The CartIt Commerce System Installation Guide

On UNIX and Linux Platforms

Version 8.0

February 3, 2003

CartIt Commerce System Installation

This chapter will provide you with the information needed to install CartIt 8.0 for UNIX/Linux.

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

CartIt for UNIX/Linux System
CartIt for UNIX/Linux requires a UNIX or Linux family Web server; previous versions of CartIt for UNIX were available as a separate version depending on the type of UNIX system you used. This version will work on all flavors of UNIX, including Linux.

Core Requirements:

- PERL Version 5.x Interpreter
- sendmail (a standard UNIX program that is used as a mail transport system)
- <u>Private</u> cgi-bin
- FTP Access to Server – Telnet or SSH (Secure Shell) access recommended
- 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 a UNIX server and retrieve your orders. This system requires:

- Microsoft Windows 9x/Me/NT/2000
- 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 Path to PERL Version 5
- The Path to "sendmail"
- 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 and *optionally* a Telnet or (preferred) SSH client program.

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.

A good SSH client can be obtained from F-Secure at http://www.f-secure.com/. Their client contains both SSH for shell and scp (Secure Copy) which is a more secure method of copying files than FTP.

Preparing the Scripts for PERL

Before we begin, you need to open all files in the 'cgibin' folder that came with your installation archive.

These files should be opened one at a time in a text editor such as Microsoft **Notepad**. If the files are too large to open in Notepad, use Microsoft WordPad. If you use WordPad, keep in mind that you must always save these files in **ASCII text** format, **not in a DOC** or RTF format.

The first line of all the CartIt CGI scripts contain the following command:

```
#!/usr/bin/perl
```

You must include the #! that precedes the path to PERL. This line tells CartIt where the PERL Interpreter is located. Your Web Presence Provider should provide you with this information.

The scripts that must have the PERL path edited are:

```
cartit.cgi
cartit_checkout.cgi
cartitshiplib.cgi
cartitcclib.cgi
cartitlib.cgi
cartitcf.cgi
commercebuddy.cgi
cartit_check_install.cgi
cartitimg.util
```

`cartitgift.cgi` found in the 'gift' folder may also be included if you purchased a license for the Gift Module.

Where is PERL?

If you are feeling technical or if your Web Presence Provider cannot provide you with this information, type following at the command prompt via Telnet:

```
%prompt> which perl
```

`%prompt>` does not need to be typed on the command line. `%prompt>` is a depiction of your current command line, similar to `C:\>` in DOS.

The output should look something like this:

```
%prompt>which perl            (What you type)

%prompt>/usr/bin/perl            (The server response)

%prompt>/usr/bin/perl -v      (What you type)

%prompt>The server will respond with all types of information about
PERL including the version release of PERL; this must be 5.xxx
(where xxx is any number) or higher.
```

For the above example, assuming the server verified that it is PERL Version 5 or above, you would need to set the first line of all scripts to:

```
#!/usr/bin/perl
```

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.

If you are upgrading from a previous version of CartIt, you do not need to create these folders (these folders already exist).

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. How CartIt reads and writes to these folders will be explained in the "Uploading Data Files" section.

You should place these folders under your document root, outside of the public area of your Web site or position a server control file that 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.

Enhancing Security with Server Control Files

If the data folder is stored in a Web-readable area, it is a good idea to use a server control file. This is usually named ".htaccess" by default on most server systems, but this may not be the case, so check with your Web Presence Provider to be sure.

In Notepad or other text editor, create a file called ".htaccess". Windows may complain about this file name; if it does, you can simply create the file as "null.htaccess" and rename the file to ".htaccess" once it is on your server.

The file should have this text in it:

```
<Limit GET POST PUT DELETE>
order deny,allow
deny from all
</Limit>
```

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 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 paths 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.

You can optionally Telnet or SSH into the server, navigate to the data and carts folders and then type the UNIX command "pwd". This will show the correct path to the folder at which you are currently located.

If you are upgrading from a previous version of CartIt, you can find the path to these files in "`cartitcf.cgi`" or "`cartit.cf`" depending on the version of CartIt you have.

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 UNIX path to the folder itself.

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®.

Once the scripts have been uploaded, you must set the permissions to execute "chmod 755". "chmod" sets the permissions of a file, telling the server how to treat the file. chmod "755" is a permission that makes the file an executable program. You can set permissions by using Telnet, SSH or FTP.
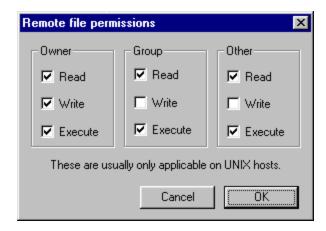
Using Telnet or SSH

If you are using Telnet or SSH, go into the cgi-bin and type "chmod 755" for each script (do NOT type the quotes). These settings should appear as follows:

```
chmod 755 cartit.cgi
chmod 755 cartit_checkout.cgi
chmod 755 cartitshiplib.cgi
chmod 755 cartitcclib.cgi
chmod 755 cartitlib.cgi
chmod 755 cartitcf.cgi
chmod 755 commercebuddy.cgi
chmod 755 cartit_check_install.cgi
chmod 755 cartitimg.util
```

Using FTP

If you are using FTP (not all FTP programs have this functionality, WS_FTP is an example of a program that does), right click on **.cgi file**, then click **chmod (UNIX)**. A dialog box will open where you must set the remote file permissions.

Your settings should look like this:

"chmod 755" settings

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!

After you upload all of these files to the data folder, you must set the permission on these files so that CartIt can read and write to them. "chmod 777" is the lowest possible permission to which you may set a file.

You may set these permissions by using Telnet, SSH or FTP.

Using Telnet or SSH

If you have Telnet access, you can log on and go to the 'data' folder on your Web server. To verify that you are currently in the 'data' folder, you may use the UNIX command "pwd" (print working directory) which will show your current location.

For example, type the following on your command line:

```
%prompt>pwd
```

Remember that "% prompt" is a representation of your current command line prompt and should not be typed.

The server will respond by showing the output of your current location:

```
/usr/local/etc/httpd/cgi-bin/data
```

NOTE: Your server response will be different from the above example. This is just an example of the format in which your server will respond. Be certain that your correct location is in fact the data directory you created for CartIt data files.

To further verify that you are in the 'data' folder, you can use the UNIX command "ls" (lower case LS) for a list of files and folders.

For example, type the following:

```
%prompt>ls
```

The server will respond with a list of the files and folders. You should see the files you uploaded earlier in the installation process.

Once you verified that you are in the 'data' folder, you can use the UNIX command "chmod" to set permissions. You can do this once for each file name by typing the following:
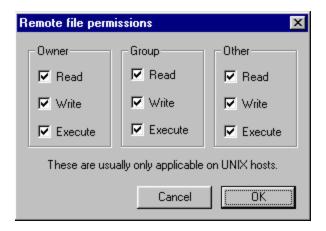
```
%prompt>chmod 777 filename
```

Or, you can do this for every file by typing the following:

```
%prompt>chmod 777 *
```

Using FTP

Again, you can also use an FTP program to set permissions. For example, WS_FTP offers remote chmod (not all FTP programs offer this feature). You can right click on a CGI file, then click **chmod (UNIX)**. A dialog box will open where you must set the remote file permissions.

Your settings should look like this:

"chmod 777" settings

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 ERROR messages, 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.

2) A "Forbidden" message indicates you did not set the script to execute (chmod 755). This could also indicate that the folder itself is not allowed to execute CGI scripts.

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.

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) One or more of the CGI scripts have an incorrect path to PERL.

g) 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   1001

Starting **Account** Number   1001

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

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.

[Create Starting Numbers] 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 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. Another possibility is that the path to PERL in one of these files is incorrect. You should: 1) Upload these files again in ASCII mode, then try to access commercebuddy.cgi; 2) If you continue to get the error, correct the path to PERL in both files on your local computer then upload them again.

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 **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.

   If you receive a "Could not open .pass file" error, you do not have the permission set correctly on the .pass file. Set the permission on this file to chmod 777.

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!**