

Actinic Ecommerce Version 5

Release Notes

Actinic Software Limited

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Revision History

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1 Introduction

1.1 Description

Actinic Ecommerce is a desktop Windows program which enables the user to publish an illustrated, on-line catalogue, take secure, encrypted orders over the Internet, and process these orders in-house. It supports the creation of an e-commerce site with catalogue, shopping cart, secure payment and subsequent order processing.

Actinic Ecommerce is unusual in not requiring a database at the web site nor a Secure (SSL) Server, a leased line, or transaction charges – all the user needs is a dial-up account with an ISP and a web site with CGI access capability.

Building on the proven business to consumer base of Actinic Catalog, Actinic Business provides business-to-business capabilities, including customer account handling, sophisticated discounting options, links to external databases and more advanced searching.

Version 5 is an upgrade from Version 4.

1.2 Description of Changes to Actinic Ecommerce Since Version 4

1.2.1 Objectives

Actinic Ecommerce v5 has four main objectives:

1. To address the needs of Web Hosts
2. To ensure the reliability of Catalog matches historic levels
3. To better meet the needs of web designers
4. To provide a simple content management capability i.e. Brochure

1.2.2 New Features

1.2.2.1 General Features

- Major overhaul of help files and documentation
- Navigator allows choice of 'skin' so designers can create different Navigator styles. (Advanced feature)
- Navigator ability to link to URLs allowing links to be put on the Navigator to other web sites. (Advanced feature)
- Different sample databases in each of Catalog and Business so that the Business database can better illustrate some of the Business-only features e.g. quantity break pricing.
- Ability to launch Catalog with site name as a command line parameter so a multi-site user can have different desktop icons to launch each site.
- Template and Script upgrader to facilitate upgrading from earlier Catalog release (v4 or v3). This GUI-based utility guides the user through the process of upgrading scripts and templates but preserving any changes they had made previously. (Advanced feature)
- Ability to view licence terms within Catalog.

1.2.2.2 Catalog Importing/Exporting

- Export of catalog information in hierarchical format.
- Ability to import snapshots from older versions of Catalog.
- Import/Export of auxiliary information such as Shipping tables.

1.2.2.3 External Linking (Business only)

- Linking to Access 2000 supported.

1.2.2.4 Stock Management

- Products not orderable if associated component products are out-of-stock. This overcomes the problem that although for example you can prevent orders being taken for batteries on their own, currently they can still be ordered if a component of another product e.g. a clock.

1.2.2.5 Business Settings

- “Returns Policy” tab in Terms and Conditions to help merchants comply with distance selling legislation.

1.2.2.6 Shipping and Handling

- Weight of components included into total shipping weight. This improves the current situation where only the basic product weight is used regardless of included components.
- Import and export of shipping information in hierarchical format to facilitate administration of shipping tables.
- Sample import files are provided for ParcelForce, DHL and FedEx. See the section “Shipping Table Import Files”.

1.2.2.7 Tax

- Up to 50 taxes supported improving the ability to cope with tax regulations such as those in the USA and Canada.
- Tax-inclusive prices indexed for search when tax inclusive prices only displayed.
- Tax summary reports showing the merchant how much tax he has collected in a given period.

1.2.2.8 Customer Accounts (Business only)

- Price schedule discounts apply to component prices (at the moment they only apply to base products), and component quantity taken into account.
- Price schedule-specific product message to customers allowing the merchant to give a message about a product to a targeted group of customers.
- Customer Account reports.
- Export of Customer Account and Price Schedule information in hierarchical format.

1.2.2.9 Themes and Colours

- Site templates saveable as a custom theme. (Developer only)

1.2.2.10 Design Features

- “Brochure” – a new sub-product that extends the set of elements that can be included in the Catalog tree including home page and information page elements. Allows the merchant to build a web site broader than just the store but using the same design elements. (Business only)
- The fundamental page design layout - ACT_PRIMARY - selectable at section level allowing a varied look and feel on different parts of the site.
- Restrictions on use of variables in the templates lifted - NETQUOTEVARs available in all top level templates, custom variables available in all templates and inherited down the catalog. (Advanced feature)
- Separate NETQUOTEVAR for each navigation button which allows much more flexible ways of navigating around the online catalogue and presenting different styles of navigation button. (Advanced feature)

- NETQUOTEVAR for NEXT and PREVIOUS section links now available allowing the shopper to step through sections rather than going up and down the hierarchy. (Advanced feature)
- NETQUOTEVAR for section lists now available (either top level, complete structure or current child list) in structured form allowing features such as drop-down appearance of sub-sections when the mouse hovers over a section icon. (Advanced feature)
- New simple search bar template that can be used on every page. (Advanced feature)
- Style sheets can now be used, with new sample themes. (Advanced feature)
- Navigator Template manager gives a visual representation of the page and clicking on any part of the page offers the relevant template or prompt for editing.
- Template editing buttons where all templates can be selected.
- New higher quality themes.
- Embedded HTML now available as prompts. (Advanced feature)
- Almost all hardcoded strings removed and replaced by editable prompts.
- Cart value and number of items held in cookie so they can be accessed through JavaScript and displayed on any page. (Advanced feature)
- User-specified page names to permit external links into specific store pages.
- A "Powered by Actinic" feature giving security assurance for the shopper.
- Site HTML and Preview HTML stored in separate folders below site folder

1.2.2.11 Shopping Cart

- Adding same item to cart in two actions still honours quantity discounting.
- "Remove All"

1.2.2.12 Order Processing

- Automatic customer e-mailing when an order status changes e.g. goods shipped.
- Monthly Account Statement allowing account customers to receive a monthly statement rather than being invoiced order-by-order. (Business only)
- Enhanced sales reporting including top product statistics etc.

1.2.2.13 Security and Payment

- New grid style administration of payment methods allowing effectively unlimited methods.
- Payment methods dependent on invoice and shipping locations so for example credit card payment could be made unavailable for orders shipped to certain countries.
- Support for Western Union PayCash, where the shopper has to pay for goods at a Western Union agency before the merchant ships the goods.
- Ability for shopper to abandon payment by one method and select another.
- Improved SSL support giving option of whole site or just checkout use.
- Support for Shared SSL allowing merchants to adopt SSL without need for their own SSL certificate

1.2.3 Host

- New FreeTrial product for evaluation-only hosting.
- Security enhanced by security daemon (not in FreeTrial)
- Support for stores with distinct URLs.

- Web-based shop administration.
- User configurable activity and summary reporting.
- E-mail facility to expiring/expired accounts.
- Forwards and backwards compatibility with Catalog versions.

1.3 System Requirements

1.3.1 Merchant PC

Your desktop PC may run Windows 95, 98, ME, NT 4, 2000 or XP and should have a minimum of 64 MB memory (128 MB preferred), 60 MB of free disk space and dial-up (or leased line) access to the Internet. You must have Internet Explorer version 5 or later installed.

Your PC must be configured to a minimum resolution of 800x600 pixels. Any thing less and Catalog won't be displayed wholly within your screen. Catalog is also best viewed using a 65536 colour (or better) display.

1.3.2 Web site

Your ISP must be running Windows NT, 2000 or Unix, and provide Perl 5 or better, and a user writeable CGI directory.

Actinic Business requires a set of Perl files called 'MD5'. These files implement encryption/decryption, which is required to support logging in to online customer accounts. Actinic Business includes a local copy of MD5, however for improved performance, Actinic recommend that the ISP be asked to install "Digest-MD5", version 2.09 or later.

1.4 Certified Compatibility

Actinic warrants that v5.0 of Actinic Catalog and Actinic Business has been tested against the specified versions of the following software, and works successfully.

- Host, v5.0

1.5 Restrictions

1.5.1 Linking to External Databases

Actinic Business's external linking feature can be used to bring in product information from an external data source. There is no support for linking with section, component, attribute or customer data.

1.5.1.1 External Database Formats

Actinic Business can create and maintain an external link with the following data sources:

- A Microsoft Access table (versions 95, 97 or 2000)
- A Microsoft Excel workbook (versions 3.0, 4.0, 5.0, 97 and 2000)
- A table in an SQL-based database that provides a Level 2 ODBC-compliant driver. If the driver only has partial compliance to Level 2, then we require dynamic cursor support.

Support is also available for the following databases:

- dBase III, IV and 5
- FoxPro 2.0, 2.5, 2.6, 3.0 and DBC
- Paradox 3.x, 4.x and 5.x

However, as we have had mixed success with the above databases, correct linking and operation cannot be guaranteed. If they do not work for you, we recommend you convert these databases to Microsoft Access.

1.5.1.2 Specifying Tax Information

V5 does not support linking to the "Tax Treatment" field. Use the "V4 Tax n Data" fields instead. See the help for more information about linking to tax fields.

1.5.2 Installing Database Components

"Microsoft Data Access Components" (MDAC) and the Access Jet engine are provided on the installation CD. They are installed as part of the normal installation process but can be skipped by user selection. If they aren't installed then certain database operations within Actinic Ecommerce may fail meaning that normal operation isn't possible.

1.5.3 MD5 calculation

Actinic Business installs its own MD5 script and uses it if it can't find the MD5 Perl module installed on the web server. If the MD5 Perl module is already installed then it is used instead of Actinic's.

Actinic's MD5 implementation is slower than the Perl module implementation (because it has to be written in Perl) so we recommend the ISP install the Perl module for improved browser performance.

1.5.4 Internet Explorer earlier than version 5

Catalog/Business v5 uses some facilities provided in libraries installed with Internet Explorer. In particular, Internet Explorer version 5 or later must be installed otherwise Catalog/Business v5 may fail to run properly. You may receive the error message:

"Error Starting Program - The Catalog.exe file is missing export WININET.DLL:FtpCommandA"
if you haven't got Internet Explorer version 5 or later installed.

2 Release Version Details

2.1 Installation directory structure

Actinic ecommerce v5	The default installation directory. Holds files common to all sites, such as reports and help files.
Backup	Any files replaced during the installation are placed here.
Formats	Holds various default styles.
NavigatorSkins	The files and configuration details of the Navigator.
Themes	The files that constitute the themes, available via the Design Themes menu option.
OCCUpgrade	Installation directory for the Payment Service Providers install program. Contains the master files. On startup, Catalog copies the relevant files to the current site.
Original	The master set of files from which all licensed sites are created.
Sites	Locates all licensed sites.
Site1	Default site after installation.
SnapshotFolder	Default location of all site and theme backups made via the File Snapshot menu option.
Starter Guide	The browser-based introduction to the functionality in Catalog v5 and Business.

2.2 File version numbers

Catalog.exe 5.0.0.0 BMGB

The main application program.

ConnectionWizard.dll BIQA

Supporting file for the Network configuration wizard.

ActDiagnose.exe BIQA

ActDiagnostics.dll BIQA

A diagnostic and problem solving tool. Do not use unless instructed to do so by Actinic's technical support staff.

ActShipHand.ocx BIQA

An ActiveX control used by Catalog. It configures shipping and handling.

OCCControl.ocx BICA

AuthNetOCX.ocx BICA

DHOCCControl.ocx BICA

WUPayCash.ocx BICA

An ActiveX control used by Catalog. It configures payment service providers.

2.3 Install program version numbers

Catalog.exe BMGB

Installs Actinic Catalog or Actinic Business.

PSPSetup.exe BMGB

Installs the supported online payment service providers.

Mdac_typ.exe 2.6

Microsoft data access installer. Ensures all ODBC-related drivers are correctly installed.

Jet40SP3_Comp.exe

Microsoft Access database engine (JET) update. Ensures all JET-related drivers are correctly installed.

3 Installation

3.1 Upgrading previous versions of Catalog

Firstly check which version of Catalog you have installed. Click on Help and from the drop down menu select About. Please read the appropriate instructions given in the following sections as applicable.

Existing Catalog users who are planning to upgrade to Catalog or Business v5 and also reuse the same web site should perform the following actions:

- Download all orders
- Tell Catalog to suspend ordering on your web site
- Upgrade to v5
- Instruct Catalog or Business v5 to refresh the web site
- Remove the suspend setting

If you have the web space we recommend uploading to a test site and verifying the site before going live with it.

3.2 Installation Instructions

Close any open Windows applications. Place the CD in the CD drive. The installation program will self start. If it doesn't, locate the file *setup.exe* on the CD and run it. You will be directed to install a number of components, which together form the full release of Catalog. Read the instructions carefully before advancing to the next installation wizard screen. In most cases the default options can be accepted.

The install program works on all Microsoft platforms.

3.3 Simultaneous Installations of Catalog and Business

Like previous releases of Actinic Catalog, it is not possible to install two copies of v5 (including a copy of Catalog and a copy of Business) on the same PC. However, once a copy of Catalog or Business has been installed and licensed, new sites can be licensed for either Catalog or Business. Thus, through one installation, several different sites can be maintained.

3.4 New installation

Catalog or Business v5 can be installed into a new directory and will be the default installation option for most users.

- If you have v2 and/or v3 and/or v4 installed, they will be unaffected by the installation of v5 if you choose not to upgrade. Use of a second website to 'evaluate' the upgrade is permitted within the terms of the license agreement so long as you do not operate both sites concurrently to take live orders.
- If you had an existing installation of v5 it will still be present but non-functional (see Simultaneous Installations of Catalog and Business).
- v5 requires a different authorisation key to v2, v3 and v4.

3.5 Upgrading v2 to v5

To upgrade from v2 to v5 it is first necessary to upgrade to version 3, run version 3 once to create a site for upgrade, and then follow the instructions below for upgrading v3 to v5. Contact Actinic Administration to obtain a copy of v3.

3.6 Upgrading v3 to v5

3.6.1 Upgrading non-Supermall Client releases of v3 to v5

It is perfectly safe to upgrade Catalog v3.x to v5

The v5 install program detects the presence of a v3 installation and offers to upgrade it. It does not have to be upgraded. However, if it is, please note the following issues:

- The first time the v5 install program is run, an upgrade option called "Upgrade existing v3 installation" will be available. Select this to upgrade one or more of your v3 sites. The installer will display your existing v3 site names and allow you to select one or more of them. You will then be asked to select one of them to become the default site used by Ecommerce v5 when it first starts up after the installation.
- The install program first installs v5 into a new directory. It then copies the selected v3 sites to the v5 installation directory. When Actinic Ecommerce is started it will prompt for a v5 authorisation key – v3 authorisation keys are not valid. After this, the v3 configuration details (including templates) will be upgraded to v5. If you Upload the files to the web site in the usual way you will notice that your site looks a little different and has more functionality. It will still reflect your list of products.
- The v3 to v5 upgrade process automatically upgrades your templates, Perl scripts and image files. If you have modified the v3 templates, you will be able to review the upgrades and edit them as necessary. The same applies to any changes you manually made to the Perl scripts. V3 report files are copied to a backup directory called "Backup v3xxx" (where xxx is replaced with minor version number) in the "Actinic ecommerce v5" directory.
- The v3 installation of Catalog is not modified or altered in any way.
- You should spend some time familiarising yourself with the v5 configuration options and how they affect the online catalog.
- The v3 Advanced User Guide showed how to replace the Catalog-generated 'Add to Cart' buttons with image files. This continues to work in Catalog v5 and Business, but it will not work if the product contains variants. Refer to the latest v5 Advanced User Guide for more information.
- If you subsequently want to upgrade some more v3 sites to v5 then run the v5 install program again. This time an upgrade option called "Upgrade further v3 sites to v5" will be available instead. Select this to upgrade more of your v3 sites. The installer will display your existing v3 site names and allow you to select one or more of them. You will then be asked to confirm the selected sites for upgrade before the selected sites are upgraded.

3.6.2 Upgrading Supermall Client releases of v3 to v5

- **Only ever obtain Catalog install programs from your reseller!**
- This product has now been renamed to *Actinic Host*.
- Only upgrade your copy of Host (more specifically, your copy of Catalog running in Host mode) if your ISP or reseller allows you to. This is because the Host files on your PC interact with some files on your reseller's web server, and it is important that both sets of files are the same version. Your reseller must be able to support v5 before you can upgrade your copy of Host to v5. If you upgrade first, you may find you can't access your online Catalog.
- Once you are able to upgrade to v5, the process is similar to that described in "Upgrading non-Supermall Client releases of v3 to v5"

3.7 Upgrading v4 to v5

3.7.1 Upgrading non-Host Client releases of v4 to v5

It is perfectly safe to upgrade Catalog v4.x to v5

The v5 install program detects the presence of a v4 installation and offers to upgrade it. It does not have to be upgraded. However, if it is, please note the following issues:

- The first time the v5 install program is run, an upgrade option called "Upgrade existing v4 installation" will be available. Select this to upgrade one or more of your v4 sites. The installer will display your existing v4 site names and allow you to select one or more of them. You will then be asked to select one of them to become the default site used by Actinic Ecommerce v5 when it first starts up after the installation.
- The install program first installs v5 into a new directory. It then copies the selected v4 sites to the v5 installation directory. When Actinic Ecommerce is started the v4 configuration details (including templates) will be upgraded to v5. If you Upload the files to the web site in the usual way you will notice that your site has more functionality. It will still reflect your list of products.
- The v4 to v5 upgrade process automatically upgrades your templates, Perl scripts and image files. If you have modified the v4 templates, you will be able to review the upgrades and edit them as necessary. The same applies to any changes you manually made to the Perl scripts. V4 report files are copied to a backup directory called "Backup v4xxx" (where xxx is replaced with minor version number) in the "Actinic ecommerce v5" directory.
- The v4 installation of Catalog is not modified or altered in any way.
- You should spend some time familiarising yourself with the v5 configuration options and how they affect the online catalog.
- If you subsequently want to upgrade some more v4 sites to v5 then run the v5 install program again. This time an upgrade option called "Upgrade further v4 sites to v5" will be available instead. Select this to upgrade more of your v4 sites. The installer will display your existing v4 site names and allow you to select one or more of them. You will then be asked to confirm the selected sites for upgrade before the selected sites are upgraded.

3.7.2 Upgrading Host Client releases of v4 to v5

- **Only ever obtain Catalog install programs from your reseller!**
- Only upgrade your copy of Host (more specifically, your copy of Catalog running in Host mode) if your ISP or reseller allows you to. This is because the Host files on your PC interact with some files on your reseller's web server, and it is important that both sets of files are the same version. Your reseller must be able to support v5 before you can upgrade your copy of Host to v5. If you upgrade first, you may find you can't access your online Catalog.
- Once you are able to upgrade to v5, the process is similar to that described in "Upgrading non-Host Client releases of v4 to v5"

4 Instructions for Use

4.1 Introduction

Actinic Catalog / Business comes with extensive and integrated help. You can press the F1 key on your keyboard at any time to display the main help file. You can also click on the '?' button at the top right hand corner of each window and then click on an individual field on the screen to get specific, context sensitive, help. Use the Help menu for a complete explanation of using Actinic Catalog, including configuration details and creating the online Catalog at your web site.

In addition to the help system, a complete manual called UserGuide.pdf will have been placed in the installation directory. To access this manual, a copy of Adobe Acrobat Reader needs to be installed on your machine. You can download the latest version (Version 4 or above) of Adobe's Acrobat Reader application free from <http://www.adobe.com/> or <http://www.adobe.co.uk/>.

There are no differences between the contents of the help file and the user guide, they are just different mediums to suit different tastes.

4.2 Printing the Help Manual

If you wish to have a printed copy of the help, we recommend printing the manual (UserGuide.pdf) as this contains a table of contents, page headers, page footers and page numbers.

4.3 The Navigator

This release of Catalog / Business comes with a feature known as the Navigator, designed to help you configure the system and carry out routine tasks.

The Navigator is a useful tool that makes it quick and easy to move around the key areas of the program. When Catalog / Business is first started, or if enabled via a menu option, the Navigator appears as a moveable window and acts as an interface to the Catalog / Business configuration screens. By clicking on the Navigator icons you can view a series of screens and access all the functionality you need to design and publish your catalog, and to download and process orders from your web site.

If the Navigator does not automatically appear when you start Actinic Ecommerce, select menu "View | Navigator" or type Ctrl + N once Catalog has been launched,.

4.4 Starter Guide

The starter guide is a HTML-based tutorial designed to introduce the salient features of both Actinic Catalog and Actinic Business. It is available as a Window's menu option. First click the Windows Start button, then the Programs menu, then the Actinic Ecommerce v5 menu, then finally the Starter Guide menu.

4.5 Shipping Table Import Files

Some shipping table import files have been included with this release to facilitate shipping table set-up if you plan to use ParcelForce, DHL or FedEx. The tariff data was correct at the time of preparation (October 2001) but may not be at the time of use so please check with the service providers before use. All the tariffs assume the shipments are made from the UK. Any fuel surcharges, frequent user discounts etc are not reflected in the tables.

All the files can be found in the site folder. By default this is C:\Program Files\Actinic ecommerce v5\Sites\Site1.

Actinic will not be providing routine updates to the files provided.

4.5.1 ParcelForce

The shipping import file is ImportParcelForce.csv. The services included are:

- International Economy
- International Scheduled
- International Standard
- Parcelforce 24
- Parcelforce 48
- Parcelforce by 10am
- Parcelforce By 9am
- Parcelforce by Noon
- Parcelforce Standard

To check whether tariffs have changed visit <http://www.parcelforce.com/tariff/>.

Some points to note:

1. Although there are 12 ParcelForce zones some services may not be available for all countries in the zone. That is why the import file uses different zones for each class.
2. Zones 1 to 4 are breakdowns of the UK and the geographical content of each zone is in fact dependent on the location of the sender. In the import files, tables for all 4 zones are included but zones 2-4 have no countries included. The user will need to modify the zone contents to best fit their location and business model.
3. Saturday delivery supplements are not included.

4.5.2 DHL

The shipping import file is ImportDHL.csv. The services included are:

- DHL European Union Document Express
- DHL European Union Parcel Express
- DHL Worldwide Document Express
- DHL Worldwide Parcel Express

To check whether tariffs have changed visit <http://www.dhl.co.uk/software/DHLT2001.pdf>.

A point to note:

1. The Zone E table is included but relates just to shipments to New York City. The zone has been left empty.

4.5.3 FedEx

The shipping import file is ImportFedEx.csv. The services included are:

- FedEx International Priority Package
- FedEx International Priority Envelope
- FedEx International Priority Pack

To check whether tariffs have changed visit <http://www.fedex.com/gb/rates/>.

4.5.4 How to use the import files

The following approach to using the import files is recommended:

1. Go to the View | Business Settings | Shipping and Handling tab. Set shipping by Total Weight.
2. From the File menu choose the Import option. In the Import Wizard, select:
 - Hierarchical Import
 - For the file name use the Browse button to find the required file as detailed above.
 - Choose to Update; Text - Comma delimited; ANSI (Windows)
 - Click through all the remaining screens and finally press Finish.
3. Go to the View | Business Settings | Shipping and Handling tab.
4. Firstly list By Class. Delete any classes that you do not intend to use. Then click By Zone and delete any zones that are not now associated with a Class.
5. Check the tariffs match the provider's latest price list. Also check the zone contents to make sure they meet your requirements (e.g. there may be some countries in there to which you don't want to ship).

Having achieved the required set up you can make future changes either within the Catalog/Business application or you can Use File | Export to export a csv file which you can edit with a spreadsheet or text editor. For example you may want to apply new provider tariffs or apply a markup to the rates. Note that the prices must be entered in pence not pounds.

4.6 Cleaning up Site folder after Upgrade

v5 stores preview and website HTML pages in sub-folders below the site folder. This means that the only HTML files that need to be in the site folder are the templates. If you have upgraded from a previous version, the site folder will contain old preview and website HTML files (copied from your earlier version of Catalog/Business) which can be deleted manually. Take special care to ensure that you don't delete any template files which are usually called Act_XXXXX.html. Also, don't delete any .bmp files that start P_ as these are required for normal operation.

4.7 Frequently Asked Questions for v5

Q: When I try to start Catalog I get the error message:

“Error Starting Program - The Catalog.exe file is missing export WININET.DLL:FtpCommandA”

A: Upgrade your copy of Internet Explorer to version 5 or later. See the section “Internet Explorer earlier than version 5”

5 Changes

5.1 Summary of changes in current release

This section is used for maintenance releases.