



USER GUIDE

KARTRIS v1.3

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1 Overview

Kartris is an ASP.NET web application for running e-commerce web sites. Although commonly referred to as a 'shopping cart', that is in fact just one element of Kartris. The system is fully featured e-commerce CMS (content management system) that can store and display product and other data to customers, and has the e-commerce elements that allow items to be selected and purchased, and orders to be processed.

Kartris is written in VB.NET with an MS SQL 2005+ database, and as such must be hosted on an MS Windows Server running the Microsoft IIS web server for production deployment, although it can be run for development and test purposes on a variety of Windows installations.

The software consists of four main elements:

- The Kartris core, which is compiled and provides the essential framework functionality
- The pages, controls, business logic, templates and other files (including full source code) that run the site
- The database, which stores all product, customer and other data, and the associated code (including stored procedures and the data access layer)
- Other product specific files such as uploaded product images, downloadable files, etc.

Kartris has a modern, user-friendly interface that makes use of AJAX to deliver a fast, feature-rich experience that works on all modern browsers.

Certain sections of this manual are highlighted either for importance, or because they refer to more technical information that is intended largely for developers. We have marked such sections in colour as follows:

DEVELOPER

Sections marked like this contain technical information intended primarily for developers and IT specialists who are setting up Kartris systems. A general user can normally ignore these sections.

IMPORTANT

Sections containing important security or other warnings are highlighted in red. All users should pay special attention to these sections.

2 Setup

This section deals with installing Kartris and doing some basic configuration.

IMPORTANT

There are two main scenarios for setup - **local** and **remote**. 'Local' means installation on a computer you have full access to such as your desktop or laptop computer, or a server if you have full admin rights. 'Remote' means a computer you can only access via FTP and MS SQL.

2.1. Download the Software

<http://www.kartris.com/t-Downloads.aspx>

The software itself comes as a zipped file.

IMPORTANT

Always ensure you obtain Kartris either from our web site, or from a source you trust such as your web host or Microsoft's tools.

2.2. Prerequisites

You must have the following software installed in order to run Kartris.

- Windows IIS6 or IIS7 (the web server on Windows Server 2003 or above, Windows XP Pro, Vista or Windows 7)
- MS SQL 2005 Express or above (available free from Microsoft's web site) or one of the full versions of MS SQL 2005 or above
- ASP.NET 3.5, and the latest .net 3.5 service pack

For best performance, a modern browser such as Firefox 3+, Chrome or IE8+ is recommended for using the back end areas.

2.3. License

Kartris will come with a free license (with some limitations) already within the zip. If you need to unlock the limitations for a trial period - for example, because you need to test SSL or have more than 500 product versions, please contact us via our site (<http://www.kartris.com>) and we can issue a 3-month fully working trial for you.

If you purchase Kartris, you will normally be granted an unlimited duration license for your major version of Kartris (and those versions below it) for your URL or server.

The *license.config* file should be placed in the root of your web site, replacing any *license.config* in our default package. Kartris will not work without a valid license file in the appropriate place.

The software will warn you in the back end if you are using a temporary license that will expire soon.

IMPORTANT

Do not make any alterations to the license file as Kartris will not work with a license that has been altered in any way.

2.3.1 Domains

The free license included in the Kartris zip will work for any domain. A full Kartris license will typically be issued for a specific domain such as `http://www.mysite.xyz`

A domain license will also work with any URL that begins `http://localhost/`, so you can use a full license in a development situation too. If you need a temporary license for another development URL, please contact us via our web site.

The URL of your site needs to be set in the **general.webshopurl** config setting. Any requests that hit your site on alternative domains (or for example, without the 'www') will be redirected to the URL specified.

If your **general.webshopurl** config setting does not match the URL specified within your license, the site will appear closed and you will see an error regarding this in the back end.

2.4. Installation

There are various ways to install Kartris depending on your circumstances.

2.4.1 Microsoft Web App Gallery

Kartris is featured within the Microsoft Web App Gallery. Various Microsoft Tools including IIS and Web Matrix make it simple to install Kartris. However, the MS Web App Gallery often takes several weeks to verify new versions of Kartris (even minor updates) that we submit. Consequently, it might not give you the very latest version of the code.

2.4.2 Installing Kartris manually on a local computer

If you have IIS 6 installed on your machine, the procedure to install Kartris is as follows:

1. Unzip Kartris to a folder on your web server root folder. This is typically found at `C:\inetpub\wwwroot\` but might vary depending on your system setup. We will assume your new folder is called 'kartris' in the next steps, but you can give it another name if you wish.
2. Open up the Internet Information Services (IIS) control panel and expand the default web site tree. Right click the Kartris folder and select 'properties'. Hit the 'create application' button to turn the Kartris folder into an application.
3. Check the ASP.NET tab and ensure this web is set to ASP.NET

2.xxx (which handles ASP.NET 2.0 and above, including 3.5). In IIS7, you set this for the application pool that this site runs in.

4. Back in Windows Explorer, right click the Kartris folder and click the security tab. Then add the 'ASP.NET Machine Account' or 'NETWORK SERVICE' account and ensure it has full control.
5. Go to your site by pointing your browser to `http://localhost/kartris/`
6. The setup routine should now open up a walk you through the rest of the installation process. This will create the database, check settings and rewrite the *web.config* file with the correct database connection string. If permissions don't allow it to write this file, it will give you the option to download it and then FTP it to your site.

If you get problems running the database setup and want to create the database first through MS SQL's Management Studio interface, the .sql file is located here within the Kartris zip:

Uploads/Resources/kartrisSQL_MainData.sql

When you run the setup routine again, it should notice that you already have a Kartris database populated.

7. Once setup and logged in to the back end, you can go to the front end by clicking the Kartris logo link in the top left of the page.

2.4.3 Installing Kartris on web space

1. Unzip Kartris to a folder on your desktop. Using FTP, upload the files to your web site.
2. Call up the site in your web browser, and the setup routine should run.
3. When you get to the stage to setup the database connection, you will probably need to use the database address (or IP), name, username and password given to you by your web host. The install routine will try to rewrite your *web.config* file with these connection details, but if the permissions do not allow this, you can download it from the setup routine and then upload to the root of your site with FTP instead.
4. If you get problems running the database setup and want to create the database first through MS SQL's Management Studio interface, the .sql file is located here:

Uploads/Resources/kartrisSQL_MainData.sql

When you run the setup routine again, it should notice that you already have a Kartris database populated.

5. Once setup and logged in to the back end, you can go to the front end by clicking the Kartris logo link in the top left of the page.

2.4.4 Forcing the install routine to run again

Sometimes you might want to run the install routine again – for example, to reset the admin password for Kartris if you forget it.

You can do this by making a couple of minor changes to the *web.config* file.

First, find the connection string, around line 45 – it looks something like this:

```
<add name="KartrisSQLConnection" connectionString="Data Source=localhost\SQLEXPRESS;Database=kartrisSQL;Integrated Security=True;connect timeout=50" providerName="System.Data.SqlClient"/>
```

Edit the string so that the database details cannot be found, e.g. change the database name to a database that does not exist on the server.

Secondly, find this a few lines down from the connection string:

```
<!--<globalization resourceProviderFactoryType="Kartris.SqlResourceProviderFactory" culture="auto" uiCulture="auto" enableClientBasedCulture="true"/>-->
```

It needs to be uncommented (remove the `<!--` before it and the `-->` after it).

With both of these measures, Kartris should fire into the setup screen.

At the end of the setup routine, Kartris will rewrite the *web.config* file (if permissions allow) or offer it to you for download, so that it can be manually uploaded to the web site.

3 The Back End

The back end is the administration section of Kartris, where product data is managed and orders are processed.

3.1. Logging In

To access the back end, one must login to Kartris. The login address is given during the setup process, and is:

[your site address]/Admin/

You will need the *username* and *password* to login. This is the username and password created during the setup process.

IMPORTANT

It is vital that you keep a note of the username and password somewhere safe, but preferably away from your computer. If you lose it, it is not possible to recover it from the database because it is hashed (scrambled using a one-way function). The Data Tool has a feature to let you reset your admin password if you forget it.

Alternatively, you can run the setup routine again - see 2.4.4 Forcing the install routine to run again on page 11 above

3.2. Security

3.2.1 SSL

If your web site has a secure certificate installed and SSL (secure sockets layer) enabled, you can increase the security of the back end by running all pages through HTTPS.

3.2.1.1 Checking for SSL

The first step is to check your site has SSL enabled. To do this, simply go to the front page of your site and then edit the address in the browser so it uses HTTPS instead of HTTP. For example,

https://www.demo.xyz/

If you see an error in your browser that the site is untrusted, or that the connection was interrupted, or any other browser error, then SSL is NOT running properly on your site. You should contact the host or your developer if you believe it should be.

If SSL is installed and working correctly, then you will get redirected to the home page but with HTTP. The main thing to ensure is that you don't see any browser error.

3.2.1.2 Activating Kartris's SSL support

Once logged in to the back end, find the **general.security.ssl** config

setting (see '4.2.1 Finding config settings' on page 17 below) and change it to 'y'. You will then need to login again, but you should see that all back end pages now use HTTPS.

IMPORTANT

Do not activate this config setting unless you have confirmed SSL is available and working. If you do, you will lock yourself out of the back end, as it will force SSL which will generate an error. Please see the knowledgebase for solutions if you do this accidentally.

3.2.2 IP restrictions

One of the most effective ways to protect the back end from unauthorized access is to limit access to particular IP addresses or ranges. Although a username/password security system is employed, there is always the possibility that these details might be compromised (for example, phishing, keylogger on your local machine). IP security ensures that an attacker cannot access your back end from their machine, even if they have the username and password.

The drawback is that it can prevent you accessing the store from a remote location, should you need to (while travelling, for example).

When you connect to the internet, you do so from a unique 'internet protocol' address, which is a number such as 192.168.1.255. Most businesses will have a fixed IP address when connecting to the internet, which means that every time you connect, your ISP allocates the same IP address to you.

3.2.2.1 Finding your IP address

Your ISP may tell you your IP address with other account details they provide to you. But the quickest way is to Google 'what is my IP address' and the top few results will be sites that will tell you your IP address when you visit them.

3.2.2.2 Restricting IP access through IIS

If you have your own server or virtual server, and have admin access to the IIS web server, you can restrict access to the back end through this.

In IIS 6, the ability to limit access by IP is built in. In IIS 7, you might have to activate this feature separately.

Using IIS to enforce security in this way adds an additional level of security because it is completely independent of Kartris. Anyone trying to access the Kartris back end will be turned away unless their IP address matches one of those you have expressly authorized. Kartris pages won't even get run.

You can also ban particular IP addresses and ranges (although it is far better from a security perspective to 'deny all' and then allow specific addresses rather than try to ban problem IPs and ranges).

3.2.2.3 Restricting IP access through Kartris's web.config

If you don't have admin access to the IIS web server running your web site (i.e. you perhaps only have FTP access), you can still restrict the back end access to specific IP addresses or ranges. Simply edit the 'BackEndIpLock' element in the *web.config* file on the root of your site. With a single IP added, it will look like this:

```
<add key="BackEndIpLock" value="192.168.0.100" />
```

Or with multiple ones, like this:

```
<add key="BackEndIpLock" value="192.168.0.100,192.168.200,80.90" />
```

To remove the IP block, set the value to blank:

```
<add key="BackEndIpLock" value="" />
```

3.3. Back End Logins

Kartris will create an admin account for you with your chosen password during the setup process. However, many store owners will need to have multiple staff members accessing the back end. Kartris therefore allows an unlimited number of extra back end accounts to be created.

3.3.1 Creating logins

The login management page can be found by going to 'Configuration > Logins'. All logins for the site will be displayed in tabular format. Checkboxes show the permissions settings for each account, as well as whether or not the login is live.

The primary login accounts for Kartris don't have any 'delete' option and the permissions for these accounts cannot be changed. This ensures that the main admin accounts are always valid, and that you cannot inadvertently lock yourself out of control by removing the primary accounts or reducing their access level.

IMPORTANT

Note that anyone with config permissions can create new users with any permissions they wish, or edit their own permissions to give themselves any permissions they choose. Bear this in mind if you grant configuration permissions to a user but deny them 'orders' permission, for example. The user would be able to edit their own permissions to give themselves 'order' permissions if they wanted.

3.3.2 Setting permissions

User accounts can be restricted using the permissions checkboxes so that they can only access certain areas in the back end. The back end is divided into four broad areas:

- **Configuration permissions** - user can change config values, shipping, tax, countries and other setup details
- **Product permissions** - user can view/edit categories, products and versions
- **Orders permissions** - user can view/change customers, orders, affiliates and coupons
- **Support permissions** - user can view/change support tickets and knowledgebase articles

This permissions structure serves two purposes. Firstly it allows you to prevent certain users from being able to make major changes to site settings, or products, for example, while allowing them to process orders. Secondly, it simplifies the back end somewhat by removing extraneous menus for users who do not need them.

4 Further Configuration

Once you have Kartris running and have logged into the back end, you will want to continue to configure and setup the software to run your store.

This section covers the process to follow, and is laid out in the recommended order that you should use when configuring your Kartris installation.

First, an overview of important back end tools is provided.

4.1. Back End Search

Kartris has a powerful back end search feature at the top of the page in the admin section that searches multiple tables for items matching (or including) the search text entered. This can be used to find most items you would commonly need to locate quickly including products, customers, configuration settings and even text/wording from site pages. Even entering part of a word or name will find the top few matches.

For example, if you wish to find a config setting relating to affiliates, even just entering 'affil' should find it.

4.2. Config Settings

The config settings should not be confused with the *web.config*, which is a file on the site holding basic configuration for the site including the database connection.

Config settings are stored in the database (in the *tblKartrisConfig* table), and can be used to control the operation of many aspects of the software.

We store configuration settings within this databased system rather than the *web.config* as it provides some useful advantages.

- Keeps the *web.config* relatively uncluttered
- Helps config settings to persist when you upgrade Kartris to a newer version using the data tool
- New config settings can be added and changed regardless of file permissions on the site (common permissions may deny access to rewrite the *web.config* file)
- Config settings can be updated without the application restarting (changes to the *web.config* file will cause a restart)

Some important config settings are set during the setup routine; most of the others are less critical and can be tweaked later once you have Kartris running and your site under development.

4.2.1 Finding config settings

Config settings can be located most easily from any back end page using the general search box. Just enter a part of the name of the config setting, and the system will find any matching records (up to 15 maximum can be displayed).

If you are less familiar with the config settings, you will find it easier to navigation to the config settings page ('Configuration > Config Settings'). From here you can navigate a hierarchical dynamic menu of the config settings. Hovering over either 'frontend', 'backend' or 'general' links will open out the menu – new sections will fold out as you hover over certain entries. This can be a good way to explore and find new settings relevant to particular features.

4.2.2 Changing config settings

Once you have located a config setting, you can click to edit it. Be extremely careful to ensure that you do not set config settings to an invalid value. This can cause errors in the operation of Kartris. Great care should be taken to double check values being changed before you click to submit any changes.

4.2.3 Making changes in the database directly

It may be tempting to try to update config settings and other site records directly in the database tables, rather than using the Kartris admin back end. This should generally be avoided because it is easy to add bad data that can prevent Kartris from working. To protect against casual attempts to modify data directly, Kartris has triggers on most tables which are temporarily disabled by Kartris when it needs to modify data. Disabling these triggers can be done from the 'Configuration > Database Admin' section. Any disabled trigger will typically be restored whenever any updates to the table are performed by the Kartris admin section.

DEVELOPER

If you need to make changes to records in the database directly, you can disable the triggers that protect data, and re-enable them, using the following stored procedures:

```
_spKartrisDB_DisableAllTriggers  
_spKartrisDB_EnableAllTriggers
```

4.3. Regional Setup

One of the main factors in how you setup your store will be your location, and the location of the customers you deal with.

4.3.1 Taxation

4.3.1.1 Prices inc/ex tax

If you are in Europe, then typically you will want to enter prices on your

web site inclusive of tax. Stores based in the US, or European stores that deal primarily with business customers, will normally want to enter prices exclusive of tax.

This is controlled by the **general.tax.pricesinctax** config setting which should be set to 'y' for tax inclusive prices, and 'n' for ex-tax prices.

Note that for tax inclusive prices, tax is calculated 'per item' rather than per row of the basket. As such, a rounded 'ex tax' price can be calculated. But for ex-tax pricing, tax is applied to each row of the basket. Consequently, it is not possible to show a rounded inc-tax price for individual items, because this would in many cases not quite tally with the actual tax on the order (due to the different rounding used, per-item and per-row) and would be likely to confuse customers or lead to complaints that the site has added up the tax wrongly. Instead a percentage figure is shown where necessary (see '4.3.1.3 Show tax' on page 18 below).

4.3.1.2 US state tax

In Europe, the tax rate is typically set for each item, with certain items being exempt. Whether a customer pays tax depends on their country too – most EU customers will pay the tax, while those outside the EU will not.

In the US, tax is calculated differently. The total price of the items for an order is calculated, and a % tax applied to this total at checkout for customers in the same state. Customers out of state are typically not charged tax.

You can control which tax model is used with the **general.tax.usmultistatetax** config setting. Set to 'y' if you wish to use the US state tax model, or 'n' if you want to use the European tax model.

4.3.1.3 Show tax

Most stores will typically show a single price for each item, which might be either inc-tax or ex-tax. In this case, you should set your **frontend.display.showtax** config setting to 'n'. If you wish to show the tax associated with an item, set this to 'y'.

The way tax is displayed depends on whether prices are inclusive of tax or not (see '4.3.1.1 Prices inc/ex tax' on page 17 above).

Table to show how the two tax config settings affect the display on the site		frontend.display.showtax	
		y	n
general.tax.pricesinctax	y	Ex tax £8.51 Inc Tax £10.00	Price £10.00
	n	Ex tax £10.00 Tax 17.5%	Price £10.00

Note that in all the cases in the table above, the item price is entered in the back end as 10.00, and the tax rate is 17.5%. It is the config setting

general.tax.pricesinctax that determines whether this means £10.00 at checkout (£10.00 inc tax) or £11.75 (£10.00 plus 17.5% tax).

Note that if you enter prices into your store ex tax, and then switch to inc tax, the prices won't change (for example, an item entered as £10.00 won't suddenly become £11.75 – it will still be £10.00, just that this will now be considered inc tax instead of ex tax).

4.3.1.4 EU VAT

This item only applies to businesses in the European Union.

If your store is in the EU, it should zero rate tax to businesses with a valid EU VAT number who are in the EU but outside of your own country. To activate this feature, set your **general.tax.euvatcountry** config setting to the two-letter ISO code for your own country. For example, if you are in the UK, you should set it to 'GB', in Germany 'DE', in Sweden 'SE' and so on.

Once you do this, European Union customers whose shipping address is outside the UK (or whatever your home country is set as above) will be presented with an extra field during checkout in which to put their EU VAT number. If the number is entered, tax will be zero-rated. The customer should then declare this purchase in their own country and pay tax to their own country's relevant tax authority.

To try to ensure EU VAT numbers are correct, Kartris checks values entered using the EU's own web service. If this is unavailable or unreachable, Kartris will automatically check instead using an inbuilt function that has some basic knowledge of the format required for each country. Please note that Kartris cannot determine that the VAT number belongs to the company in question, only that it is a genuine number (if using the web service) or corresponds to the appropriate format for numbers from that country (if Kartris reverts to the inbuilt function).

If you experience any issues with the VAT number check, it can be turned off by setting the **general.tax.euvatnumbercheck** config setting to 'n'. But in this case, you should manually check each order to ensure any VAT numbers entered are correct, or you could be liable for the tax you deducted.

IMPORTANT

Some payment systems replace the checkout stage of Kartris (for example, Google Checkout). In these cases, some features of the Kartris checkout such as handling EU VAT numbers may not be possible. If you want to ensure complete control over the checkout procedure, then it is best to choose a payment solution where the standard Kartris checkout process is used, with the payment made at the end. If choosing Google Checkout, you are limited to whatever features Google Checkout supports.

4.3.1.5 Shipping tax

Depending on your country's tax rules, shipping may or may not be subject to tax. You can set this with the **frontend.checkout.shipping.taxband** config setting – enter the ID of

the tax band you wish to use. Please note that as with products, tax is only charged when the customer is subject to tax based on their location.

4.3.2 Currencies

Kartris is designed to be run with one or multiple currencies. Each store will have at least one currency (the 'base currency'), and optionally additional currencies that are related to this by an exchange rate.

To access the currency page in the back end, go to 'Regional Setup > Currencies'.

At default, the base currency is set to GBP (British Pounds). If your store operates primarily in another currency, click to edit this and then enter the appropriate ISO code, symbol and format.

You can then add or alter the extra currencies, and set the exchange rate between this currency and your default currency.

A full list of ISO codes can be found here:

http://www.iso.org/iso/currency_codes_list-1

4.3.2.1 Live currency rates

Kartris features a live currency feed which saves you having to manually look up updated exchange rates each day. This can be accessed from the 'Regional Setup' menu, or from a link on the currencies page.

The page will first show you the current rate your site is using, and the new rate it has looked up from the feed. You can override the values if you wish. Click the 'update' button to set the new rates live.

Please note that there may be charges or support may be required to use certain services like this.

4.3.3 Shipping

To access the shipping page in the back end, go to 'Regional Setup > Shipping'.

Shipping is the term we use to refer to all methods of delivering physical products by post, parcel service or courier.

The banded shipping system in Kartris allows you to specify multiple shipping methods, zones, each with its own price grid.

4.3.3.1 Shipping by weight or order value

You can choose to calculate shipping based on the weight of an order, or value, depending on your **frontend.checkout.shipping.calbyweight** config setting. Set to 'y' to calculate by weight, or 'n' to calculate based on order value.

4.3.3.2 Shipping methods

You can set up any number of shipping methods for your store, such as 'standard post', 'express post', 'courier' and so on.

4.3.3.3 Shipping zones

You can set up any number of shipping zones for your store. A shipping zone is an area which has its own shipping price levels. Countries and state records will be mapped to the appropriate shipping zone later. At the simplest, you might want a 'home' zone for orders in your own country, a 'regional' zone for countries nearby, and a 'rest of world' zone for everywhere else, for example.

4.3.3.4 Shipping rates

Once you have set the methods and shipping zones, you can start to create the actual shipping rates. Click the 'Shipping Methods tab' and then click the 'Rates' link by the first shipping method.

This brings up a list of the bands that are in effect for each shipping zone. You can create any number of bands for each zone to fine tune the shipping price for any weight/value.

This process can be repeated for each shipping method.

4.3.4 Countries

To access the countries page in the back end, go to 'Regional Setup > Countries'.

For each country, you can set the following:

- Name (supports multiple languages)
- Shipping Zone (see '4.3.3.3 Shipping zones' on page 21 above) - here you can set which shipping zone this country falls into.
- ISO codes - these are preset for most records and should not need to be changed
- The region – this is for records that represent a country/state combination, such as US state records. You can enter the state code here. Google Checkout and some other external systems may use this. Leave the field blank for countries.
- Tax – whether or not tax should be charged to customers from this country
- Live? - whether you wish to include this country. If you uncheck this, the country won't be available as a selection for customers during checkout, so you will effectively exclude customers from that location from being able to order on your store. You may decide to do this if there are particular countries you don't wish to ship to.

4.3.5 Payment Systems

Payment systems are used by Kartris to accept payment (or in some cases, a promise of payment) through the store.

Kartris supports a number of different payment systems, and the number will grow over time. There are four broad types:

- **Remote** – e.g. RBS Worldpay, SagePay VSP Form – these redirect customers to a secure page at the payment gateway's site, with the successful payment being communicated back to Kartris via some kind of 'callback'.
- **Local** – e.g. SagePay VSP Direct – the customer enters card details directly into Kartris and Kartris then communicates with the payment system server-to-server. Since card details are entered through Kartris itself, SSL is obligatory.
- **Alternative Checkout** – e.g. Google Checkout – the customer is routed to the payment system's web at the start of the checkout and stays there for the entire process, with information such as pricing and shipping options, as well as payment success/failure communicated between the payment system and Kartris using server-to-server communication. Although the card details are not entered directly into Kartris, Google Checkout still requires that all communication between Kartris and the payment system be done under SSL.
- **Special** – this typically describes certain payment methods through Kartris that don't require a third party payment system. For example, payment by 'PO' (purchase order – to take an order where actual payment will be invoiced or made offline).

4.3.5.1 Setting up various payment systems

The online knowledgebase has details of the setup procedure for supported payment systems:

<http://www.kartris.com/Knowledgebase.aspx>

4.3.5.2 Supported payment systems

Kartris has support for a number of payment systems, and more are being added over time. For a full listing, check our web site.

4.3.5.3 Installing further payment systems

Kartris is designed to allow new payment systems to be added without changing code or making changes to the database.

Unzip the files and copy the folder for the payment system to the 'Plugins' folder in the Kartris web. Then go to 'Configuration > Payment and Shipping Gateways'.

Click the 'Refresh' link and Kartris should find the new payment system.

Once in the list, you can click 'Edit' to change its settings. Each payment system has its own settings, which vary from system to system. This information is not stored in the database; instead it is stored as XML within the payment system itself. This makes installation simpler since you don't need to add new database records for each new payment system.

If you receive an error when you try to save changes to the settings of a payment system, it is most likely caused by there not being 'write' permission to the 'Plugins' folder.

4.3.5.3.1 The 'Status' setting

Most payment systems in Kartris have a 'Status' setting; this lets you switch the operation of the payment system as follows:

- ON – the payment system is active and is available for customers to select for payment
- OFF – the payment system is disabled
- TEST – the payment system is set in test mode; it will only be visible at checkout if you are logged in as a store admin. Orders will be passed with a 'test' flag so cards will not be billed.
- FAKE – an additional test setting; this simulates an order callback without sending anything to the payment gateway. It is a useful way to test the settings and see what happens with successful orders but without having to repeatedly go through the payment stage on the remote site.

4.3.5.3.2 Process currency

Most payment systems have a process currency. If you leave this blank, Kartris will pass orders to the payment system in whatever currency the user selects on your site.

For that to work, your payment system provider must support multiple currencies, and your account with them must permit orders in all the currencies available on your site.

You should set the process currency from blank, if:

- Your payment system account only supports one currency
- Your store offers customers a choice of at least one currency that your payment system account does not support
- Your payment system provider provides very poor currency conversion rates, so you prefer to pass all orders in a single currency as customers will get better conversion rates from their credit card providers.

The process currency (if not blank) should be a three-letter ISO code for the appropriate currency.

Customers will be alerted at the last step of the checkout that the actual amount they will pay will be converted, and they will be shown the converted amount in that currency, as well as the order total in their preferred currency. This conversion will be done at the rate in your currency settings (see '4.3.2 Currencies' on page 20 above).

4.3.5.3 Encrypting the settings file

The settings for each payment system is stored in an XML file. This is given a *.config* extension so that the file contents can not be read across the web if the exact path to the file is typed into a browser.

For additional security, it is advisable to encrypt this file using the checkbox provided once your site is going live.

4.4. DB Admin

Kartris has a back end section dedicated to various database related tasks. To access this, go to 'Configuration > Database Admin'.

IMPORTANT

You may find that some tabs referred to below are not visible when you log in. In this case, the `backend.expertmode` config setting is probably off. This setting hides some back end features, even to those with 'config' user permissions. You can edit the config setting to turn on expert mode, which will show advanced tabs in the db admin section.

Expert mode also allows you to edit certain field details of config settings and language strings that are normally hidden.

4.4.1 Home screen

From here you can restart Kartris. This works by making a minor change to the `web.config` file and saving it – ASP.NET will restart a site when this file is changed. Therefore it only works if your site has write permissions to the root. If you need to restart Kartris and this does not work, you can manually change the `web.config` via FTP.

4.4.2 Admin logs

Kartris keeps logs of many important changes made through the admin section.

4.4.3 Error logs

Kartris will log ASP.NET errors within the Uploads/Logs folder. This tab allows you to view these errors more conveniently from the back end of Kartris. In the event an error means the site is unavailable, you can view the error logs via FTP. Note that error logs are created with a *.config* extension to ensure the raw files are not visible to the public.

4.4.4 Triggers

The Kartris database is protected from casual deletion or modification of data by a series of triggers. The various stored procedures that update data disable a trigger, update the data and then re-enable it again.

If you need to disable a trigger on a specific table, or all tables, you can do so from here. Typically triggers will be reactivated when queries on those tables next fire up, or you can reactivate them manually.

DEVELOPER

In some cases, you may need to make emergency edits to the config settings or other records and the back end of the site might not be available. In these cases, you can disable and enable triggers just by running the following stored procedures directly.

```
_spKartrisDB_DisableAllTriggers  
_spKartrisDB_EnableAllTriggers
```

4.4.5 Clear data

This provides an easy way to clear data related to products, orders or sessions. It's important not to attempt to clear data directly from Kartris by just blanking all the tables in the database, as some hold data such as config settings and language strings that is vital to the operation of Kartris.

4.4.6 Run query

This provides an easy way to run a query against the database. A non-expert would typically only use this if Kartris support staff provide a query for them to run to perform a task such as to alter the database in some way, or find some information that is required for a support issue.

4.4.7 Data export

4.4.7.1 Orders

There is a built in function to export orders between two specified dates as CSV (which will open up in Excel or a spreadsheet).

4.4.7.2 Custom Export

Virtually any data from the Kartris database can be exported to file using a custom export. You simply choose a name, field delimiter, string delimiter and then enter a query. The export can be saved and run again in the future. You can create many custom exports. Some database knowledge and experience is required.

4.4.8 Tools

This gives an overview of your database, and lets you back it up. Note

that this fires the backup facility within MS SQL server. It does not enable a remote backup. You should discuss with your hosting provider about the best way to obtain an off-server back up of your MS SQL database.

4.4.9 Full Text Search

MS SQL has a feature called 'full text search' that significantly improves the performance of text searches across data, especially on very large databases with many records. This has to be available at the database, so it is not activated in Kartris as standard.

If you have the facility available on your database, you can activate FTS from here.

5 Product Data

Product data includes not just products, but categories, versions, options and attributes too. The relationship between these will be covered in this section, as well as the process for setting them up.

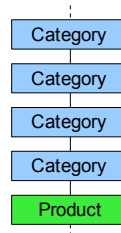
5.1. Relationships

Before you start entering product data, it is important to understand the way this data is structured in Kartris.

There are three basic required elements of product data structure – categories, products and versions. A product must have at least one version, and feature in at least one category – so in this respect, all three elements of data structure are required for every product item you have.

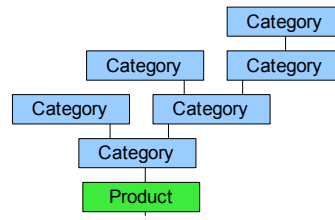
5.1.1 Unlimited category levels

As shown below, categories can be nested within other categories. Kartris is designed to allow unlimited category levels.



5.1.2 Multiple parent categories

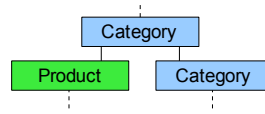
Each category can have any number of parent categories, and you do not have to have the same number of category levels throughout the store. For example, below we see a product whose category can be reached via three navigation routes. One of them has two levels, one three and the other four. A product can also have multiple parent categories.



5.1.3 Mix products and subcategories

A category can at the same time be a parent both to other categories, and products. This provides more flexibility as you can nest general interest products in a category, while still subdividing other items into

further subcategories.

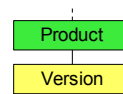


5.1.4 Product types

There are three main types of products and each must have at least one version.

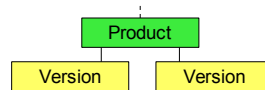
5.1.4.1 Single product

The simplest is a **single** product, which has just one version, though for display purposes this is merged into the product display.



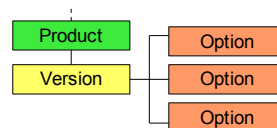
5.1.4.2 Multiple version product

The second type of product is a **multiple-version** product. This is suitable for items that tend to have only one degree of variation. For example, ketchup that might come in several different sizes, or a book that comes in hardback, paperback and audiobook. Each version can have its own image, as well as the product having images too.



5.1.4.3 Options product

The last main type of product is a **options** product. This has a single base version and unlimited options can be applied to it. This is suitable for products such as clothes that can come in multiple sizes and colours. You can have as many options as required, and these can display as dropdown menus, radio buttons or a checkbox. It is therefore ideal for items such as computers that might be highly configurable, with a choice of hard-disks, processors, operating systems, RAM, and so on.



5.1.4.4 Combinations product

There is also a subtype of options product called a **combinations** product. This displays similarly to options products on the front of the site, and is created by first creating an options product. It can then be converted to a combinations product. The primary advantage for a

combinations product is that each possible permutation of options can be allocated its own SKU (item code) and stock levels can be managed separately for each permutation of options. The drawback is that combinations products can only be used where there are less than 250 permutations of options for a product – this constraint is built in to maintain performance, and it would generally be unlikely that any store would maintain stock of more than 250 variations of a particular product.

As a rule, you should ONLY switch from normal options products to combinations if:

- You need a unique SKU (item code) for each size/colour/style permutation OR
- You need to track stock levels for each size/colour/style permutation AND
- There are fewer than 250 possible permutations of options for the product – the store will prevent you creating a combinations product if this figure would be exceeded.

5.2. Adding Product Data

5.2.1 Process overview

Since products must be nested under a category, you must first create the categories for your site. Only then will you be able to add products to the site.

5.2.2 Navigation

You can navigate the category structure in the Kartris back end from the category treeview menu on the left hand side, or drill down into subcategories from the main part of the page.

You can add new items (products or subcategories) within any category you navigate to, or edit the category itself using the 'Edit' link to the top right of each category page.

When you view a category page, you will see any products or categories under it. You can click 'Edit' to make changes to any of these. If you put a subcategory or a product within the wrong category you can edit the product to correct this later.

5.2.3 Creating a new product

If you are creating an 'options' product, then you will need to create the options first (see '5.4 Options' on page 33 below).

You can either go to 'Products > Add New Product', or you can click the 'New' link next to the products section in a category view.

This will bring up an empty product page.

5.2.3.1 Category parent

Each product must belong to at least one category. In such cases, the category that a product belongs to is called its 'parent'. To select a category, enter the name (or part of the name) in the single line text box of the 'category parent' section. A list of matching categories will spring up. Select the appropriate one and hit the 'Add' link next to the box. The category will be added in the box above.

Kartris supports multiple category parents. You can use the same process to add further categories. All the categories that a product belongs to will be listed in the multiple dropdown.

To remove a category from being a parent of this product, simply highlight it in the multiple dropdown list and click the 'Remove selected' link.

These relationships will only be saved when the product is updated/created with the 'Save' button at the foot of the page.

5.2.3.2 Product type

There are three types of product type – single version, multiple version and options product. These are explained further elsewhere (see '5.1.4 Product types' on page 28 above).

When you select the product type, some of the dropdown menus immediately below will be enabled or preset to certain values and disabled. This is because certain selections of these only apply to certain product types.

If you are editing an existing product, and find that you are not permitted to change the product type, it is most likely because the product has associated data which is incompatible with the other product types. For example, if you have a multiple-version product, it cannot be changed to a single version or options products without first deleting the extraneous versions.

5.2.3.3 Product not visible warning

After creating a new product, you will see a warning at the top of the page that the product is not live on the web site because there are no versions live. This makes clear if there are any reasons why the product being viewed is not visible from the front end of the web site. The reasons include:

- No valid live version
- Product is disabled (live box unchecked)
- Product belongs to a customer group (in this case, the warning makes clear that the product is only visible to members of that group, and not the wider public)
- None of the parent categories are live

The warning should make it easy to avoid situations where a product you have created does not appear on the front of the web site, but you cannot figure out why.

5.2.3.4 Creating a version

In Kartris, every product must have at least one 'version' under it. A version is the record that contains the price, tax rate, SKU (unique item code), item weight and stock quantity information.

If you create a 'single version' product, a new version is automatically created. However, you must still go to the 'versions' tab in order to enter a price and other minimum information, as well as to set the new version live.

For other product types, you must also create at least one version before the product is complete and can be visible on the front of the web site to be purchased.

5.2.3.5 Finding and viewing versions

Versions can be reached in a number of ways.

You can navigate the category structure and see products listed; clicking the [+] sign to the left hand side of the product name will expand the product so that its versions are visible.

Versions can also be found from the search box in the Kartris back end.

When editing a product, you can switch to the 'versions' tab to see all versions listed.

5.2.3.6 The 'Images' tab

Kartris products can have unlimited images. To add an image for a product, click the images tab and then 'Add new'.

Hit 'Browse' and navigate to an image on your local computer. Ideally, this image should be sized already for use as a 'large view' image on your site. Typically this would mean JPEG format (.jpg extension), no more than 600 pixels in each direction, and below 100KB in size. Once selected, click the 'upload' link to the left of the browse box. The image should appear in the list.

Don't worry if it appears slightly distorted or squashed; this back end view is not how the image will appear on the front end; it is just a rough thumbnail that will be made square here. On the front end of the site, the image aspect ratio will be maintained, and it will be reduced in size where necessary for use as various sized thumbnails, normal sized view, and large view.

You can upload multiple images one by one. They will appear here as a list. The image order can be changed using the +/- buttons to the right, or it can be deleted.

Where there are multiple images, the first will be used for the product on the front end of the site. On the product page itself, the first image will display larger, while the others will be thumbnailed below in a gallery. A large view feature is automatically provided.

If no image is included, a place-holder image may be displayed on the front end instead, depending on the **frontend.display.image.products.placeholder** config setting.

5.2.3.7 The 'Attributes' tab

Attributes will need to be set up before using this feature (see '5.5 Product Attributes' on page 34 below).

Check the attributes you wish to use, and a text field appears by them. You can enter the text value for all languages that your store uses. Don't forget to 'Save' anything you change.

5.2.3.8 The 'Reviews' tab

This lists all reviews of this particular product.

5.2.3.9 The 'Related Products' tab

This feature lets you tie products together with one-way links, so customers viewing this product will see links to any other products you specify. See 8.2 'Related Products' for further information.

5.3. Sorting Products and Categories

5.3.1 Default sort order

Typically as default, categories, products and versions will be sorted based on three corresponding config settings:

frontend.categories.display.sortdefault
frontend.products.display.sortdefault
frontend.versions.display.sortdefault

The sort direction (ascending or descending) is determined by these config settings:

frontend.categories.display.sortdirection
frontend.products.display.sortdirection
frontend.versions.display.sortdirection

These are the 'global' settings. When you create new categories and products, they will default to using these config settings for sorting the child categories, products and versions under them.

5.3.2 Changing sort order for particular sections

You can choose to sort items under a particular category or product

differently to the store default (global) settings.

For example, if you wish to sort the versions of 'product A' by price, you can click to edit 'product A', and then change the 'Sort Versions By' to 'Version Price'.

A similar thing can be done for products and subcategories of a category.

5.3.3 Custom sort order

There are some occasions when sorting by a field value is not enough to get items in exactly the order you would like, and you need to specify the exact order of items.

In this case, edit the parent item and set the sort to use the 'Sort' item – normally the last option in the dropdown.

Once this is done, you should see child objects in the back end listings now have an up and down arrow by them. You can move the items up and down using this. Any changes to sort order you make here take effect instantly (there is no need to 'save' anything).

5.4. Options

Before creating 'options' products, you will first need to create some options.

Options products are typically used when you have an item that has more than one aspect of variation. For example, if you have an item that is available in 5 different colours, you should generally create it as a multiple version product, with each colour as a different version. But if the same item is available in 5 different colours AND 3 different sizes, then you have two different variables. In such cases, options result in a cleaner interface from the customer perspective.

5.4.1 Creating options

Go to 'Products > Option Groups'

Click the 'new' link.

Give the option a name, such as 'Colour', choose the display type. You will also have to set language specific names for this option for use on the front of the site.

Click 'save'.

Next, click on the 'Option Values' link for the option group you just created.

Enter the name, e.g. 'Blue'. You can also enter a price and weight modifier for this option to reflect the fact that some options come at additional cost. Note that these values are just defaults – you can change them per product when you use the option later if you wish.

Add as many options as you need.

5.4.2 Using options

Once you have options, you can create an options product.

Click the 'options' tab within a product (if there is not one, make sure you created a product of the correct type, on the main Product Info tab).

You can enter basic info for the item, including the base price.

On the 'Product Options' tab, you can select which option groups apply to this item, and which options in each to include. You can also override the default price and weight modifiers. For each option group, you can check the box if it is optional – in this case a select is not required. You can also select which of the option values is the default value – the menu or radio button on the front end will default to this.

5.4.2.1 Sort value explained

The sort value is an arbitrary number used to determine the order that options appear in. If you leave it as zero, then Kartris will determine the order of options.

So if you want 'colour' to appear after the selection for 'size', set the sort order value to 10 for size and to 20 for colour.

It makes sense to assign in steps of 10 rather than with consecutive numbers, as it gives you the flexibility to insert new values later without having to change all the sort values. For example, you can insert a new option 'style' between size and colour by giving it a sort value of 15.

5.4.2.2 Price and weight modifiers

When you create an option value, you can enter a price modifier and a weight modifier (in default currency). In this way, an option selection by a customer can change the overall value of an item. For example, a T-shirt might be €14.99, but the extra-large option might be €2.00. When the customer selects this option, the price of the T-shirt on the page will change to €16.99.

Similarly, a particular option that adds additional weight can be accounted for (important if your shipping prices are related to item weight).

5.5. Product Attributes

Product attributes are pieces of special information associated with a product. Entering information in the form of attributes, rather than just plain text within the description, not only aids the clarity of display, but also enhanced functionality since the data is more structured.

Attributes are entered at product level, so if you have multiple versions or an options product, care should be taken to ensure that the attributes

apply to the product in general, including all versions.

5.5.1 Attributes vs. options

Attributes are sometimes confused with 'options', but they are quite different. Options are choices that are available to a customer to select when choosing a product. Attributes on the other hand are fixed pieces of information that apply to the product and cannot be selected or deselected by a customer.

To give an example of usage, a book might have a number of attributes:

- ISBN (unique book number that all books have)
- Publisher
- Author
- Genre (thriller, romance, non-fiction, etc.)
- Format (hardback, paperback, audio book, e-book)

Once created, you can enter the information for each and every book you feature on your site (although there is no requirement to enter any attributes for any item where you don't wish to).

5.5.2 Creating attributes

Go to 'Product > Product Attributes'. A list of all current attributes appears. You can click to create a new attribute, or edit an existing one.

Attribute type is fixed as 'text', but other types may be supported in future.

You can control if the attribute is displayed in the product page from the checkbox – unchecking the box means the attribute is hidden from displaying there.

If all the attributes of a product are hidden in this way, the 'product details' section on the product page will be hidden.

You can control whether an attribute is searchable too, with the 'include in search' checkbox. For example, you might not want voltage to be searchable, but you would most likely want the author attribute for a book to be searchable, or the ISBN number, as customers are very likely to use these to find particular items.

The final option is 'Show on comparison table'. This sets the circumstances under which the attribute will be displayed when comparing products.

5.6. Suppliers

Suppliers are manufacturers or resellers from whom the store purchases items it sells.

To access suppliers functionality, go to 'Products > Suppliers'.

Any suppliers you set up will be available in the 'suppliers' selection when editing or creating a product.

Setting the supplier is useful to help with managing stock in the back end of Kartris. You can list all the products from a particular supplier from the suppliers page – this makes it easy to locate all items from a particular source if you have a recall or other issue to attend to.

Also, you can filter the stock level warnings ('Products > Stock Levels') by supplier. This allows you to see which items need ordering from any particular supplier while preparing an order.

5.7. Stock Tracking

If you sell items where you have a limited number in stock, and where your resupply period might be more than a day, you will normally want to use stock tracking to ensure you don't sell items that you cannot deliver.

5.7.1 Activating stock tracking

Stock tracking does not need to be activated globally for the store. Instead, you can apply just to the items that you need to track stock for.

When creating or editing a version (see '5.2.3.4 Creating a version' on page 31 above), check the 'stock tracking' checkbox. There are two relevant text fields: the actual stock quantity, and the warn level.

When the stock quantity reaches the warn level or below, a stock warning will appear in the 'To Do' list on the right hand side of the back end. This way, you can re-order more stock before your supplies are exhausted.

5.7.2 Out of stock

Items which are out of stock will have their 'Add' button on the front end replaced by an 'out of stock' message to prevent the items being purchased.

You can choose to allow continued purchases of items that are out of stock with the **frontend.orders.allowpurchaseoutofstock** config setting.

6 Orders

Orders are accepted through the front end of Kartris. But this is just the first step. The store owner will want to review orders, possibly check for fraud or other problems, and then assuming all is well, process them.

This section deals with processing orders and the various options and settings that affect the order process.

6.1. Finding Orders

The first step to processing an order is to find it – there are several options for this in Kartris:

6.1.1 'To do' list

The 'to do' list on the right hand side of all back end pages is the quickest way for a user to see tasks that need action. Links to orders that are awaiting invoice, payment or dispatch will appear when there is at least one order of the relevant type awaiting action. Clicking the link brings up a list of such orders.

6.1.2 Orders menu

The orders menu allows the store owner to list the most recent orders, or the most recent orders at a particular stage of processing (complete, awaiting payment, etc.).

6.1.3 Orders search

The search box on the orders page will accept either of the following:

- **Date** – best entered using the calendar button next to the box to ensure the correct format. In this case, a list of orders from this date will display.
- **Order ID** – in this case, Kartris will go direct to this order.

6.1.4 Customers

If a customer makes contact about an order but does not have the order ID or exact date to hand (perhaps because they entered a bad email address and did not receive the order confirmation), then the customers page can be used to find the customer record.

Click 'Customers > List/Find' and then enter either:

- **Partial/full customer name**
- **Partial/full email address**

In both cases, partial values can be used so if the full name does not get

a match (because the name was in a different format was misspelled), searching with just the surname or first name, or just the email domain, might get a match.

Once you local a customer record, there is a link from each record of the customers list as well as from individual customer record pages to find all orders made by this customer.

6.1.5 General search

The main cross-site search box in the back end will find orders by the order ID.

It will also find customers by name or email address, or by partial matches.

6.2. Processing Orders

There are 4 stages for orders to move through. These are indicated by 'Order Status' checkboxes when viewing an order in the back end.

- **The order has been sent to the store owner** – this box is checked when an order is successfully placed. Sometimes we refer to this simply as 'sent'.
- **An invoice for payment has been issued** – this box is checked manually in the admin section to record that an invoice has been issued to the customer for payment.
- **Payment has been received** – this box indicates that payment for the order was successfully received. In the case of an online payment, the callback process normally triggers this box to be checked automatically when a successful payment is made.
- **The order has been dispatched** – this typically signifies that the order process is complete where payment was received via the web site. It is checked manually by the store owner once the order has been shipped. For orders that have been invoiced, this is of course not the end of the order process as payment is still awaited.

In the most common scenario where a customer makes an online payment for the items in their basket, the first three boxes will typically be checked, leaving only the dispatch of goods to be manually changed on the order.

6.2.1 Order progress

The 'Order Progress' box is normally updated automatically for online payments just to confirm the payment, but the admin user can add extra comments and choose whether to send the status update to the customer by email. This is a useful way of notifying the customers of shipping delays or any other issues that might affect their order. These comments can be viewed from the 'My Account's section if the customer

logs in to check the order progress.

6.2.2 Issuing invoices

There is an 'Issue Invoice' link from each order. This can be used to view a print version of the invoice for printing if you require a customer be sent a print copy with their order, or by post to request payment. Note that viewing or printing this invoice does not automatically check the '**An invoice for payment has been issued**' box. That box must be checked manually by the admin user to confirm that the invoice was sent to the customer.

Customers may view invoices from within their 'My Account' section in a print-ready format so some stores may decide to use this as the primary delivery method for invoices and receipts.

6.2.3 Batch process

To change the status of multiple orders in one go, select 'Orders > Batch Process'.

7 Customers

Although we use the term 'customers', the user records created in Kartris can actually be for people who may not have purchased anything on your site. For example, a user can create an account on the system in order to create a wish list, or save baskets, or sign up to the news letter.

If these users decide to purchase at a later date, they will use the same account that they created previously.

By keeping all user data linked to a single account (which is unique for an email address), it is easy for both the store owner and the customers themselves to see order history and access other features of the software.

7.1. Finding Customers

You can click through to a customer from any order record in the back end.

On the Customers page ('Customers > List/Find'), you can search by part of the email address, name, company or by the ID number. If you enter a number alone that matches exactly an ID number of a customer in the database, Kartris will take you directly to that customer's user record.

7.2. Customer Groups

If you deal with certain types of customers such as retail customers, wholesale customers, preferred customers, etc. you may find it useful to group these customers so that you can easily find all similar customers or apply certain benefits and restrictions to them. The customer group functionality in Kartris can be accessed by going to 'Customers > Groups').

7.2.1 Managing groups

The interface lists all the customer groups, and has special links to 'affiliates' and 'mailing list', which are special built-in customer groups. You can edit a customer group and apply a % discount to members of that group. This discount will be applied when the customer checks out. The discount is applied to the value of items in the order, excluding shipping and handling.

7.2.2 Restricting access to certain products

One of the common requirements of an online store is to hide certain categories and products from all but specific customers. When editing a category, product or version, you will see a dropdown menu selection for 'Limit by group'. In this way, you can link a category, product and/or version to a specific group. In this case, only customers who are logged in to the front end and are members of the appropriate group will be

able to see these items. Other customers will not see them, or be able to find them in searches.

7.2.3 Creating unique prices per-item, per-group

Although customer groups functionality allows you to set a % discount for each group, you may find that this does not give you the direct control you need. You may want to individually price certain items for a specific group, so for example it might be \$15.00 for retail customers, or \$13.25 for wholesale clients.

Kartris has a tab under versions labeled 'Customer Group Prices' where you can override the price of any version for each customer group. Leaving the price at zero for any group will mean that the item for that group will be at normal price (and not zero!).

7.3. Customer Settings

7.3.1 Customer discount

You can set a % discount for each customer if you wish. This will apply a % discount to the value of all items within the order, excluding shipping, handling and any other costs. This is in addition to any customer group discount applied so care should be taken to not give double-discounts inadvertently.

7.3.2 Change customer password

In Kartris, passwords are hashed for additional security. This means that the raw password is not stored in the database; instead, a function called a 'hash' is used to scramble the password, and this scrambled value is stored. When a customer logs in, the password they give is also scrambled and then compared to the stored scrambled password to make sure they match.

Because the raw password is not stored, the system cannot send the password to the customer as a reminder because the hash is not reversible. Therefore if a customer loses or forgets their password, it must be reset. There are two ways to do this (1) the store owner can change any customer password from the back end (2) the customer can request a password change from the front end.

IMPORTANT

In the first case above, you should always be careful when customers request a password change on the telephone or by email that you are absolutely 100% sure that the customer is the genuine owner of the account.

In the second case (online request to change password), the customer will be sent a link to the email address of their account that is valid for a limited period (1 hour) and that will allow them to reset their password.

7.3.3 Change customer email address

There is no way for a customer to change their email address on the front end of the store. The email address is assumed to be unique, and therefore we use this as the username. To avoid various issues with changing email addresses (including verification of the new account to ensure that its owner accepts the change and the problem of existing accounts), we have made changing email addresses a back-end only feature at present. If a customer needs to change their email address, then it is possible for the store owner to do this.

The Kartris back end will check that the email address is not already in use (so you cannot have two accounts with the same email), but it will not check that the owner of the new email address consents to the change (i.e. that the person making the change owns the new account), or that someone requesting the change (by telephone or email) is actually the owner of that account.

IMPORTANT

For security reasons, you should always be careful when customers request an email address change that you are absolutely 100% sure that the customer is the genuine owner of both email accounts. The best way is to write to both the old and new addresses separately and get a reply from both (a reply that includes your original email text). It is vital that you don't inadvertently hand control of an account to a third party due to lax security procedures. Although they could not access credit card data, they would be able to access personal details such as address and phone number as well as order history.

7.3.4 Approve for special payments

Most payment gateways have a setting 'AuthorizedOnly'. If checked, this means that only customers whose accounts have the 'Approve for special payments' box checked will see this payment option at checkout. This is most commonly used for payment methods you may want to restrict to trusted customers, such as 'PO_OfflinePayment' (where a customer can order goods without a credit card and the invoice is sent to them for payment later).

If the 'AuthorizedOnly' box for a payment method is not checked, then this payment option is available to all users.

If the 'AuthorizedOnly' box for a payment method is checked, but the user is not approved for special payments, they will not see this option at checkout.

7.3.5 Language

When an account is created, Kartris will store the current language in the account record so that it can be used for any communications later. It is also useful to know the preferred language in case you need to contact a customer about something.

7.3.6 Affiliate details

7.3.6.1 IsAffiliate?

This determines whether the user has requested to become an affiliate or not (they can do this from a link in the 'my account' section on the front end). You can approve an affiliate by giving them a % commission above zero.

7.3.7 Mailing list

Kartris operates a strict 'opt-in' mailing list. This requires not just that someone sign up to the mailing list (including by clicking a link in the 'my account' section or checking a box during checkout), but also that they respond to the confirmation email that is sent automatically, by clicking the link within it.

7.3.7.1 Mailing list process

Over the years that we have produced e-commerce software, some customers have queried the need for the extra confirmation step, as they feel it reduces the number of sign-ups on the list. While it does indeed do this, the reason is clear: to prevent the addition of addresses by people who don't own those addresses (either accidentally or maliciously).

For example, I could sign up an email address of someone with a very similar email address to mine by accident. But I would not then receive the confirmation link, and so could not click it to confirm the address. Consequently, this bad address would not be added to the mailing list.

Your web host will not tolerate you continuing to mail to a list which has generated spam complaints because some addresses turn out to belong to people who were added without their consent, especially once they find it is because you did not confirm addresses properly. In such cases, the whole list is tainted. While 99% of the addresses might be genuine, you have no way of knowing which ones are not, and will have no choice but to discard the whole list and start again using proper opt-in confirmation.

So there is nothing to be gained from not using opt-in confirmation, because it is only a matter of time before you'd be forced to discard a tainted list and start from scratch with it.

7.3.7.2 Mailing list details

The mailing list details are stored for reference, so that if asked by your host, you can provide the sign-up date/time and IP, and confirmation date/time and IP for any email address. You can also provide proof that your system is coded to ensure only confirmed opt-in can be used.

7.4. Affiliates

Affiliates are organizations and individuals who refer customers to the store via a specially coded link. In return, the affiliate will be given commission based on the sales generated by those they refer.

7.4.1 Becoming an affiliate

A customer/user record can be an affiliate if two conditions are met:

1. **The 'IsAffiliate' box is checked** – the customer can set this by applying to become an affiliate through the 'my account – affiliate referrals' section, or you can set it manually.
2. **The affiliate commission is set above 0%** - this can only be done by a store admin on the back end of Kartris. In this way, each affiliate must be manually approved by an admin before their relationship with the store is confirmed and active.

7.4.2 What the affiliate needs to do

One approved as an affiliate, a user can see their status change in the 'my account – affiliate referrals' section. They are presented with a link such as:

<http://www.demo.xyz/?af=184>

The 184 is the customer/user ID number, and can be passed to the home page.

7.4.3 Awarding commission

When a new customer follows an affiliates link to a store powered by Kartris, the store sees the affiliate ID and records this in the customer's session. A 'hit' is also recorded, indicating that the link resulted in a customer visiting the site.

If the new customer goes on to make a sale, two things happen.

Firstly, the new customer's record is permanently tagged as 'belonging' to the affiliate who referred them.

Secondly, the affiliate will be credited with commission for this order, which will be the % of the total value of the order minus shipping, and any discounts.

7.4.4 Returning customers

If a new customer's record was tagged as belonging to a certain affiliate as described above (see '7.4.3 Awarding commission' on page 44 above), then if the return at any time in the future to make further orders, the affiliate will receive commission on these too.

If an existing customer who does not belong to any affiliate follows a

referral link and subsequently makes a purchase on this visit, they will from that point on 'belong to' the affiliate whose link referred them. The affiliate will receive commission for this sale and any future sales made to the same existing customer.

7.4.5 'Double' affiliates

It is not possible for a customer to 'belong' to multiple affiliates. Therefore, a customer who 'belongs' to a certain affiliate will remain as such regardless of whether they follow any other affiliate's links in future.

The original affiliate will receive any commissions on sales to a customer who they referred originally, even if that customer has followed another affiliate link on subsequent visits.

This is to ensure that affiliates cannot be 'poached' later to deny the original affiliate credit for a customer they referred.

7.4.6 Using affiliates to track incoming links

A store owner may have external advertising or links that contribute traffic to his or her site. Advertising networks such as Google AdSense provide fairly detailed information on click-throughs, and even conversions when coupled with Google Analytics. However, sponsored links or forums or blogs may be harder to track.

It is therefore possible to use the affiliate system to track such links, but setting up each link as a separate affiliate. This will require either using bogus email addresses, or setting up multiple new addresses. But it will mean that you can then ask your partners to use a specific URL you give them (see '7.4.2 What the affiliate needs to do' on page 44 above), so all incoming traffic, and the sales generated can be monitored.

7.4.7 Viewing referrals and commission

Affiliates can view both hits and sales that resulted from their referrals from the 'my account – affiliate referrals' section on the front end.

Store admins can view similar information by going to 'Affiliates > Affiliate Stats'.

7.4.8 Paying commission

Payment information to the affiliate can be viewed from the 'Payments' link from the customer record in the customer listing. This will show the affiliate's total commission earned, and the value of any payments made to them.

Any commissions earned that have not been paid yet will be listed. If you pay a commission (or issue a coupon for it instead, if your terms are to pay commissions as discount coupons instead of as cash), you can check the box next to the commissions paid and click the 'Set as Paid' button. A payment for the total amount will appear below, while the commission

records will disappear. If you make a mistake, or cancel a coupon/payment, just select 'Mark as Unpaid', and the commissions will be unpaid again.

8 Promotional Tools

Kartris contains a number of features that enable you to draw attention to particular items or provide special prices that will encourage purchases.

8.1. Promotions

Promotions are special offers that provide some benefit to customers if the order meets certain criteria. Offers such as 'buy one, get one free' are classic examples, though the Kartris system is somewhat more flexible than this.

Promotions can be created and managed by going to 'Products > Promotions' in the back end.

8.1.1 Limiting the number of promotions

Promotions can rapidly cause major problems when they overlap, as it creates many more possible options as to what rules should be applied.

For example, if you have a **buy two 'A' and get 'B' free** in a store that also has **buy two 'A' and get 'C' free**, you are effectively giving both B and C away when the user buys two of 'A'. Other problems can occur when one of the 'free' items (B or C) in the case of the above, also earns some promotion discount. For example, if you had another promotion **buy B get D free**, then the item B (which is free thanks to one of the promotions above) also results in a free item 'D'. So the purchase of two 'A' now gives B, C and D for free. Probably not was intended when each promotion was created.

To limit the chance of multiple promotions, stores may wish to limit the total number of promotions that can be triggered in a single order. The config setting **frontend.promotions.maximum** can be set to zero for 'no limit', or any number above to limit promotions.

8.1.2 Creating a promotion

When clicking the 'New' link, the promotion form comes up.

The promotion can be given a name, in multiple languages if you store supports that, and a checkbox can be set to determine if the promotion is 'live' (available) or not.

8.1.2.1 Start and end dates

A promotion must have a start date and end date. If you wish to make the promotion effectively permanent, you can give it an end date a long way in the future. To get dates entered in the correct format (reverse dates – which eliminates the ambiguity between month-day-year and day-month-year formats), as well as to save time, you can click the calendar icon and select the date.

8.1.2.2 Max quantity

The 'Max quantity' field gives a way to limit the number of each particular promotion that can be added to each order.

8.1.2.3 Sort value

As detailed above (see '8.1.1 Limiting the number of promotions' on page 47 above), it may be desirable in some cases to limit the maximum number of promotions that can apply per order to avoid situations where overlapping promotions inadvertently cause the store to give away more than intended. In such cases, setting a sort order value for each promotion helps determine which promotions will be selected. For example, if the items in the basket would trigger 3 promotions, but the number of promotions is limited to 2, the two with the highest sort order settings will be retained and the other discarded.

8.1.2.4 Parts 'A' & 'B'

Promotions consist of two sides – the first being what the customer must spend or purchase, and the second being what they receive as a result. We refer to these as part 'A' and part 'B' for simplicity.

On the promotions page, part 'A' is set on the left hand side, and part 'B' on the right hand side.

From the first dropdown menu of part 'A', the type of promotion can be chosen. Once a type is selected, textboxes will appear to let you specify further information. For example, if you select buy [X] of [P] (buy a certain number of a certain product), a textbox appears for the quantity (X). Enter a whole number. A second textbox also appears for the product (P). Enter the name or part of a product name here, and the filtered box will display the options. Select the appropriate one, and it will be entered to the textbox. The last step is to click the 'Add' link to add this new pattern to part 'A'. It will turn into a blue link just below the dropdown menu.

Note that you can add multiple requirements to part 'A'. So you could have a requirement to buy one product D, **and** spend \$10, for example.

The next step is to fill out what the customer receives on part 'B'. The process is similar to that for part 'A'. Again, remember to click 'Add' to register your selection. You can create multiple received items too.

8.1.2.5 Adding an image

You can optionally choose to add an image for a promotion.

8.1.2.6 Full list of promotion types

Part 'A':

Buy [X] of version [V] – e.g. buy 2 barbecue beans, small size

Buy [X] of items from category [C] – e.g. buy 5 items from 'books'

Buy [X] of product [P] – e.g. 1 barbecue beans (any size)

Spend [£][X]

Part 'B':

Get [X] of [V] for free – e.g. get 1 barbecue beans (small size) free

Get [X]% off [V] – e.g. get 10% off barbecue beans (small size)

Get [£][X] off – e.g. get £5 off

Get [X] of [P] for free – e.g. get 1 floor mat (any colour) free

Get [X]% off [P] – e.g. get 5% off 1 floor mat (any colour)

Get [X]% off items from category [C] – e.g. get 15% off any book

Key:

[X] = a whole number

[V] = a specific version of a product

[P] = a product (any version)

[C] = a category

[£] = the default currency (£, \$, etc. depending on your store)

8.2. Related Products

Cross-selling means being able to sell an additional product or service to an existing customer. One powerful way to do this is targeted links between certain products that might appeal to similar buyers, or are related. For example, if you sell electronic items, you might wish to link through to the appropriate batteries or carry case.

8.2.1 Nature of links

Related product links are one-way in that if you create a link from product 'A' to product 'B', there will be no link from product 'B' to product 'A' (unless you create this separately of course). The logic is probably obvious – in the case above regarding batteries, you would not want to visit the battery page and see links to every single electronic item that links to this type of battery.

8.2.2 Creating and editing links

Navigate to a product page and click the 'Related Products' tab.

In the text box, start to type the name, or part of the name of the

product you wish to create a link to.

A list of products will appear – select the correct one. Then click 'Add New' and it will appear below. You can repeat the same process to relate more products with this one.

You can delete any relationships from the list too.

Finally, click 'Save' to store the changes.

8.3. Coupons

Coupons, sometimes referred to as gift certificates, are special codes that can be entered by a customer before checkout to obtain some kind of discount (fixed or percentage).

Coupons can have various restrictions on use; from the time period during which there are valid to the number of times they can be used.

8.3.1 Creating coupons

Navigate to 'Miscellaneous > Coupons' – you will see a list of previously created coupons (if any), and a link to create new ones.

You can choose the type of coupon discount (fixed amount or percentage), the start and finish date of the coupon, and whether the coupon is reusable or not. Coupons that are not reusable will expire when used.

The 'coupon code' checkbox lets you choose whether to enter the coupon code yourself. This way, you can choose something short, memorable and easy to type. This is useful if you create multiple use coupon codes to publish in an advertisement for example.

If you want to create multiple coupons of the same kind in one go, then the store will name them with pseudo-random codes.

You can disable and re-enable any coupons from the listing.

You can delete coupons only if they have not been used. Any coupon that was used for an order is protected from deletion, so the record of it will always remain.

8.4. Customer Discounts

See '7.3.1 Customer discount' on page 41 above.

8.5. Customer Group Discounts

See '7.2.1 Managing groups' on page 40 above.

8.6. Quantity Discounts

It is a common feature of many transactions to provide discounts for quantity to encourage bulk purchases. Sometimes this is referred to as 'price breaks'.

Kartris has a flexible quantity discounts system that allows unlimited price breaks for any quantities specified. This is set at version level (since it is the version that holds the price info).

Simply click to edit a version, and then click the 'Quantity Discount' tab.

Enter the quantity break point, and the price for purchases of that number or more. Note that the price you must enter is per item, so prices should go DOWN as the quantity goes up.

IMPORTANT

Make sure you enter the discounted price PER ITEM, and not for the total number of items. For example, if an item is normally \$9.99, and you set up a quantity discount for 10(+), then the price should be LESS than \$9.99 (i.e. \$8.99) and not \$89.90 (the price of 10 items). This is because the price applies for any quantity of 10 or above, not just 10 items.

If quantity discounts are available, the user will see a link for quantity discounts on the front end when viewing the product.

If a user adds 5 items into the basket (below the price discount level) and then later adds a further 6, the system will automatically pool these together and apply the discount from that point on. Similarly, if a user adds 10 items (with discount) and then removes one from the basket, they will immediately be recalculated at the normal price.

9 Content Management

Kartris is essentially a content management system (CMS), in that it provides a framework to manage categories, products and so on. However, in the context of this user guide, we refer to 'CMS' functionality when talking about features that manage additional content to the core product data.

9.1. Language Strings

Kartris contains a large amount of text content relating to basic site features, such as 'Shopping Basket', 'Search', 'Submit'.

Rather than hard-code these values into pages, we store these various words and phrases in the Kartris database, and pull them out as necessary on particular pages. We called these 'language strings'.

This system gives a number of advantages over hard-coding text into .aspx files:

- The text content and the page functionality are separated, so each page can be made to support multiple languages.
- Having all text in the database means you can change text instantly through the back end, without having to change any files.
- The .aspx files themselves can be replaced (with newer versions that fix bugs, for example) but this does not overwrite the actual text they contain.
- The text values can be located quickly and easily with a search in the back end.

9.1.1 Finding and editing language strings

Go to 'Regional Setup > Language Strings'.

You will see a paged listing of all the language strings in the store. A search term and filters can be applied. For example, search for 'shopping basket' – you will see that any language strings containing the text 'shopping basket' are located.

The name of the language string is typically a good indication of where it is used. For example **PageTitle_ShoppingBasket** is clearly the title used on the shopping basket page, but will generally be used elsewhere too such as on menu links to the shopping basket.

This search functionality applies to both the name of the language string and the value of it. If you find some text on the front end that you wish to change (for example, if you want to change 'shopping basket' to 'cart'), simply search for the text 'shopping cart', find the appropriate string in the results and edit it.

9.1.2 Cannot locate a language string

In some cases, you may have found text on the front end that you wish to edit, entered this into the language string search, but found no results.

There are a number of possible reasons.

Most likely, the text you copied is not part of a language string. For example, it might be product text, text from a custom page or part of a news item. Language strings are only for text that is general text for Kartris features and pages (i.e. what would be present even in a store that was completely empty of any content).

Another possibility is that you have copied text that is formed with more than one language string – try trimming down the text and searching again.

9.1.3 Strings translation

There is a second tab on the language strings page headed 'Strings Translation'.

This lets you list all the language strings in order to aid translation from one language to another.

You can select (for example) English and Arabic, and then search. You can also filter results as above.

This tool helps aid translating Kartris from English to a new language.

9.2. Custom Pages

Most sites will want to add additional pages of information about the site, the business, and so on.

Kartris provides a simple way to do this: go to 'Miscellaneous > Custom Pages' and you will see a list of all additional content pages added to the site.

9.2.1 Creating or editing a page

Click the 'New' link or 'Edit' on an existing page record.

You can set the ID (name) of a page, which is the value used to call that page on the front end (or the text part of an SEO friendly link, if those are activated – see '11.2.3 Overriding default URLs' on page 59 below).

There is a dropdown menu to select the 'parent' page. In this way you can control the page hierarchy displayed in the breadcrumb trails on the page, by creating a nested structure of pages.

Clicking the small icon to the bottom right of the 'text' field will bring up a WYSIWYG editor.

9.2.2 Linking to pages

Pages that you create will not automatically have links to them. You should ensure therefore that you place appropriate links to enable navigation within your skin's masterpage, or in the parent custom page (if the page is a child of another).

9.2.3 The default page

There is a custom page record called 'Default' (or if you deleted this, you can recreate it). This contains the content of the free text area on the home page of your web site.

9.3. Site News

The default front end setup on Kartris typically supports several news story clips that link through to the full news story.

You can change the maximum number of stories that display with the **frontend.news.max** config setting.

These are pulled dynamically based on the 'date created' field.

As you enter newer stories in the back end, so these will push the older ones off the home page.

Story content can be entered with the WYSIWYG editor by clicking the icon to the bottom right of the story content field. Note that in the front end, any HTML will be stripped when displaying story clips or summaries (which are truncated). This is to ensure that the truncation does not result in text where an HTML tag is opened but not closed, or cut in two (so it opens but does not close). In such cases, broken HTML would result and could affect the display of the whole page.

10 Support Systems

Kartris contains built-in facilities to handle customer support through your web site.

These include a searchable knowledgebase system that you can load up with articles relating to specific products or technical issues, and a support ticket system that allows you to handle support from customers in a managed way, instead of via a slew of emails.

10.1. Knowledgebase

The knowledgebase features can be turned off (so they are hidden on the front end of your site) using the **frontend.knowledgebase.enabled** config setting.

To access the knowledgebase features in the back end, go to 'Support > Knowledgebase'.

10.1.1 Keywords

Articles can be created with just a name (display title), text (details) and page-title tag (for search engines). It is also suggested to use keywords; as well as populating the meta-keywords tag on the page, these keywords are also searched as part of the knowledgebase search on the front end. It is useful to add alternative spellings or names for certain things, or common misspellings, to ensure that articles have the best chance of being found with the knowledgebase search.

10.2. Support Tickets

10.2.1 Drawbacks of email support

The vast majority of web sites provide email support to customers. However, there are a number of problems with such a system, especially on busier sites, or those that sell a highly technical product where premium support might be available.

- Email is a direct communication between two users. If customers are told simply to mail support@mydomain.xyz, then you need to devise a way to break this mail up to various staff if the workload is more than one person can manage.
- Once a customer is in discussion with a certain member of staff, then only that member of staff will receive the follow up emails. If they are away, the messages will go unanswered.
- Very often, support issues need information to be bounced back and forwards. With a busy email box, it can often be hard to tie previous replies to the more recent ones, especially if they are spread over a longer period.

- Email is not linked to your customer database, so there is no way to easily confirm that you are receiving mail from someone who has actually purchased from you, or who is entitled to the support they are claiming without time-consuming checks.

10.2.2 Advantages of support ticket system

The Kartris support ticket system provides a web-based alternative for dealing with technical and sales support that has a number of advantages.

- Tickets go into a pool, with any member of staff being able to take them from the back end. Even staff in multiple offices can provide support.
- If a customer is in discussion with a member of staff who is absent or unavailable, another staff member can easily take over the ticket and ensure that support continues to be provided, unlike email where it may be problematic to access an absent staff member's email.
- The ticket system keeps the original support request and subsequent replies from staff and the customer in a chronological thread.
- The support ticket system is based around the same customer records that order history and other account-related features are linked to. It allows you to access further customer information easily from the support ticket. It also means that the customer's ability to post tickets can be linked to their account status. The system effectively controls access to support, so only those entitled to it are given it.
- Having support issues all contained within the database creates scope to monitor performance, as well as search for similar issues. Kartris keeps track of the time taken in responding each time, so a total time for each ticket and customer can be calculated.

10.2.3 Dealing with support

Support tickets opened by customers will show up in yellow in the back end support tickets view when they are still unassigned to a staff member. Once a site admin views the ticket and assigns it to themselves (the simplest way is using the 'Me' link next to the 'Assigned to' menu), they can reply to it.

The customer will receive an email when the ticket is updated. They should enter any follow up comments through the web site rather than by responding to the email, to ensure all comments are linked to the thread. The ticket will show as light grey in the listing.

Once a customer has replied, the admin responsible for the ticket will receive an email notification. The ticket will show again as yellow,

meaning that action is required.

Once an issue has been resolved, the ticket can be closed. At this point it will change colour to dark grey.

The status can also be set as 'not sure' or 'unresolved'. Tickets will generally be set to this when you wish to highlight them for future attention rather than immediate attention.

10.2.4 Statistics

Kartris shows a number of statistics on each ticket, including the number of tickets raised by this customer, the total number of messages and the total time taken on tickets for this customer (in addition to the time taken for this ticket, which is under the ticket details on the left hand side).

11 Search Engine Optimization

Often referred to simply as 'SEO', this covers the various design aspects of a web site that improve the performance of it in search engines.

Kartris is designed to provide good SEO performance as default, with various options that enabled fine-tuning and extra improvements, with a little extra time and effort.

11.1. Domain Forwarding

Kartris is designed to run on a single domain, which also benefits search engine performance.

See '2.3.1 Domains' on page 9 above

11.2. Meta-Tags

Meta-tags is the term used to describe three common HTML tags that appear in the 'HEAD' section of the HTML code of most pages:

```
<meta name="description" content="Content Here" />
<meta name="keywords" content="Content Here" />
<title>Content Here</title>
```

The 'title' tag contains the text that will display at the very top window bar when the page is open in a browser. It is also the page title that a search engine will typically show as the main hyperlink in its search results.

The meta tag for 'description' gives a summary of what the page contains. Typically this will be the additional text just under the hyperlink in a search engine result.

The meta tag for 'keywords' contains extra keywords that are relevant to the page but is not displayed in search results, and seems to have a lower priority in terms of the effect on results.

Because Kartris forms pages around a standard template, these tags are not present in the template; instead the tags are created dynamically by Kartris for every page.

11.2.1 Defaults

You can set the Kartris defaults for the meta-tags using the following language strings:

ContentText_DefaultMetaDescription

ContentText_DefaultMetaKeywords

In places where no other data is available, Kartris will fall back on the

values here. But in most cases, it will find more page-specific data to use if possible.

11.2.2 Overriding default meta-tags

Kartris will do a fairly good job of filling meta-tags and page title for pages automatically. For example, on a product page, it will use the product name in the title tag, and fill the description with a truncated section of text from the product description. The keywords will generally use the **ContentText_DefaultMetaKeywords** value.

But you can override these default values in many cases.

For example, when creating or editing a product, category, knowledgebase article or custom page, you can open extra fields with the **[+]SEO** link. This allows you to override the default values that Kartris will insert, and specify the exact text you want to appear.

This can be useful if you want to keep the product or category name short and concise, but have the page title itself longer and with more keywords to help improve page indexing.

11.2.3 Overriding default URLs

Kartris can format 'friendly' URLs (see '11.3 Friendly URLs' on page 59 below). You may wish to optimize the text/name part of the URL for products and categories using the **URL Name** box. This allows you to replace the default value (normally the item name) with whatever text you prefer to use.

11.3. Friendly URLs

On database driven applications like Kartris, a single page such as **Product.aspx** is used to display every single product in the store. Since extra information needs to be passed to it to tell it which product to display, the URLs (web addresses) typically contain extra parameters and values passed to the page.

For example:

`http://www.demo.xyz/Product.aspx?ProductID=10`

As more information is passed, the URL can become longer and messier.

Although search engines will (contrary to popular belief) index these pages, it can typically take longer, and they may not index as many pages on your site as they would if each page was truly separate.

To overcome this, Kartris at default creates 'friendly' URLs, which appear like static page addresses (rather than a single page with dynamic information passed to it as parameters). When properly configured, this will make the site appear (both to users and search engines) as a collection of 'static' pages in a folder hierarchy, just as if every product was on its very own page and these pages were sorted into folders.

11.3.1 Turning friendly URLs on/off

You can turn friendly URLs on or off from the **general.seofriendlyurls.enabled** config setting.

11.4. Canonical Tag

One frequent point that SEOs (search engine optimizers) raise is the so-called 'duplicate content penalty'. The claim is that having a page accessible with multiple URLs will harm search engine ranking, or even (according to some SEOs) have you booted from Google for spamming.

In reality, as the official Google blog makes clear (see link below), you will **not** be penalized for this. In fact, Google will even do a good job of recognizing multiple URLs that point to the same page, pooling them and their page rank.

<http://googlewebmastercentral.blogspot.com/2008/09/demystifying-duplicate-content-penalty.html>

But in order to eliminate any doubt, Google, Microsoft (Bing) and Yahoo all now recognize the 'canonical' tag. This lets you specify within the source of a page which URL that page should be indexed as. So even if it is reachable through multiple navigation routes, you will tell Google the preferred URL to use. Kartiris forms canonical links automatically within pages, so you don't need to activate anything in this regard.

11.4.1 Why don't you use 301-redirects instead?

301-redirects as a method of getting the preferred URL indexed predates the canonical tag. The problem is that it loses 'location awareness' in a URL. For example, a product 'laptop' can be in multiple categories, and the folder hierarchy in the URL will be different as well as the breadcrumb trail.

Using 301-redirects means that end users, as well as search engines, only get to see a single URL, and therefore lose location awareness through the hierarchy and breadcrumb trail.

Using the canonical tag is better because it allows us to pass location specific information through the URL, giving users a clear idea of where the product lies within the category structure, while at the same time ensuring that search engines only see the same unique product URL.

12 Visual Customization

DEVELOPER

This sections contains a lot of information intended for developers using the Kartris software. While it is possible for users who are relatively tech savvy (familiar with HTML and CSS) to skin their own site, the majority of end users will benefit from hiring a web developer to do this for them.

A developer should not necessarily require either specialist Kartris or ASP.NET knowledge to develop a skin for Kartris, though use of, or access to a Windows server is essential in order to run and test the skin with Kartris.

While it is possible to use a standard template with minor alterations, many businesses will want to develop a more unique appearance.

12.1. Skinning Overview

Skinning is the process that enables a web site to have its appearance changed across many or all of the pages by means of a template or theme, or both.

The Kartris system uses ASP.NET's built-in skinning facilities as the basis for its skinning system.

12.2. Kartris Skins

There are actually two aspects to the skinning system – 'master pages' and 'themes'. In previous versions of Kartris, these were located in the default Microsoft locations - the */MasterPages* folder and the */App_Themes* folder.

From Kartris 1.3 onwards, these were merged into a single folder. This means that both the masterpage and CSS theme can be changed from a single selection, as well as putting all the files and embedded images in one place, making them easier to package and install or copy to other locations.

The 'Admin' skin is a required skin which is used for the back end admin area. It is not compatible with the front end of Kartris.

The 'Kartris' skin should not be removed, even if unused, as this is the default front end skin that Kartris always assumes is available.

12.2.1 Selecting a skin

By default, Kartris will use the 'Kartris' skin for front end pages. A selection of other skins ships with Kartris; these can be selected from the back end on a per-language basis. Go to 'Regional Setup > Lang & Email Setup' and then choose the language. You can choose the skin to use, and then optionally the masterpage within this (by default, Kartris will use the 'Template.master').

We made the skin switchable at the language level because some

languages can benefit greatly from having a different skin. In particular, right-to-left languages like Arabic and Hebrew will normally have reversed layout and altered CSS, as well as alternative fonts.

Alternatively, you might decide to have a single skin with multiple masterpages for each language instead.

12.2.2 Masterpages

Each skin has at least one masterpage file called 'Template.master'. The masterpage is the basic template for the structure of pages throughout the site. It is largely HTML but supports special ASP.NET tags called *user controls* which can be used to embed dynamic content within it. A masterpage can also have VB or C# code associated with it.

By default, Kartris will look for and use the following master page files in front end skins:

- **Template.master** – the main template for the site
- **HomePage.master** – the home page of the site will first look for this file; if it is not present, it too will use the 'Template.master' instead. By having a 'HomePage.master' file, you can have a different look and feel for the home page than for the rest of the site – quite a common design requirement.

You can select the masterpage within a skin to use for each language if you want to override the default 'Template.master' for a particular language.

12.2.2.1 Custom masterpages for particular sections, pages or customers

Some sites may wish to use a customized skin for one section of their site. For example, a wine site may wish to add a French, Italian or Australian feel to sections selling wines from those countries. Alternatively, some sites with dedicated account ordering for a particular client may wish to co-brand the site with that client's logo.

To deal with such cases, Kartris's skin system has a special skin config file in the 'Skins' folder. In the default Kartris install, this is called 'Skins.config.sample' – it would need to be renamed 'Skins.config' in order to take effect. It looks something like this:

```
<?xml version="1.0" encoding="utf-8" ?>
<configuration>
  <CustomerSkinRules>
    <!--<Customer ID="12" SkinName="Classic"/>-->
  </CustomerSkinRules>
  <CustomerGroupSkinRules>
    <!--<Customergroup ID="34" SkinName="Classic"/>-->
  </CustomerGroupSkinRules>
  <ProductSkinRules>
    <!--<Product ID="56" SkinName="Classic"/>-->
  </ProductSkinRules>
</configuration>
```

```

<CategorySkinRules>
  <Category ID="7" SkinName="BlackAndOrange"/>
</CategorySkinRules>
<ScriptSkinRules>
  <!--<Script Name="Checkout.aspx" SkinName="Classic"/>-->
</ScriptSkinRules>
</configuration>

```

In the above example, only one 'category' rule is active – category with ID of 7 will use the skin 'BlackAndOrange'. The others will use the default skin specified for each language instead. You can add rules for multiple categories within that section if you wish – same applies to the other sections.

12.2.2.2 Code behind

The top of each page (aspx file) references the default masterpage:

```

<%@ Page Language="VB" AutoEventWireup="true"
MasterPageFile="~/Skins/Kartris/Template.master"
CodeFile="Product.aspx.vb" Inherits="Product" %>

```

You can override the default masterpage for this page from here, but it is advisable to use the functionality of the 'Skin.config' instead as it is easier to control, and easier to see from one place which pages are using which masterpage.

12.2.3 CSS

A skin also contains CSS (cascading style sheets) files and associated images that control the layout and styling of page elements within Kartris.

So whereas the masterpage may contain a two or three column layout with header and footer sections, it is the CSS that actually controls where these page elements appear on the page, how wide they are, and so on.

Furthermore, CSS control the fonts, colours, background images and other visual cues that can radically change the look and feel of a web site.

Links to the CSS files are included in each masterpage. Unlike the default 'App_Themes' functionality of ASP.NET, Kartris will not automatically find .css files inside a skin. So you must ensure your masterpage links to any CSS files your site uses.

To differentiate between the different elements controlled by CSS, we typically break up the CSS files within a skin into four files:

- **template.css** – this contains styles that refer specifically to the master page, such as the size and layout of major page elements like the header, footer, columns and so on.

- **general.css** – this contains styles that are used throughout the site, such as H1 and other font tags, table formatting, form field styling and so on.
- **sections.css** – this contains style information that refers to specific sections or pages of the Kartris, such as product page layout, column widths for the basket table, and so on.
- **menus.css** – this contains CSS for the various menu systems, such as the horizontal dropdown page menu, and the various category menus (fold-out, accordion, etc.)

We should stress that there is no technical reason why the theme needs to be divided up into these multiple CSS files – we do it purely to help break up what would otherwise be a very large file, and to (hopefully) make it easier to know where to find particular styles.

If you need to add your own styles, you could either add them to our existing CSS files, or you could create a new .css file in the skin you are using. Don't forget to add a link in the masterpage to it.

12.2.3.1 Tweaking our skins

For many users, one of our sample skins will give the general layout required. The task will then be to change colours and fine tune the size of elements. It's important to get used to the idea of finding the appropriate styles within the HTML source so you know what to modify.

For example, say you have a particular piece of text on the page whose colour you wish to change. The process will be to view the HTML source of the page, and then use the 'find' tool to search for this text. Around this text you should see the tags and their classes that apply to it. You can then search the .css files in the Kartris theme to find the appropriate item.

When working with CSS, a good toolbar on your browser can be extremely useful once you get familiar with it. We highly recommend Firebug and the Web Developer Toolbar for Firefox. Opera, IE and Google Chrome all have good web developer support available too. These toolbars can help you locate CSS styles quickly by simply pointing to items on a page, as well as (in some cases) letting you make changes dynamically to a cached stylesheet and see the changes in real time.

It's impossible for us to provide specific technical support on finding individual elements within the .css, as this can vary from skin to skin. Taking the time to become familiar with the great free CSS developer tools out there will pay for itself many times over!

13 QuickBooks Integration (BETA)

IMPORTANT

The Kartris support for QuickBooks is partially complete. It will presently not handle orders with promotion discounts or coupons. We are working to add support to these as quickly as possible.

QuickBooks is an accountancy program from Intuit. There are various versions offered with different levels of features and with specific country-related features. The country versions include the USA, UK and Canada. The different country versions have much in common, but have specific support for certain localized features. For example, the UK version supports VAT (value added tax), whereas the US and Canadian versions support the different types of sales taxes that operate in those countries.

13.1. QuickBooks Web Connector

In order that QuickBooks can 'talk' to online systems such as shopping carts, Intuit developed the QuickBooks Web Connector (QBWC), an extra piece of software. This is available as a free download from Intuit:

<http://marketplace.intuit.com/webconnector/>

The QBWC runs on the same computer on which QuickBooks is installed, and acts as middleware between QuickBooks and a special web service on your Kartris web site.

The QBWC supports a wide range of different QuickBooks versions, including the different country versions. For this reason, you don't need a specialized version of the QBWC for your specific version of QuickBooks. Check Intuit's documentation if you are not sure whether your version of QuickBooks is supported by the QBWC.

13.1.1 Installing the QBWC

IMPORTANT

If you are using an older version of QuickBooks (more than one year old) then you may get an error when using the QBWC. This seems to be because newer versions of the QBWC assume your system has some software installed that is installed by newer versions of QuickBooks, but not by older ones.

In this case, you should uninstall the QBWC, sign up to the Intuit Developer network and download the SDK (Software Development Kit). Install this, and then re-install the latest QBWC and it should fix the problem.

The QBWC must be installed on the same machine on which you run QuickBooks.

13.1.2 Further setup

Ensure that you have QuickBooks running, the QBWC running and that your Kartris web site is accessible and running.

In QuickBooks, go to chart of accounts, and add a new account called 'Kartris Store' – make it an 'income' account.

Then add a new non-stock inventory item called 'Kartris Order Item', and set it to belong to this account.

Now, in Kartris, go to 'Configuration > QuickBooks Integration'. In the **QBWC Password** field, enter your choice of password (this can be anything, but the longer the better for security purposes). Hit the update button to set this config setting.

Then you can enter a **Poll Interval** too – in minutes. The QBWC will check for new orders or information on this schedule.

The final step on Kartris is to click the button to generate a .qwc file and save this to your computer. In the QBWC interface, push the 'Add an Application' button at the bottom and browse to the .qwc file you just made.

Some confirmation screens will popup up – accepting these should create the link between Kartris and QuickBooks.

13.1.3 SSL support

The QBWC is hardcoded to require SSL (secure sockets layer) on remote domains. This is recommended since it encrypts the information transfer between QuickBooks and Kartris, which may contain sensitive information.

The QBWC will work however with any URL that contains 'localhost', presumably so that developers can test using a local web site. We have therefore coded Kartris to append an unused parameter 'localhost' to URLs, in order to permit operation on a live web site that does not have SSL – for testing purposes for example.

While this means that Kartris/QuickBooks integration will work on a live site without SSL, we would urge store owners to consider the benefits of SSL and not to risk using the feature without SSL. Intuit have hardcoded the use of SSL in for a reason after all.