



Users Manual

CardFlex Cart

Shopping cart software

v. 2.0



Users Manual



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I. Introduction

The CardFlex shopping cart software is designed to help you build a robust online store. This software can satisfy both a professional user, interested in up-to-date and advanced functionality, and a novice for whom the simplicity is the main factor.

You will find the module very user friendly and easy to use. You just go to our site, buy the software, build your store and start selling. The manual will guide you step-by-step through installation, setup and use of the shopping cart software.

The CardFlex Cart module comes pre integrated with the CardFlex payment gateways and supports all major credit card types.

Thank you for using the CardFlex Shopping Cart software.

II. What is the CardFlex Cart

The CardFlex Cart is powerful shopping cart software is optimized to build stores that can handle over 10,000 product skus.

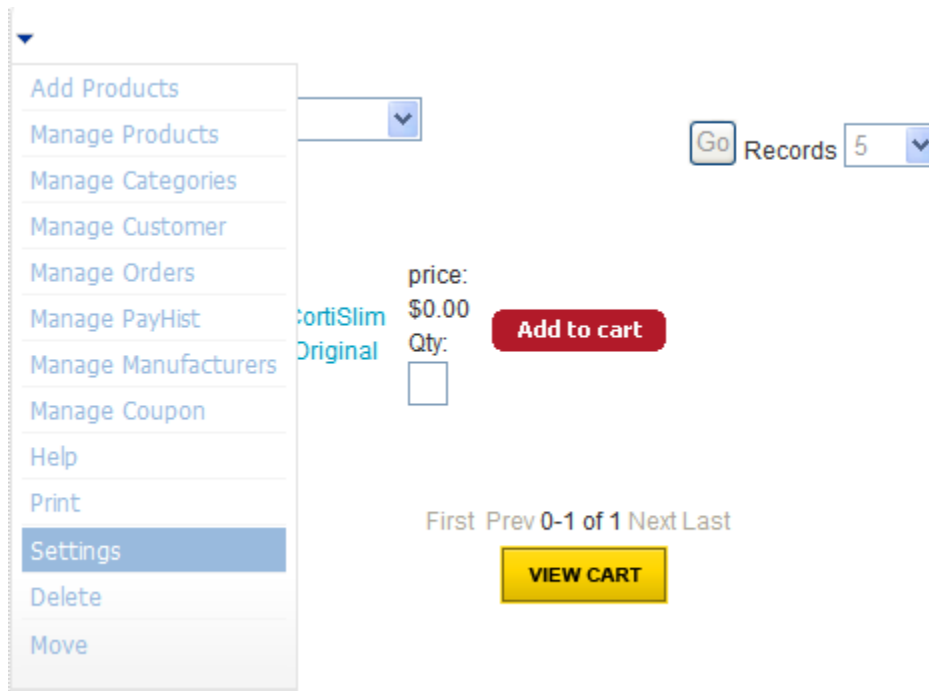
The CardFlex Cart is your best choice if you are:

- Looking for quality shopping cart software to start an online business.
- A site owner wishing to integrate a shopping cart with your existing web site.
- A web developer searching for a professional low-cost shopping cart
- An ISP or web hosting company that wants to offer a shopping cart solution as a part of your services.
- Looking for a good shopping cart to create a dynamic website with some specific functionality.



III. Configuring the Module Settings

Hover your mouse over the drop down arrow in the upper right hand corner of the CardFlex Cart module container and choose settings.



Scroll to the bottom of the screen and click the plus sign next to the “CardFlex.Buy Now Settings”



☐ **SmithCart Settings**

Gateway Setup

Gateway :	<input type="text" value="Authorize.Net"/>
Merchant ID:	<input type="text" value="25ht9m67PD"/>
RegKey :	<input type="text" value="35J2rq5d6LTJ2Yg6"/>
Test Mode :	<input checked="" type="checkbox"/> (Applicable for only Authorize.net, First Data and Innovative Gateway)

Payment Mode Setup

Credit Card :	<input checked="" type="checkbox"/>
ACH Checking :	<input checked="" type="checkbox"/>
ACH Savings :	<input checked="" type="checkbox"/>

A. Gateway Setup

Merchant ID - This is a required field for the CardFlex gateway. Merchant ID is a unique id that identifies you with the gateway.

Password - This is the gateway password and is a required field.

B. Payment Method Setup

The payment mode setup defines what payment methods are displayed in Step 2 of the cart checkout.

Credit Card – Check this box if you want to offer users the ability to checkout and pay for your products using credit cards. Supported credit cards are Visa, MasterCard, American Express, Discover, Diners and JCB

eCheck Checking - Check this box if you want to offer users the ability to checkout and pay for your products using eCheck.



eCheck Savings - Check this box if you want to offer users the ability to checkout and pay for your products using eCheck.

C. Shipping and Handling Setup

Shipping and Handling Setup

Carrier	<input type="text" value="USPS"/>
Free Shipping	<input type="checkbox"/>
Free Shipping for Orders over x \$\$'s	<input type="text"/>
Store Zip Code	<input type="text" value="92677"/>
Shipping Methods	<input type="checkbox"/> Parcel Post
	<input checked="" type="checkbox"/> Media Mail
	<input checked="" type="checkbox"/> Priority Mail Flat Rate Envelope
	<input type="checkbox"/> Priority Mail Small Flat Rate Box
	<input type="checkbox"/> Priority Mail Regular Flat Rate Box
	<input type="checkbox"/> Priority Mail Large Flat Rate Box
	<input type="checkbox"/> Express Mail
Handling Charge	<input type="text" value="2.5"/>
International Handling	<input type="text" value="6.5"/>
Combine Shipping and Handling	<input type="checkbox"/>

Carrier – United States Postal Service (USPS) and UPS shipping carriers are supported in the shopping cart for calculating real time shipping rates for the customer.

Free Shipping – Check this box if you do not want to charge shipping in your store. If this checkbox is checked the shipping section below the cart will not be displayed to the user and no shipping will be charge to their order.

Free Shipping for Orders over X \$\$'s – Check this box if you want to offer free shipping on orders over a certain dollar amount. For example, if you enter “100” in this field and the customer’s order subtotal is over 100 dollars then shipping will be free. If



the customers order subtotal is less then 100 then shipping charges will apply as normal. Free shipping for orders over X \$\$'s applies before discounts (coupons) and taxes.

Store Zip Code – Enter the zip code where you will be shipping product from. This is used in calculating real time shipping rates with UPS.

Shipping Checkboxes – Check the shipping methods that you want to be available to the user during checkout.

Handling Charge – Enter the handling charge that you want charged to domestic orders during checkout. Handling is shown in the cart as a separate line item unless the combine shipping and handling checkbox is checked.

International Handling Charge – Enter the handling charge that you want charged to international orders during checkout. Handling is shown in the cart as a separate line item unless the combine shipping and handling checkbox is checked.

Combine Shipping and Handling – Check this box if you want to combine shipping and handling to a single line item dollar amount in the cart checkout, order confirmation screen and email invoice receipt send to the user and store admin. Combining shipping and handing as a single line item allows you to set a fixed price for shipping by choosing free shipping above and entering a handling charge.



D. Tax Setup

Tax Setup

Charge Tax All	<input type="checkbox"/>
Tax Rate	<input type="text"/>
Use Tax Tables	<input checked="" type="checkbox"/>
Home State	California <input type="button" value="v"/>

Charge Tax All – Check this box if you want to charge a flat tax rate to all orders in the store. All customers will be charged tax regardless of what city and state they are ordering from.

Tax Rate – Enter the Tax Rate that you want to charge on orders in your store. If you enter a value in this textbox, the store will charge a flat tax rate (i.e. 7.75) on all orders in the store.

Use Tax Tables – Choose this option if you want the store to lookup the exact tax rate in the tax tables. If you select this option only customers in your “Home State” will be charged tax.

Home State – Select the state that you operate your business from. Only customers in your home state will be charged tax.



E. General Cart Configuration

General Cart Configuration

Show User Defined Field :

Dropdown Datasource : User entered Values

Dropdown Label : How did you hear about us

Dropdown Values : + x

Internet
Friend
Business

Show Categories

Show Quantity On Hand

Display Opt In

Success Redirect to URL : www.smith-consulting.com

Success Redirect Image : Browse... Save Image File

Coupons and Discounts

Show Coupon

Show Categories – Check this box if you would like to display the categories in your product catalog. If the show categories checkbox is not checked then categories will be hidden.

Show Quantity on Hand - Check this box if you would like to display the Quantity on Hand column on the cart screen during checkout.. If the Quantity on Hand checkbox is not checked then the quantity on hand will be hidden.

Display Opt In - Check this box if you would like to display the Opt In checkbox and message to your customer during checkout. If the Opt In checkbox is not checked then Opt In checkbox and message will be hidden. If the user Opts In during checkout a “True” value will be stored in the database for this customer. It is a good idea to check this box if you would like to engage your customers using email marketing.



F. Coupons and Discounts

Show Coupon – Check this box if you want to offer your customer a discount on their order. If you check this box a coupon text box will be displayed on the cart screen for the user to enter their coupon code. If they enter the proper coupon code their order total will be discounted by the amount of the coupon that you configured in the Manage Coupons section.

G. Email Setup

Email Setup

User Email Confirmation Subject:	<input type="text" value="Your Order from CortiSlim"/>
User Email Confirmation Header:	<input type="text" value="Thank you for shopping with CortiSlim. Your order will be shipped in two weeks. You can expect delivery in early January 2009. Your credit card will not be charged until your order is shipped."/>
Admin Email Confirmation Subject:	<input type="text" value="New Order on Website"/>
Admin Email Confirmation Header:	<input type="text" value="Thank you for shopping with CortiSlim"/>

[Update](#) [Cancel](#) [Delete](#)



User Email Confirmation Subject - Enter the subject line for the email that will be sent to the customer upon successful registration and payment.

User Email Confirmation Header - Enter the text for the header of the email that will be sent to the customer upon successful registration and payment. The header will be displayed at the top of the invoice.

Admin Email Confirmation Subject - Enter the subject line for the email that will be sent to the portal admin upon successful registration and payment.

Admin Email Confirmation Header - Enter the text for the header of the email that will be sent to the portal admin upon successful registration and payment.

The following tokens can be entered in the email body to customize the email message.

[FIRSTNAME]

[LASTNAME]

[USERNAME]

[EMAIL]

[ORDERTOTAL]

Note: All email tokens should be entered in uppercase.

Save your settings - When you are finished configuring the settings above click the “Update” button at the bottom of your screen.

Congratulations! Your new Shopping Cart is almost ready for use.

IV. Setup and Manage Categories

Before you add products to your shopping cart you need to add at least one category. To add or edit a category hover your mouse over the drop down arrow in the upper right hand corner of the CardFlex Cart module container and choose Manage Categories to setup your product categories.



SHOPPING CART

ContentPane

The screenshot shows a web application interface. On the left, a vertical navigation menu is open, listing various management options: Add Products, Manage Products, Manage Categories (highlighted in green), Manage Customer, Manage Orders, Manage PayHist, Manage Manufacturers, Manage Coupon, Help, Print, Settings, Delete, and Move. The main content area displays a shopping cart with two items. The first item is 'Original 90 Capsules' with a price of \$38.95 and a quantity input field. The second item is 'Burn 90 Capsules' with a price of \$29.95 and a quantity input field. Each item has a red 'Add to cart' button. At the top of the main content area, there is a search bar, a 'Go' button, and a 'Records' dropdown menu set to '5'. A small image of a pill bottle is visible at the bottom left of the main content area.

The following screen will be displayed when you choose Manage Categories”.



▼
Add New Category

Sort Order

Category Name

Share

SortOrder	CategoryName	Share	Edit	Delete
1	Diet Pills	Yes	Edit	Delete

[Back](#)

A. Add New Category

Sort Order - The sort order field controls the order in which the categories are displayed in the product catalog. Enter a numeric number from 1 to 999. The product categories will be sorted in ascending order by the sort order field.

Category Name - Enter the product category that you wish to add in the “Category Name” field. After you have entered your category click the “Add New Category” button to add the new category to the database.

Share – The “Share” checkbox only applies if you have added more than one cart module on different pages. This feature is used in situations where you want multiple product catalogs on different pages of your website. For example, if you are selling books and computers on your website and you wanted to have one page dedicated to books and another page dedicated to computers. If the share checkbox is checked for a particular category the category will be displayed in all product catalogs on any pages where you have added the shopping cart module. If the share checkbox is not checked then categories added to your first cart module will remain separate from categories added to your second cart module.



B. Edit and Delete Categories

Edit Categories

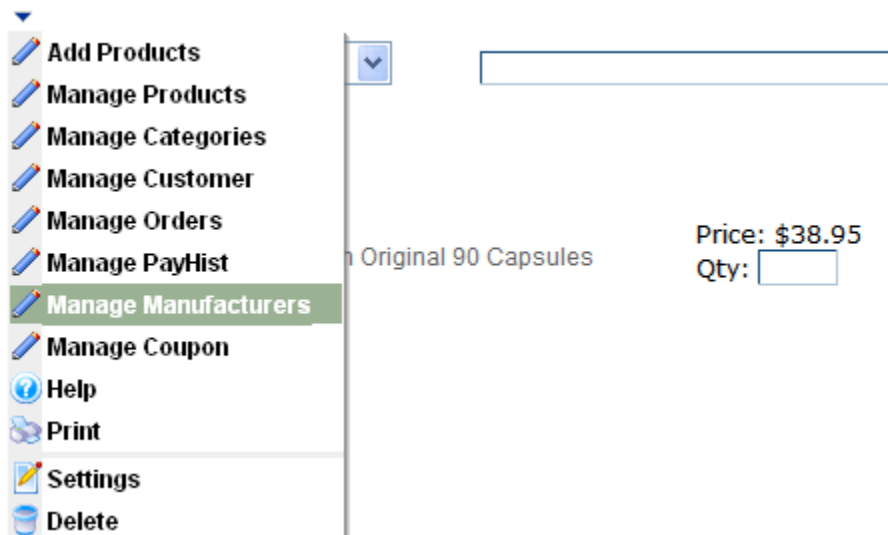
From the datagrid that lists your categories click the edit link next to the category you wish to edit. Make the changes to the sort order or category fields and click the update button to save your changes. Click the cancel button to cancel your changes.

Delete Categories

From the category datagrid that lists your categories click the delete link next to the category you wish to delete.

V. Setup and Manage Manufacturers

To add or edit a manufacturer hover your mouse over the drop down arrow in the upper corner of the CardFlex Buy Now module container and choose Manage Manufacturers.





The following screen will be displayed when you choose Manage Categories”.

▼
Add New Manufacturer

Manufacturer Name:

ManufacturerName		
CortiSlim	Edit	Delete

[Back](#)

A. Add New Manufacturer

Enter the Manufacturer that you wish to add in the “Manufacturer Name” dropdown. After you have entered your category click the “Add New Manufacturer button to add the new Manufacturer.

B. Edit and Delete Manufacturer

Edit Manufacturer

From the datagrid that lists your Manufacturers click the edit link next to the Manufacturer you wish to edit. Make the changes to the Manufacturer and click the update button to save your changes. Click the cancel button to cancel your changes.

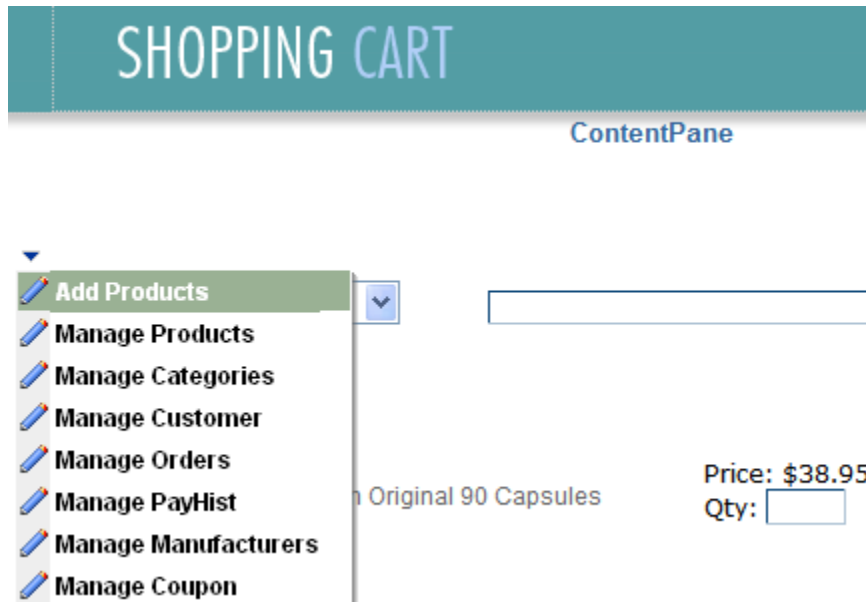
Delete Manufacturer

From the datagrid that lists your Manufacturer click the delete link next to the Manufacturer you wish to delete.



VI. Setup and Manage Products

Hover your mouse over the drop down arrow in the upper corner of the CardFlex Buy Now module container and choose Add Products.



The following screen will be displayed when you choose “Add Products”.



Add/Edit Products Screen

Category ID:	<input type="text" value="Diet Pills"/>
Manufacturer:	<input type="text" value="CortiSlim"/>
Product Sku:	<input type="text" value="1234"/>
Product Name:	<input type="text" value="CortiSlim Original"/>
Select Image To Upload:	<input type="text"/> <input type="button" value="Browse..."/>
Thumbnail Image To Upload:	<input type="text"/> <input type="button" value="Browse..."/>
Unit Cost:	<input type="text" value="38.95"/>
Quantity On Hand:	<input type="text" value="93"/>
Summary:	<input type="text" value="CortiSlim Original Summary"/>
Description:	<input type="text" value="CortiSlim Original Description"/>
Recurring Billing flag	<input checked="" type="checkbox"/> (Applicable for only Authorize.net Gateway)
Subscription Interval :	<input type="text" value="Monthly"/>
Total Occurrences :	<input type="text" value="9999"/> - "9999" = infinite recurring billing
DownLoad URL:	<input type="text"/>
Weight:	<input type="text" value="1.00"/>
Sort Order:	<input type="text" value="1"/>
Items in SKU:	<input type="text" value="1"/>
Exclude Coupons:	<input type="checkbox"/>
Share:	<input type="checkbox"/>
Featured:	<input type="checkbox"/>
Archived:	<input type="checkbox"/>

Category ID – Select the category you want your product in from the dropdown list.



Manufacturer - Select the manufacturer for your product from the dropdown list.

Product Sku – Enter your product sku or model number in this field. The product sku is typically a unique number that identifies your product for inventory purposes.

Product Name - Enter your product name in this field. The product name is displayed to the user in the product list, product detail and cart screens in the shopping cart.

Select Image to Upload – The image you select here is the large image that is displayed to the user in the product details page. Click the browse button and a file dialog box will be displayed where you can navigate and select your product image you wish to upload. When you click the submit button at the bottom of the screen your image will be automatically upload to the server and a path to the image will be stored in the products table.

The cart supports any image size you upload.

Thumbnail Image to Upload - The image you select here is the thumbnail image that is displayed to the user in the product listing page. Click the browse button and a file dialog box will be displayed where you can navigate and select your product thumbnail image you wish to upload. When you click the submit button at the bottom of the screen your image will be automatically upload to the server and a path to the image will be stored in the products table.

The cart supports any thumbnail image size you upload.

Unit Cost – The unit cost is the cost you want to charge for your product. Enter your product unit cost here.

Quantity on Hand – The quantity on hand field is used to manage your available inventory for your product. Enter the current available product quantity you have available in your inventory. Every time a user purchases a unit of product the quantity on hand is decremented by the number of units purchased.

Summary – Enter a summary product description here.

Description – Enter a detailed product description here.

Recurring Billing Flag - Check this box is you want to enable recurring billing for a particular product. Recurring billing is only supported using the Authorize.net gateway.



Subscription Interval – This dropdown box is where you configure the interval for recurring payments. The options available are weekly, monthly and yearly. For example, if you choose monthly and the user purchases a product on 1/1/09, the first payment will be automatically billed on 1/1/09 at midnight. Their second payment will be billed on 2/1/09 and so on.

Total Occurrences - This setting only applies if you have checked the box for recurring billing above. Enter a numeric value for the number of times that you want the recurring billing to charge the customer's credit card. Enter "12" to bill the customer's card 12 times. Enter "9999" to have the recurring billing continue indefinitely.

Download URL – Enter the URL to the product that you wish the user to download upon successful checkout and payment. Before entering the url in this field, create a subdirectory to store your downloadable products off the portal root. Next, upload/copy your downloadable files to the directory you just created on your server. By allowing you to copy your downloadable products to your server using FTP you can copy as many products as you wish in a single operation rather than uploading your products one by one. This should save you quite a bit of time!

URL syntax for downloadable products:

<http://domain-name/portals/portal#/subdir/downloadablefile>

Example URL:

<http://www.CardFlex-consulting.com/portals/5/myproducts/CardFlex.BuyNow1.01.00.10.zip>

Weight (Ounces) – Enter your product weight here. The weight field is used for calculating shipping costs during checkout. Weight should be entered as ounces.

Sort Order - The sort order field controls the order in which the products are displayed in the product catalog. Enter a numeric number from 1 to 999. The products will be sorted in ascending order by the sort order field.

Exclude Coupons – Check the exclude coupons checkbox if you wish to exclude this product from being discounted when the user enters a valid coupon code during checkout. This enables you to choose which products are discounted when you have an active coupon enabled in your cart.

Items in Sku – Items in Sku is used if you are bundling multiple products in a single sku. For example, a “But 2 Get 1 Free Deal”. It is used in conjunction with the coupon



feature giving you the ability to control the coupon discount. For example, if you are running a promotion for 5 dollars off and individual products and the customer purchases the buy 2 get 1 free you can give them 10 dollars off. This feature allows you to use a single coupon codes for the single items or the bundled items.

Share – The “Share” checkbox only applies if you have added more then one cart module on different pages. This feature is used in situations where you want multiple product catalogs on different pages of your website. For example, if you are selling books and computers on your website and you wanted to have one page dedicated to books and another page dedicated to computers. If the share checkbox is checked for a particular product the product will be displayed in all product catalogs on any pages where you have added the shopping cart module. If the share checkbox is not checked then products added to your first cart module will remain separate from products added to your second cart module.

VII. Setup and Manage Coupons

To add or edit a coupons hover your mouse over the drop down arrow in the upper corner of the CardFlex Buy Now module container and choose Manage Coupons.

The screenshot shows a dropdown menu on the left with the following items: Add Products, Manage Products, Manage Categories, Manage Customer, Manage Orders, Manage PayHist, Manage Manufacturers, Manage Coupons (highlighted), Help, Print, Settings, Delete, and Move. To the right, there is a search bar with a 'Go' button and 'Records' text. Below that, the word 'Original' is visible. The price is listed as '\$34.00' and the quantity is in a text box labeled 'Qty:'. A red 'Add to cart' button is present. At the bottom, there is a yellow 'VIEW CART' button and a pagination control showing 'First Prev 0-1 of 1 Next Last'.



The following screen will be displayed when you choose Manage Coupons.

▼
Add New Coupon

CouponCode	Coupon Name	Coupon Amount	Discount By Item	Coupon Quantity		
1234	5 Dollar Off Coupon	\$5.00	<input checked="" type="checkbox"/>	100	Edit	Delete

First Prev 0-1 of 1 Next Last

Back

A. Add New Coupon

Click the “Add New Coupon” link to add a new coupon.

▼

Coupon Code:

Coupon Name:

Coupon Amount:

Discount by Item:

Coupon Quantity:

Coupon Code – The coupon code is an alphanumeric value that the user enters in the cart to apply the discount.

Coupon Name – The coupon name is a unique name that you assign to the coupon to help you reference the sale or promotion you are offering discounts for. The coupon name does not show up in the front end cart to the user. The coupon name is only used for backend reporting.



Coupon Amount – The coupon amount is the discount amount. It should be entered as a numeric amount without the dollar sign.

Discount by Item – The discount by item checkbox allows you to apply the coupon at the order level or the order line item level. If the discount by item checkbox is checked and the user enters a valid coupon then the customer will receive a discount for each line item they have in the cart. For example, if the customer has two items in their cart and they enter a valid coupon for 5 dollars off then they will receive a total discount of 5 dollars. If the discount by item checkbox is not checked the customer would only receive a 5 dollar discount.

Coupon Quantity – The coupon quantity allows you to place a limit on the total number of coupons allowed per order per customer. For example,

1. You setup a 5 dollar off coupon code “1234” in the manage coupons screen.
2. You have entered a “coupon quantity” of “5” for this coupon.
3. The user orders a quantity of 6 for this item
4. The discount will be \$25 for this item

B. Edit and Delete Coupons

Edit Coupons

From the datagrid that lists your coupons click the edit link next to the coupon you wish to edit. Make the changes to the coupon and click the update button to save your changes. Click the cancel button to cancel your changes.

Delete Coupons

From the datagrid that lists your coupons click the delete link next to the coupon you wish to delete.

Congratulations! Your new Shopping Cart is now ready for use. Make sure that you logout as host before going thru the checkout.



Manage Orders Screen

▼

Search: Records: ▼

Select	ID	First Name	Last Name	City	State	OrderDate	ShipAddress	ShipZipCode	ShipMethod	Status		
Select	Invoice	2	Dave	Smith	Laguna	CA	2/5/2009	20 Kendall,	92677	UPS Ground	Open	Edit

First Prev 0-1 of 1 Next Last

Click the “Edit” link to the right of the order that you have shipped and wish to settle the credit card transaction. When you click the “Edit” link the status field will be available for you to change.

▼

Search: Records: ▼

Select	ID	First Name	Last Name	City	State	OrderDate	ShipAddress	ShipZipCode	ShipMethod	Status		
Select	Invoice	2	Dave	Smith	Laguna	CA	2/5/2009	20 Kendall,	92677	UPS Ground	Open	Update Cancel

First Prev 0-1 of 1 Next Last

- Open
- Shipped
- Closed
- Cancelled

Choose the “Shipped” status from the status drop down list. Click the “Update” link to save the record. When the “Shipped” status is selected and saved a settlement request will be sent to the gateway settling the credit card transaction on the order and depositing the money to your bank account.

Note: Depending on if you meet the cutoff time for your credit card processor your funds will be deposited within 24 hours.

The reason that the credit card transaction is not setup for auto settle is because by law, for ecommerce transactions you are not allowed to settle a credit card transaction until the transaction is shipped.



Viewing Order Details and Payment History

Click the “Select” link to the left of the order to view the order detail and payment history of the order you want to view.

▼

Search: Records:

Select	ID	First Name	Last Name	City	State	OrderDate	ShipAddress	ShipZipCode	ShipMethod	Status	
Select	Invoice 1	Dave	Smith	Laguna Niguel	CA	3/29/2009	20 Knedall, Unit B	92677	UPS Ground	Open	Edit
Select	Invoice 2	Dave	Smith	Laguna Niguel	CA	3/29/2009	20 Knedall, Unit B	92677	UPS Ground	Open	Edit
Select	Invoice 3	Dave	Smith	Laguna Niguel	CA	3/29/2009	20 Knedall, Unit B	92677	Free	Open	Edit

First Prev 0-3 of 3 Next Last

Order Detail

OrderID	Product Name	Quantity	UnitCost
1	CortiSlim Original	1	\$45.00

Payment History

Name	PayType	PayDate	Amount	Account No	Credit Card Exp	Status
Dave Smith	CreditCard	3/29/2009 6:21:23 PM	\$57.34	4012888888881881	0110	True

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Viewing and Printing the Order Invoice

Click the “Invoice” link to the left of the order to view the order invoice. Click the print button at the bottom of the invoice to print it.



Invoice

Ship To :

Dave Smith
20 Knedall Unit B
Laguna Niguel CA 92677

Shipping Method :

UPS Ground

Bill To :

Dave Smith
20 Knedall Unit B
Laguna Niguel CA 92677

Order Date : 3/29/2009

Order # : 1

Qty	Description	Unit Price	Total
1	CortiSlim Original	\$45.00	\$45.00

Handling Cost : \$2.00

Shipping Cost : \$6.85

Sales Tax : \$3.49

Total : \$57.34

[Print](#)

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VIII. Email Confirmation Invoice Receipt

After a successful order in your online store two email confirmations are sent out automatically. The first email confirmation is sent to the customer who placed the order. The second email confirmation is sent to the portal admin.

The following is a copy of the email confirmation invoice receipt that is sent to the customer and portal admin. You can insert a custom header that will appear at the top of the invoice. You can also custom the subject for the email confirmation. The custom



header and subject are configured in the email section of the module settings. Refer to section III module settings for instructions.

The following is a sample email confirmation receipt that is automatically sent when an order is placed:

Order Number: 34
Order Date: 03/31/2009 09:52 AM

Shipping Address:
Abdulrafie Altayeb
P. O. Box 15582
Jeddah , Jeddah
21454
SA

Billing Information:
Payment Type: Credit Card
Abdulrafie Altayeb
P. O. Box 15582
Jeddah , Jeddah
21454
SA

Product Name	Quantity	Price
Smith Registration Professional	1	\$75.00

SubTotal:	\$75.00
Discount:	-\$0.00
Shipping:	\$0.00
Handling:	\$0.00
Tax:	\$0.00
Order Total:	\$75.00



IX. Email Marketing

A. Customer Opt In

An Opt In checkbox presented to user during checkout that enables you to build a white list of email addresses that you can use for email marketing and email blasting. The Opt In field is stored to database with the customer email address.

B. Storing IP Address of Customer

The shopping cart will automatically store the IP Address of user who successfully purchases products in the shopping cart. The IP Address is saved to the customer table along with the user's email address. This feature will allow you to comply with CANSPAM requirements for your email marketing campaigns.

X. Affiliate Marketing

The shopping cart provides support for Affiliate Marketing to sell your products. The cart has the option to store affiliate id in order table on successful purchase. The cart tracks Affiliate purchases giving you the ability to pay out commissions to your affiliates in a multi level marketing (MLM) model.

A. Creating a new Vendor and Affiliate

- 1) Set up a Vendor for each affiliate or incoming link you want to track. A Vendor is a website or company that links to your website.
 - a. Navigate on "Admin > Vendors > Add New Vendor".
 - b. Set up your Vendor details. Make sure you enter your own email address so you receive the email with the affiliate id.
 - c. Click "Update" to continue.

- 2) Set up an Affiliate association for this Vendor



- a. At the bottom of the Vendor detail screen you will see the “Affiliate Referrals” heading.
 - b. Click on “Add New Affiliate”.
- 3) Generating a unique affiliate id and referral URL. After you create a new vendor and affiliate you should receive an email that looks like this:

Dear Affiliate,

Your account for the Affiliate Program has been created.

To begin earning commission, please use the following URL to link to our site:

<http://www.yourwebsite.com/Default.aspx?AffiliateId=27>

B. Affiliate Tracking

Adding affiliate tracking capabilities to your website is one of the most effective ways to achieve more sales, more traffic and better search engine ranking. The CardFlex Cart supports the following affiliate tracking campaign types:

1. Click Thru

An affiliate links to our website using the following link:

<http://www.yourwebsite.com/?AffiliatId=12>

This type of affiliate link and click thru will generate traffic to our website. You may or may not decide to pay commission for this type of referral.

2. Click Thru to Acquisition

An affiliate links to our website using the following link:

<http://www.yourwebsite.com/?AffiliatId=12>

This type of affiliate link will track click thru and if the user registers on your site. You may or may not decide to pay for this type of referral.

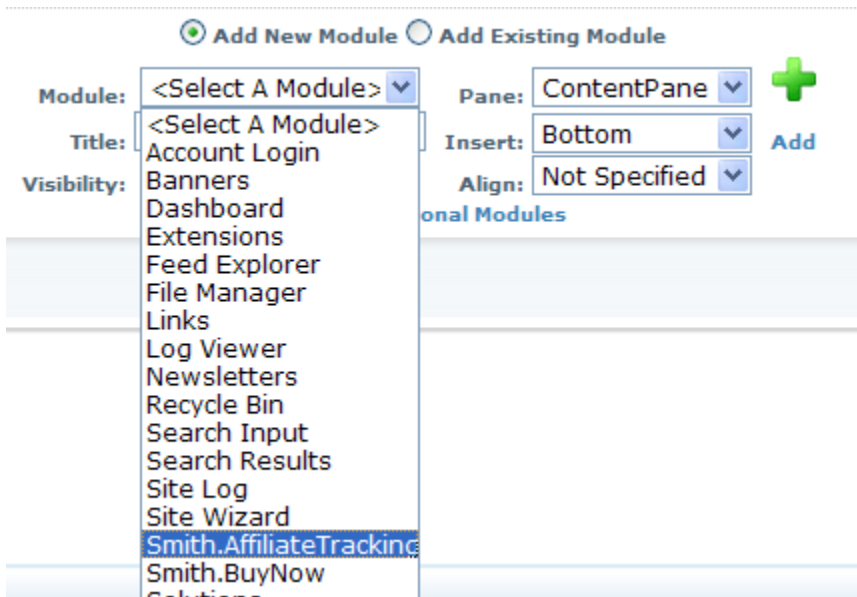
3. Click Thru to Purchase – Product Listing Page or any page on your website



To track affiliate purchases, the affiliate tracking module needs to be added to any page except the shopping basket page and the product detail page. Affiliate tracking on the shopping basket page and the product detail page will work automatically without the Affiliate Tracking module simply by passing the affiliateid in the url.

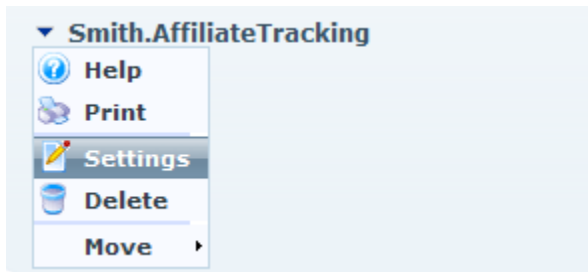
Follow these steps to add the Affiliate Tracking module to your page:

- A. In the store control panel add the CardFlex.AffiliateTracking module to any pane on your page.



- B. Edit the settings in the affiliate tracking module.

To view the affiliate tracking module settings hover your mouse over the drop down arrow in the upper corner of the affiliate tracking module container and choose “Settings”



Scroll to the bottom of the Affiliate Tracking Module Settings screen



Page Settings

Smith.AffiliateTracking

Affiliate Tracking Setup

Affiliate Tracking Id :

Update **Delete** **Cancel**

The “Affiliate Tracking Id” is defaulted to “AffiliateId”. The “AffiliateId” is the label that identifies the affiliate in the url. In most cases you will leave the default.

- C. Under page settings uncheck “Display Container” and “Allow Print” so website users do not see the module on the page. Click update to save the changes.

Page Settings

In this section, you can define settings specific to this particular occurrence of the Module for this Page.

Basic Settings

Icon:

Link Type:

File (A File On Your Site)

System Image

File Location:

File Name:

Upload New File

Alignment:

Left Center Right Not Specified

Color:

Border:

Collapse/Expand:

Maximized Minimized None

Display Container?

Allow Print?

To obtain the proper url for your affiliate to link directly to a page on your website follow these steps:



- A. Navigate to the desired page on your website you want your affiliate to link to and copy and paste the url from the browser window

Example URL for the product listing screen:

<https://www.yourwebsite.com/ShopOnline/tabid/60/Default.aspx?AffiliateId=20>

Example URL for your home page:

<https://www.yourwebsite.com/Default.aspx?AffiliateId=20>

- B. In the example url above, substitute your AffiliateId that was assigned for the affiliate. The affiliateid can be found in the Admin – Vendors screen.
- C. Send you affiliate your new link

4. Click Thru to Purchase – Cart Screen or Product Detail Page

Linking to the Shopping Basket Screen

To obtain the proper url for your affiliate to link directly to the shopping basket screen and automatically add a product to the cart follow these steps:

- A. Navigate to your cart screen and copy and paste the url from the browser window

Example URL:

<https://www.yourwebsite.com/ShopOnline/tabid/38/ctl/Cart/mid/370/Default.aspx?AffiliateId=20&productid=1>

- B. In the example url above, substitute your productid and affiliateid that was assigned for the product and affiliate. The productid can be found in the manage product screen and affiliateid can be found in the Admin – Vendors screen.
- C. Send you affiliate your new link

This type of affiliate link will automatically add your product to the shopping cart and also will track if the user successfully purchases your product.



Linking to the Product Detail Screen

To obtain the proper url for your affiliate to link directly to the product detail follow these steps:

- D. Navigate to your product detail screen for the product that you want your affiliate to link to and copy and paste the url from the browser window

Example URL:

<https://www.yourwebsite.com/ShopOnline/tabid/38/ctl/ProductDetails/mid/370/ProductID/1/Default.aspx?AffiliateId=20>

- E. In the example url above, substitute your affiliateid that was assigned for the affiliate. The affiliateid can be found in the Admin – Vendors screen.
- F. Send you affiliate your new link

If an affiliate links to your website and the customer purchases a product in your store you should pay commissions to affiliates. The typical affiliate commission is between 10 and 20 percent.

The CardFlexCart can easily be private labeled with your affiliate's logo and custom colors to meet your online marketing strategy needs.



XI. Adding a product to the cart directly from a link

The CardFlex Cart supports adding products directly to your cart by adding productid in the url or querystring. This is useful if you are developing your own product catalog navigation & menu system using another framework like flash or want to build your product catalog using normal pages. The CardFlex Cart supports adding products directly thru the querystring in the url. Follow these steps to obtain the correct link for hyperlinking:

1. Add a new product in the CardFlex Cart module admin from the manage products screen.
2. Click the view cart screen from the product catalog and go to the cart.
3. Cut and paste the url from the browser window and paste it into your favorite editor.
4. Add “?productid=1” to the end of the url where product id is the product id assigned after you add a product from the manage products screen in step 1 above.

Example URL:

<http://localhost/dnn490/Store/tabid/55/ctl/Cart/mid/377/Default.aspx?productid=1>

XII. PCI Compliance

Security of your customer’s personal information and credit card data is number one priority for CardFlex and our shopping cart was built to be fully PCI compliant. The Payment Card Industry Data Security Standard (PCI DSS) is a set of requirements designed to ensure that ALL companies that process, store or transmit credit card information maintain a secure environment. The PCI DSS is administered and managed by the PCI SSC www.pcisecuritystandards.org an independent body that was created by the major payment card brands (Visa, MasterCard, American Express, Discover and JCB.).

1. Credit Card Encryption – Cart supports storing or not storing the credit card in the database. If you choose to store the credit card to the database, the credit card is stored using RSA 256 bit encryption of the credit card number.
2. Card Security Code – CVV/CID on the back of a credit card is collected from the user and sent to the payment gateway for authorization but is never stored in the database.



3. SSL – Cart fully supports SSL
4. Cart supports validation for SQL injection and cross site scripting to prevent unauthorized access to the database