WebMerchant
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Chapter 1
Welcome to WebMerchant

Welcome to WebMerchant, the complete automated payment processing solution for WebCatalog.

About WebMerchant

WebMerchant 3.0 represents a dramatic step forward in the payment processing, product delivery, and email notification capabilities available with WebCatalog. Utilizing the power of WebCatalog's WebDNA language, WebMerchant is built with numerous time-saving features. In addition, WebMerchant adapts easily to new environments through the modification of WebDNA-embedded HTML files.

WebMerchant is a sophisticated package, effortlessly handling the automated payment processing capabilities of CyberCash, ICVerify, and MacAuthorize. Plus, other payment systems may be added in the future. In addition to authorization, WebMerchant includes the ability to void or credit purchases. Systems requiring book and ship authorizations are also handled.

The WebMerchant package is a collection of WebDNA templates, databases, and included files. The core functionality of the product is encrypted in the templates. The databases and many included files are left unencrypted allowing you to more easily access their data or customize their look and functionality. We do not recommend modifying the templates, however, until you have a good understanding of WebDNA.

Chapter 2
Getting Started

Getting started with WebMerchant consists of:

- Meeting the minimum system requirements

- Installing WebMerchent

- Making store preparations

Installation Requirements

WebMerchant can be installed on any system meting the following hard-
ware and software requirements:

HARDWARE

- A MacOS-compatible computer with 1 MB of available hard
  drive space.
- A Windows NT computer with 1 MB of available hard drive
  space.

SOFTWARE

- Web server software running on either a Macintosh OS or
  Windows NT system.
- WebCatalog CGI (.exe for Windows, .acgi for Macintosh) or Plug-
  in (ISAPI dll for Windows, WebSTAR compatible plug-in for
  Macintosh).

Installing WebMerchant

Before you begin please read the "About WebMerchant" file included with your product package for any last minute instructions regarding installation.

If you have an older version of WebMerchant installed, the new version will override the files already installed.

The included installer application will ask you for the location of your WebCatalog folder. This is the folder that contains the WebCatalog application or plug-in and all the other product folders. Windows users will most likely find this folder in the scripts directory. Macintosh users will normally find this folder at the root of the web server directory.

WebMerchant installs components in three different areas. First, the general WebMerchant administration page is installed in your WebCatalog "Admin" directory. This allows you to add or delete stores to your WebMerchant installation using WebCatalog's standard administration pages. Second, a set of universal templates, used by all the WebMerchant stores, are installed in a folder named "WebMerchant" in the "Globals" folder. Lastly, the individual store components are installed in a folder named "WebMerchant" in the "Store" folder of the StoreBuilder.

If you already have an existing store, you should copy the WebMerchant folder found in the "Store" folder to your existing store directory. Current WebMerchant customers will recognize this setup as being nearly identical to previous installation requirements.

Store Preparations

WebMerchant requires a minimal amount of modification to your existing WebCatalog-based storefront. The StoreBuilder sample included with WebCatalog includes all the modifications mentioned below. These instructions are provided for reference purposes and for sites built from scratch. You should be familiar with the eCommerce extensions to WebCatalog's WebDNA language before continuing.

Your storefront must use the Purchase command, or context, when customers place orders so that their shopping cart / order file will be moved from the shopping cart folder to the orders folder (as specified in the WebCatalog preferences). WebMerchant only processes orders found in the orders folder.

WebMerchant decides how to process and order by the contents of the PayMethod field in the order file. Currently, WebMerchant supports the following values for PayMethod:

CC

> If the value of the PayMethod field is "CC" then WebMerchant assumes the order requires credit card verification. Minimally, the AccountNum, ExpMonth, and ExpYear fields must also be filled in with valid credit card number, expiration month, and expiration year respectively. If your merchant network requires address verification, then the values in the name, address1, address2, etc. fields are used as the billing address (the values in the shiptoname, shiptoaddress1, etc. fields are assumed to be shipping values, obviously). The total amount of the charge is the value of [grandTotal] as displayed in the [lineitems] context.

BK

> If you are performing credit card authorization, and use the book/ship model, then you should set the PayMethod field to "BK" when you book and order (this should be the setting when the order is submitted with the Purchase command). Card number and address settings in the order file should also be set appropriately (see information under "CC" above).

SH

> If your order has already been booked, and is ready to ship, change the value of the PayMethod field to "SH" from "BK". Then submit the order again using the Purchase command. Note that the original transaction number assigned when the order was booked has been saved in the order file. The administration templates included with WebMerchant change the PayMethod field automatically when re-submitting a booked order.

VO

> Set the value of the PayMethod field to "VO" if you want to credit the amount of the order back to the customer. When using the credit link in the administration pages, this value is set automatically.

AC

> If the value of the PayMethod field is "AC" then WebMerchant assumes

you have written your own WebDNA-based authorization program. This account authorizer is contained in the AccountAuthorizer.inc file in the WebMerchant folder in your store directory.

The simplest method for setting the PayMethod field is to use the WebDNA [setheader] context. Including the following WebDNA on the final invoice page (or thank you page before executing the [purchase] tag) will set the PayMethod field:

```
[setheader cart=[cart]]PayMethod=CC[/setheader]
```

If you plan on delivering products electronically, you need to store the name, or path, of the product in the order file. The value of the "CanEmail" field in the order file should be set properly as well. Begin by setting up your product database so there is a field named "CanEmail" and "FilePath". The value in the CanEmail field should be "T" or "F" (True and False respectively) depending upon whether the product is electronically deliverable. By default, when a product is added to the shopping cart using the [addlineitem] context or Add command, the value of the CanEmail field is automatically set in the shopping cart / order file. You can also set this field manually using the [setlineitem] context:

```
[setlineitem
  cart=[cart]&db=products.db&index=1]CanEmail=F[/setlineitem]
```

Unlike the value of the CanEmail field, the path to the electronic product is not set automatically in the order file when the [addlineitem] context or Add command is used to add a product to the shopping cart. Thus you should add the following WebDNA to your final invoice page which copies the path information from the product database to the order file (note that the following code must be within an [orderfile] context):

```
[lineitems]
[setlineitem
  cart=[cart]&db=products.db&index=[lineindex]]textE=[lookup
  db=products.db&lookinfield=sku&value=[url][sku][/url]&return
  field=filepath][/setlineitem]
[/lineitems]
```

In this example, we are using the textE field for the order file line items to contain the file path - this should match your WebMerchant preferences. See the description of the Attach File Field in the WebMerchant store preferences for more information.

Chapter 3
Configuring WebMerchant

All WebMerchant configuration is performed remotely via your Web browser. All serial numbers and preferences are entered remotely as well.

Administration

Enter the WebCatalog administration pages and click on the "WebMerchant Admin" link in the left frame. Next click the "Add New Store" link in order to set your store preferences. In the main frame a form will appear asking for some general information about your store. After you have entered the requested information you must click the "Save Changes" button for your changes to be recognized. When adding a store in this manner, the WebMerchant files are not actually copied to the store directory; only WebMerchant's internal database of stores is updated.

WebMerchant's Store Setup

Adding/Deleting Stores

A single copy of WebMerchant can process orders for a single merchant account. If you are running multiple stores that share a single merchant account then you only need one copy of WebMerchant. However, if you want to run multiple stores, each of which has its own merchant account, then you will need to purchase multiple copies of WebMerchant. Contact Smith Micro Software about special bundle pricing for WebMerchant.

In order to use multiple copies of WebMerchant, copy the "WebMerchant" folder that was originally installed in the StoreBuilder's "Store" folder into each of your store directories. Then click "Add New Store Serial #", and enter the proper information, for each store. Note that some preferences (like the location of the Orders directory) is global to all copies of WebMerchant. This is necessary since WebCatalog uses these preferences as well.

You can delete a store installation by clicking the "Delete This Store Serial #" link in the proper store setup. Deleting a store does not actually delete any of the WebMerchant files in your store's WebMerchant folder. Instead, it merely updates WebMerchant own internal database of assigned serial numbers.

Store Preferences

Store Name

The store name is used as an identifier for the various WebMerchant administration templates and does not appear in any public pages. It does not have to match any existing file or folder name. Choose a short descriptive name.

Serial Number

Enter your WebMerchant serial number. This number is of the form WMRT-XXXX-XXXX-XXXX-XXXX.

URL

Enter the full URL (including the "http://" prefix) to your store folder. Your store folder is the folder that contains the WebMerchant folder mentioned earlier in the installation procedure. Since this URL is used by WebMerchant in its administration pages, which you probably want to view through a secure (SSL) server, the default prefix is "https" rather than "http". If you do not have a secure server installed, or have it set up in a different way, you should change this prefix to "http".

Enabled

WebMerchant is a sweeper application. That is, it constantly looks in the "Orders" folder, specified in your WebCatalog preferences, for new orders to be processed. The sweeping process takes place at an interval determined by a store trigger added to WebCatalog's trigger database. When first installing WebMerchant you should uncheck the Enabled option. This turns off the automatic sweeping of the orders folder and allows you to manually sweep the orders folder with the "Process Orders" link mentioned below. After you are happy with your WebMerchant installation, and have processed orders manually to verify that WebMerchant is working properly, check the Enabled option and save the changes.

Utilities

The links found in the Utilities section provide necessary processing and administrative capabilities. Before linking to any of the Utility pages be sure to click "Save Changes" if you have modified any of the fields in the general store information.

Process Orders

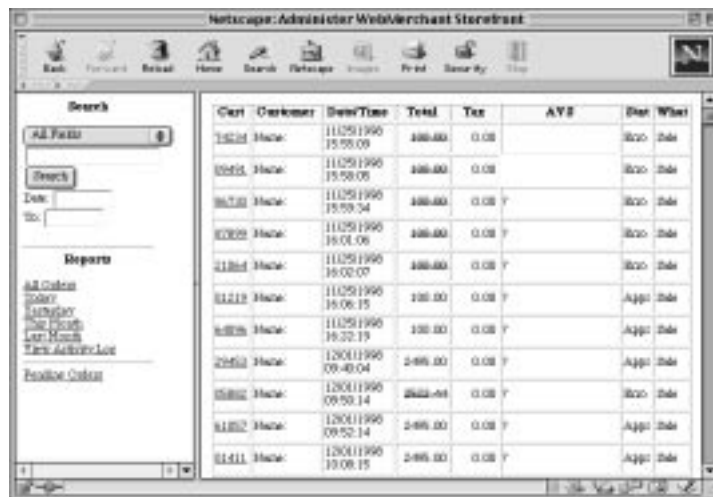Clicking the process orders link causes WebMerchant to sweep the orders folder (as set in your WebCatalog preferences) and process all the current orders. If there are no current orders, the page will come back quickly with no transactions. If there are orders in the folder, the page will not return until all the orders have been processed. A short description of each transaction will be listed on the page.

The process orders link is a manual link to the page that will be executed automatically at a pre-determined interval by WebCatalog's trigger database. This allows you to check the functioning of WebMerchant, and see the results, before automating the process.

Administer Orders

After installing WebMerchant, and checking its functionality, this is where you will spend most of your time. The order administration page contains many new accounting and payment processing capabilities not found in previous versions of WebMerchant.

When you click on the Order Administration link, a new window in your browser will open with two frames. The left frame contains all the basic order administration functions. The orders themselves are listed in the main frame on the right.

WebMerchant's Order Administration

In the left frame, the top section contains a small search form that lets you find orders based on information in a particular field, or by date range. For the most part, you should be able to use the pre-built searches in the sec-

ond section that show you all orders, today's orders, yesterday's orders, this month's orders, and last month's orders.

Orders are listed with the last 5 digits of the order number linked to a complete view of the order file contents. A single cart value may appear more than once in the list if the order was voided or booked and shipped. Voided orders are listed with a line through the value of the order to signify that the amount was voided or credited back to the customer.

When you click on the order number you will see a full listing of the order file information. This is called the order detail page.

Credit Money Back To Customer

WebMerchant's Order Detail Page

If your customer returns the product, or has purchased in error, you can void the order (credit the money back to the customer) by clicking on the "Credit Money Back to Customer" link shown on the order detail page. Clicking this link automatically changes the PayMethod type to "VO" and re-submits the order for processing. After successfully crediting the money back to the customer, a separate entry in the order listings will appear with same cart value as the original purchase.

Pending Orders

Click the Pending Orders link in the left frame of the WebMerchant Administration pages to view all the pending orders.

WebMerchant's Pending Order Page

Orders are moved to the pending folder for two reasons. First, when WebMerchant is unable to authorize a credit card purchase, perhaps because the merchant network is down, the order is moved to the pending folder so that you can resubmit the order after the network becomes available. Click "resubmit" and the order will be moved from the pending folder back to the orders folder and processed again.

Orders using the Book/Ship model also use the pending folder. When the
order is booked it is moved into the pending folder to await the ship com-
mand. After the product has been shipped click the "Ship" link. When
clicking "Ship" the PayMethod value is automatically converted to "SH"
and resubmitted to the orders folder.

Edit Store Preferences

The store preferences contain detailed information about how your orders
will be processed by WebMerchant. Current WebMerchant customers will
notice that the store preferences are very similar to the preferences found
in previous versions of WebMerchant.

WebMerchant's CyberCash Store Preferences

Payment Processor

Before editing any other preferences, you should set your payment processor. The appropriate processors for your platform (Windows or Macintosh) will appear in the pop-up menu. After selecting the processor, click the "Change Payment Processor" button. Appropriate preferences for that processor will appear at the bottom of the form.

The credit card processor is invoked when the payMethod field in the order file is set to "CC". If you want to write your own payment processor you can use a value of "AC" and modify the AccountAuthorizer (described later) to perform your authorization. Credit card orders that use the Book/Ship model should set the payMethod field initially to "BK" to have the order booked. Then set the order to "SH" when the order is shipped, and run the order again. This is handled automatically by the order administration templates provided with WebMerchant.

Store Administrator Groups

There are two groups allowed to administer each store. Members of the "Admin" group (as determined in the Security section of WebCatalog's preferences) can administer all the stores on your server. In addition, you can specify a second group that is only allowed to view and process orders for a single store installation. Members of this group are only given access to the WebMerchant administration templates for a single store. Create this group by adding a new user in WebCatalog's Security section and give them a unique group affiliation. For example, the group name for the ACME Cracker Factory store might be "ACME". When entering username/password combinations for administrators allowed to access the store's orders, they would be members of the "ACME" group. In this situation you would enter "ACME" in the Store Administrator Group field. If you have a single store on your server, and only need members of the "Admin" group to access WebMerchant, you can leave this preference empty.

Store Administrator Email

This is the email address of your store administrator. When WebMerchant experiences difficulties, notices will be sent to this email address. Note that

email regarding approved and declined orders are sent to different address-
es specified below.

Log File

This is the name of the log file where WebMerchant stores information
about its operation.

Payment Processor Settings

CyberCash Settings

CyberCash CCID

When you set up an account with CyberCash, you are issued a CyberCash
ID, or CCID. Enter your CCID here.

CyberCash Secret

When you set up an account with CyberCash, you are issued a CyberCash
Secret. Enter your secret here.

CyberCash Host

When you set up an account with CyberCash, you are told what host com-
puter to communicate with CyberCash, typically "cr.cybercash.com". Type
the host machine address here.

CyberCash Admin Server

When you set up an account with CyberCash, you are told what URL to
use to administer your account. Type the CyberCash Admin URL here.

Address Verification

This pop-up menu determines whether CyberCash sends address informa-
tion to your merchant network. This setting must match your network
requirements. Do not select address verification unless your network
requires it.

MacAuthorize Settings

WebMerchant's MacAuthorize Store Preferences

MacAuthorize Program Name

This is the actual name of the MacAuthorize application as seen in the
Desktop. For example, "MacAuthorize 2.0 Demo". WebMerchant does not
launch MacAuthorize automatically - you should have MacAuthorize

launches automatically by adding an alias to the program to your Startup items directory.

Address Verification

This pop-up menu determines whether MacAuthorize sends address information to your merchant network. This setting must match your network requirements. Do not select address verification unless your network requires it.

Settling Your Account With MacAuthorize (Single User Version)

When WebMerchant authorizes an order with MacAuthorize the money is not actually credited to your merchant account until the orders are settled. Typically, most businesses settle their orders once a day. The single user version of MacAuthorize (as opposed to the Hub version mentioned below) does not offer automatic settling. You are required to settle your account manually each day, or at any interval you choose. Due to difficulties with MacAuthorize when settling batches that do not contain any orders, this process cannot be reliably automated. You should upgrade to MacAuthorize Hub (which settles automatically) if you do not want to settle manually.

MacAuthorize Hub Settings

In addition to all the preferences used for MacAuthorize, the MacAuthorize Hub adds the following items:

Hub Merchant Identifier

When you set up MacAuthorize Hub, you need to tell it which computers on the network will be allowed to control it. Enter the name that identifies this setup.

ICVerify Settings

Substation ID

Enter the ICVerify substation ID here. This value is used to identify which substation is accessing ICVerify.

Request Directory Path

The full path to the ICVerify request directory (where authorization requests are placed). This should be a standard file system path like "C:\ICVerify\Request".

Address Verification

This pop-up menu determines whether ICVerify sends address information to your merchant network. This setting must match your network requirements. Do not select address verification unless your network requires it.

Email Settings

"From" Email Address

This is the email address that all messages sent by WebMerchant will be "from". All messages go through the email server specified in the WebCatalog preferences. If your mail server requires that all messages have a valid "from" address, then you must make sure this address is a valid email account. A general address like "webserver" or "ACMEstore" is best since it will be used in numerous different situations.

Accounting Email Address
Fulfillment Email Address

The accounting and fulfillment addresses are each sent notification, using their own unique templates, whenever an order is successfully processed.

If you only require a single notice, you can leave the fulfillment address blank.

Problem Email Address

The address where notice is sent for all orders that are declined or have problems in some other way. This person may then go to the order administration pages to resubmit the order after updating credit card or other information from the customer.

Folder Settings

Pending Folder

The pending folder contains order files that have been processed, but have not been completed. These orders usually require manual intervention in order to complete the verification process. They have not been declined. There are two primary situations where orders are sent to the pending folder.

The first reason is that the payment processor is unable to connect to the merchant bank network or is unable to authorize the card for some reason. If this occurs, the order is sent to the pending folder so you can re-submit it later. Notice is sent to the store administrator in this situation.

The second reason an order will be sent to the pending folder is when a book vs. ship model is being used. In book/ship situations, the order is authorized for a particular amount ("booked"), but the card isn't actually charged until a later time (when the product is "shipped"). All orders using this method are placed in the pending folder after they have been booked. When the product is shipped, you charge the card by clicking the "ship" link in the order administration pages for the pending folder.

Stockroom Folder
WebDelivery Folder

The location of the product files used for WebDelivery. This folder is
"secure" in the sense that it can lie outside the Web hierarchy and all
delivery files are copied from this folder to the Web Delivery folder when
product is purchased - the customer is never given a link into this directory.
If you are not using WebDelivery (all your products require physical deliv-
ery) then you can leave this preference blank.

File Attachment Field

When using web delivery, this specifies the line item field in the order file
(textA - TextE) where the relative path from the stockroom folder to the
actual product file is located. For example, Suppose you have two products
and their files are named "productA.zip" and "productB.hqx". The product
A file is located in a folder named "ProductA" in the stockroom folder and
product B is located in a folder named "ProductB" in the stockroom folder.

If you've selected the "textA" field to contain your file attachment informa-
tion, then when a product is added to the shopping cart, you need to add
the file location to the textA field of the order file. For product A, the textA
field would contain "ProductA/productA.zip". For product B, the textA field
would contain "ProductB/productB.hqx". Normally, these paths would be
stored in the product database. When WebMerchant attempts to deliver the
product, it appends the path found in the textA field to the Stockroom
Folder path to get the actual file location for each product.

If you are not using WebDelivery, you should leave this preference on
"None".

Chapter 4
Modifying WebMerchant

Modifying Triggers

By default, WebMerchant is set to sweep the orders folder once per minute. For most situations, this sweep frequency works well. If you'd like to modify the sweep frequency you can edit the trigger used by your store to sweep the folder. Click the "Triggers" link in the WebCatalog administration pages. Edit the trigger whose URL goes to the "WebMerchant/ProcessOrders.tpl" page in your store folder.

Modifying Templates

Since WebMerchant is built using WebCatalog's WebDNA language, you can easily modify many of its features. Files that you will most likely modify are the email templates used to send out purchase notification, and the authorization templates used to perform post-authorization actions. All of these templates are found in the WebMerchant folder placed in your "Store" folder (by default, installed in the StoreBuilder's "Store" folder).

Email Templates

All the email templates used by WebMerchant are contained in the "EmailTemplates" folder found in the WebMerchant directory (of your individual store directory).

EmailLineItems.inc

This template is included in the other email templates and formats the look of the line items purchased.

AdminPending.email

This email template is used whenever an order is placed in the "Pending" folder. Orders are considered pending if they are using Book/Ship authorization and the Book authorization has been performed, or if WebMerchant is unable to verify authorization because the bank network is unavailable. The Store administrator address is sent this message.

AccountingApproved.email
AccountingDeclined.email

These are the email templates sent to the accounting email address stored in the store preferences.

CustomerApproved.email
CustomerDeclined.email

These are the email templates sent to the customer.

FulfillmentApproved.email

This is the email template sent to the fulfillment email address stored in the store preferences.

Authorization Templates

Under normal conditions you do not need to modify the authorization templates. These templates are called ("executed") after authorization takes place. There are three possible authorization states: Good, Bad, and Pending.

GoodPath.inc

This template currently performs an [include] on the "good" email templates. In addition, it performs the WebDelivery actions stored in the WebDelivery.inc file. You may add your own WebDNA to the GoodPath.inc or WebDelivery.inc files.

BadPath.inc

This file is included when an authorization is declined.

PendingPath.inc

This file is included when an authorization is considered "Pending". Orders are pending when you are using Book/Ship authorization and the Book authorization takes place and when the merchant network is unavailable or unable to make the authorization for some reason.

Account Authorizer

If your perform authorizations on account numbers, PO's, or other methods that do not include WebMerchant's standard credit card authorization hooks you can use your own WebDNA-based account authorizer instead. In order for orders to be processed by the account authorizer, the value in their payMethod field of the order file must be "AC".

The account authorizer is simply a WebDNA template that is called whenever an AC order is placed. It is up to you to decide when an order is good or bad and what to do in each case. By default, the AccountAuthorizer.inc file in the WebMerchant folder accepts orders whose account number field is set to "4000300020001000" and declines all other orders.

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Chapter 5
Web Delivery

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Background

Web Delivery allows you to automatically deliver electronic goods after payment authorization has been successful. While this has obvious applications for businesses that sell software, web delivery can also be used to allow immediate downloading of graphic images, PDF files, or movies. In addition, the web delivery mechanism in WebMerchant provides immediate feedback regarding payment authorization to customers purchasing physical goods.

"Near Real-Time" Authorization Feedback

Many Web sites provide immediate Web-based feedback regarding payment authorization. The problem with "real-time" authorization (waiting for authorization to complete before returning a "Thank You" page to the customer after they have clicked "Purchase") is that credit card authorization relies on the speed and availability of your bank's merchant network to handle the transaction. If the network isn't able to provide a quick response, then your customer may be forced to wait quite a while. When your customers wait for your server, especially after submitting a purchase request, they can become impatient and concerned about the validity of their order - often leading to multiple payment submissions or other unnecessary customer service issues.

WebMerchant follows a "near real-time" approach to credit card processing. Rather than forcing the customer to wait for authorization to complete before returning a page to the customer, WebMerchant relies on WebCatalog to immediately return a "Thank You" page after an order is submitted and placed in the WebMerchant Orders folder. WebMerchant

processes the orders at a specified interval and notifies the customer via email after processing takes place. This means that payment authorization may take a few seconds or a few minutes depending upon your settings. This system works well in many situations, however, there are advantages to providing immediate web based feedback during the authorization process. You can use the web delivery mechanism in WebMerchant to do this without losing the benefits of near real-time processing.

WebDNA for Thank You Page

In order to provide your customers with the web-based authorization feedback provided by web delivery you need to add some additional WebDNA to your existing "Thank You" page - the page returned to your customers after submitting an order. Remember, you don't need to be selling electronic products to use this feature. Add the following code (which can be modified to change the text and formatting) to your "Thank You" page:

```
[text]WebDelFol=[lookup
  db=webmerchant/webmerchantprefs.db&lookinfield=preference&va
  lue=WebDeliveryFolder&returnfield=value&notfound=webmer-
  chant/webdelivery/][/text]
Please click <a href="[webdelfol][cart].tpl">here</a> to view
  authorization and download information.<br>
[!]This writes out a temporary page that is replaced by the
  GoodPath/PendingPath/BadPath include files[/!]
[WRITEFILE secure=F&file=[webdelfol][cart].tpl]
<!--HAS_WEBDNA_TAGS-->
<HTML>
<HEAD>
<META name="Pragma" value="no-cache">
<META HTTP-EQUIV="Refresh" CONTENT="30; URL=[cart].tpl">
<TITLE>Processing</TITLE>
</HEAD>
<BODY bgcolor="#ffffff">
<H2>Your order is being processed</H2><BR>
<BR>
This URL will automatically reload every 30 seconds.
</BODY>
</HTML>
[/WRITEFILE]
```

The first bit of code gets the location of the web delivery folder specified in your WebMerchant preferences. A temporary file will be written out in this

folder so your customer can follow the progress of their purchase authorization. The name of the file is the shopping cart value with a .tpl suffix. A link is created to this page and a "dummy" version of the page is written out with an embedded [writefile] context. Initially, the page merely reloads itself every 30 seconds. It is up to the other WebMerchant "hooks" (GoodPath.inc, BadPath.inc, and PendingPath.inc) to overwrite this page with the results of the authorization. Since the dummy page reloads itself, the final results will appear as soon as they are processed. The customer must click on the "Please click here to view authorization information" link in order to see what's happening.

Preference Settings

Web delivery relies upon the values in your individual store preferences to determine how delivery works. Here is how you should set your preferences, depending upon the type of products your store sells.

Physical Products

If your store only sells physical products, then you should set the value of the stockroom folder to nothing. The value of the pending and web delivery folder should be set appropriately. The Attach File Field pop-up menu should be set to "None".

Physical and Electronic Products

In this situation, follow the instructions for electronic products below. Make sure that your database has a field named "canemail". The value of this field is used to determine whether web delivery should "deliver" the product or not. If you are using the Store Builder, make sure the pop-up values for electronic and physical products are set appropriately.

Electronic Products

Set the Attach File Field pop-up to TextA-TextE (depending upon which one you are using to store the file name or path to your electronic product). Set the values of the web delivery and pending folder appropriately. The stockroom folder preference depends upon how your electronic products are delivered.

If your electronic products are serialized, or protected in a similar way, then there's no need to copy products from a "secure" stockroom folder to a "temporary" web delivery folder. In this situation, it is advisable to allow people to link directly to an ftp site (which can be password protected with the necessary password in the URL) so all customers can download their products from the same location. This saves disk space and does not unnecessarily slow down your server while files are copied. As you can guess, the value of the stockroom folder preference should be blank in this instance, and the full ftp (or http) path to the product should be contained in the Attach File Field of the shopping cart.

Since distributing product serial numbers is a very common function of many sites that sell electronic products, we've built a simple serial number mechanism into WebMerchant as well. Link to the file "SerialNums.tpl" located in the WebMerchant folder of your store folder. By default, the path to this file would be http://www.your domain.com/webcatalog/store-builder/store/webmerchant/serialnums.tpl. This page allows you to add serial numbers for specific product SKUs to a database. After each successful purchase, if a serial number exists for the product purchased (by matching the SKU value of the product to the SKU value in the serial number database) then the number is sent via email to the customer and is tagged as "used" in the serial number database. When serial numbers for a particular product run out, email notification is sent to the store administrator. You may, of course, customize the serial number mechanism to fit your situation by editing the SerialNums.tpl page, database, and hook into the GoodPath.inc file.

If your products are not serialized (graphic images and PDF documents are good examples) then you will want to use WebMerchant's ability to copy files from the stockroom folder to a temporary download location in the web delivery folder. In this situation, you should set the WebMerchant individual store preference for the stockroom folder to the proper file path.

Additionally, you should put the name of the product in the order file / shopping cart Attach File Field. WebMerchant looks for a file with the name in this field in the stockroom folder. If it is found, the product is copied to the web delivery folder and renamed with a random prefix. A link to the copied file is placed on the final web delivery page. By default, WebMerchant deletes all files in the web delivery folder every 24 hours.

The shopping cart (and order file) format is a tab-delimited text file of the following format:

```
H <tab> Version <tab> Date <tab> Time <tab> Email
<tab> PayMethod <tab> AccountNum <tab> ExpMonth
<tab> ExpYear <tab> Name <tab> Company <tab> Address1
<tab> Address2 <tab> City <tab> State <tab> Zip <tab> Phone
<tab> TaxRate <tab> ShipVia <tab> ShipCost <tab> Header1
<tab> Header2 <tab> Header3 <tab> Header4 <tab> Header5
<tab> country <tab> ShipToEmail <tab> ShipToName <tab>
<tab> ShipToCompany <tab> ShipToAddress1 <tab> ShipToAddress2
<tab> ShipToCity <tab> ShipToState <tab> ShipToZip
<tab> ShipToCountry <tab> ShipToPhone <tab> Header6
<tab> Header7 <tab> Header8 <tab> Header9 <tab> Header10
<tab> Header11 <tab> Header12 <tab> Header13 <tab> Header14
<tab> Header15 <tab> Header16 <tab> Header17 <tab> Header18
<tab> Header19 <tab> Header20 <tab> Header21 <tab> Header22
<tab> Header23 <tab> Header24 <tab> Header25 <tab> Header26
<tab> Header27 <tab> Header28 <tab> Header29 <tab> Header30
<tab> Header31 <tab> Header32 <tab> Header33 <tab> Header34
<tab> Header35 <tab> Header36 <tab> Header37 <tab> Header38
<tab> Header39 <tab> Header40 <tab> NonTaxableTotal
<tab> TaxableTotal <tab> TaxTotal <tab> ShippingTotal
<tab> CartIPAddress <tab> CartUsername <tab> CartPassword
<tab> Precision <tab> TaxableShipping <tab> AuthNumber
<tab> ResponseText <tab> Status <tab> BatchNumber
<tab> ReferenceNumber <tab> SequenceNumber
<tab> ItemNumber <return>
```

Followed by multiple line items (one per sku, tab-delimited, return at end):

```
L <tab> sku <tab> quantity <tab> price <tab> taxable
<tab> canEmail <tab> unitshipCost <tab> textA
<tab> textB <tab> textC <tab> textD <tab> textE <return>
```

WebCatalog saves Shopping Cart files in a folder you specify in the preferences. If the ShoppingCartFolder preference is "shopping carts/", then WebCatalog looks for a folder called "shopping carts" in the same folder as

the template being displayed. If the preference is "../shopping carts/" then WebCatalog looks for the folder one level "up" from the template.

Shopping Cart files stay in the shopping carts folder until they expire (24 hours of inactivity), or until the visitor presses the "Purchase" button on an invoice form. Then the file is moved to the Orders folder defined in the preferences. WebMerchant picks up the orders that appear in that folder and processes them accordingly. WebCatalog itself will do nothing to the files once they are moved to the Orders folder.