <?php print $Ship_Last_Name ?></span><br/>
     <?php if ($Bill_Company || $Ship_Company): ?>
      <?php print $Ship_Company ?><br/>
     <?php endif; ?>
     <?php print $Ship_Street ?><br/>
     <?php if ($Ship_Street_2 || $Bill_Street_2): ?>
      <?php print $Ship_Street_2 ?><br/>
     <?php endif; ?>
     <?php print $Ship_City ?>, <?php print
$Ship_State_Abbrev ?> <?php print $Ship_Postal_Code ?><br/>
```

```
     <?php print $Ship_Country_Name ?><br/>
    </address>
    <div class="addr_footer">
     <a class="addr_edit tip" href="<?php print
$Edit_Address_URL ?>" title="edit address"></a>
    </div>
   </div>
  <?php endif; ?>
 </div>
<?php endif; ?>
```

3. Find this:

```
<?php if (!empty($Shippable)): ?>
```

4. Change to:

```
<?php if (!empty($Shipping_Chosen)): ?>
```

5. Find this:

```
<?php if (!empty($Shippable)): ?>
 <?php print sc_price($Shipping_Total) ?><br />
<?php endif; ?>
```

6. Change to:

```
<?php if (!empty($Shipping_Chosen)): ?>
 <?php if ($Shipping_TBD):?>
  <span class="tip" title="shipping cost to be determined
after order completion.">TBD</span>
 <?php else:?>
  <?php print sc_price($Shipping_Total) ?><br />
 <?php endif;?>
<?php endif; ?>
```

checkout_pay_redirect.tpl.php
checkout_pay_redirect_iframe.tpl.php

1. Find this:

```
<?php stylesheet('style_main.css.php') ?>
<?php print stylesheet("style_variant1_$SC
[theme_variant1].css.php") ?>
```

2. Change to:

```
<?php sc_stylesheet('style_main.css.php') ?>
<?php sc_stylesheet("style_variant1_$SC
[theme_variant1].css.php") ?>
```

checkout_ship.tpl.php

1. Find this:

```
<div class="ship_rate">
 <input style="vertical-align: middle" id="rate_<?php print
$Rate['Field_Value'] ?>" class="radio" type="radio"
name="ship_rate" value="<?php print $Rate['Field_Value'] ?
>" /><label for="rate_<?php print $Rate['Field_Value'] ?
>"><?php print $Rate['Method_Name'] ?> - <?php print
sc_price($Rate['Price'],'text') ?></label>
 <?php if ($Rate['Delivery_Days']): ?>
  <div class="dlv_days">
   <?php print $Rate['Delivery_Days'] ?> day<?php if ($Rate
['Delivery_Days'] != 1) print 's' ?> to delivery
   <?php if ($Rate['Delivery_Time']): ?>
    by <?php print $Rate['Delivery_Time'] ?>
   <?php endif; ?>
  </div>
 <?php endif; ?>
 <?php if ($Rate['Description']): ?>
  <div id="rate_detail_<?php print $Rate['Field_Value'] ?>"
class="ship_rate_detail sc_hide">
   <div class="sr_inner">
    <?php print $Rate['Description'] ?>
   </div>
  </div>
 <?php endif; ?>
</div>
```

2. Change to:

```
<div class="ship_rate">
 <input style="vertical-align: middle" id="rate_<?php print
$Rate['Field_Value'] ?>" class="sc_check" type="radio"
name="ship_rate" value="<?php print $Rate['Field_Value'] ?
>" />
 <label for="rate_<?php print $Rate['Field_Value'] ?>">
  <?php if ($Rate['Cost_TBD']):?>
   <?php print $Rate['Method_Name'] ?> - Price to be
determined
  <?php else:?>
   <?php print $Rate['Method_Name'] ?> - <?php print
sc_price($Rate['Price'],'text') ?>
  <?php endif;?>
 </label>
 <?php if ($Rate['Delivery_Days']): ?>
  <div class="dlv_days">
   <?php print $Rate['Delivery_Days'] ?> day<?php if ($Rate
['Delivery_Days'] !== 1) print 's' ?> to delivery
   <?php if ($Rate['Delivery_Time']): ?>
    by <?php print $Rate['Delivery_Time'] ?>
   <?php endif; ?>
  </div>
 <?php endif; ?>
 <?php if ($Rate['Description']): ?>
  <div id="rate_detail_<?php print $Rate['Field_Value'] ?>"
class="ship_rate_detail sc_hide">
   <div class="sr_inner">
    <?php print $Rate['Description'] ?>
```

```
    </div>
  </div>
 <?php endif; ?>
</div>
```

discounts_qty_based_price.tpl.php

1. Find this:

```
<?php print $discount['Price_Label']?>
```

2. Change to:

```
<?php print $Price_Label?>
```

email_html.tpl.php

1. Find this:

```
<?php stylesheet("style_main.css.php"); ?>
```

2. Change to:

```
<?php sc_stylesheet("style_main.css.php"); ?>
```

featured_product.tpl.php

1. Find this:

```
<div class="featured_prod_btns">
```

2. Change to:

```
<div class="featured_prod_btns form_btns">
```

forgot_password.tpl.php

1. Find this:

```
<form id="forgot_password_form" class="sc_form" accept-
charset="utf-8" action="<?php print $Form_Action?>"
method="post">
```

2. Change to:

```
<form id="forgot_password_form" class="sc_form" accept-
charset="utf-8" action="<?php print $Form_Action?>"
```

```
method="post" novalidate>
```

3. Find this:

```
<ul>
 <li>
  <label><?php print $Missing_Icon ?>Email address:</label>
  <div class="fields_box_field">
   <input class="<?php print $Error_Class?>" type="text"
name="forgot_pw[Email_Address]" value="<?php print
$forgot_pw['Email_Address']?>" />
  </div>
 </li>
</ul>
```

4. Change to:

```
<ul class="same_line_labels">
 <li>
  <label>Email address</label>
  <div class="fields_box_field">
   <input class="<?php print $Error_Class?>" type="email"
name="forgot_pw[Email_Address]" value="<?php print
$forgot_pw['Email_Address']?>" />
  </div>
 </li>
</ul>
```

5. Find this:

```
<?php print $reCAPTCHA_HTML ?>
```

6. Change to:

```
<?php print $Captcha_HTML ?>
```

product_catalog_nav.tpl.php

1. Find this:

```
<!-- search field -->
```

2. Add this above:

```
<?php if ($Show_Search):?>
```

3. Find this:

```
</form>
```

4. Change to:

```
<?php endif;?>
```

5. Find this:

```
<input type="text" name="search[terms]" size="9"
value="Search" onfocus="this.value=''" onblur="if
(this.value=='') this.value='Search' " />
```

6. Change to:

```
<input type="search" name="search[terms]"
placeholder="Search" />
```

related_products_content.tpl.php

1. Find this:

```
<?php foreach($Product_Rows as $Product_Row): ?>
 <div class="box_row <?php print $Product_Row['instance']?
>">
  <?php foreach($Product_Row['products'] as $Product): ?>
   <div class="box_outer <?php print $Product['instance'].'
'.$Product['box_width_class'] ?>">
    <div class="box_inner" style="<?php if ($Product
['height_difference']) print "margin-top: $Product
[height_difference]px" ?>">
     <?php print $Product['HTML'] ?>
    </div>
   </div>
  <?php endforeach; ?>
 </div>
<?php endforeach; ?>
```

2. Change to:

```
<?php foreach($Product_Rows as $Product_Row): ?>
 <?php foreach($Product_Row['products'] as $Product): ?>
  <div class="box_outer <?php print $Product_Row
['instance']?> <?php print $Product['instance'].'
'.$Product['box_width_class'] ?>">
   <div class="box_inner">
    <?php print $Product['HTML'] ?>
   </div>
  </div>
 <?php endforeach; ?>
<?php endforeach; ?>
```

related_products_nav.tpl.php

1. Find this:

```
<div class="box_inner" style="<?php if ($Product
['height_difference']) print "margin-top: $Product
```

```
[height_difference]px" ?>">
```

2. Change to:

```
<div class="box_inner">
```

store_footer.tpl.php

1. Find this:

```
<div id="sc_footer">
 <div id="sc_footer_inner" class="<?php print
$SC_Footer_Classes?>">
```

2. Change to:

```
<footer id="sc_footer">
 <div class="sc_inside <?php print $SC_Footer_Classes?>">
```

3. Find the last closing div:

```
</div>
```

4. Change to:

```
</footer>
```

store_main.tpl.php

1. If you plan on making your custom theme responsive (see section further down this page), find this:

```
<meta name="description" content="<?php print
$Description ?>" />
```

2. Add this after:

```
<meta name="viewport" content="width=device-width, initial-
scale=1.0, maximum-scale=10" />
```

3. Find this:

```
<!--  left navigation -->
<?php if (sc_nav('Primary')): ?>
 <div id="sc_col1" class="nav_col">
  <?php
   // Left Navigation section
   print sc_nav('Primary');
  ?>
```

```
 </div>
<?php endif; ?>

<!--  right navigation -->
<?php if (sc_nav('Secondary')): ?>
 <div id="sc_col2" class="nav_col">
  <?php
   // Right Navigation section
   print sc_nav('Secondary');
  ?>
 </div>
<?php endif; ?>
```

4. Add this above:

```
<div id="sc_nav">
```

5. and this below:

```
</div>
```

subcategory.tpl.php

1. Find this:

```
<img class="subcategory_img" src="<?php print
$Thumbnail_Image['dyn'] ?>" width="<?php print
$Thumbnail_Image['width'] ?>" height="<?php print
$Thumbnail_Image['height'] ?>" alt="<?php print
$Thumbnail_Image['alt'] ?>" title="" />
```

2. Change to:

```
<img class="subcategory_img <?php print $Img_Class?>"
src="<?php print $Thumbnail_Image['dyn'] ?>" width="<?php
print $Thumbnail_Image['width'] ?>" height="<?php print
$Thumbnail_Image['height'] ?>" alt="<?php print
$Thumbnail_Image['alt'] ?>" title="" />
```

Templates you should delete

These files are no longer used. If they are present in your custom theme folder, delete them.

- best_sellers_box.tpl.php
- best_sellers_main.tpl.php
- new_products_box.tpl.php
- new_products_main.tpl.php
- option_detail_page.tpl.php
- order_info_popup.tpl.php
- order_status_popup.tpl.php

Templates you should revert

- account_form.tpl.php
- categories_box.tpl.php
- category.tpl.php
- checkout_address_form.tpl.php
- checkout_pay.tpl.php
- checkout_pay_cvv2_help.tpl.php
- checkout_view.tpl.php
- checkout_view_buttons.tpl.php
- message.tpl.php
- option*.tpl.php (all templates starting with "option")
- order*.tpl.php
- page_navigation.tpl.php
- product*.tpl.php
- recaptcha.tpl.php
- search_results.tpl.php
- store_header.tpl.php
- store_restricted.tpl.php
- welcome_back_nav.tpl.php

style_main.css.php

With the release of Squirrelcart version 4.0 in October of 2013, it became no longer necessary to modify style_main.css.php. We strongly discouraged modification of this file in all documentation released since that date.

The correct way to customize your CSS for Squirrelcart is by extending our built-in CSS using a file named style_custom.css.php which only contains the changes you wish to make. See **this page** **(Section 9.3.14)** for more info.

If you have a customized version of style_main.css.php:

1. Make a copy of your custom theme so you can work on it without disturbing the default theme. See the **Copying a Theme for Testing** **(Section 9.3.8)** topic for instructions. After copying your custom theme using those instructions, make sure it is **set as your user account's current theme** **(Section 9.3.5)**.

2. Read our documentation explaining **how to extend our CSS** **(Section 9.3.14)**

3. Using those instructions, create a style_custom.css.php file inside your new custom theme folder.

4. Rename the style_main.css.php file in your new custom theme folder to style_main.css.OLD.php to disable it.

5. If any of these files are present in your new custom theme folder, rename them to disable them:
   style_variant2_800.css.php
   style_variant2_1024.css.php
   style_variant2_1280.css.php
   style_variant2_fluid.css.php

6. With these files disabled, you have disabled all of your custom CSS. You should now see more options to choose from for this new theme when setting your current theme. If you would like to change the appearance to be responsive, change the **Width** theme setting to **responsive**. Change the other theme options as you wish until you have something close to what you want. Then, continue below to add your custom CSS back in.

7. Using a comparison tool like **Diff Now (https://www.diffnow.com/)** (free, online) or **Beyond Compare (http://www.scootersoftware.com/)**, compare your style_main.css.OLD.php file with the style_main.css.php file in the **squirrelcart/themes/squirrelcart/** folder **from the version you are upgrading from**.

   For example, if you are upgrading from v4.5.4 you will be comparing your file to the style_main.css.php file in squirrelcart/themes/squirrelcart from your file backup of v4.5.4. This will show you every line you changed as compared to the original style_main.css.php file from the version you are upgrading from.

8. Copy only the changes that you made to the style_custom.css.php file. You'll have to have some knowledge of CSS to do this. You can view your changes in the storefront to see their effect.

9. When done, set your new custom theme as the **store's default theme (Section 9.3.4)**.

Making your store responsive (mobile friendly)

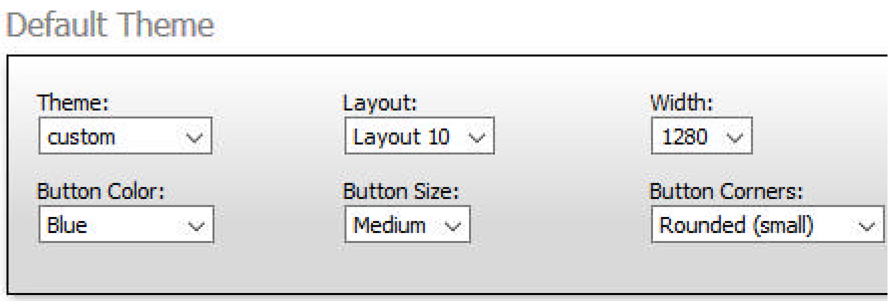
Squirrelcart version 5 now mobile friendly, with a responsive theme that looks great on all devices. New installs will automatically have a responsive design.

To make your upgraded store responsive, you will first need to determine how your theme is setup.

Determining your theme configuration

1. Open the themes table

2. At the top of the page under Default Theme, you will see a field named **Theme:**



3. Determine which of the following applies to your configuration:

Configuration A: Your settings match this if you see a field to the right of the Theme field named Layout, and it is set to anything other than "custom".

Configuration B: Your settings match this if you see a field to the right of the Theme field named Layout, and it is set to 'custom'. This theme has custom style settings.

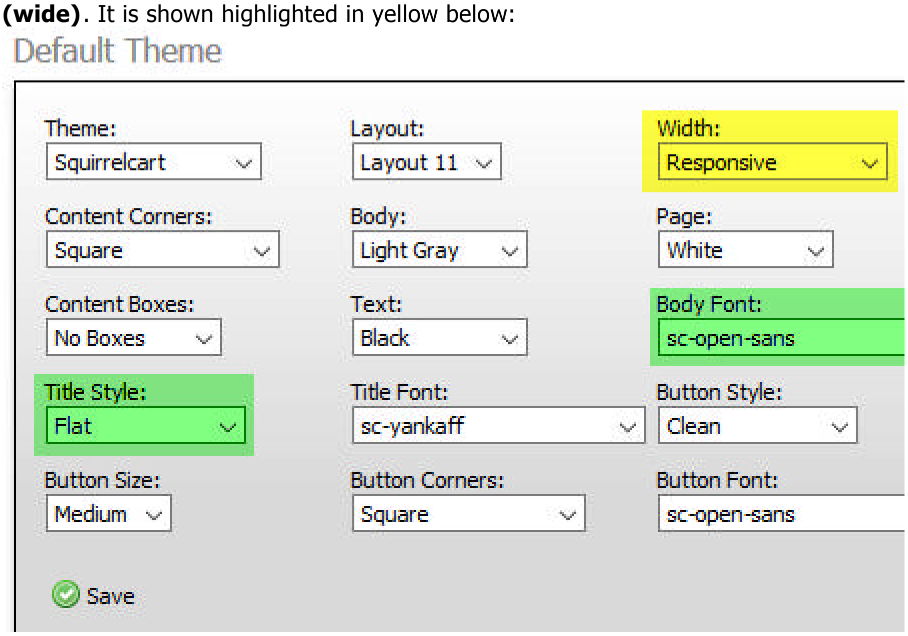
Configuration C: Your settings match this if the Theme field is set to "Highland Avenue" or "Main Street"

Configuration D: Your settings match this if you do not see a "Layout" option to the right of your theme.

To make your store responsive follow the instructions below that correspond to your configuration.

Configuration A

1. Change the **Width** field under Default Theme to **responsive** or **responsive (wide)**. It is shown highlighted in yellow below:



2. Optionally, you may want to also change the fields highlighted in green. These four settings are new to v5. They work as follows:

Title Style - changes the appearance of the titles seen inside nav blocks and content blocks on your store's homepage.
Body Font - this changes the main font for most text in the store.
Depth - this controls shadows and gradients.
Form Headers - this controls the titles seen above certain forms throughout the store.

3. Click the **Save** button to save your changes. View your storefront page, and adjust accordingly until you are happy with the result.

If you want to make additional changes to the appearance of the store, see the "Customizing" section of this documentation.

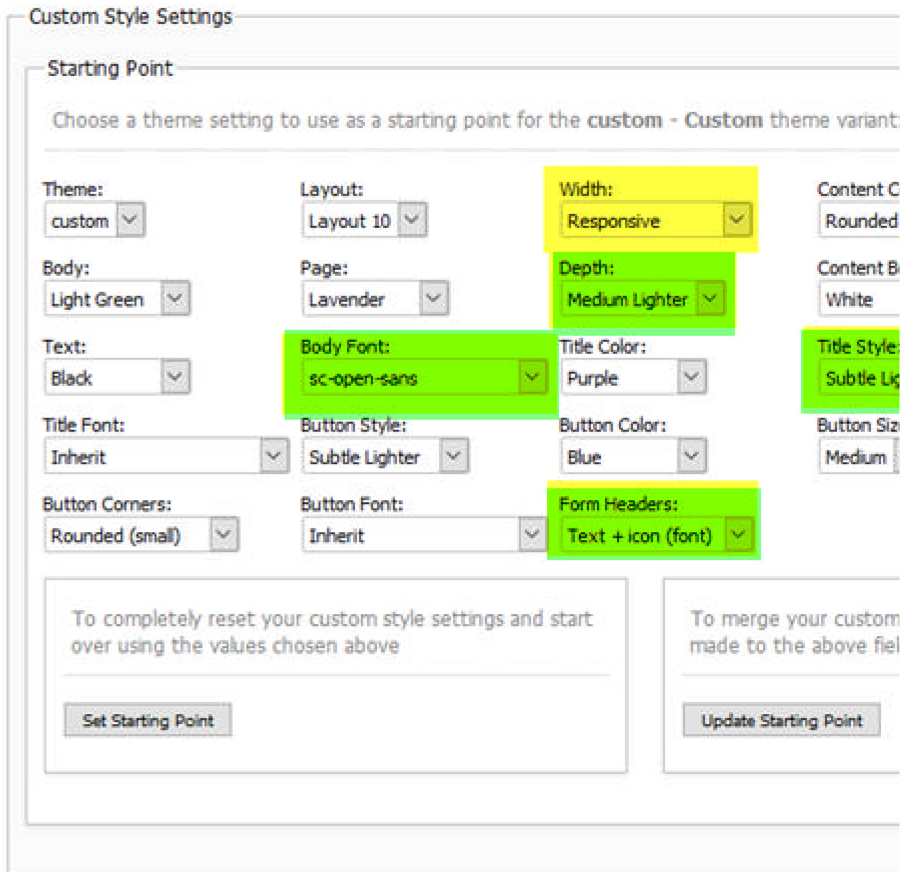
Resize the width of the browser window to determine if the responsive features are working.

Configuration B

You may want to **make a copy of your theme (Section 9.3.8)** and make these changes to that copy so it doesn't negatively impact your live site until you are ready to make it live.

1. Open your theme's record by clicking on its row

2. Locate the **Starting Point** section of the form:



3. Change the **Width** field to **responsive** or **responsive (wide)**. It is shown highlighted in yellow above.

4. Optionally, you may want to also change the fields highlighted in green. These four settings are new to v5. They work as follows:

   Title Style - changes the appearance of the titles seen inside nav blocks and content blocks on your store's homepage.
   Body Font - this changes the main font for most text in the store.
   Depth - this controls shadows and gradients.
   Form Headers - this controls the titles seen above certain forms throughout the store.

5. Click the **Update Starting Point** button shown above (bottom right corner, inside the **Starting Point** fieldset).

6. You will see a confirmation prompt. Click **OK.**

7. The page will reload. Scroll to the bottom and click **Save Changes**.

8. View your storefront page, and adjust accordingly until you are happy with the result.

If you want to make additional changes to the appearance of the store, see the

"Customizing" section of this documentation When you are done, make sure to **set this theme as the default theme (Section 9.3.4)** for your store

Resize the width of the browser window to determine if the responsive features are working.

Configuration C - Highland Ave and Main St.

The latest versions of the Highland Ave and Main Street theme have been updated to work in version 5. They are not responsive. We plan on making them responsive in the future.

If you wish to have a responsive store, the easiest way is to **create a new custom theme (Section 9.3.6)**, and make sure the **Width** theme option (shown in the Default Theme image above) is set to **Responsive**.

When you are happy with the look of your theme, **set it as your store's default theme (Section 9.3.4)**.

Configuration D

This configuration is the result of copying the style_main.css.php file from the master Squirrelcart theme into your custom theme folder. We have recommend against doing this since the release of v4 in 2013.

To make your theme responsive, you'll need to change your configuration by removing the style_main.css.php file and replacing it with a style_custom.css.php file.

This process is explained above, at the bottom of the **Theme and Template Changes** section, under the heading **style_main.css.php**.

Need help?

Lighthouse Development (the makers of Squirrelcart) offer upgrade services. Please see this page for more information:

http://www.squirrelcart.com/upgrade-service

Our standard upgrade service does not include updating custom theme templates. If you are interested in pricing to update your custom theme for version 5 please contact us:

http://www.squirrelcart.com/contact

12.6.3.14 v5.5.0

Overview

This page has been written as a guide to aid you in upgrading your site to v5.5.0 and after. Please read this page in its entirety before attempting to upgrade.

Lighthouse Development (the makers of Squirrelcart) offer upgrade services. Please see this page for more information:

https://www.squirrelcart.com/upgrade-service

Our standard upgrade service does not include updating custom theme templates. If you are interested in pricing to update your custom theme for version 5 please contact us:

https://www.squirrelcart.com/contact

Photo Gallery Module

A new Photo Gallery module was released alongside Squirrelcart version 5.5.0. It is included with Squirrelcart Pro. You can read about it here:

https://www.squirrelcart.com/shopping-cart-modules/photo-gallery

Theme and Template Changes

If you are using a custom version of any of the below template files, make the changes outlined for the custom version of that file inside your custom theme folder (Example: **squirrelcart/themes/YOURTHEMENAME)**. If you are not using a custom version of that file you do not need to make any changes. This section is a guide only. If a v5.5.0 template file has a lot of changes, you are probably better off reverting to the default version by removing your custom version of the same file.

How to revert a template

If you have a custom version of a template listed below and do not wish to update it, you can revert it. Reverting a template causes the master version of that template to be used. To revert a template that is in your custom theme folder, rename or delete it. Template changes begin below:

store_content.tpl.php

1. Find this:

```
<?php print sc_breadcrumb_nav() ?>
```

2. Change to:

```
<?php if (!isset($_GET['print_order'])) print
sc_breadcrumb_nav(); ?>
```

ship_notify_email_text.tpl.php

1. Find this (last line of the file):

```
<?php endif; ?>
```

2. Add this before that line:

```
<?php elseif($Tracking_URL):?>
To track your package, visit this URL: <?php print
$Tracking_URL?>
```

ship_notify_email_html.tpl.php

1. Find this (last line of the file):

```
<?php endif; ?>
```

2. Add this before that line:

```
<?php elseif($Tracking_URL):?>
 <p>To track your package, visit this URL: <a href="<?php
print $Tracking_URL?>"><?php print $Tracking_URL?></a></p>
```

Templates you should revert

- page_navigation.php
- order_email_customer_html.tpl.php
- order_email_staff_html.tpl.php

style_main.css.php

With the release of Squirrelcart version 4.0 in October of 2013, it became no longer necessary to modify style_main.css.php. We strongly discouraged modification of this file in all documentation released since that date.

The correct way to customize your CSS for Squirrelcart is by extending our built-in CSS using a file named style_custom.css.php which only contains the changes you wish to make. See **this page** **(Section 9.3.14)** for more info.

If you have a customized version of style_main.css.php:

1. Make a copy of your custom theme so you can work on it without disturbing the default theme. See the **Copying a Theme for Testing** **(Section 9.3.8)** topic for instructions. After copying your custom theme using those instructions, make sure it is **set as your user account's current theme** **(Section 9.3.5)**.

2. Read our documentation explaining **how to extend our CSS (Section 9.3.14)**

3. Using those instructions, create a style_custom.css.php file inside your new custom theme folder.

4. Rename the style_main.css.php file in your new custom theme folder to style_main.css.OLD.php to disable it.

5. If any of these files are present in your new custom theme folder, rename them to disable them:
   style_variant2_800.css.php
   style_variant2_1024.css.php
   style_variant2_1280.css.php
   style_variant2_fluid.css.php

6. With these files disabled, you have disabled all of your custom CSS. You should now see more options to choose from for this new theme when setting your current theme. If you would like to change the appearance to be responsive, change the **Width** theme setting to **responsive**. Change the other theme options as you wish until you have something close to what you want. Then, continue below to add your custom CSS back in.

7. Using a comparison tool like **Diff Now (https://www.diffnow.com/)** (free, online) or **Beyond Compare (http://www.scootersoftware.com/)**, compare your style_main.css.OLD.php file with the style_main.css.php file in the **squirrelcart/themes/squirrelcart/** folder **from the version you are upgrading from**.

   For example, if you are upgrading from v4.5.4 you will be comparing your file to the style_main.css.php file in squirrelcart/themes/squirrelcart from your file backup of v4.5.4. This will show you every line you changed as compared to the original style_main.css.php file from the version you are upgrading from.

8. Copy only the changes that you made to the style_custom.css.php file. You'll have to have some knowledge of CSS to do this. You can view your changes in the storefront to see their effect.

9. When done, set your new custom theme as the **store's default theme (Section 9.3.4)**.

Need help?

Lighthouse Development (the makers of Squirrelcart) offer upgrade services. Please see this page for more information:

https://www.squirrelcart.com/upgrade-service

Our standard upgrade service does not include updating custom theme templates. If you are interested in pricing to update your custom theme for version 5 please contact us:

https://www.squirrelcart.com/contact

13 Backups

13.1 Backups - Overview

Good backups are essential to ensure that you do not lose the hard work you've invested in setting up your store. This section describes in detail how to backup your installation, and recover from a failure.

13.2 Backing up Your Files

1. Open your *FTP* client
2. Download the **squirrelcart** folder from your site. This is usually at the same level as your *storefront* page.
3. Download your *storefront* page (defaults to **Storefront Page - store.php (Section 9.2)**)
4. Download your images folder (defaults to **sc_images**)
5. Download your **sc_data** folder. This is described in the **Installation > Uploading Files via FTP (Section 2.4)** topic.

13.3 Backing up Your Database

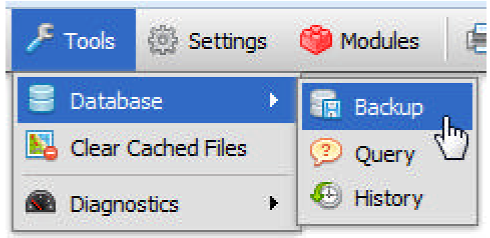
Overview

There are a few ways to backup your database. We will explain the most common methods in this topic.

Backing up Your Database With Squirrelcart

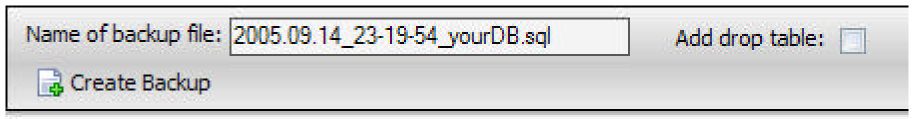
Squirrelcart includes a backup utility that utilizes the mysldump command on your server. DB backups are created inside the **sc_data/sc_backup** folder. By default, the **sc_data** folder is located inside your squirrelcart folder. We recommend that you move the **sc_data** folder so it is above your *web root* folder. This will ensure that your backup files are not web accessible.

1. Click the **Backup** menu link



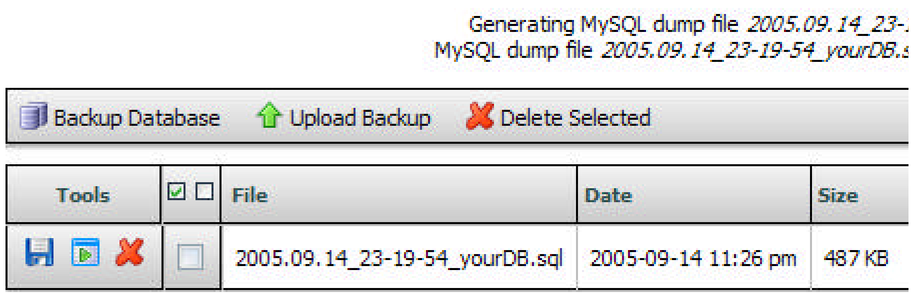
2. Click the 

button. You will see the following section appear:



3. Change the name of the backup file if you wish. If you would like this backup to be able to replace your existing database records when imported, check the **Add drop table** field.

4. Click **Create Backup.** You should see something like this:



5. If you would like to keep a copy of your backup on your computer, click the  button. You will be prompted to save the file.

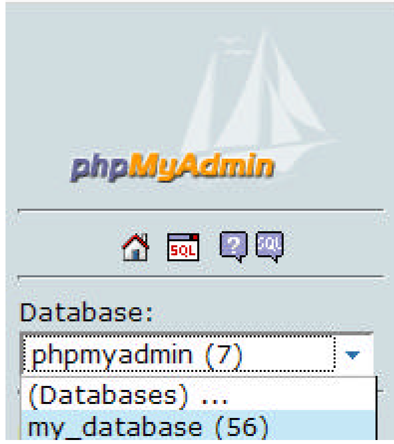
Backing up Your Database Using phpMyAdmin

phpMyAdmin is an Open Source database management utility. It is available for download for free at **http://www.phpmyadmin.net (http://www.phpmyadmin.net/)**. Many webhosts include a working copy of phpMyAdmin inside your hosting control panel.

Because many different versions of phpMyAdmin have been released, this should only be considered a guide. The exact steps may vary depending on your version.

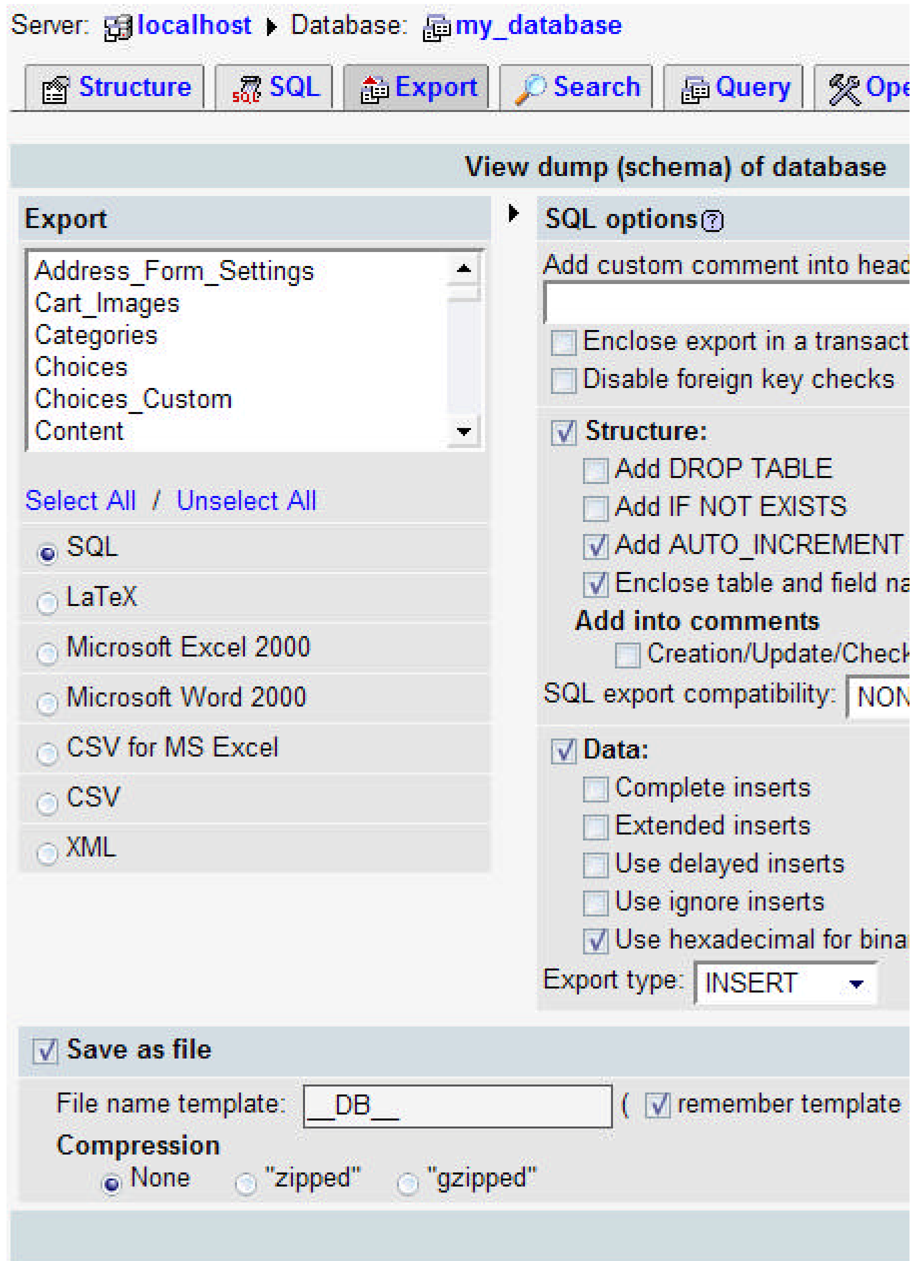
1. Open phpMyAdmin

2. Select your database in the left navigation frame if it is not already selected.



3. Click the **Export** tab

4. Check the **Save as File** field, and click the **Go** button to start the backup.



5. You will be prompted to save the backup file. Save it in a secure location.

6. Open the backup file using a text viewer (Notepad, Wordpad, etc..) and confirm that you see information that looks complete.

Backing up Your Database From a Command Shell

This section explains how to perform a backup from either a Unix/Linux or Windows command prompt. The steps involved to access a command prompt vary depending on your OS, and will not be discussed here.

1. Open your command shell application

2. Navigate to folder that contains the "mysqldump" command.

3. Enter the command to mysqdump as follows:

   ```
   mysqldump -ufred -pwilma my_database > mybackup.sql
   ```

   In the above example:

   - **fred** is the username with access to the database
   - **wilma** is the password for that account
   - **my_database** is the name of the database
   - **mybackup.sql** is the name of the file you wish to use for the backup.

     The first 3 parameters match the information you entered in Squirrelcart's config.php file.

13.4 Restoring Files

Restoring files is as simple as uploading the files and folders that you downloaded during your backup to their original locations.

The folders in steps 2 through 5 below should be uploaded to location specified in your **config.php (Section 2.9.1)** file for the **$site_www_root** variable.

1. Open your *FTP* client.

2. Upload the **squirrelcart** folder

3. Upload **store.php** (default name for your *storefront* page)

4. Upload the **sc_images** folder

   After you upload your images folder, you will need to set file permissions. See the topic titled **Setting File Permissions (Section 2.9.2)** in the installation section for more information.

5. Upload the **sc_data** folder to it's original location. The default location for this folder is inside your **squirrelcart** folder. If you moved this to a different location (which is recommended) then you will need to restore it to that location.

13.5 Importing a Database Backup

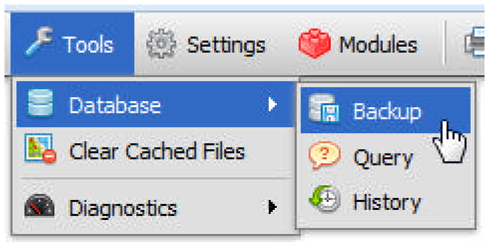
Overview

The database files used by Squirrelcart are plain text format, and have the file extension "**.**sql". A SQL file contains query statements that can be used to alter your database. You can also use database backup files to restore your database to a previous state. There are a few ways to import database files. We will discuss the most common methods below. Please take caution when overwriting an existing database with new data.

Importing a Database File Using Squirrelcart's Control Panel

Squirrelcart's control panel backup utility is designed to import database files on top of your existing database, and is usually used to upgrade to a newer version. You can also restore a complete database backup on top of your existing backup if the backup was created with the **add drop table** option. This causes MySQL to delete your existing tables before attempting to replace them with the versions from the backup file. You cannot restore a database backup to an empty table using the control panel.

1. Click the **Backup** menu link

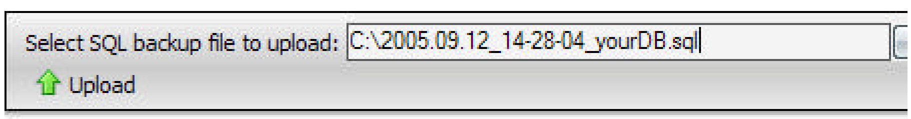
   

   If you have any database files in your **sc_data/sc_backup** folder they will appear in a table. If the backup you wish to import is listed in the table, skip to step 5

2. Click the  button

   You should see a new section appear.

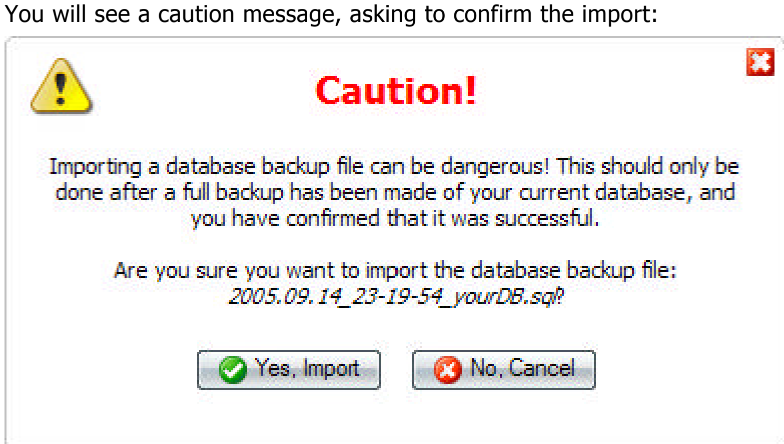
3. Click the **browse** button and locate your database file.

4. Click the **Upload** link. Your file should be uploaded and will appear in the table.

5. Click the  button to import your backup file.

6. You will see a caution message, asking to confirm the import:

Click **Yes, Import.**

7. If successful, you should get a message similar to this:
   "Import successful! 26 rows affected."

Importing a Database File Using a Command Shell

This section explains how to import a database file from either a Unix/Linux or Windows command prompt. The steps involved to access a command prompt vary depending on your OS, and will not be discussed here.

1. Open your command shell application

2. Navigate to folder that contains the "mysql" command.

3. Enter the command to mysql as follows:

   ```
   mysql -ufred -pwilma my_database < mybackup.sql
   ```

   In the above example:

   - **fred** is the username with access to the database
   - **wilma** is the password for that account
   - **my_database** is the name of the database
   - **mybackup.sql** is the name of the file you wish to use for the backup.

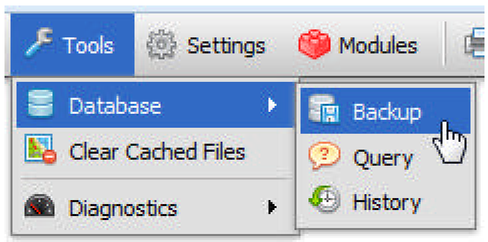
     The first 3 parameters match the information you entered in Squirrelcart's config.php file.

14 Tools

14.1 Database

14.1.1 Tools - Database Backup

Squirrelcart includes a comprehensive database backup tool. It is discussed in detail in the **Backing up Your Database (Section 13.3)** and **Importing a Database Backup (Section 13.5)** topics, in the Backups section of this documentation.



14.1.2 Tools - Database Query

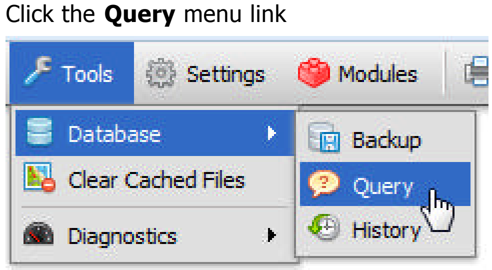
Overview

Squirrelcart contains a tool you can use to perform direct MySQL queries to your database. Making direct queries can be dangerous, so this utility should be used with caution.

Launching the Query Tool

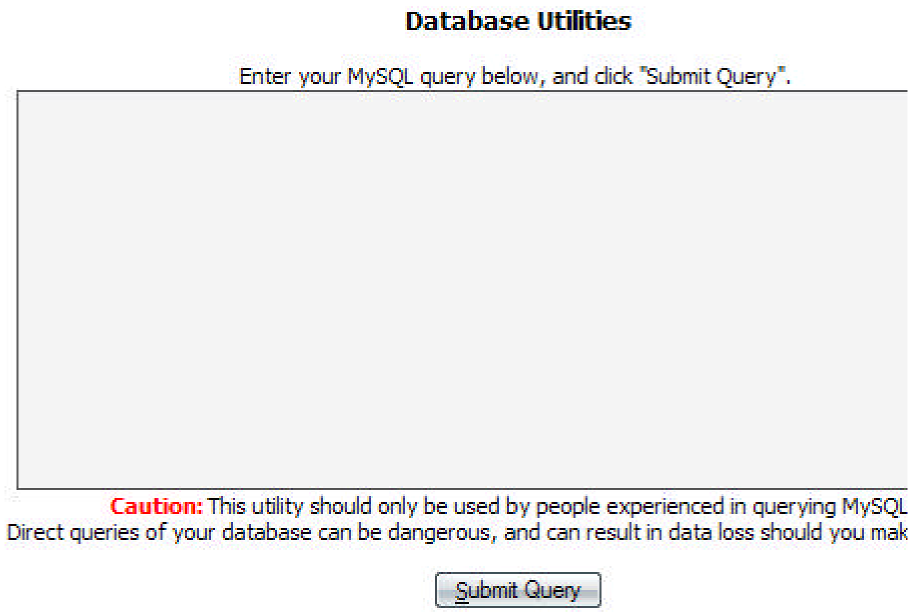
1. Open the **control panel (Section 3)**

2. Click the **Query** menu link



Executing a Query

1. Launch the Query tool. You will see the query field, which looks like this:



2. Enter your query in the field and click **Submit Query**. For this example, we will enter the following query:
   SELECT First_Name, Last_Name, Email_Address FROM Customers;

   Be sure to include a semicolon at the end of the query.

   For this example, you would see one row for each customer below the query field:

First_Name	Last_Name	Email_Address
Admin	Account	youremail@example.com

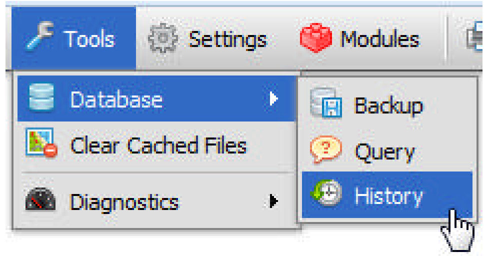
The query tool will accept any valid MySQL query statement. You can also perform multiple queries at the same time by including more query lines in the query box.

14.1.3 Tools - Database History

Launching the Database History Tool

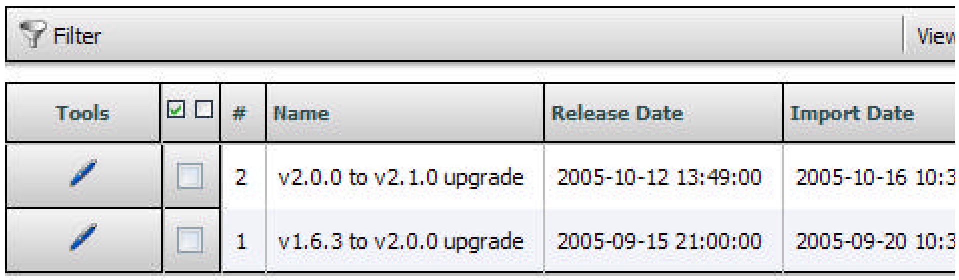
1. Open the **control panel (Section 3)**

2. Click the **Database History** menu link



Overview

Every time you import a database file provided by Lighthouse Development into your Squirrelcart installation, a special table is updated to indicate the status of that query. This allows you to troubleshoot database imports, and to see a historical list of all the updates you've made to your database to date.



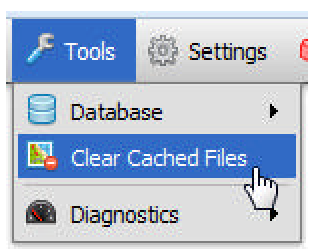
A icon in the status column indicates a successful import. A icon in the status column indicates a failed import.

14.2 Clear Cached Files

Launching the "Clear Cached Files" Tool

1. Open the **control panel (Section 3)**

2. Click the **Clear Cached Files** menu link



Overview

The **Clear Cached Files** tool is used to delete temporary cached files that Squirrelcart uses to improve performance. Cached files are stored in the **sc_data/tmp** folder. The name of all cache files begin with **cache-** , as in:

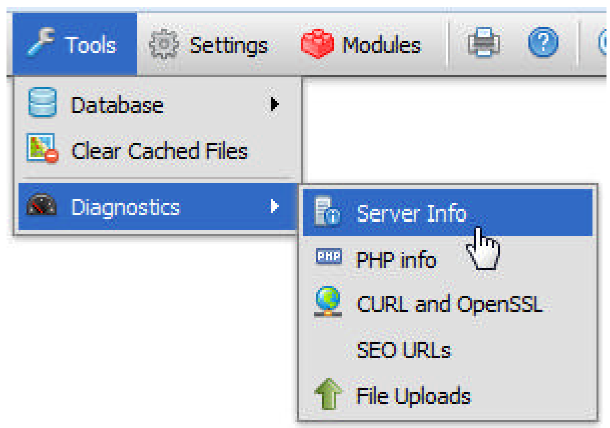
`cache-dade2debef275fc1450ed81af5ebfb75.jpg`

For most installations, it is not necessary to delete cached files. If your store has been online for a long time, deleting cached files may free up some disk space as unneeded files may still be cached. However, for most installations we recommend that you do not clear your cached files unless you have a good reason to do so.

14.3 Tools - Requirements & Server Info

Launching the Requirements & Server Info Tool

1. Open the **control panel (Section 3)**
2. Click the **Requirements and Server Info** menu link



Overview

The Requirements & Server Info tool is used to display information about your configuration. It displays your PHP and MySQL version numbers, and other useful information. If you have a feature enabled that requires a particular PHP extension, it will show you whether or not that extension is available on your server.

Squirrelcart Requirements

PHP version >= 4.0

MySQL must be installed

You have FedEx Ship Manager Direct enabled, which requires CURL and the EXPAT library.

You have USPS Real Time Rates enabled, which requires CURL and the EXPAT library.

You have UPS Real Time Rates enabled, which requires CURL, OpenSSL, and the EXPAT library.

Requirements Check

The following shows the status of the Squirrelcart required settings on your server. **Green** indicates the requirement has been met, **red** indicates it has not.

PHP version is OK
MySQL version is OK
CURL is enabled
EXPAT library is installed

Server Information

PHP Version: 5.0.4 (click here for full PHP details)
MySQL Version: 4.1.12-nt
CURL Version: libcurl/7.11.2 OpenSSL/0.9.7g zlib/1.1.4

15 Tips & Troubleshooting

15.1 Problem Resolution

This page describes some of the ways you can go about resolving a problem you may be experiencing with your installation.

Documentation

If you are having a problem with a particular feature, the first step you should take is to go over the documentation for that feature and see if any steps may have been missed.

Upgrade

If you feel that the problem you are having may be related to a bug, it is always a good idea to upgrade to the latest version of Squirrelcart to rule out all known bugs that have been resolved in the latest version.

Check the Bug Reports Section of our Forums

We post all bugs in the Bug Reports section of our forums, located here:

http://www.ldev.com/forums

If you feel the problem you are having is due to a bug, search that forum to see if it has been reported by others. For most bugs, you will find a fix in the forums.

Check the Other Forum Sections

There may be information on the problem you are having in other sections of the forums. Try performing a search to locate a topic that corresponds to the feature you are having a problem with.

Post in the Forums

If your problem is not of a critical nature, create a post in our forums for it. Please be aware that the forums are a user to user community that we participate in as well. There is no guarantee that you will receive a response from our staff. The forums are not considered official support, but are an invaluable tool.

Request Support

If all else fails, you may request official support from our staff using our helpdesk. You can get more information about support here:

http://www.squirrelcart.com/support

15.2 Reporting a Bug

We do our best to eliminate most bugs with rigorous testing. Bugs, however, can sometimes occur. If you feel you have found a bug, please do the following:

1. Make sure the bug hasn't been reported. To do this, visit our forums:

http://www.ldev.com/forums

Click the link labeled **Bug Reports**. Inside that forum, there is a **Confirmed** section which contains all known bugs confirmed by us. The posts in the root of the **Bug Reports** section have not been confirmed. It is best to search for the bug you are experiencing using the search link.

2. If you cannot locate a post for your suspected bug, click the **New Thread** button, and create a new post explaining the bug. Be as specific as possible, and be sure to include your Squirrelcart version number for reference.

15.3 Diagnostic Mode

Overview

Diagnostic Mode is a tool you can use to troubleshoot problems you may be having with Squirrelcart. When enabled, you will receive a popup window whenever diagnostics data is available for a given page. As you navigate your storefront, the diagnostics window will continue to update and show the newest message on top. Only users in the **Store** Admin group will be able to see the diagnostics mode data.

Some of the information that may be seen in the Diagnostics Mode popup window:

- MySQL errors (if any occur)
- Communication to and from other websites (payment gateways, shipping couriers, etc...)
- Discount information - this shows the logic Squirrelcart is following to determine which discounts to order

Enabling Diagnostics Mode

1. Login to your *storefront* as a store admin

2. Click the **Diagnostic Mode** field found in the **Admin Options** nav block.

> You can also enable diagnostics mode by checking the **Diagnostics Mode** field on your **Store Settings (Section 6.1)** page.

15.4 Add to Cart Manually

Overview

While we recommend that you let Squirrelcart generate your product pages, you do not have to. This page explains how you can add HTML to any page you like for the purpose of adding an item to the cart. In this topic, we will explain 2 methods you can use to add an item to the cart:

- Form

- Link

Gather Data

Before we can add the code necessary to add an item to the cart, we will need to gather some information about that product.

1. **Add Item to Database**

   In order for you to add an item to the cart, that item must be present in Squirrelcart's database. If the item you wish to work with is not in your database, follow the instructions in the "**Creating and Modifying Products (Section 7.1.2)**" topic to create it.

2. **Obtain Product Record Number**

   Each product has a unique record number in your database, so Squirrelcart can identify it. To locate the product's record number, view your products by clicking **Catalog > Products > Manage** in the control panel. Locate the product you wish to work with. The record number for that product will be listed in the first column, under the **#** symbol. Write this number down.

3. **Obtain Product Option Information**

   If you wish to use product options for this product, you will need to add them to the product in the database, as described in the **Managing Your Store > Products > Product Options** section of this documentation. Once you've added them, you will need to write down the options and their choices in the order they appear on the product's record. The order is very important to ensure the appropriate option/choice is added to the cart. For example, you would write down something like:
   Size: small, medium, large
   Color: red, blue, yellow

Using a Form to Add to Cart

1. **Open page in editor**

   Open the page you wish to add the code to. For this example, we will start with a simple blank page which initially looks like this:

   ```
   <html>
   <head></head>
   <body>
   </body>
   </html>
   ```

2. **Add HTML**

   Inside the <body> tag, add a <form> tag as in this example, which shows the minimum amount of code needed to add an item to the cart:

   ```
   <html>
   <head></head>
   <body>
        <form action="store.php" method="get">
             <input type="hidden" name="prod_rn" value="274" />
             Quantity: <input type="text" name="quantity"
   ```

```
size="3" value="1" />
          <input type="submit" value="add to cart" />
     </form>
</body>
</html>
```

In the code above, the first field is named **prod_rn** and the value should be set to the record number of the product.

3. **Add Options**

   If you would like to add options, you will need to add more fields to your form. Let's assume you had the following 5 options and choices specified on the product's record, in the following order:

   Option type: Select
   Option name: Size
   Choices: small, medium, large

   Option type: Radio
   Option name: Color
   Choices: red, green, blue

   Option type: Checkbox
   Option name: Add Gift Wrap

   Option type: Text
   Option name: First Name

   Option type: Textarea
   Option name: Engraving

   The HTML you would need to add for these 5 options would be:

```
<!-- For first option, name starts with 0, as in "option_0"
-->
Choose size:
<select name="option_0">
     <option value="0"></option>
     <option value="1">small</option>
     <option value="2">medium</option>
     <option value="3">large</option>
</select><br />

<!-- For 2nd option, name is "option_1" -->
Choose color:
<input type="radio" name="option_1" value="0" />Red<br />
<input type="radio" name="option_1" value="1" />Green<br />
<input type="radio" name="option_1" value="2" />Blue<br />

<!-- For 3rd option, name is "option_2" -->
Add Gift Wrap?: <input type="checkbox" name="option_2"
value="0" /><br />

<!-- For 4th option, name is "option_3" -->
First Name: <input type="text" name="option_3" />

<!-- For 5th option, name is "option_4" -->
Engraving: <textarea name="option_4"></textarea><br />
```

Using a Link to Add to Cart

The HTML code needed to add an item to the cart using a link is similar to the code needed to add to cart using a form. The only difference is that you need to pass field/value pairs using a query string in the URL. Using a link to add to cart will not allow a customer to specify choices for options, or for quantity.

Simple

The simplest way to add (1) unit of an item to the cart via a link is to add HTML similar to this example to your page:

```
<a href="store.php?prod_rn=274&quantity=1">Click Here to Buy 1
Item</a>
```

The number that appears after "prod_rn=" represents the product's record number in the Products table.

With Options

You can add options to the item as well, by specifying their names and values in the URL. Using the same 5 options described in the **Using a Form to Add to Cart** section above, you could set the options as follows:

```
<a href="store.php?
prod_rn=274&quantity=1&option_0=2&option_1=0&option_2=0&option_
20Anniversary">Click Here to Buy 1 Item</a>
```

For Use in Email

You may need to send someone a link to add an item to the cart using email. You can do this in most email clients by just typing the URL, as in this example:

```
http://www.example.com/store.php?prod_rn=274&quantity=1
```

Field Information

The following table shows the fields that can be passed, along with their expected values.

Field Name	Required	Expected Value
prod_rn	y	integer - representing the product's record number in the Products table
quantity	y	integer - number of units to add to cart
		This field is used to ensure that a product is not added to the cart twice if a customer refreshes the page after submitting the form. It needs to be set to any unique value, and should change every time the product page is loaded. If your product page name ends in ".php", you can set microtime as follows: `<input type="hidden" name="microtime" value="<?php print microtime()?>" />`

microtime	n	If your product page does not end in ".php", you can set microtime as follows:
		`<input type="hidden" id="microtime" name="microtime" value="" />`
		`<script type="text/javascript">`
		`     document.getElementById('microtime').value = Math.random();`
		`</script>`

option_**X**	n	This field is used to add product options to the cart. The **X** should be replaced with an integer representing the position of the option on the product's record, starting with 0. If the option is of type select or radio, the choices should have integer values starting from 0, representing the order of choices as they appear on the product's record. Example:
		`<select name="option_0">`
		`     <option value="0"></option>`
		`     <option value="1">Small</option>`
		`     <option value="2">Medium</option>`
		`     <option value="3">Large</option>`
		`</select>`

Important Notes:

- You cannot use the POST method in your form tag. You must use GET.
- When specifying options and their choices, they MUST be represented in the order they appear on the product's record. If they are not in order, they will not correctly correspond to the options and choices for that product, and will not work correctly.
- When using this method, you may wish to make some template modifications as follows:
  - Remove the Product Catalog nav block to keep customers from browsing the cart using Squirrelcart's storefront page
  - Remove the "modify" link in the checkout
  - Remove the product links in the checkout
- If you plan to create pages to add items to the cart on a domain other than the one used for your Squirrelcart installation, you will need to specify the referring domain name on your **Store Settings (Section 6.1)** page, using the **Authorized Hosts** field in the **Security Settings** section. This field will only appear when the **Check Referrer** field in the same section is checked.
- If you plan on creating links to add items in emails, you should disable the **Check Referrer** option in **Store Settings (Section 6.1)**.

15.5 Moving to a New Server

Overview

This topic explains the steps that should be followed when moving your Squirrelcart installation from one web server to another. This is common when switching webhosts, or when changing your domain name.

Steps

1. Follow the instructions in the **Backups** section of the documentation to backup your files and your database.

2. Follow the Installation procedures, with the following exceptions:
   a. Instead of uploading the squirrelcart folder from a new distribution, upload your backup squirrelcart folder. Do the same for your *storefront* page (store.php by default).
   b. Upload the sc_install folder from the same version of Squirrelcart you are running
   c. Locate the file inside the sc_install folder that is named something similar to **sc_x.x.x_install.sql**, where x.x.x is the version of Squirrelcart. Rename that file by adding a ".old" extension to the end of the filename.
   d. Upload your database backup file to the sc_install folder, and rename it to match the original name of the file you just renamed. The format must be exactly as above or the import will fail.

3. After you have uploaded your backup file and renamed it, you may use the installation script, which will import that file into your database during the installation process.

15.6 Testing Sessions

Test Sessions

As of version 2.2.0, Squirrelcart's installation script will test sessions for you and report problems if they are found. If you need to test sessions after Squirrelcart is already installed, follow the instructions below.

Squirrelcart uses PHP's built in session management in order to keep track of what is in your cart, and your login. If Session Management is not working properly, Squirrelcart cannot function. To test sessions, open the diag_session.php file in your browser. The file is located inside your squirrelcart folder. The normal URL would be similar to:

http://www.example.com/squirrelcart/diag_session.php

You should see the following:

Session test file for Squirrelcart.

- Waking up session
- The counter is now 1

Refresh the page. You should now see something similar to this:

Session test file for Squirrelcart.

- Waking up session 9471fda174d46f902d858543f6b5c77e
- The counter is now 2

Keep refreshing the page, and each time, you should see the counter increment by 1. If it does not, then sessions are not working. If you have a problem with sessions, you will need to contact your web host for resolution before you can use Squirrelcart.