What Is CoastCart?

CoastCart is an advanced shopping cart system that allows you to create and manage your e-commerce solution online, securely and easily via your own browser. No special software is needed to create your cart or manage your cart.

The engine behind the shopping cart is powerful VisualBasic script. This allows your customers fast and robust server processing times. The heart of the cart is an Access database, which easily allows for up to 30 simultaneous connections and up to 30 MB of data.

The cart offers:

- web based management that is integrated into your current control panel

- easy installation,

- flexible web design options including the use of your own logo, choice of background colors or images, choice of text/link colors,

- easy database creation and maintenance, including file upload and the ability to separate your shop into categories,

- up to 15 different fields to describe your product, including specialized form fields such as pull-down menus and text boxes,

- the choice of processing your orders yourself using offline or processing your orders online with Authorize.Net,

- long term order storage, customer profiles and printable invoices for easy shipping

- advanced features such as header & footer includes that allow customized web pages and a referrer tracking system for commission based sales,

- the ability to compute sales tax for your home state,

- seven different shipping models to best suit your company's practices,

- secure checkout for your customers and secure order management for you.

A Step-by-Step Overview

Step One - Request that the Cart be Installed. Go into your Control Panel and click on "Install Shopping Cart."

Step Two - Create your graphics and gather the necessary product information to create the database. Now is the time to rough out the look of your site, which can go from "exactly what you see" to fully customizable with unique headers and footers, type faces, colors and navigational elements to the rest of your web site.

Step Three - Enter the general cart information into the Appearance Setup View. This will create the name, address, color, and e-mail settings that will be used throughout the cart.

Step Four - Decide which fields you will need for your product descriptions and enter them into the Configuration Setup View.

Step Five - Create the product database by Adding and Editing your Categories and Items found the Configuration Setup View. *Be sure to delete the default categories and items placed in the cart for demonstration purposes.*

Step Six - Enter your currency, tax, shipping and Authorize.Net (if applicable) information into the Billing Setup View.

Step Seven - Test your cart. Make sure that the graphics are correct, the descriptions informative and your credit card processing system is working smoothly.

Step Eight - Create a hyperlink from the body of your site to /cart/default.asp page so your customers can find your cart.

You are now ready to begin taking orders!

Installation

Plan B customers receive CoastCart as part of their hosting package. Log into your control panel and click on Add Shopping Cart.

Our technicians will receive your request. The cart will be installed in your web site's folder within 24-48 hours.

You will be notified as soon as your request is completed.

Navigation

CoastCart has a navigation bar that allows you to move between various screens. It is different from the regular navigation menu in your control panel.

Cart Home takes you to a basic navigation screen where you can access Appearance, Configuration, Billing, Purge and Orders.

Appearance takes you to the Appearance Maintenance form that allows you to set up the backgrounds, colors, logo, headers, footers, etc., for your cart.

Configuration takes you to the Configuration Maintenance page that allows you to set up the product fields in your database.

Note: *You Add or Edit Categories or Database Items from this screen.*

Billing takes you to the Billing Maintenance form that allows you to establish Order Department Name, Postal Address, Phone Number, Fax Number, Accepted Payment Types, Referrer Question

Purge clears out your database of old shopping carts.

Orders allows you to look at pending and completed orders.

CP Home takes you back to the main page of the Control Panel.

Appearance Setup

CoastCart has been designed to offer you options when integrating the cart into your web site. Most of the fields are self-explanatory. Unless a field is specified as necessary, if you leave it blank the cart will resort to the default settings.

Title will display centered in header of your cart. If you are using customized headers and footers, this will only display during the secure checkout process.
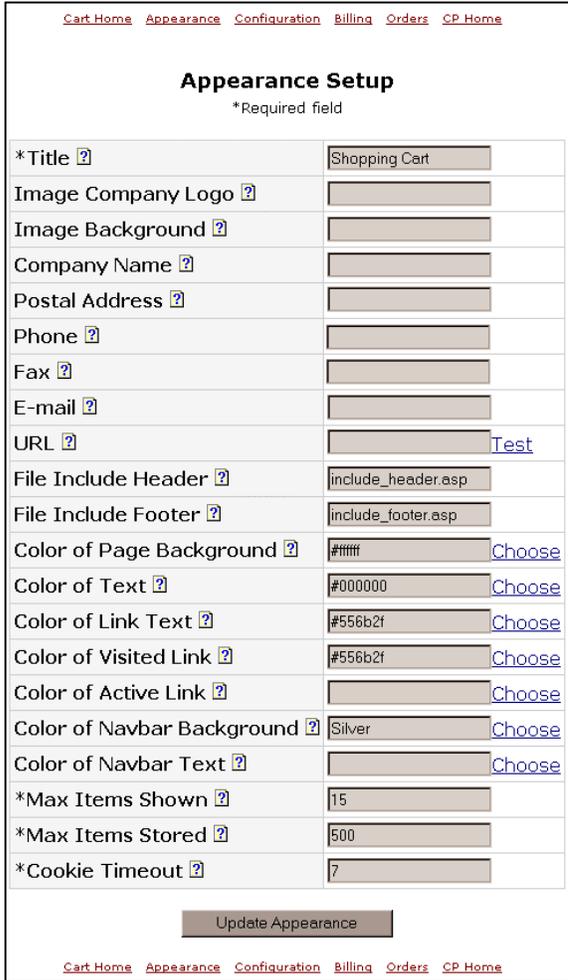
Image Company Logo is a relative link to the logo image file from the root. This field considers the root of your cart as its starting point. Unlike the header (which are links to html pages), a logo will not change the parameters of your html page, such as text font or color. The Title of the cart will appear in the header with the logo. Both will be centered.

Image Background is a relative link from the root of your cart to the background image file. See an example.

Company Name will display centered in footer of your cart. If you are using customized headers and footers, this will only display during the secure checkout process.

Cart Home Appearance Configuration Billing Orders CP Home	
Appearance Setup	
*Required field	
*Title ?	Shopping Cart
Image Company Logo ?	
Image Background ?	
Company Name ?	
Postal Address ?	
Phone ?	
Fax ?	
E-mail ?	
URL ?	Test
File Include Header ?	include_header.asp
File Include Footer ?	include_footer.asp
Color of Page Background ?	#ffffff Choose
Color of Text ?	#000000 Choose
Color of Link Text ?	#556b2f Choose
Color of Visited Link ?	#556b2f Choose
Color of Active Link ?	Choose
Color of Navbar Background ?	Silver Choose
Color of Navbar Text ?	Choose
*Max Items Shown ?	15
*Max Items Stored ?	500
*Cookie Timeout ?	7
Update Appearance	
Cart Home Appearance Configuration Billing Orders CP Home	

Postal Address will display centered in footer of your cart. If you are using customized headers and footers, this will only display during the secure checkout process.

Phone will display centered in the footer of your cart. If you are using customized headers and footers, this will only display during the secure checkout process.

Fax displays centered in the footer of your cart. If you are using customized headers and footers, this will only display during the secure checkout process.

E-Mail will display centered in the footer of your cart. If you are using customized headers and footers, this will only display during the secure checkout process.

URL: This is the domain of your site. Use the full URL. For example, use http://www.mydomain.com. The Test button will bring you to your own homepage. There are links in the cart that prompt your visitor to return to the homepage.

Color of Page Background: If you are not using a background image, then you will want to set the background color of your cart. It is generally best to use a light color so your customer can print off pages easily if they choose.   If you don't choose something here, it will default to white.

Color of Text: This will be the color of the text found throughout your site. Be sure to pick a color that has enough contrast to your background to be legible. If you do not choose something here, it will default to black.

Color of Link Text are for the hyperlinks in the cart. This will occur on every page. *Note:* If you are using headers and footers, this setting may no longer be valid as the values will become the values established in the header.

Color of Visited Link are for the hyperlinks in the cart. This will occur on every page. *Note:* If you are using headers and footers, this setting may no longer be valid, as the values will become the values established in the header.

Color of Visited Link are for the hyperlinks in the cart. This will occur on every page. *Note:* If you are using headers and footers, this setting may no longer be valid, as the values will become the values established in the header.

Color of Active Link is the color of the hyperlink that you followed to get to the current page. This will occur on every page. *Note:* If you are using headers and footers, this setting may no longer be valid, as the values will become the values established in the header.

Color of Navbar Background is the background color of the navigation bar. It defaults to lavender. This will occur on every page. *Note:* If you are using headers and footers, this setting may no longer be valid, as the values will become the values established in the header.

Color of Navbar Text is the text for the navigational bar. This will occur on every page. *Note:* If you are using headers and footers, this setting may no longer be valid, as the values will become the values established in the header.

Maximum Items Shown will limit how many items will be displayed at any one time. This can be useful as it limits how long your pages will be. For example, if your Category "Plants" contains 200 items and you specify a limit of 25, only 25 will be shown on the category page at any one time. The customer will be prompted to see the next page. This is important because items "below the fold," or further down the page than the average computer screen can see immediately upon entering the page, will stand a greater change of being ignored.

Max Items Stored is the upper limit on the database.

Cookie Timeout sets the number of days the cookie retains cart data before expiring. This allows the cart to "remember" what your visitor has ordered in the past. It defaults to seven days.

Configuration Setup

Allowed Fields sets up the parameters available in your Add Items form page. You will need to choose all of the ones you would possibly need. For example, half of your items have a color specification and the other half do not. By enabling the field here, you will allow the option to show up on the form page.

However, if the item doesn't need a color specification, then simply leave the field blank.

> **Part Number** - A unique number identifying the part
>
> **SKU** - A unique number identifying the item
>
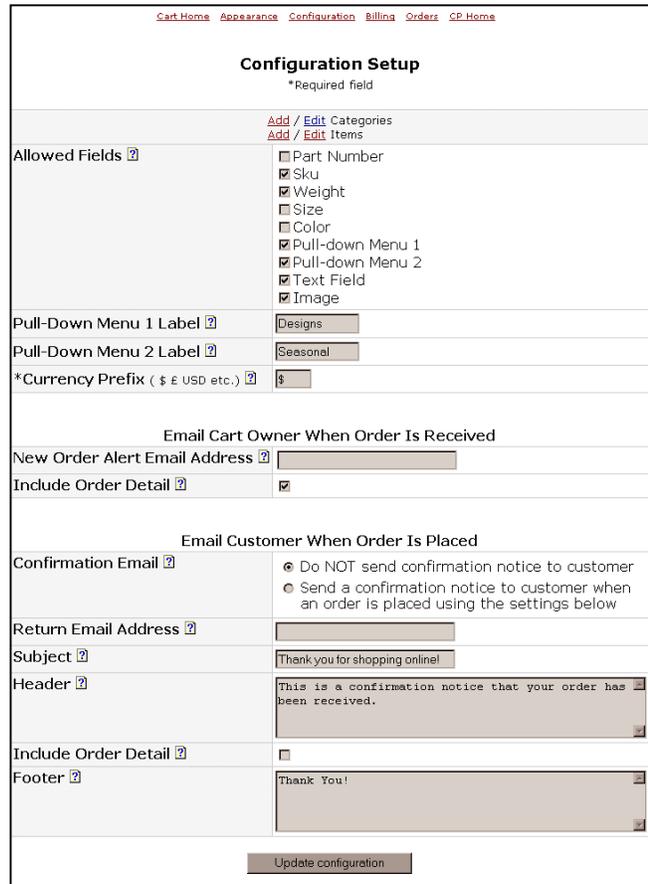> **Weight** - A necessary field when determining shipping by weight
>
> **Size** - provides a pull-down menu for sizes. The size label is predetermined.
>
> **Color** - provides a pull-down menu for colors. The color label is predetermined.
>
> **Drop Down 1** - enables a pull-down menu for multiple choices of features, such as color, sizes or designs. You will need to specify the label for this field later in this form.
>
> **Drop Down 2** - enables a pull-down menu for multiple choices of features, such as color, sizes or designs. You will need to specify the label for this field later in this form.
>
> **Text Field –** enables a text field that your customer can write information into. Good for monograms or items customized with names or dates. *Note: You specify the Label for the Text Field in the "Add Item Form."*
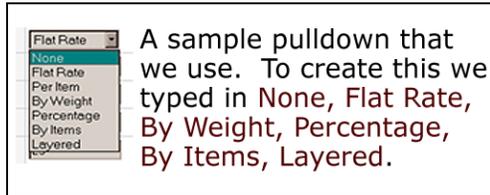
Image - allows you to upload or hyperlink to an image to be used in the cart

Pull-Down Menu 1 Label creates the Label for Pull-Down Menu 1. For example, you have a pull down menu for S, M, L, XL. The label would read "Sizes Available."

Pull-Down Menu 2 Label creates the Label for Pull-Down 2. For example, you have a pull down menu for S, M, L, XL. The label would read "Sizes Available."

A sample pulldown that we use. To create this we typed in None, Flat Rate, By Weight, Percentage, By Items, Layered.

Currency Prefix establishes the currency your cart will accept. For example, $ or £ for dollars or pounds respectively. You can only use one currency type in the cart.

New Order Alert E-Mail Address is the e-mail address you want to receive notification that an order has been placed. If you leave this feature blank then this feature is disabled.

Include Order Detail - Click this box to have the items ordered and shipping address included in the e-mail. This will not send the credit card information, however. You will need to log into the secure control panel to access the credit card information.

Confirmation Email is the checkbox that enables the system to send an e-mail to your customer to confirm the order. The default is set up **not** to send a confirmation.

Return Email Address is the e-mail address you want your customer to see when they receive their confirmation. It may or may not be the same as your standard e-mail address. Quite often it is set up as *sales@yourdomain.com* or *support@yourdomain.com*

Subject - Enter here the subject heading you want your customer to see when they receive their confirmation from you.

Header - Enter what text your customer will read when they receive their confirmation. This will be the same for all clients.

Include Order Detail - Click this box if you want your customer to receive the details of their order in the confirmation e-mail. There will be

Footer - Enter the text you want your customer to see when they receive their confirmation. This will be the same for all clients.

Creating the Product Database

Tips on Preparing Yourself

- Make sure to have everything ready ahead of time. Have any graphics ready in a folder on your hard drive or uploaded into a graphics folder in the cart subdirectory, /images.

    Note: *All graphics will appear in the cart the exact size that they are. Scaling is not an option. So, if your graphic is 500X500 pixels, that's the size it will be on your customer's screen. Be sure to size your graphics appropriately.*

- Have a print out of your product list, including any descriptions, available sizes, colors or weights in front of you and ready to go. You can always edit the product

descriptions at a later date but it is much more efficient and accurate to create everything at the same time.

- The database must be built online one item at a time and cannot be uploaded to the site.
- Most clients prefer to load their entire product line at once. They may not even have it all available, but they don't have to go in and add more items later. It is possible to enable or disable various items and categories whenever you want so your database might have 50 items but only 25 would be enabled at any one time.

The Process

1. Set up the parameters for your products in the Configuration Setup view. Do you offer sizes? Colors? Monograms? If you want to see it in the Item Maintenance view, then you will need to enable it first. Make sure to enable every field you will possibly need.

2. Create the categories you will need. The categories function as a left-hand menu bar and will help your customers navigate throughout the shopping cart.

3. Build your database one item at a time. You will need to decide which items, if any, you want to display on the home page (called a "Deep Link.")

4. To make any changes, click on the Edit Items link, which will bring you to a view of the entire database. From there you can edit the Item Maintenance view. Be careful if you click on Edit Categories. If you delete a category, it will disable all items in that category.

Add/Edit Categories

The primary level of organization is the category. The categories will be visible at all times as the customer peruses your cart, so you can use the categories as an extra level of navigation.

You can enable or disable the categories that you do not want used, so if you have various seasonal categories you can enable only the ones that apply. However, when you disable a category, you disable all of the product in that category.

If you do not have a large number of products you can work around this in a number of ways. You can have each product have its own category. That way your customers can always see your product linked on the left hand navigation bar. Or, you can set up deep links in the Add Item View so your product will appear on the home page of the cart. This allows your customers to find what they're looking for easily and with a minimum of clicks.

Add/Edit Items

There are over 11 parameters for each item. Most of these are self-explanatory. For example, the Item Name and Description are just that. The name will appear under the category list. The description will appear only on the shopping cart page dedicated to the Item.

Item Name is the name as it will appear in the category. The item name must be unique.

Description allows you to fully describe the item for sale.

Enabled check this if you wish the item to appear in the cart.

Category displays the item under one of the categories you have set up.

Price is the price of the item.

Sale Price puts in the reduced price of an item that is used in all circumstances. It is important to note that if you don't fill in a field it will not appear on the cart. So, if you don't have a Sale Price for this item, don't put a sale price into the field.

Limit Per Order will allow only a certain number of items to be sold at any one time.

Part Number is a numeric field that identifies your item.

SKU is an alphanumeric field that identifies your item.

Weight is most often used if you are basing your shipping on weight. Be as accurate as possible, since it is questionable to charge more once the client has agreed to the shipping amount on the web site.

Size is a pull-down menu. Enter each option separated by commas. For example, the entry "small, medium, large, extra-large" will create the drop-down box where the visitor must choose between small, medium, large, or extra-large.

Color is a pull-down menu. Enter each option separated by commas. For example, the entry "red, green, blue, yellow" will create the drop-down box where the visitor must choose between red, green, blue, or yellow.

<div style="text-align:center">

Choose One ▾

</div>

Pull-down 1 is a pull-down menu. Enter each option separated by commas. For example, the entry *Apple, Pumpkin, Blueberry, Cherry* will create the drop-down box where the visitor must choose between Apple, Pumpkin, Blueberry, or Cherry. If you specify this field, it becomes mandatory. The field must be specified by the customer or they will get an error message.

Pull-down 2 is a pull-down menu. Enter each option separated by commas. For example, the entry *Apple, Pumpkin, Blueberry, Cherry* will create the drop-down box where the visitor must choose between Apple, Pumpkin, Blueberry, or Cherry. If you specify this field, it becomes mandatory. The field must be specified by the customer or they will get an error message.

Custom Text Field is a text field where your clients can put in customized information, such as initials for monograms.
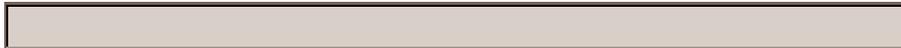
Deep Link allows a graphic and brief description for this item to be displayed on the home page of the cart. This is perfect for special items. The link will go to the full description and order form for the item.

Abridged Description For Deep Link allows just 255 characters for you to describe your item.

Upload Thumbnail Image - This is the image that will display in the shopping cart and on the home page of the cart (if selected). The image displayed will be the exact size of the GIF or jpeg. If no image is entered, then none will be displayed.

- **URL** - If you wish to store your images at a different website then type in the location of this site. For example:
  http://www.myotherdomain.com/images/apple.gif

- **Relative Path** - You don't need to fill this in if you use the upload feature below. If you have already uploaded your graphics files, however, and simply want to insert the relative link, then put the path and file name here. If you have placed the image in the /cart/images folder, you only need to key in the name of the file. If you have placed the images anywhere else in your site, you will need to key in the path and file name starting from /cart/images. For example, you have placed the file apple.gif in the cart/images/upload folder, then you would use upload/apple.gif as the path. If you placed the graphic file apple.gif in the main image folder in the root of your site, then you would key in ../../images/apple.gif.

- **Upload Image** - If you have stored the images on your hard drive of your local computer then you can use this feature. The upload happens automatically when you click on Update Item. You will not get a success/failure message. The image is placed in /cart/images/ subfolder and the relative path is automatically filled in for you.

Upload Full-Size Image - Enable this to display a link next to the image in your cart that will prompt the customer to view a larger image. The image displayed will be the exact size of the GIF or jpeg. If no image is entered, then none will be displayed.

- **URL** - If you wish to store your images at a different website then type in the location of this site. For example: *http://www.myotherdomain.com/images/apple.gif*

- **Relative Path** - You don't need to fill this in if you use the upload feature below. If you have already uploaded your graphics files, however, and simply want to insert the relative link, then put the path and file name here.   If you have placed the image in the /cart/images folder, you only need to key in the name of the file. If you have placed the images anywhere else in your site, you will need to key in the path and file name starting from /cart/images. For example, you have placed the file apple.gif in the cart/images/upload folder, then you would use upload/apple.gif as the path. If you placed the graphic file apple.gif in the main image folder in the root of your site, then you would key in ../../images/apple.gif.

- **Upload Image** - If you have stored the images on your hard drive of your local computer then you can use this feature. The upload happens automatically when you click on Update Item. You will not get a success/failure message. The image is placed in /cart/images/ subfolder and the relative path is automatically filled in for you.

Editing the Product Database

Once your database has been built, it is a simple matter to edit the item descriptions. In the Configuration Maintenance View, click on the Edit link in front of items. It will take you to a view of the entire database contents. Then, click on *Edit* in front of the items you wish to modify. When you click on *Edit* it will bring you to the Item Maintenance View where you can make modifications to the database entry. Note: You cannot undo the "Update" function.

Action	Item	Enabled	Price	Sale Price	Limit Per Order	Sku	Weight	Size	Design	Seasonal	Image Type	Image
Dinnerware												
	Category								Moose, Cowboy, Flag, Berries, Apple, Fly, Snowman			
Edit Delete	Sugar & Creamer	Y	$19.00	$0.00	0	166	.5		Moose, Cowboy, Flag, Berries, Apple, Fly, Snowman		Stored	sugacreamer.gif
Edit Delete	Round Melting Pot	Y	$13.00	$0.00	0	174	.5		Moose, Cowboy, Flag, Berries, Apple, Fly, Snowman		Stored	roundpot.gif

Billing Overview

There are four major areas to consider when setting up your billing information:

Credit Cards:

What credit cards do you take? The options are Visa, MasterCard, Discover and American Express.

Order Processing

How will you process your credit card information? CoastCart gives you two options for processing your orders.

1. You can take your customer's credit card information and process it yourself in the method you are most comfortable using.   If this is your choice, just fill in the Accepted Payment Types fields and you are all set.

2. You can also set up an Authorize.Net account and process the credit card information online. In order to do this, you will need to establish a merchant account through your bank.

Shipping

What model will you implement when you charge your customer for shipping? There are seven different shipping models available

Tax

You will need to get sales tax for customers residing in the state where your corporate headquarters are located.

Setting Up Billing Information

Accepted Payment Types   Choose from one to four options based on your merchant account:

- Visa
- Mastercard
- Discover
- American Express

Tax State - Tax is assessed only for customers in your state. This is not a logical field - it is a matching field. If your customer puts KA instead of KS for Kansas, then tax will not be charged.

Tax Rate determines the tax rate on a percentage basis in decimal terms. If your state tax is 5.5% then you would put in .055. If you entered 5.5 for 5.5%, then your item will be multiplied by 5.5. Your customer would pay $55 dollars in shipping for a $10 item rather than 55 cents.

There are seven different shipping models available.

1. **None** - No shipping at all. This would be useful if you are selling e-books or downloadable software. No shipping will be charged.
2. **Flat Rate** - One rate for any order. For example, you charge $15 for shipping regardless of where a customer resides. You would fill in "Shipping Flat Rate." This is a currency figure.
3. **Per Item** - Shipping is charged as a combination of flat rate and item rates. The number of total items will be multiplied by the shipping rate, which you will enter in "Shipping Rate" as a currency figure. This amount is then added to a base fee, which is entered under "Shipping Flat Rate."
4. **By Weight** - Shipping will be charged based on the weight of items sold. When choosing this option, it is important to put the weights of all items in the Item Maintenance form. The Cart will compute the shipping by multiplying the Shipping Rate by the Weight. This is a currency number.
5. **Percentage** - Shipping is computed based on a certain percentage of the total bill. Put the value in "Shipping Rate." If you had 8% shipping you would enter .08 as the percentage number.
6. **By Items** - Each item has a flat rate for the shipping fee and is a currency. There is no base fee charged and this entered in the Item Maintenance menu.
7. **Layered** - Although this is the most complex shipping model, it is the favored model of many catalogs and online stores. The customer knows how much shipping is charged based on how much they purchase. In the example below, customers who spend $19 will pay $8.00 in shipping. It is important in this model to cover all prices. It would be easy to say shipping ranges from 1 - 10, 11-20 and 20-30. What if somebody's order comes to 20.51? (Shipping is computed after tax.) Therefore, you need to enter the ranges 0-10, 10.01 - 20, and 20.01-30.

Shipping Flat Rate is a flat rate to be charged for shipping.

Shipping Rate is used in more than one instance. This field is a variable number and can be either a percentage or a currency amount. Either way, this figure will be multiplied to achieve a final shipping amount. This field is used in three different shipping models: By Weight, Percentage, and Per Item.

Shipping Minimum Charge - This is the smallest rate that will be charged for shipping.

Shipping Maximum Charge - This is the highest rate that will be charged for shipping.

Layer Ranges - Enter the value ranges and shipping rate for each value range. For example, shipping for orders $0-$50 would be $3.50, $50.01 - 200 would be $7.50 and orders $200.01 and up would be $12.50. It is very important to cover all contingencies. In the ranges above, you can see that the lower range ends at $50 and the next higher range starts at $50.01.   If the next range started at $51, then an item costing $50.25 would not have been charged tax.

Authorize.Net ADC URL is the code necessary for Authorize.Net to return to your cart during order processing. The value is
https://www.hostline.com/cps/cart/ro_return.asp

Authorize.Net Login is your account ID from Authorize.Net. You will need to set up a cooperating bank merchant account to get this number.

Authorize.Net Test Mode enable this if you are just testing the cart. No information will be sent to Authorize.Net.

Merchant Accounts

CoastCart offers two options for credit card transactions.

1. You can use the credit card information stored in the database to key it manually into your own credit card terminal.

2. You can process your transactions on through the control panel by connecting online to Authorize.Net.

To take advantage of the Authorize.Net feature of your cart, you will first need to establish a merchant account through your bank. Most banks charge a monthly fee for this and coordinate the details directly with Authorize.Net.

Authorize.Net provides a list of resellers, which is another way of saying cooperating bank. Authorize.Net receives a $.10 fee per transaction. You will receive a merchant's id and password from your bank so you can access your Authorize.Net account online. This will provide you with a complete rundown of who has purchased and whether the transaction has been completed or is still pending.

You then set up your CoastCart account to specify that you want to use Authorize.Net and whether or not you want the cart to process orders immediately. You will need to give Authorize.Net our ADC URL, which is a return code so the results can be returned to CoastCart.   Our ADC URL is **https://www.hostline.com/cps/cart/ro_return.asp**

Setting up Your Cart to Use Authorize.Net

Log into your control panel and click on "Shopping Cart Administration."

When you come to the Cart Home page, click on Billing.

You will have three parameters:

1. Client ID = Given to you by your bank
2. ADC URL = **https://www.hostline.com/cps/cart/ro_return.asp**
3. Test Mode = when clicked the authorization isn't live and is only in test mode.

Processing Orders

To process your orders, log into your control panel and click on "Shopping Cart Admin." Then click on the link "Orders."   You will come to a page that has a table containing your orders. The newest orders will be first.

Action	Status	E-mail	Payment Method	Card Number	Name On Card	Card Type	Expiration
Edit I Invoice	New	user123@domain.com	p_visa	4444444444444444	Henry D. Client	Visa	02-2003

or if you have Authorize.Net

Action	Status	E-mail	Payment Method	Card Number	Name On Card	Card Type	Expiration
Edit I Invoice I Process Order	New	moi@mydomain.com	p_mastercard			Visa	03-2002
Edit I Invoice I Process Order	Incomplete	vous@yourdomain.com					-
Edit I Invoice I Process Order	New	k@domain.com	p_mastercard			Visa	04-2005

You will have to options to pursue with the order.

Edit will take you to the user profile page, where you can see and modify line by line the credit card, billing and shipping address for your customer.

Invoice will take you to the View Order screen for this order. You can print this off for your own purposes, such as manually processing the order or using it as an invoice for your customer.

Process Order will only appear if you have set up Authorize.Net. Click on Process and it will bring you to the screen where you submit the order for processing.

Exporting Data From the Database

Export all shopping cart order information to a tab delineated text file for use with spreadsheets and other software programs.

You have two options. You can get just the customer information only or you can get the the customer information and the order details. Once you choose which option you would like, then you will be prompted to save the file to a disk. Click on "Save this file to a disk."

Cart Home   Appearance   Configuration   Billing   Orders   CP Home

Export Data

Include ⊙ Customer billing information only
          ○ Customer billing information and details of all orders placed

Export Data

Cart Home   Appearance   Configuration   Billing   Orders   CP Home

You can then import the text file into your favorite database or management program. Most of them accept tab delineated text files.

⚓ Customer Profiles

Along with each order there is a corresponding customer profile. This contains all of the information for the specific order. There are a couple of things to realize about the profiles.

1. **The profile is dynamic**. A customer can log in with an e-mail address and password. The cart will even take care of sending the customer their forgotten password. Each time a customer logs in they can change their address and credit card number. Therefore, the profile will change over time. The only way to secure the address and credit card a specific order was sent to is by printing off the Invoice for that order.

2. **Once you delete the order, you no longer have access to the profile.** There is a fine line between keeping your order view screen current and having access to your client's information. We recommend keeping your orders at least a month or two past closing to ensure they get their order correctly, accept credit card billing and for your sales staff to do any necessary follow-up.

3. **If you delete the order, the customer can still access their profile**. If you delete the order and the profile, then they will need to create a new profile when they return.

4. **Do not change the password unless you want to deny access to a client**.

⚓ The Use of Graphics in the Cart

Graphics are very important on the Internet. CoastCart has several features that allow you to give your cart a graphically rich appearance. There are a couple of important things to know ahead of time to make graphic placement easier.

Each product can have two pictures.

You have the option of two image views - thumbnail and enlarged. The primary display image, or thumbnail, will be displayed in the cart. It will also display a link next to the can be linked to a larger "better view" image. To make this work, you will need two versions of each picture. Normally the thumb will be smaller - somewhere in the 100 - 300 pixel range works best. The larger picture can be any size but images larger than 1200 pixels will not display on most computer screens. A general maximum is 800. They do not have to be the same picture but the link will always say,

You have the option of displaying chosen product on the home page of the cart.

In the Items Maintenance view of the Shopping Cart Administration portion of your Control Panel. This is called a Deep Link, which is a feature that allows a graphic and brief description for this item to be displayed on the home page of the cart. This is perfect for special items. The link will go to the full description and order form for the item.

There is no limit on how many items you can display on the home page. However, it is important to note that any items displayed below the initial screen are not likely to be

viewed. Unless you have a small product list, it is usually best to feature a smaller number of important items or one from each of the Product Categories.

Important things to Note:

All graphics will appear in the cart the exact size that they are.

The cart does not offer image scaling as an option. So, if your graphic is 500X500 pixels, that's the size it will be on your customer's screen. Be sure to size your graphics appropriately
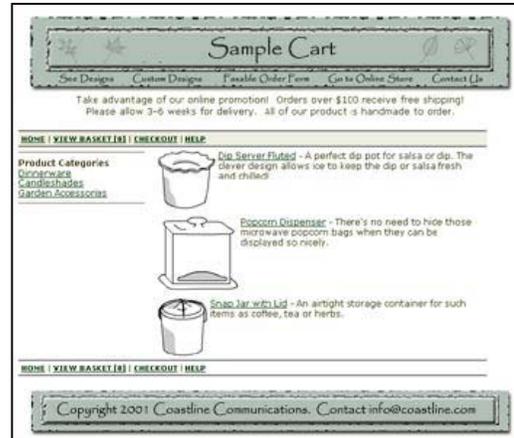
Make sure to have images ready for upload ahead of time.

Have any graphics ready in a folder on your hard drive so you can upload them as necessary or upload the items into a graphics folder in the cart subdirectory, /images. (If you choose to upload ahead of time, you will need to remember what the names of the individual files are because you will need to type them into the relative path field.

You can place your logo on each page.

The logo will appear on the top of the cart above the "Shopping Cart" title. This is just a graphic file, not an HTML page, so it cannot have any links or hotspots.

Advanced Graphic Features

You can also use a graphic in the header and footer of your cart (this is set up in the Appearance Setup View). These headers and footers can sport image maps so your customer can navigate throughout your site easily.   This is considered an advanced feature, however, and should only be used by those comfortable with HTML.

Customizing Your Cart's Appearance

CoastCart was designed to be offer maximum flexibility when integrating the cart into your current web design.   Even though the heart of the cart is firmly established, there are several ways to work around the main portion of the frame in a stylish and effective manner.

Although any customization should be considered only by designers comfortable with HTML and ASP code, it is actually quite easy to both do and undo.

NOTE: It is very important to never change the default.asp file in your /cart subfolder. Any changes to this file could disable the cart completely and cause

Header and Footer Files

Built into the control panel you have the option of choosing header and footer files that change the look of the cart immediately. This brief tutorial shows the possible ways you can

use the header and footer to provide both an integrated look and expanded navigational possibilities.

Cascading Style Sheets

To get more control over your text components, you will want to add a style sheet to your site if you choose to use headers and footers. It is beyond the scope of our support to go into how to make style sheets. However, it is important to know that all the text in the cart body is in table cells. As such, you need to specify a default for "TD". Also, the navbar already has a class specified of tdnavbar_up and tdnavbar_dn. These should be included in your style sheet.

Frames

You can also choose to frame the cart. While some people dislike the use of frames, when used correctly they give the cart the appearance of being seamlessly integrated into your site.

Using Headers and Footers

The include_header.asp and include_footer.asp are located in the root of the cart subfolder placed in your site. You can enable the header and footer file in the "Appearance Configuration" page of the Cart's Control Panel.

The Header and Footer files are used to customize the appearance of your cart. They are considered advanced features that should only be attempted by those who feel comfortable writing and manipulating HTML and ASP code.

Whether to use default files or not. You don't have to use the default header and footer file. You can specify the exact files that you would rather use for a header and/or footer, but make sure that the code leading into and out of the shopping cart is in place. The header and footer files will modify the appearance of the cart in sometimes unexpected ways. You will want to experiment.
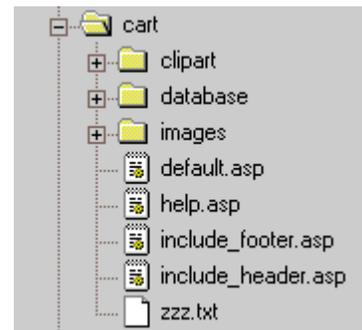
The Cart's Fonts and Colors. It is important to note that if you use the default header and footer include files, the color of page, color of text, color of link text, and color of visited link will no longer work. You must then set them up in include_header.asp. The Check out the changes when the font is changed in the html of the include_header.asp - Times Roman, Verdana, Comic Sans. The best way to do this is to use a style sheet.

Centering the Cart Contents.   If you want the cart to be centered or fully contained within the boundaries of the header gif, you will need to set up a table in the header AND footer files. To see the difference when the first half of a table tag is added to include_header.asp and the second half of a table tag is added to include_footer.asp. With tables. Without Tables.

Using Frames - The Pros and Cons

You can use frames to customize the look of your cart. Simply set the default page in the Cart subfolder as the initial target frame. Note: Do not rename default.asp to anything else.

When setting up your hyperlinks, make sure that they are all relative. The Cart is set up to operate from the links on database generated page.

It is important to remember that the SSL page will remain in SSL mode, but most browsers will not show the lock.

To verify the lock right click in the SSL frame. Go to Properties then click on Certificates. This lets you know that the page is secure. However, it can be difficult to explain to customers. You will need to decide if the design flexibility this offers can be offset by the customer who may not make an order.
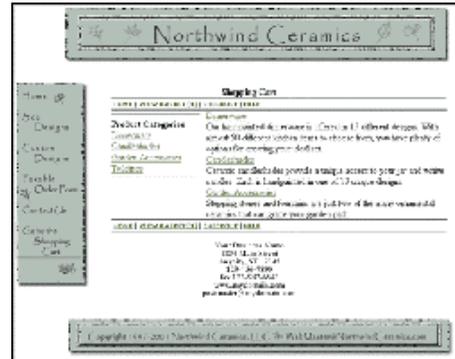
Commissions for Referring Sites

It is common for sites to give a commission to those sites that referred successful customers. CoastCart offers a simple way to know who deserves commissions on sales.

When somebody links to your cart, they need to place in their code a number or series of letters and/or number that you have assigned the link owner. The system then places a cookie on a customer's browser. When you view the order you know if it came from one of your referring sites or not.

Imagine that you have set up a system where you pay your referrers 5% of the total sale. You have assigned a website the code **abcd1234,** which is something that you choose and maintain.

First, they will need to set up the link on their site. If they are linking just to your site, they need to use **?ref=**abcd1234, for example:

> <a href="http://www.mydomain.com"**?ref=**abcd1234>

If they want a deep link to a specific product, then use an **&ref**=abcd1234. For example:

> <a href="http://www.mydomain.com/cart/default.asp?act=show_item&item=88"**&ref=**abcd1234>

To get this string, open the cart to the specific product and copy the URL from the address bar.

Then, you will know that an order has been referred because you will see a new field appear in your order view indicating which referrer should get the commission.

It is up to forward the commission on to the appropriate site.

The Shopper's Experience

CoastCart was designed to make shopping, checking out and paying as easy as possible for your customers. As you create your database, it is important to remember a couple of key points:

- **Keep your image files small.** Make sure that the images are sized appropriately for the field in which they will be viewed. Optimize them with a graphics program such as Adobe's Photoshop or ImageReady or Macromedia's Fireworks.

- **Make sure that your descriptions are accurate and informative.** One of the biggest reasons web shoppers site for not purchasing a product online is they don't have enough information. You have up to 11 fields to provide as much information as possible.

- **Check out the information at shopper watchdog sites.** They give wonderful information on what your shoppers are looking for and what makes them feel safe enough on your site to spend money.

Our Most Frequently Asked Questions

What sort of database is my cart using and can I edit it directly?
CoastCart uses Microsoft Access as its database.

The database can only be modified through the control panel. For security reasons, primarily the protection of your client's credit card number, the database is encrypted.

When I view my orders, how do I know the data is safe?
You can only view your orders through the control panel, which is protected by SSL encryption. When you look at the address bar of your browser, you will see "https" instead of "http" and that indicates a secure connection.

Can I edit my cart using FrontPage?
If you are careful you can use FrontPage on include_header.asp and include_footer.asp. However, you should never edit the default.asp page using FrontPage, as it will tend to rewrite the code and disable the cart.

What happens to my order after it is submitted?
The order is sent to a database that is located on the server, so the database is never sent anywhere that it could be viewed.

What do I do if I want my customer to go directly into my site when they type in my URL?
You can place a small piece of code called a response redirect that you would create in a **default.asp** page in the root of your folder. The only code that you want in the page is:

```
<%
Response.Redirect "http://www.yourdomain.com/cart/default.asp"
%>
```

I typed in the location of my images in the Add Item view (in the control panel) but when I view my cart I just see that little box that means the picture is missing. What happened?

The default folder for cart item pictures is cart/images/user_images. You should put all pictures in that folder and just key in the name of the picture file. If you must use a folder elsewhere, you will need to put the relative URL from the location of cart/images/user_images. For example, if you put a cart/images/graphics/ subfolder, then you will need to key the URL in as ../graphics.

Terminology

ADC URL - The return code required by Authorize.Net to process your credit card information. Our ADC URL is **https://www.hostline.com/cps/cart/ro_return.asp**

Appearance Maintenance View - The control panel view that establishes text and background colors, background images, logos, headers & footers, and other global properties that influence appearance.

Authorize.Net - The online credit card processing company the cart was designed to compliment. If you want to use online order processing (either automatically or manually, depending on your preferences), you will first need to establish a Merchant Account with a cooperating bank (Authorize.Net provides a list) and they will do all of the coordinating with Authorize.Net. You just need to supply your merchant ID and password to our cart and you are ready to go.

Billing Maintenance View - The control panel view that contains your Authorize.Net and accepted credit card information.

category - The initial organizing level of the cart. For example, a shopping cart for a shoe store might have Shoes, Boots, Sneakers, and Sandals as categories. Individual items would then be listed inside the category.

cookie: A temporary file placed on the customer's browser that identifies that customer whenever he or she makes a selection. The cookie can reside permanently in your web browser folder or can be removed after a transaction is complete. CoastCart requires the use of cookie technology and a customer needs to give permission for the receipt of cookies to do business online.

Configuration Maintenance View - The control panel view that sets up the database fields that will be gathered for your product items.

CP Home - The link on the navigation menu that will take you back to the Control Panel home page.

customer profiles - Each customer has a profile in your database that contains their name, address, phone number, credit card and e-mail address. The database is secure and each transaction involving the profile is encrypted.

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database - The cart uses an Access database, which is really a collection of tables containing data. The database is an excellent way of storing and sorting data.

deep link – A feature of the cart that allows a graphic and brief description for an item to be displayed on the home page of the cart. This is perfect for special items. The link will go to the full description and order form for the item.

default.asp - The main page of your site or subfolder. This is set to appear automatically when visitors type in your domain name. With all other web pages, the visitor must type in a unique name. If you use the URL **http://www.mydomain.com/cart** and don't specify a file, then the browser will automatically bring up the default.asp page. Note: It is very important not to edit this page in any way, as it will disable your cart.

drop-down box - Choose One ⏷ This allows you customers to customize their shopping purchases and saves you from having to assign different SKUs to yellow sneakers, red sneakers, green sneakers, and blue sneakers.

FAQs - Internet lingo for "Frequently Asked Questions." There are some problems or issues that more than one person has had that we can pull together and answer ahead of time.

form - A specialized html file that gathers information from your site's visitors

form field - Each individual field in a form, such as "name," "address," "e-mail address"

frames - A specialized html file that contains multiple files

gif - A type if image file best suited for flat, non-gradiated colors, and is used often for text, cartoons, and backgrounds. It tends to be smaller than a jpeg.

include - A type of file that contains part of the html code for a given page. It doesn't have enough code to comprise a complete page so that when it is inserted into another file (in this case, default.asp) it doesn't create conflict with the other snippets of code.

include_footer.asp - A specialized include file in your /cart subfolder that has code specific to the cart. The header file can customize the text, colors, backgrounds, and images used in the cart.

include_header.asp - A specialized include file in your /cart subfolder that has code specific to the cart. The footer most often contains contact information and copyright notices.

Invoice View - In the Review Orders View, this view allows you to see all the information about a given order - shipping and billing address, credit card, and order numbers.

item - The cart's name for each individual item that is for sale.

jpeg - An image file that is best suited for shaded colors. It tends to be a bit larger than gifs and are usually used sparingly.

logo - The graphic image used for your corporate identity.

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merchant account - If you currently sell retail or provide services, and you accept credit cards, you already have a merchant account. This is a special account that allows you to accept payment by credit card. Some merchant accounts are set up for direct retail sales, and some accounts are set up for Internet sales. You need a merchant account that allows credit card acceptance via the Internet.

navigation - The ability to move between web pages via hyperlinks. A good web site allows for easy navigation between important pages.

optimization - The process of making images compact enough for the Internet. A jpeg, for example, that begins in Photoshop as a 50K file can usually be shrunk down to 15K. Properly optimized images are faster to download, which means your customers will see your images quickly.

Order Processing View - The view that shows all of the information you will send to Authorize.Net for this account and allows you to submit the order for authorization and capture.

Purge Database View - This view eliminates old and unprocessed shopping carts from the database. This cannot be undone.

Review Orders View - The view that allows you to see all of your orders, both new and old, that have been submitted by customers. From this view you can go to Edit Profile Views, See Invoice Views, and Process Credit Card Views.

shopping cart - A program that allows a site's visitor to choose multiple items, checkout with them, and pay for them using a credit card.

SSL (Secure Socket Layer): Credit card data must be transmitted securely through a process called encryption (or scrambling). You can tell when you're on a site that has SSL security because the URL starts with "https" instead of the non-secure "http".

test mode - When you are first setting up Authorize.Net, you can use this mode to pretend to process.
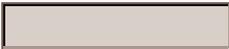
text field [ ] Text fields allow your client to enter unique information, such as monograms, names and addresses.

upload - The process of importing images (in this case) to a subfolder in your site from some other source. The upload function of the cart defaults to "My Pictures" on your c-drive.

URL - the Internet address for your site. **www.mydomain.com**. A complete URL can contain subfolders and file names, as well.

Web Safe Colors

000000	000033	000066	000099	0000CC	0000FF
003300	003333	003366	003399	0033CC	0033FF
006600	006633	006666	006699	0066CC	0066FF
009900	009933	009966	009999	0099CC	0099FF
00CC00	00CC33	00CC66	00CC99	00CCCC	00CCFF
00FF00	00FF33	00FF66	00FF99	00FFCC	00FFFF
330000	330033	330066	330099	3300CC	3300FF
333300	333333	333366	333399	3333CC	3333FF
336600	336633	336666	336699	3366CC	3366FF
339900	339933	339966	339999	3399CC	3399FF
33CC00	33CC33	33CC66	33CC99	33CCCC	33CCFF
33FF00	33FF33	33FF66	33FF99	33FFCC	33FFFF
660000	660033	660066	660099	6600CC	6600FF
663300	663333	663366	663399	6633CC	6633FF
666600	666633	666666	666699	6666CC	6666FF
669900	669933	669966	669999	6699CC	6699FF
66CC00	66CC33	66CC66	66CC99	66CCCC	66CCFF
66FF00	66FF33	66FF66	66FF99	66FFCC	66FFFF
990000	990033	990066	990099	9900CC	9900FF
993300	993333	993366	993399	9933CC	9933FF
996600	996633	996666	996699	9966CC	9966FF
999900	999933	999966	999999	9999CC	9999FF
99CC00	99CC33	99CC66	99CC99	99CCCC	99CCFF
99FF00	99FF33	99FF66	99FF99	99FFCC	99FFFF
CC0000	CC0033	CC0066	CC0099	CC00CC	CC00FF
CC3300	CC3333	CC3366	CC3399	CC33CC	CC33FF
CC6600	CC6633	CC6666	CC6699	CC66CC	CC66FF
CC9900	CC9933	CC9966	CC9999	CC99CC	CC99FF
CCCC00	CCCC33	CCCC66	CCCC99	CCCCCC	CCCCFF
CCFF00	CCFF33	CCFF66	CCFF99	CCFFCC	CCFFFF
FF0000	FF0033	FF0066	FF0099	FF00CC	FF00FF
FF3300	FF3333	FF3366	FF3399	FF33CC	FF33FF
FF6600	FF6633	FF6666	FF6699	FF66CC	FF66FF
FF9900	FF9933	FF9966	FF9999	FF99CC	FF99FF
FFCC00	FFCC33	FFCC66	FFCC99	FFCCCC	FFCCFF
FFFF00	FFFF33	FFFF66	FFFF99	FFFFCC	FFFFFF