



The CartIt Commerce System Installation Guide

On Windows Operating Systems

Version 8.0

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The CartIt Commerce System Installation

This chapter will provide you with the information needed to install the CartIt Commerce System Version 8.0 on a Windows-based Web server.

The last part of this manual will introduce you to CommerceBuddy. CommerceBuddy is a Windows-based program used in conjunction with CartIt. CommerceBuddy allows you to publish your shopping cart options and configurations.

Recommended Preparation

To successfully complete installation we recommend that you have access to the following software:

- Windows Notepad and WordPad, or other Text Editor
- WS_FTP FTP software, available in both freeware and shareware versions from <http://www.wsftp.com/>

System Requirements

The CartIt Commerce System

The CartIt Commerce System requires a Windows family Web server.

Core Requirements:

- Private cgi-bin
- PERL Version 5.x Interpreter
- SMTP Server
- FTP Access to Server
- Quality Commercial Hosting Account

TIP: Your private cgi-bin does not have to be called "cgi-bin". Your Web Presence Provider has provided this folder but it can be named anything. For example, you may call this folder cgi-local. Any name is suitable as long as the folder is designated for CGI scripts in the Web server configuration.

CommerceBuddy Windows System

CommerceBuddy is a Windows-based desktop application that enables you to connect to your Web server and retrieve your orders. This system requires:

- Microsoft Windows 9x/Me/NT/2000/XP
- Internet Explorer 5.0 or higher
- Pentium 166 processor (200Mhz processor recommended)
- 32 Megabytes (MB) RAM (64-128 MB recommended)
- 6 MB hard disk space
- 20 MB recommended for database to accommodate for growth, possibly more depending on the activity of your site

Getting Ready for Installation

Before you begin the install you will need to have some information from your Web Presence Provider.

You need to know:

- The location of the SMTP server.
- The name of your “cgi-bin” and the location of this folder

Most Web Presence Providers have this information published in online manuals, usually under information about Custom CGI Scripts or PERL Scripts.

If you are not able to obtain this information from your Web Presence Provider's Web Site, contact their technical support and they should readily have this information available to you.

What is a CGI-BIN?

A cgi-bin is not just any folder, a cgi-bin is a special folder designed to run CGI scripts. This folder can be named anything. It is important that you contact your Web Presence Provider or refer to your Web Presence Provider's support site for information on where your cgi-bin folder is or where it should be located.

Recommended Software

You should have an FTP program such as WS_FTP.

A reliable FTP program is WS_FTP, obtainable from <http://www.wsftp.com/>. They offer both a free and a commercial version of WS_FTP. The free version should work just fine, but the Pro version is worth the minimal fee.

Preparing the Server for Installation

Creating Two Folders (directories)

On your server, you will need to create two folders, one for the shopping cart and another for the data files.

You should name your shopping carts folder "carts" and your data folder "data". These names are recommended as folder names because they are easy to remember.

CartIt must be able to **read** and **write** to these folders. The “carts” folder will remain empty and you will not upload any files to this folder. However, you will upload files to the “data” folder.

WARNING: NEVER store any files in the “carts” folder. CartIt will create shopping carts, store them in this folder and remove them when they expire.

When you create these folders, note the paths to them. This is important and you will need to enter these paths later in the 'cartitcf.cgi' file.

Important Security Warning

You should place the 'carts' and 'data' folders in an area of your Web server that can not be read by everyone in the world. If you create these folders as subfolders of the cgi-bin, make sure that they are not available to read worldwide. However, CartIt must be able to read and write to these folders.

You should place these folders under your document root, outside of the public area of your Web site or **use IIS to block all IP addresses from accessing this folder (Your Internet provider can assist you with this);** this prevents anyone from accessing these folders. Keep in mind that CartIt will store credit card numbers in the 'data' folder temporarily until you retrieve them with CommerceBuddy.

Configuring the 'cartitcf.cgi' File

Within your install package, you will find the CGI script "cartitcf.cgi" in the cgi-bin folder. Open this file in Windows Notepad or other text editor. You have many variables to configure in this script, and the script itself has instructions before each line that you need to configure. We will not go into detail here because the instructions are in the file. However, we would like to mention a few points that may be a little bit confusing.

\$data_directory and \$carts_directory

Remember the two folders you created for the shopping carts and data? Two of the variables you will configure in this script include the full path to these folders. This path varies greatly from server to server, so if you are not an advanced user you may want to ask your Web Presence Provider what the paths are to these folders are.

Tip:

It is a common mistake by many users to enter the URL in these variables. This is NOT proper. You do not want to enter a Web address! You want to enter the path to the folder itself. Example: C:\WebSites\UsersAccounts\YourAccount\Data

Enter Your License Number

With your install package, you also received a license number. You must enter this license number in the "cartitcf.cgi" script.

TIP: Be very careful that your license number is entered correctly. It is a good idea to copy the license number and paste it directly into the script.

Uploading the CGI Scripts

Once the scripts have been prepared, they must be uploaded with an FTP program. You must upload these scripts to the cgi-bin. When you upload them, be sure you use ASCII mode, NOT binary mode. **It is always important that you upload these programs in ASCII mode.** If you do not upload these programs in ASCII, CartIt will not function correctly.

WARNING: DO NOT use any Web interface provided by your Web Presence Provider. This interface will cause corruption to the scripts. Also do not upload or access these files from Microsoft® FrontPage®.

Uploading the “data” Files

Within your installation archive, you have a folder called ‘data.’ All of the files in this folder must be uploaded to the ‘data’ folder you created on your server.

Remember to Upload These Files in ASCII Mode!

Checking the Installation

You can now access the “cartit_check_install.cgi” program. This program was uploaded with your installation process. This program will check all inaccuracies that may have taken place throughout the installation process.

You can access this program by typing the following at the URL:

`http://www.yoursite.com/cgi-bin/cartit_check_install.cgi`

When the script executes, it will provide you with additional information about the installation process.

If there are any inaccuracies, the “cartit_check_install.cgi” program will report these inaccuracies to you in the form of ERROR messages. If you receive an ERROR message, please correct these errors and then execute the “cartit_check_install.cgi” program again.

If you receive a server error message when you log on, it may be for one of the following reasons:

- 1) A 404 Not Found message indicates that you have the incorrect location. Check the URL you typed again. It is also possible that the Web presence provider is *hiding* *.cgi files and will not let the Web server find them. Make sure your Web presence provider allows you to run *.cgi files.
- 2) A “Forbidden” message indicates you did not set the script to execute. This may indicate that the folder itself is not allowed to execute CGI scripts, contact your Internet provider.
- 3) An Error Message (500) may occur for one of the following reasons:
 - a) You uploaded one or more of the CGI scripts in binary mode instead of ASCII mode.
 - b) You uploaded one or more of the scripts with a Web interface provided by your Web Presence Provider instead of FTP software.

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- c) You entered your license number incorrectly in cartitcf.cgi.
- d) Each variable line in cartitcf.cgi does not end with a semicolon(;).
- e) You accidentally removed one or more of the single quotes in cartitcf.cgi.
- f) Your upload was interrupted. This is not common, but it happens and you may want to re-upload the files in ASCII mode!

If there are no errors in the script, the following Web page will appear:

CartIt needs to know what invoice number (order number) and shopper account number you want to start with.

Starting **Invoice** Number

Starting **Account** Number

You must enter the starting numbers now, but it is extremely important that you **NEVER CHANGE THESE NUMBERS AFTER THEY HAVE BEEN CREATED.**

These numbers must remain unique for each order and account. CommerceBuddy will use these numbers for internal record referencing and modifying these numbers may cause data integrity errors.

Only Click Once!

The CartIt Starting Number Generation Page

The Starting **Invoice** (Order) Number can be any random number that you select. Please remember that this number will be incremental.

The Starting **Account** Number can be any random number that you select. Please remember that this number will be incremental.

WARNING: You can **NEVER CHANGE THESE NUMBERS AFTER THEY HAVE BEEN CREATED.** These numbers will be unique for each order and account. CommerceBuddy will use these numbers for internal record referencing and modifying these numbers will cause data integrity errors.

After you have entered the Starting Invoice and Account Numbers, click the **Create Starting Numbers** button. **This button will only run once.** After this button has been clicked it will NOT allow you to re-submit Starting Numbers.

The Congratulations Screen

Once you have submitted your Starting Numbers, you will see a default Congratulations Screen. As mentioned on this screen, your current password to access the CartIt system is "cartit". Please remember this password. You may change this password with CommerceBuddy. If you do not have a copy of CommerceBuddy, you may download a copy from the CartIt Web Site at <http://www.CartIt.com/>.

Completing the Installation Process

To complete the installation process for CartIt, you must run CommerceBuddy, the Windows-based commerce management tool.

Registering CommerceBuddy

Start CommerceBuddy if it is not already running. Click the Help button, then click About CommerceBuddy.

[Help] -> About CommerceBuddy

In this dialog box you will enter your license numbers and domain name.

Setting Up Connectivity

Now we want to confirm the location of commercebuddy.cgi on your Web Site. Start your Web browser and go to the following URL at your Web Site:

<http://www.yourwebsite.com/cgi-bin/commercebuddy.cgi>

or if you have SSL on your site:

<https://www.yourwebsite.com/cgi-bin/commercebuddy.cgi>

(Please note the 's' on the https URL.)

Make sure you type the URL to commercebuddy.cgi correctly; it will be in the cgi-bin on your Web site and will be named commercebuddy.cgi.

If you correctly typed the URL address, the text **Hello!** will appear on the Web page.

Connectivity Problems (NO "Hello!" Screen)

If you see the text "Hello!" on the screen then skip this section. If you receive a 500 Server Error message, then double-check your installation. Because we have already run the cartit_check_install.cgi script, we know that at least part of your installation is correct.

This tells us that the most likely problem is either the "commercebuddy.cgi" OR "cartitlib.cgi" file was corrupted during upload, including the possibility that it was uploaded in binary mode. You should upload these files again in ASCII mode, and then try to access commercebuddy.cgi.

If the "Hello!" screen appears, please perform the following steps:

1. Copy the URL address to your clipboard.
2. Open CommerceBuddy if it is not currently running.
3. On the main menu, click **Options** (located at the top left of CommerceBuddy).
4. On the **Options** menu, click **Vital Configs -> Net Connections Settings**.
5. Paste the URL address that you copied in Step 1 into the **Net Connections Setting** box.
6. Select **OK**.

The reason you went to this page with the Web browser instead of just typing the URL in the dialog box is:

1. We can be 100% sure you have the correct location.
2. We can be 100% sure the script is running without error.

Configuring Options with CommerceBuddy

Once you have completed the above steps, continue to complete each section of the “Options” menu. Each one of these dialog boxes handles a different aspect of your Web site configuration.

Publishing Options

After you have completed the configurations in the **Options** menu, click the **Online** button on the Navigation menu.

The Session Action window will appear. By default, there is no action currently selected. On the left side of the window is a list of actions that can be performed. These actions include:

- Get Orders and Information
- Poll Server
- Maintenance
- Publish Options and Configurations

1. Click the **Maintenance** menu item to expand it, then select **Change Password**.
2. At the top of the screen, you will see a small text box. Enter your default password as “cartit” (do not enter the quotes).
3. Once you enter this password, the **Start Session** button will become active. Be sure you are connected to the Internet and click the **Start Session** button. CommerceBuddy will ask you for a new password, then will go online to change your password.
4. Once your password is changed, you will need to enter it into the Password box again for future sessions.
5. Click on **Publish Options and Configurations**. This action will publish all options and configurations you entered in the Options menu.
6. Click **Start Session**. Once this action is complete, all options and configurations have been published and you are no longer in the installation process.

Congratulations! CartIt is now functioning and ready for your commerce pages. **We wish you success in your e-commerce ventures!**