CFWebstore®

Version 6.50

Setting up and Running Your Store

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INTRODUCING CFWEBSTORE®

CFWebstore® is a ColdFusion application used for setting up an online store and shopping cart. While someone with no knowledge of ColdFusion can use it after going through these instructions, it is designed to be installed and set up by a web developer with at least some experience with this scripting language and they will find it an easy process to get started. If you've never used ColdFusion before though, you'll learn quickly in the process!

To use CFWebstore®, you will need a web server running at least ColdFusion MX and a database server with Microsoft SQL Server or MySQL.

The 6.0 version of CFWebstore® includes many new features and options, so if you are upgrading from an older version, you'll want to review this documentation to get an idea of what's new. Take your time to explore the product and all it can do, and make good use of this file when you get lost!

WHY FUSEBOX?

Whether you are new to CFWebstore® or a previous user, you may wonder what is Fusebox and why it was used for this software. Basically, Fusebox is a framework that outlines a way to organize the code. It includes a core set of files, and best practices for how to break down the rest of the application. It allows for separation, for instance, of the page display elements and the coding logic. It is one of the most commonly used frameworks by ColdFusion developers at this time, and is used for other languages as well such as PHP.

What this means for CFWebstore® is that by coding in Fusebox, we are structuring the application in a way that anyone familiar with Fusebox can easily follow. Those new to Fusebox can easily find more information on it, and will be learning a methodology common to many ColdFusion projects, rather than trying to learn a methodology no one else uses.

The common follow-up question is why Fusebox 3? At the time this product was being recoded, Fusebox 4 was still being developed, and no version was available at the time for ColdFusion 5 servers, which we wanted to continue to support. Fusebox 3 is also considerably easier to learn for coders that are new to the methodology. Changing the underlying framework to a newer Fusebox version, or another framework will be a huge undertaking and will be done as part of a complete code re-work.

You don't need to install anything on your server to use Fusebox. For more information on Fusebox, visit fusebox.org and halhelms.com. You can also find a bunch of good Fusebox 3 tutorials in your documentation directory.

INSTALLING CFWEBSTORE®

CFWebstore® is not a self-contained software application with an executable setup file. It is essentially just a very large collection of ColdFusion templates. To use CFWebstore®, you must install the files on a server that is running at least ColdFusion MX 6. Installation involves little more than extracting the files into the directory which you will be using to host your store. You don't need to install any Fusebox files, those are included in the installation file. There are just a couple more things you need to do to get the store up and running.

STEP 1: DATABASE SETUP

First step is to setup the database. CFWebstore® supports SQL Server and MySQL. We no longer support Access due to its unsuitable as a platform for hosting ecommence.

SQL Server: To use SQL Server or SQL Server Express, use the provided script in /database/version650/mssql_cfwebstore.sql to create a starter store database. The process is very simple, just follow these steps:

- Create a new database in SQL server on your remote server
- Open Query Analyzer and select your new database on the toolbar.
- Open the mssql_webstore.sql script file and run it. This will create the table structure, indexes, defaults, etc. and insert all the default settings, user data, states and countries, etc.
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MySQL: CFWebstore® supports MySQL, version 4.1 or higher. The steps are basically the same as those for SQL Server, just set up a new database and run the /database/version650/mysql_webstore.sql import script to create the starter store schema and data.

STEP 2: COLDFUSION ADMINISTRATOR

In order for the software to be able to interact with your database, you need to first add a datasource in the ColdFusion Administrator. By default, the datasource name is "CFWebstoreFB6". You will probably prefer to use your store's name or some other more descriptive name. DON'T USE SPACES OR DASHES IN YOUR DATASOURCE NAME! While the Administrator will allow this, it may cause problems with your store, as the Datasource name is used when setting cookies. Also, be sure the first character of the name is a letter (not a number). **A note on security settings:** you can enter the username and password for your datasource either in the datasource definition *or* in the settings for your store. If you are unsure which to use, check with your host.

If you are using shared hosting then your hosting company will provide you with the DSN (data source name) of your database in the Coldfusion Administrator.

STEP 3: CONFIGURING THE STORE

- Open the /config.cfm file to configure your settings. These settings tell the store what your datasource name is, what type of database you are using, your store URL, etc. ***Your store will not work correctly if any of these settings are incorrect!*** Just follow the comments in the file to configure it for your site. If you make any mistakes, you can just correct the file and reload the site, these settings are not cached in any way and will take effect immediately.

- Pay special attention to the StorePath and CFCMapping settings in config.cfm. These must be set correctly or the software will not be able to find all the core shopping and checkout functions, causing errors in your store. PLEASE NOTE that these are URLs, NOT file paths. Usually setting the StorePath will automatically configure your CFCMapping and no change to it is needed. There are a couple configurations though which may require you to set up a custom mapping in ColdFusion for the CFCs. The first is if your store path has any periods (.) in it. Periods in a cfc mapping are counted as separate directories so this requires a custom mapping. The other situation is if you are using a SSL that has a different path than your main store has. This is typically only found in stores using a shared SSL. Again, just set up a custom mapping (or have your host assist in doing this) that points to the CFC directory and enter the mapping name in the CFCMapping setting.

- Before making your store live, you will want to change the Administrator password. The default login is username "admin" and password "admin". After logging in, go to the My Account page and click on the link to change the current password. This will allow you to change the password for the Administrator. You can also use the admin tools to set up other administrator accounts.

- Make sure if you accept credit card payments on your site, that you have your host install an SSL certificate. Even if you don’t take credit cards, SSL is a good idea for security, as it will add extra protection to your admin area. When installing SSL, the best approach is to purchase your own certificate and have it exactly match the store domain. Be sure if your address includes a “www” on the front, that the SSL address includes it as well, as some browsers will block the cookies if it is not exactly the same. “www.mysite.com” and “secure.mysite.com” are NOT the same and "www.mysite.com" and "mysite.com" are also not the same. These kinds of setups will have problems with cookies in some browsers so be sure to use the exact URL for each. If you want to use shared SSL, pay attention to the additional information elsewhere in this document relating to that kind of setup.

- PLEASE NOTE that CFWebstore is not currently PA-DSS certified. If you take credit card payments, be sure to check if your merchant bank requires PA-DSS software as many do these days in addition to PCI certification. If so, you may need to use any of the payments gateways such as CRE Secure or Shift4's i4Go that hide the payment page on an external, verified payment site. This will help fulfill your PCI compliance requirement without needing PA-DSS certified software, and reduce any liability issues or concerns you otherwise would have in taking online payments. These gateways do an excellent job of disguising their sites to match yours for a completely seamless customer experience.

- A note for Unix users: Some users have found they need to adjust the read/write settings on some directories for the store to work correctly. Ideally your host will have ColdFusion set up to have write access on your site, but if not, you may have to do a chmod on some directories to allow write access. These directories include files, images, logs, errors and if you use downloads, your download directory and the tempdownloads directory.

- A note for Railo users: CFWebstore supports version 3.x of Railo out-of-the-box. However, one small code edit may be needed. In the main fbx_Settings.cfm page, you will need to comment out the second cferror line (around line 66) as this error type is not supported on Railo as of this time.

- You're now ready to start setting up your store! Spend some time going over all the various store options and pages and making sure your store is configured properly. You may want to make a diagram of how your site will be structured before beginning to create your categories and store pages. Pay particular attention to the configuration on each of the main settings pages:

    1. Main Settings
    2. Shopping Cart Settings
    3. Payment Settings
    4. Shipping Settings
    5. User Settings

MAIN SETTINGS

The Main Settings control a wide variety of options for your store. These will often have site-wide effects on how your store will work so take your time and make sure you understand what each does! You'll find this option under Site Design on the admin menu. Let's go over each of the settings available here, by the sub-section they are organized into:

SITE SETTINGS

1. **Site Name** – This is the name you wish to use for your store. It will appear on the title of the website and will be used in emails to your customers.

2. **Company Address** – Your merchant address as you would like it in email confirmations, can also be used in footers for your store.

3. **Home Country** – Select your home country. The home country is used to determine domestic versus international rates and will appear first on the country list on order forms.

4. **Locale** – The locale is used by the ColdFusion server to determine how to format your numbers and dates. Select the most appropriate locale for your home country.

5. **Images Directory** – You can change the name of the directory where your images are stored if you wish. The directory should be located under your main store directory.

6. **Open Admin Links in New Window** – When activated, clicking on an inline edit link in the store will open up the administration section in a new window.

Layout Settings

1. **Site Logo** – The site logo is an optional image you can use on your site layout and invoices.

2. **Default Palette** – The default palette is the one that will be used if no custom palette for a page is defined. This will also determine the default layout page to use for your site. You can set up the default palette in the Colors & Palettes section.

3. **Default Fuseaction** – This determines which page will appear when the user accesses the main index.cfm page of your site. By default, it will use "page.home".

4. **Default Columns** – This is the number of columns that will be used for subcategories and content (products and features) unless a custom setting is defined.

Email Settings

1. **Company Email** – This is the email used for order confirmations and other correspondence with customers.

2. **Webmaster Email** – The webmaster email is used for error reports from your site.

3. **SMTP Server** – If not configured in your ColdFusion Administrator, enter your SMTP server address here for sending store emails.

4. **SMTP Port** – The port for your SMTP server.

5. **SMTP Username** – If your SMTP sever requires authentication, enter the username here.

6. **SMTP Password** – The SMTP password, if using authentication.

SEO Settings

1. **Use SES Links** – This setting will configure your store to use search-engine safe links throughout the client areas. In order for these to work your server must be properly configured to allow them, see the SESConverter section for more information. If you use mod_rewrite or

other URL rewriting function on your server, you can also configure the fbx_Settings.cfm file further to remove the ‘index.cfm’ in the middle of the URL.

2. **Metatag Description** – This is the description of your store to be used for search engines. This is the default description used for all pages unless a custom one is entered.

3. **Metatag Keywords** – Keywords used to describe your site for search engines. As with the description, these will be used for all pages that do not have custom ones entered.

FEATURES

1. **Root Category (Features)** – Used to determine the home category for your features for navigation links in your store.

2. **Max Features** – The maximum number of features that will display on one page. The customer will receive links to additional pages of features once the maximum is reached.

PRODUCTS

1. **Root Category (Products)** – Used to determine the home category for your products for navigation links.

2. **Max Products** - The maximum number of products that will display on one page. The customer will receive links to additional pages of products once the maximum is reached.

3. **Units of Money/Weight/Size** – This is the text used in the store to describe your units of weight, size and money. These are used for displaying this information in admin forms and to the customer and should match your Locale settings.

4. **Inventory Control** – This sets whether inventory tracking is used and at what level products are removed from inventory. *None* will turn off all inventory tracking features. *Store* will remove products from inventory as soon as an order is placed in the store. *Admin* will remove products once the order is marked as Filled or In Process. *Mixed* will remove the product when the order is placed for online credit card payments, and when the order is filled for offline payments.

5. **Cache Products** – This setting will allow your categories to cache the product queries so as to lower the amount of database calls needed. This is particularly helpful for sites will lots of products and busy traffic. Please note that you will need to manually reset the cached data after adding or editing products.

6. **Show # in Stock** – This setting will show the quantity of product in stock to the customer.

7. **Show Out of Stock** – Disabling this will remove products from your store if they are out of stock. If you have this set to 'No' be sure to enter stock amounts for all your products or they won't show up!

8. **Show Retail Prices** – Displays the retail price of products as entered in the Product Pricing screen to the customer (as a comparison for your own store prices).

9. **Sort Products By** – Determines the sort order for products on the category pages. You can sort by the product name or by the product SKU.

10. **Order Button Text** – The text that is displayed on the purchase button for items in your store.

11. **Order Button Image** – An image that can be used as the button for products that do not have options.

DESIGNING YOUR STORE

Every store needs its own unique look. CFWebstore® includes both simple ways to change the look of your store as well as advanced features for experienced web designers. Let's look at each of the main areas you can use for customizing your design.

COLOR PALETTES

Palettes are used to define the color and images used for your design in the store. You can set up as many different palettes as you want to and use them for various pages throughout the store. The settings for a palette are as follows:

1. **Palette Name** – Name used to refer to this palette in the admin area.
2. **Titles** – Color to use for titles of pages, if no image selected
3. **Text** – Color for the main text of the site
4. **Links** – Color for links
5. **Visited Links** – Color for links that have been visited already
6. **Line Color** – Color for lines on the page, if no image used
7. **Background Color** – Background color for the page
8. **Layout File** – Custom layout, if any, to use with this palette. See the custom layout section below for more information.
9. **Parameters** – For more advanced CFWebstore developers, this allows you to send custom parameters to a layout page, to do things like swap header images, etc. This allows you to easily use a single cfm template for multiple store palettes.
10. **Background Image** – Graphic used for the background of the page
11. **Main Line** – Large line image. Upload an image, enter 'HR' for an HTML line, or leave blank for no line.
12. **Minor Line** – Thin line image. Upload an image, enter 'HR' for an HTML line, or leave blank for no line.
13. **New Image** – Graphic used to highlight new products, categories or features
14. **Sale Image** – Graphic used to highlight special products or categories
15. **Hot Image** – Graphic used to highlight products marked as 'Hot'
16. **Order Box, Highlight Box** – These colors are used for the order box that appears for products and the highlight box used for various featured information, such as products on sale, or quantity discounts for a product. The color settings for the box are:
    a. **Header Background** – Color for the background of the header of the box
    b. **Header Text** – Color of the text on the header
    c. **Table Background** – Color of the background for the main section of the box
    d. **Table Text** – Color of the text for the main section of the box

    e. **Required Field** – Color used to highlight required fields if not filled out
17. **Input Form** – These are the colors used for the forms on your site, anytime the user needs to enter information. The settings are:
    a. **Header Background** – Color for the background of the header of the form
    b. **Header Text** – Color of the text on the header
    c. **Table Background** – Color of the background for the main section of the form
    d. **Table Text** – Color of the text for the main section of the form
    e. **Required Field** – Color used to highlight required fields if not filled out
18. **Output Form** – Colors used for forms displaying information to the user, such as the item lists in the administrator area, the shopping cart, and the User Manager. The color settings are:
    a. **Header Background** – Color for the background of the header of the form
    b. **Header Text** – Color of the text on the header
    c. **Table Background** – Color of the background for the main section of the form
    d. **Table Text** – Color of the text for the main section of the form
    e. **Table Alt Background** – Color used for alternating color rows (shopping cart)
    f. **Table Highlight** – Used to highlight specific information (e.g. selected date on calendar)

If you created a new palette to use for your store default, be sure to also update your Main Settings to use it.

The Palettes list includes a link to *Copy* an existing palette, so you can duplicate all the current colors and make a few changes to create a new layout.

STYLE SHEETS

Cascading style sheets (CSS) are used as the primary method of formatting fonts and sizes in CFWebstore® in addition to form buttons, borders and other page elements. The store comes with a single pre-configured style sheet named 'default.css' in the css directory. Just adjust the fonts, sizes and colors in this one page to fit your store, and it will be applied across all pages. You can create additional style sheets to use with any alternate layouts that you create as well.

If you are new to using style sheets, you'll find many great sites on the web with tutorials and information as well as many free CSS editors.

CUSTOM LAYOUTS

Changing the color palette for a page is a nice way to add some variety to your site. But sometimes you might want completely different layouts for the sections of your site. Custom layouts allow you to do this. You will probably want to make changes to the default layout as well to give your store a unique look.

Your layouts are stored in the layouts directory of the store. The default layout is lay_default.cfm. You should use the 'lay_' prefix for all your layouts to make it easier to find them. If you look at the lay_default.cfm page, you'll notice a fair amount of ColdFusion code in there, not just HTML. The various put_.cfm pages contain different bits of code that you can include into your layouts to do different tasks. The cfinclude for put_layouthead.cfm for instance, should be included on all of your layout pages to create the header of the page which includes various scripts and functions needed for the store pages to work properly. Other files are included for things like persistent login box, store menus, storewide discounts, shopping cart summary, footers, etc. All these items are optional and may be included or not in your layout. There is also a link for the style sheet and the code that outputs the body tag using your color palette settings.

The most important part of the layout is the line that outputs the content generated by CFWebstore:

```
<cfoutput>#fusebox.layout#</cfoutput>
```

This line should appear in the middle of your design between your header and footer, where you want the content of your site to appear.

You can include the other files wherever you wish or leave them out altogether. Feel free to modify the code in the individual pages as well as needed, move them around and configure them in whatever way you wish. You shouldn't let the current design constrain you, be creative and see what you can come up with! Here is a list of the various layout components you can use in your layouts:

1. **put_layouthead.cfm** – This page outputs all the code needed in the 'head' section of the HTML page, including the dynamic page title, meta tags, javascripts and functions, etc. You shouldn't need to edit this page, but be sure to include it at the top of any of your custom layouts.
2. **put_meta.cfm** – This page is included inside put_layouthead.cfm and outputs meta tags and headers for your store. You usually won't need to edit this, but feel free to add any additional tags you want or modify if needed.
3. **put_body.cfm** – Generates a body tag using the color settings for your palette. Feel free to hard-code your body tag if you prefer.

4. **put_sitelogo.cfm** – If you added a site logo in the Main Settings, this page will output it to the page, otherwise it will output the Site Name.
5. **put_topinfo.cfm** – This template will output two pieces of information to the page, the storewide discounts (if any) and a summary of the shopping carts (number of items and subtotal). These are each called by a component, if you prefer you can call them individually in your layout page. Generally you would adjust the look of these items using styles, but more advanced users can edit the component if they prefer.
6. **put_breadcrumb.cfm** – The breadcrumb trail provides the user with links at the top of the page showing their path through the site, and allowing easy access to return to previous pages. The menu_trail class can be used to adjust the style.
7. **put_sidemenus.cfm** – This page is used for creating the category and page menus for the store (typically found on the left side of the page). Note that the sidemenus are optional, if you prefer you can just use your own hard-coded set of menus. See the Customizing Store Menus section of the Programming Guide for more information on creating menus.
8. **do_dhtml_menus.cfm** – Alternative method of doing menus, this creates CSS-based DHTML menus. Uses the built-in functions to extract categories and pages into a nested list and styled with a variety of css style sheets. See the Customizing Store Menus section of the Programming Guide for more information on creating menus.
9. **put_adminlinks.cfm** – Outputs links for the user to access the admin menu. An 'admin' link will be shown for any user with the Admin Menu permission and an 'Order Fulfillment' link will be shown for a user that has access to the Order Management section.
10. **put_searchbox.cfm** – Places a persistent search box on your layout. This allows your users to search for products or pages without having to first go to a dedicated search page.
11. **put_loginbox.cfm** – Places a persistent login box on the page. This gives the user access to login or logout from anywhere on the site, as well as access their account page. This will call the users.loginbox fuseaction to create the boxes according to the user's current login status. If you need to modify the style and/or images used for the box, these are done by the dsp_login_box.cfm and dsp_logout_box.cfm files in the uses/login directory.
12. **put_bottommenus.cfm** – This page will output horizontal menus for the categories and pages at the bottom of the page. Like the sidemenus page, it will by default save the menu text to a session variable for performance purposes. You can modify this page to use only one type of menu, change the settings of the menu, etc.
13. **put_copyright.cfm** – This page can be used to output a copyright footer to your site. It includes the name of the site, with a mailto link for emailing the merchant. The email address will be encoded to prevent spam harvesting.

14. **put_debug.cfm** – The last optional page you can use is the admin debug page. This uses a ColdFusion custom tag to output some optional debug information to the page. This can be useful when running the site from a remote server that does not have normal debug information available. To view the debug, add “Debug=Yes” to the URL string (preceded by a ? or & as appropriate). You will need to be logged in under the admin account to use this option.

One thing to be aware of when doing your layout is support for shared SSL. We highly recommend purchasing your own custom SSL certificate, but if you decide to try using a shared SSL provided by your host, you need to make sure to pass session variables on the URLs to prevent losing the session. The store creates a set of variables you should use, Request.Token1 and Request.Token2. These variables are used to add the CF session variables to store URLs especially going from a non-secure to secure link and vice versa. The first should be used if there are no other variables on the URL (such as index.cfm), and the second is used if there are already variables on the URL (such as index.cfm?fuseaction=basket.display). Take a look at the sample layout to see examples of how to use these variables, and be sure to have all links with these variables inside cfoutputs or they won’t work!

Once you have your layout created, you can use it as the default for your site by naming it lay_default.cfm (you might want to save a backup of the one that comes with the store as a reference!) Or you can save it under another name and change the default palette setting to use your new layout (this is a good way to prevent overwriting your layout when updating the store). You may want to change the default layout near the end of the fbx_Layouts.cfm page as well. You can also create new layouts to use for different sections of your store. Create a new color palette (or make a copy from the one you want to use) and enter the filename for the new layout in the settings for the palette. Select this color palette for the pages you wish to apply it to.

The store also contains an alternate layout example (lay_alt.cfm) and a layout used for printable pages with no navigation or other page elements (lay_blank.cfm). Feel free to customize and use these layouts as well.

The admin layout and all associated components are found the layouts/admin directory and generally shouldn’t be modified other than by advanced webstore developers. However, if you often view the admin from a browser/monitor with limited space you may prefer to remove the admin banner at the top, this can be done in the main frameset in lay_admin.cfm. If you want to play with the colors of the sidemenu, that can be found in lay_adminmenu.cfm and in the rico.js file (around line 179).

CATEGORY & PAGE TEMPLATES

The final, and most advanced, way to customize your site is with the page templates. These are the actual pages that generate the content of the store. If you are familiar with ColdFusion and want to modify or add new layouts for the content of the store, this allows you that kind of control. Only experienced developers should use this feature, and be sure to backup the original files before modifying them!

Category and page templates generally use the prefix ‘catcore_’ to designate them as such. This is not a requirement, just a standard used to make it easier to identify templates throughout the code.

The Category & Page Templates list shows the current assigned templates for your store. Click on *Edit* to change the details for any template or *Add New Template* to create a new template you can use for your store. For each template enter the following information:

1. **Template Name** – The name of the template as referred to on the admin forms.
2. **Parameters** – List of parameters that can be optionally defined for the template on store pages, these will be displayed to prompt the user as to what parameters they can enter when using this template. These are useful to be able to use a single template for multiple uses or in different ways, by passing in a parameter for that particular page. For instance, a common use for this is to use a parameter to swap out a header image on the template.
3. **Template File** – The path and file name for this template
4. **Template Type** – Defines the type of things the template can be used for. Options include:
    a. **Products** – Only used for category templates, this will display products assigned to the category. Be sure your template has the appropriate code to handle products.
    b. **Features** – Also only for category templates, this will display features assigned to the category. Again, be sure your template has the appropriate code.
    c. **Used for Categories** – This template can be used for category pages and will show up as an option when editing categories.
    d. **Used for Pages** – This template can be used for pages and will show up as an option when editing them.

The store comes with a number of pre-installed templates. These include the following:

1. **category header only** – This template is used for category pages that do not have any subcategories, products or features, just text.

2. **sub-categories only** – For categories with just sub-categories, no products or features
3. **home page** – The template for the home page of the site, it has parameters for outputting various special items, such as the top-level categories, new, on sale, and hot products, and the product of the day.
4. **highlights (new and onsale)** – Used to output new and/or onsale products and categories
5. **contact us email form** – Used to create a email form page. You can use the parameters for this page to customize the header for this form as well as who it will be sent to. By default the merchant email account for your store will be used. The parameters are as follows:
    a. **EmailTo** – The email account to send the email to
    b. **BoxTitle** – The title for the email form
6. **search form** – Used to create a site search page
7. **search results page** – This is the template page for search results. This page should be hidden on menus, as it is called only from the search form.
8. **products department home** – This is designed to be a frontpage for the catalog section of your store. It includes a special section for products assigned to this category (best sellers) as well as a product search box.
9. **products** – The basic template for product listing pages. You have a number of optional settings for product.
    a. **listing** – Determines the layout for the products, options include:
        i. standard (default)
        ii. vertical (less information, using a vertical layout to save space)
        iii. short (even more abbreviated listing)
        iv. gallery (fairly similar to short, best for image galleries)
        v. horizontal (less info than standard, laid out horizontally. Good for products with no options)
    b. **displaycount** - Allows you to override the default setting for the maximum products on a page.
    c. **ProductCols** - Allows you to override the setting for number of product columns.
    d. **search_header** - Outputs the product count at the top of the page. It will also show any search parameters passed by the product search form.
    e. **search_form_header** - Displays a search form at the top of the page. You can easily customize which search fields to show in the code.
10. **features** – The basic template for feature listing pages. As for products, you can override the default setting for maximum features on a page, as well as display a feature search box.
11. **items on sale** – Will display both categories and products on sale. It does not rely on products being assigned to the category, it will display all sale items in the store.

12. **features + products** – Use this template if you wish to display products and features on the same category page. You can specify which layout to use for the products.
13. **account directory** – This template is used to display the list of retailers carrying your products
14. **sitemap** – The sitemap template is used to create a complete listing of products, categories and features in your site. It uses search engine friendly links to make indexing your site easier. You can use the alpha=1 parameter to display an alphabetic search feature on the page (for stores with lots of products).
15. **contact us with file attachment** – Basically the same as the contact us email form, but allows the user to include a file attachment. Great for functions like uploading images, resumes, presentations, etc. You can customize the file for what mime types/file extensions to allow. This form requires setting the config.cfm file with a temporary directory to receive uploads, which should be outside your webroot, to protect your site from hack attempts.

A little additional information on parameters and how to use them with your templates. Parameters are entered as a comma delimited list in the form of "aa=bb,xx=yy". These parameter sets will be translated into "attributes.aa = 'bb'" and "attributes.xx = 'yy'" when the page is processed. An interesting result of this is that any variable used in the template such as "displaycount" (the number of items displayed on the page) or any query parameter (hot=1) can be passed as well. Many of the built-in store templates have various parameters that you can set to effect how the page will work.

OPTION PICKLISTS

Picklists allow you to easily change the dropdown select boxes in various areas of the site. You can easily add your own picklists just by adding new columns to the Picklist table in the database. For each picklist, just enter your values in a comma-separated list and save the changes to update the store. The default picklists included with the store are as follows:

1. **Acc Descr1** – Not currently used, available for customizations
2. **Acc Rep** – Account Reps, used for accounts
3. **Acc Type1** – Account type. System settings for accounts are manufacturers, vendors and retailers. You can add additional account types here.
4. **Feature Type** – Options for the types of features. You can use this for searching features in the Feature Manager.
5. **Gift Registry Types** – The list of different gift registries that can be created for your store, such as birthday, new baby, wedding, etc.

6. **PO Status** – Options for purchase order statuses that you can assign to a PO or use for searches.
7. **Product Availability** – Options for the availability of a product. You can display this on the product page, use for searches, etc.
8. **Review Editorial** – The editor heading options for product reviews. These are used to spotlight different editor reviews on your product pages.
9. **Shipping Status** – These are options for shipping status that you can assign to orders and use for searching orders. You can of course use it for something other than shipping notes on your orders if you wish!

ORGANIZING YOUR SITE

CFWebstore® is designed to manage all the content of your website, from informational pages to your store catalog and products. You can certainly use it for just a sub-section of your site, but designing your entire site using the software will allow you to manage all the content from one web-based location. There are two main sections in the administrator that control the organization of your content: categories and pages.

CATEGORIES

Categories are the hierarchical structure used for the store. A single category can contain other categories, products, features, or all of these! Using the store templates you can even create other specialized categories, such as the Store Locator. Generally, you will at least need to add some categories to contain your store products, so put a little thought into how you want to categorize your products before getting started.

When you click on the admin option for Categories to show the Category Manager, you will see the current list of categories at the Home level, also called top-level categories. These are the categories shown on the home page (if that option is turned on) and will be used for any menus you are using in your layout (such as the default layout). By clicking on the name of a category in the list, you will be shown the subcategories under that category. There is no limit on the number of levels you can use for your subcategories, so with large stores, it can sometimes get a little hard to browse through and find the one you are looking for! Filters and search fields are available to help you locate them as follows:

1. **Name** – search box for the name of the category. Any portion of the name will match.
2. **Template** – the page template currently assigned to the category.
3. **Access Key** – Use this to find categories currently protected with an access key.
4. **Display** – Show only categories whose display is turned on, or off.
5. **New** – Show categories which are marked as new, or not new
6. **Sale** – Show categories which are marked as on sale, or not on sale
7. **All** – This link allows you to show all categories in your site

Some additional links are available in the category manager. After using a search, you'll see the link to return to the *Browse Categories* option. While browsing, you will have a link to *Add a Category* to the current category (or home level). Finally, while in the list format, you will have a link to switch to the *Edit Form*. The Edit Form gives you a form to perform quick edits on all the categories at once. The fields include the following:

1. **Priority** – This determines the sort order of the categories on pages and menus. Priority of 1 will be listed first, then 2, and so on. Priority of 0 will be listed last. Where priority is the same, the categories will be sorted alphabetically.
2. **Columns for Subcats** – The number of columns used to display subcategories on this category page. Only used if the category has subcategories assigned and set to be displayed.
3. **Columns for Products** – The number of columns used to display products (or features) on the category page. Again, this will only be used if the category has content to be displayed.
4. **Display** – Toggles the category on and off in the store. Please note that if a category is turned off, the products and features assigned to it will also be hidden, even if they are also assigned to other, unhidden categories.
5. **New** – Marks the category as new, and displays the "new" image defined in your color palette. There are also special pages and tags you can use for displaying these categories.
6. **Sale** – Marks the category as on sale by displaying the "sale" image for the palette. Like New categories, these can be displayed in special places in your site.

Each category also has a link to *View* it in the store, and to go to the *Edit* form. The Edit Form is where you will configure all the settings for this category as follows:

1. **Category ID** – Automatically assigned by the system
2. **Name** – The name of the category. Used for the header if no title image defined and for navigation links/menus.
3. **Under Category** – The parent for the current category. The current category and any of its subcategories and their children will not be listed here, since a category cannot be a subcategory of itself.
4. **Display** – Check whether the category is displayed in the store or not. Note that if you turn a category off by setting this to 'No', the products and features assigned to that category will be hidden as well on store pages, searches, etc.
5. **New** – Check whether this is a new category, to be displayed on special pages and sections for these categories.
6. **Sale** – Check whether this is a sale category, to be displayed on special pages and sections for sale items.
7. **Priority** - The sort order of the category on pages and menus. Priority of 1 is the highest, then 2, and so on. Priority of 0 will be listed last. Where priority is the same, the categories will be sorted alphabetically.
8. **Access Key** – If you wish to restrict access to this category, set the Access Key here. Any products and features assigned to this category will

automatically receive the same access key and be restricted from view, even on other category pages. See the Access Key help section for more information on using access keys.

9. **Title Image (Teaser)** – Graphic to use for the category title on the home page (for top-level categories) and the subcategory pages for other categories.
10. **Image (Teaser)** – Thumbnail image to display with the teaser text.
11. **Teaser Text** – The short description for this category displayed on the home page (for top-level categories) and the subcategory pages for other categories. Also used for other pages such as the sitemap and search results. See the guide for information on using the WYSIWYG editor.
12. **Title Image (Header)** – Graphic to use for the main title on the category detail page.
13. **Image (Header)** – Image to use along with the title of the category.
14. **Detailed Text** – The main text for the category. See the guide for information on using the WYSIWYG editor.
15. **Template** – The template determines what this category will be used for. It is important to select the right template or your page may not behave the way you expect it to. See the section on Category & Page Templates for more information on available templates.
16. **Parameters** – Parameters are used to pass additional settings to your template and can be customized. The parameters available will vary according to the type of template being used, see the section on Category & Page Templates for available parameters. The default parameter for categories is 'noline=1' which disables the line output after the text on the category page.
17. **Discounts** – If you have setup any category-level discounts for your store, you can select them here. A category can have any number of discounts applied, the best one for that particular shopper will be applied. See the help section for discounts for more information.
18. **Display First** – If a category has both sub-categories and content, you can set which will appear first on the page.
19. **Custom Columns** – These will override your store's default settings for the number of columns to use for subcategories and for content.
20. **Custom Palette** – Select the palette to use for this category, by default the palette selected as the default in the Main Settings will be used.
21. **HTML Title** – Custom text to use as the custom title for this category page, useful for search engine placement. Putting good keywords in these titles is one of the top things you can do to improve search engine results!
22. **Meta Description** – You can enter a description specific to this category to be used for search engines; otherwise the default description set up in the Main Settings will be used.
23. **Keywords** – Enter the keywords for this category for search engines, if none are entered the store default will be used. The meta description and keywords will also be used for store searches.

The bottom of the category Edit page also has the option to *Delete* the category. You will be asked to confirm the deletion before it is completed; you will not be able to delete a category with products, features or subcategories assigned to it.

PAGES

Pages are essentially stand-alone pages that are not otherwise part of the hierarchical structure of the store (categories). Many built-in store pages are here, such as the homepage, search engine, shopping cart, etc. You can also create your own pages to be part of the menus, additional pages of content that can be linked to in your product and feature content sections, or even links to external pages. These pages can be used to create a dynamic store menu that you can use in your layouts and control from your admin area. Let's look at the two types of pages:

1. **System Pages** – These are pages that are included with the software and may not be removed. They often include special store functions and can have parameters entered that will change how they function. The system pages include:
    a. **Homepage** – the top page of the store. You can set parameters to output the top-level categories, new items, on sale items, not sold items (info only) and/or the product of the day.
    b. **Shopping Cart** – displays the current items in the shopping cart
    c. **Wishlist** – displays the user's wishlist. Be sure to enable wishlists if you are using them!
    d. **Gift Registry** – link to the gift registry homepage, where users can search, create and edit gift registries. Like wishlists, be sure to enable them in your settings if using this page.
    e. **Track Order** – This page allows users to track their order using their order number, if you are using UPS, FedEx or USPS shipping methods.
    f. **My Account** – this is the entry to the user's area where they can view orders placed, manage their address book, view affiliate and account information, etc.
    g. **Contact Us** – information for your users on how to contact you for more information, includes an email form for them to use. If you do not wish to use an email form for your contact us page, just create a new page to use instead of the system one.
    h. **Sitemap** – this page is used not just to create a complete listing of your products and categories, it uses search-engine friendly URLs that will be indexed by all the popular search engines.
    i. **Search** – the search engine page. Displays a simple keyword search textbox.

j. **Search Results** – The results page for the search engine. Should not be linked to directly.
k. **Page Error** – The text that displays when a user tries to access a product, category, page, etc. that cannot be found. This is another page used internally that you generally do not link to directly.
l. **Members Only** – This page is used when someone accesses a store page they do not have access to. Another page you should not link directly to.
m. **What's New** – Page used to output your highlighted items (new, on sale, not sold).
n. **CVV2 Help** – Used to display help on the card code field for credit card orders.
o. **Receipt** – Displays additional text on the customer receipt page, useful for adding BizRate or other post-order information.

2. **User-Created Pages** – These are pages you create to use in the store and/or your menus. When adding content to your store, you need to decide whether to use features or pages. In many cases, either will work fine. However, pages cannot be related to a product or feature (although you can manually add links to them in your text descriptions). If you wish to include a feature on the page menu, you need to still set up a page using the feature as its link.

Like the Category Manager, the Page Manager has two views. The List View which shows the current pages in the store, with their menu placements, and an Edit View which allows you to change the sort order of the pages on the menus. Click on the Edit link to edit a current page or view to see it in the store. The Add Page link will create a new page. The fields for pages are as follows:

1. **Name in Menu** – The name of the page on the menu, and on the list of pages.
2. **Menu Image** – If you wish to use graphics for your menus, you can upload an image for the page here.
3. **Shortcut Link** – Quick link to reach this page, using the format "fuseaction=page.shortcut".
4. **Link to URL** – By default, the link for the page is 'index.cfm?fuseaction=page.display&page_id=X' where X is the ID assigned to the page by the store, or 'index.cfm?fuseaction=page.shortcut'. You can override this setting by entering a different link for the page, to redirect it to a different store page, or even to an external link. Enter 'none' if you don't want a link for this page (generally used for menu headers).
5. **HREF Attributes** – any additional attributes you want to include in the menu link for the page. The most common use of this is to use a target='_blank' to open the link in a new window.

6. **Display in Menu** – Sets whether the page link is displayed on the menu
7. **Menu Position** – Determines where on the menu this page appears. You can create new menu headers and place pages under them or put everything into one big menu
8. **Priority** – Determines the position of each page in its menu. Priority 1 is listed first, then 2 and so on down.
9. **Access Key** – You can protect a page with an access key. Please note that this generally is not used for the system pages.
10. **Title on Page** – For content pages, this is the title of the page that is displayed at the top of the page.
11. **Title Image** – If you wish to use a graphic for the title, upload it here.
12. **Image** – An additional image to display with the title
13. **Page Content** – The text to display on the page. Please note that if the page redirects to another page with the Link to URL settings, the text is not used, nor the title settings. See the guide for information on using the WYSIWYG editor.
14. **Template** – The page template to use for this page (if any). See the section on Category & Page Templates for more information on available templates.
15. **Parameters** – Parameters you can set for the page. By default all pages can have the line at the top turned off, other system pages have settings as mentioned above.
16. **HTML Title** – Custom text to use as the custom title for this page, useful for search engine placement.
17. **Meta Description** – You can enter a description specific to this page to be used for search engines; otherwise the default description set up in the Main Settings will be used.
18. **Keywords** – Enter the keywords for this page for search engines, if none are entered the store default will be used. The meta description and keywords will also be used for store searches.
19. **Custom Palette** – If you have created additional color palettes/templates for your store, you can assign a custom palette to the page here, otherwise the default is used.

The bottom of the Edit page also has the option to *Delete* the page. You will need to confirm the deletion before it is completed.

ADDING YOUR PRODUCTS

Now we're really getting into it! The Product Manager is where you will add all the products to your store and each one can take a lot of work or just seconds to add! Spend some time learning about all the different settings available for products and how you can use them for your own unique needs.

PRODUCT LIST

The Product Manager is organized similar to the Category Manager in that it will show you the Home level first, with the subcategories assigned at this level. Click on a category name to open it and view any products in that category and/or subcategories. Like the Category Manager, you have some search fields and filters to use to locate your products:

1. **Name** – search box for the name of the product. Any portion of the name will match.
2. **SKU** – search box for the product SKU number. Again, any portion of the SKU will match.
3. **Display** – Sets whether the product will display in the store. Products with display turned off will not show up in searches, as related products, in product teaser boxes, etc.
4. **Sold** – Show products according to the 'Sell this Item" flag, or sale start/end dates
5. **New** – Show products which are marked as new, or not new
6. **Sale** – Show products which are marked as on sale, or not on sale
7. **Hot** – Show products which are marked as 'hot' or not 'hot'.
8. **Type** – Sort by the type of product. Default product types are:
    a. **Product** – a normal store product
    b. **Membership** – used for selling access keys for site content
    c. **Download** – for downloadable software products
    d. **Certificate** – used for selling gift certificate codes
9. **All** – This link allows you to show all products in your site
10. **Uncategorized** – This link will show a list of products not currently assigned to any category in the store.

When displaying the list of products, either from browsing or by a search, the corresponding value for each of the search fields will be shown for each product. In addition, the ID field will have a link to *Edit* the product, and mousing over this field will pop-up a menu to jump to each of the individual product edit tabs. You can also click the name of the product to view it in the store (if turned on) and can click *Copy* to create a duplicate of the product. Copied products will automatically have their display turned off so they do not show up in the store until you have applied any edits and approved them to be shown. See below for more information on the Copy feature.

As in the Category Manager, you'll find some additional links and options. After using a search, you'll see the link to return to the *Browse Categories* view. While browsing, you will have a link to add a *New Product* to the current category (or home level for uncategorized products). Finally, while in the list view, you will have a link to switch to the *List Edit*.

The List Edit gives you a form to perform quick edits on all the products in the list at once. The fields include the following:

1. **Price** – The base price for the product.
2. **Retail** – The retail price for the product.
3. **Wholesale** – The wholesale price for the product.
4. **# Stock** – Current number in stock
5. **Opt #s** – If you are tracking inventory at the option level for this product, this allows you to edit the number in stock from the List Edit rather than having to go into the option. Enter the number in stock for the options in the order they are entered for the product, with a comma (,) separating each. You must enter a value for each option or you will receive an error message.
6. **Priority** – Used for sorting the products on the subcategory pages. 1 is the highest priority, then 2 and so on down. Use 0 or leave blank for any product that should be left in the default sort order.
7. **Display** – Toggles the product on and off in the store.
8. **New** – Marks the product as new using the image defined in your color palette. There are also special pages and tags you can use for displaying these products.
9. **Sale** – Marks the product as on sale. Like New products, these can be displayed in special places in your site.
10. **Hot** – Marks the product as 'Hot'. Another setting to use for highlighting certain products.

In addition, while in the List Edit view you can click on the product name to go to the first tab of the Product Form.

Product Form

The product form page is divided into several sections, or tabs. We'll go over each of these sections in detail. Upon editing the settings in one section, you can easily move to the next section or use the tabs at the top of the page to navigate. You can also jump to a specific tab when mousing over the Edit link for the product, which will bring up a menu of tabs to click on. You also have a link to *View* the product in the store. The initial display tab only will be available when adding a new product; once the product is added, you can move on to the other sections. Please note that you must Save your changes on each tab individually, saving a tab will not save changes on other tabs.

DISPLAY TAB

The first tab on the product form is for the main product display settings. This is where you enter all the text for the product and determine where and how it will be displayed in your store. The settings on this tab include:

1. **Product ID** – This is a system-assigned number for the product. You may need to use it for making direct links to specific products and you can also use it in the quick-search field on the admin menu to pull up that product directly.
2. **Name** – The name of the product as it will be referred to in your store. Used for titles if you are not using graphic images as well.
3. **Product Type** – What type of product this is. The default settings for the type are:
    a. **Product** – a normal store product
    b. **Membership** – used for selling access keys for site content
    c. **Download** – for downloadable software products
    d. **Certificate** – used for selling gift certificate codes
4. **Manufacturer** – If you have set up any manufacturers in the Accounts section, you can assign one to the product here. The manufacturer's logo will be displayed on the product detail page.
5. **Display** – Used to toggle the product on and off in the store.
6. **Category** – The category(s) you wish to display this product in. Products can be assigned to any number of categories or none at all. In most cases, you will want to assign a category for your product to appear on for normal store browsing. Only categories that have a template type assigned that will accept products will be shown on this list.
7. **Priority** - Used for sorting the products on the subcategory pages. 1 is the highest priority, then 2 and so on down. Use 0 or leave blank for no priority setting (default sort).
8. **Access Key** – You can assign an access key to the product if you want it to be visible only for specific users.
9. **New** – Toggles the product as new.
10. **Sale** – Toggles the product as on sale.
11. **Hot** – Toggles the product as 'hot'.
12. **Allow Reviews** – Use this to set which products will allow users to add reviews. Generally this is turned off for products types like memberships and gift certificates.
13. **Use for Product of the Day** – Use this to set which products can be used for the Product of the Day on the homepage.
14. **Title Image (teaser)** - Graphic to use for the product title on category pages. Generally not used by most stores.

15. **Teaser Image** – Thumbnail product image to display on category pages. This graphic will also be used on the detailed product page if no detail image is uploaded. Product images add greatly to your store so in most cases you will want to add this.
16. **Teaser Text** – The product description to display on the category pages, depending on the template used (standard listings will show it, most of the others do not). This text will also be used on the detailed product page if no detailed text is entered. Also used for other pages such as the sitemap and search results. See the guide for information on using the WYSIWYG editor.
17. **Title Image (detail)** – Graphic to use for the product title on the detailed product page. This type of image is rarely used by most stores.
18. **Detail Image** – Full-size product image to display on the detailed product page. If none is entered, the Teaser Image is used. Optionally, you can enter a list of images, which will allow customers to toggle through the different views.
19. **Enlarged Image** – You can enter an even larger product image here, which will allow the user to click on the detail image and pop-up a separate window to view even more detail of your product. Please note that you cannot use multiple detail images *and* an enlarged image on the same product.
20. **Detail Text** - The detailed product text. See the guide for information on using the WYSIWYG editor.
21. **Parameters** – Parameters are used to pass additional settings to your template and can be customized. The default product template has parameters to adjust the text for related products and features and the product image gallery.
22. **HTML Title** – Custom text to use as the custom title for this product page, useful for search engine placement.
23. **Meta Description** – A description specific to this product to be used for search engines; otherwise the default description set up in the Main Settings will be used.
24. **Keywords** – Enter the keywords for this product for search engines, if none are entered the store default will be used. The meta description and keywords will also be used for store searches.
25. **Custom Palette** – Select the palette to use for this product, by default the palette selected as the default in the Main Settings will be used.

PRICING TAB

This page contains all the settings related to selling the product, its prices, discounts, shipping and tax settings, etc. The settings available are the following:

1. **Sell This Item** – If this is set to ‘No’ the order button will not displayed for the product. This is useful to display product information but disabling ordering for the product temporarily. It might also be used if the software is not being used for a store catalog, and/or this product is just displaying information.
2. **Sales Start** – Start date to sell the product. The product will be hidden in the store before this date.
3. **Sales End** – End date to sell the product. It will be hidden after this date.
4. **Product No**. – Also referred to as a SKU (stock-keeping unit) this is your inventory code for the product. SKUs can also be assigned to options for a product. The store search includes a search by SKU number.
5. **Minimum Quantity to Buy** – If you require a minimum amount of this product to be purchased, enter the quantity here. Any orders for the product will automatically be adjusted to this minimum quantity.
6. **Require Multiples of Minimum** – This setting will restrict the user to purchase the product in multiples of the amount entered for the minimum. For instance if the minimum is 12, and this setting is turned on, the user can order 12, 24, 36, 48, etc. As with the minimum quantity, any attempts to change the quantity will be automatically corrected.
7. **Availability** – Phrase displayed on the product page to let the customer know how soon it can be shipped. You can change the options here under Picklists.
8. **Number in Stock** – Current quantity in stock. The number is stock can also be set on a per-option basis, in which case it cannot be edited from this screen.
9. **Reorder Level** – The quantity in stock below which the merchant is notified to reorder. The email is sent to the *Order Email* account defined in the Shopping Cart Settings. If you do not wish to receive reorder notifications for this product, leave the field blank.
10. **Vendor** – The vendor that supplies this product. Vendors are created in the *Accounts* section. The vendor is used to create drop-shipping purchase orders. You can also use the shipping settings to calculate the shipping costs separately for your drop-shippers using this setting.
11. **Vendor Part No**. – The vendor’s part number or SKU for this product. This will be used on purchase orders by default. If none is assigned, the product SKU will be used.
12. **Purchase Order Cost** – Cost of this product from the vendor, used on their purchase order.
13. **Order Button** – Sets whether to use a plain HTML form button (as styled in your css file) or an image button (as set in your Main Settings) for this product. By default, products without options will use an image and products with options will use an HTML button.
14. **Options Listing** – Options can be listed either in a horizontal row, or vertically one on top of the other. Vertical options are best if you have several options. Product Addons will always be listed vertically.

15. **Show Price** – Use to display the base price to the customer. You may want to turn this off, for instance, if the product options are displaying the full price instead.
16. **Store Base Price** – This is the base price for the product. All price modifiers such as options, choices and quantity discounts will be applied to this base price.
17. **Retail Price** – Also known as the Manufacturer's Suggested Retail Price (MSRP). If these are entered and set to be displayed in the Main Settings, the customer will also be shown how much they are saving in your store!
18. **Wholesale Price** – A price offered only to users assigned to a wholesale group. You can also use the quantity discounts to set up ranges of wholesale prices, and group prices to enter other group specific prices.
19. **Tax Codes** – Sets which tax codes apply to this product, if any. See Tax Settings for setting up your tax codes. The first tax setup in the tax manager is assigned by default.
20. **Show Discounts** – This setting is used to determine if any product discounts will be displayed with the product listing. User-level discounts will only be displayed for eligible users. This only controls the display of the discount description, the next setting determines the actual discounts used.
21. **Discounts** – If any product-level discounts have been set up, you can select them here. You can assign any number of discounts to the product, the best discount for the customer will automatically be selected, including any store-level and category discounts that have been set up as well. Any quantity discounts for the product will also be applied on top of these product discounts.
22. **Show Promotions** – Sets if any promotions that apply to this product will be displayed with the product listing. This only will apply to the qualifying products for the promotion, not the discounted product. Products must be added to promotions in the Promotions section.

In addition to these fields, the following are available for normal products:

1. **Calculate Shipping** – Sets if a product is included when calculating the shipping cost. For instance, items like magazine subscriptions would not be used to calculate shipping.
2. **Weight** – The weight for the product. This is mainly used for shipping calculations, if you are using any of the methods that are based on weight of the order.
3. **Freight Cost** – You can enter a freight cost for the product here, with a domestic cost and international cost. Both should be entered if you ship this item by freight, not just one (although the international of course is not needed if you have international sales turned off). If a freight cost is entered, each individual product ordered will incur the freight cost, and no regular shipping charge for this product will be calculated. The cost will be

shown separately during checkout as "Freight" unless you turn off the setting to show freight costs in the Shipping Settings.

4. **Package Dimensions** – You can alternatively enter package dimensions here for items that are oversized and ship separately. These are used only for automated shipping calculations (not custom shipping methods). The units here will be the size unit as entered in your Main Settings and should match the requirement for your shipper and originating country. Be sure to enter values for all three dimensions, as well as the product weight.
5. **Gift Wrapping Available** – If turned on and gift wrapping is enabled globally, this will allow the user to add gift wrapping to this item.

The following fields are available for software downloads:

1. **Number of Days –** Number of days the customer will be able to download the software. Be sure to enter an appropriate number of days or your customer may not be able to access their software!
2. **Downloadable File** – The file name of the software. It should be located in the directory you specify in your config.cfm file for downloads. Click the File Manager link to browse this directory and upload new files (CFFile and CFDirectory must be enabled on your server.) Ideally, the directory for your downloadable files will be kept separate from your web root directory, for the best security against unauthorized access. You will also need to configure what Mime and file types to allow in config.cfm.
3. **Access Count** – Number of accesses to the software the customer will be allowed. After they have downloaded it this many times, they will no longer be allowed to access it. Be sure to set this at an appropriate number for your software!

The following fields are available for gift certificate products:

1. **Days Active** – Number of days the gift certificate will be active and available for use. The value of the gift certificate will be determined by the cost of the product when purchased.

The following fields are available for membership products:

1. **Access Keys** – Select which access key(s) this product will be selling. See Protecting Your Content for more information on access keys and memberships.
2. **Number of Days** – Enter the number of days this membership will provide access.

3. **Auto-Renewing** – An auto-renewing membership is used to create a membership that will automatically re-bill the customer when the current membership expires. You will need to use the User Credit Cards function to save your customer information, see the Payment Settings and Memberships section for more information and security warnings on using this. Currently this feature is only available to Shift4 gateway users.
4. **Renew to a Different Product** – If using the auto-renewing setting, you can set the product to renew to a different product. This is generally used if this product is a one-time trial membership and the renewal will be to a different, higher-cost membership. If you use this setting, the store will also prevent the user from purchasing this product a second time, and will flag multiple purchases on the same credit card.

INFO TAB

The info tab is where you can enter additional product information, for Google Base export and any additional custom fields you have defined. These are set up under Product Custom Fields.

GROUP PRICES

Group prices allow you to override the product base prices for any of your users. For each group price, simply select the group and enter the price to use for that group. Click *Add Group Price* to add the new group pricing. You can *edit* or *delete* existing group prices as well. Deleting a group in the User Management section will delete any associated product prices as well. Note that any option or addon amounts will be added to the group price for all users.

QUANTITY DISCOUNTS

Quantity discounts are unique for each product and are used to give discounts to customers that purchase certain amounts of the product. Unlike discounts set up in the Discount Manager, quantity discounts can be applied in addition to any other discounts or promotions on the product.

When you click on the Quantity Discounts Tab, you will see a form for adding a new discount and then the list of current discounts assigned to this product. To add a new quantity discount, enter the following:

1. **Type** – The discount can be either for retail customers or wholesale customers. You can set up different ranges for your retail and wholesale customers. If you want a specific discount to appear for both types of customers (if you do use both), be sure to add it for both.

2. **Quantity Range** – Enter the range for the discount. Enter a 0 for the end of the range to use unlimited quantity. Only one discount for a product should have this setting. If you enter any overlapping ranges, or other invalid settings, the store will display an error message until the problem is corrected.
3. **Discount** – The amount of the discount, in the currency used for the store.

Click *Add Discount* after entering your settings to add the discount range to the list. Links for *Edit* and *Delete* are also available to make changes to the discount levels.

PRODUCT OPTIONS

Product options are basically selections for the exact type of product the customer wishes to purchase. It allows you to offer various options without having to create different products. Examples of options might be different colors, sizes, models, etc. of your products. Options show up as a select box on the page and you can have as many options per product as you would like.

Product options are very complex in CFWebstore® and you will find many ways to use them, and ways to save time in keeping them up-to-date. You can add options immediately after creating a new product, or at any time in the future. You can have standard options that are used by many products at once, or custom options created specifically for a single product.

A note on options for IE users: Some users of Internet Explorer may have problems creating and editing options due to default IE settings in some versions. To modify, go to Tools – Internet Options and click on the Security tab. You may want to add your site as a Trusted Site and modify the settings just for trusted sites to use a lower security setting. Otherwise, just click Custom level on the first tab. Scroll through the options to find the one labeled "Active Scripting" and set it to "Enable".

An important note regarding ColdFusion 10 servers: CF 10 includes a setting to restrict the number of form fields allowed per page. The default setting for this is 100 fields. This can often cause problems for stores with large numbers of options. If you run into this problem, ask your host to increase the number of form fields to a setting that is sufficient for the number of product option choices that you need.

The Product Options tab will show any current options for the product with buttons to *Edit* or *Delete* these options. Options will be marked if they are used to adjust inventory levels and/or SKU numbers. There are also buttons to *Add a Standard Option* or *Add a Custom Option* and a link to *Edit Standard Options* if you need to add a new standard option to the system first.

First, let's explain the difference between Standard and Custom options a little more in depth. Standard options are created separately from the product and include the name of the option and how it is displayed to the customer, the choices and their prices and weights. All products using this standard option will have the same default choices, with the same price and weight modifiers, but you can selectively turn them on and off for different products as needed. Each product can set different SKUs and inventory amounts for the option as these would typically always be unique from product to product. This allows you to easily modify the options used by many products at once if for instance you need to add a new color or size for all the products that use that option.

Custom options are specifically created for an individual product. You must enter and edit all the information directly from the product admin for that product alone. When creating an option, keep in mind whether you might want to use the option for other products, and which method will be easiest to handle updates with.

So, let's try adding a standard option to your product. Click *Add a Standard Option*. Enter the following items:

1. **Select Option** - Choose the standard option you wish to use for this product (created in the Standard Option Manager).
2. **Display** – Allows you to turn this option on and off.
3. **Priority** – Used to determine the order of the option if there are multiple options for the product. If no priority is entered, options will be displayed in the order they are added.

Click *Add Standard Option* to add the new option to the product. You will then receive another page allowing you to make specific changes to this option for this product.

1. **SKU number** – Allows you to change the product SKU according to the option selection. Please note that only one option can change the SKU so this field will be disabled if it has already been entered on another option.
2. **Num in Stock** – The amount in stock for each option choice, used for inventory tracking. Only one option can be used for inventory at a time, so this will also be disabled if another option is using it.
3. **Show?** – Allows you to turn specific option choices off. This is useful for instance, if a particular choice is not available for this product.

Click *Update Option* to finish adding your standard option.

Adding a custom option is a little more complicated. Click *Add a Custom Option* to get started. If using IE you may be prompted to allowed scripted windows, be sure to accept in order to continue. You will then be prompted for the number of option choices you wish to have. For instance, if you wish to create an option for color with choices of red, green and blue, enter '3'. The software will then create a form for the specific number of choices. Enter the following information for the option:

1. **Message to Display** – This is the prompt that will be displayed to the user for the option.
2. **Description in Cart** – You can add a short description with the user's selection for the option in the shopping cart. This is particularly useful for products with multiple options. Leave blank if you just want to display the choice selected.

3. **Require a Selection** – If set to 'Yes' the store will require the customer to select one of the choices for this option. Otherwise, it is optional.
4. **Display in Store** – Allows you to toggle this option on and off without permanently removing it.
5. **Show Price on Selections** – These settings are used for how the option will display prices. You can set it to hide prices (usually used if the option does not adjust the price), show the amount added (for instance, +$1, +$2, etc.) or show the total product price with this selection. Generally with the last setting, you would hide the price on the product page as well.
6. **Priority** - Used to determine the order of the option if there are multiple options for the product. If no priority is entered, options will be displayed in the order they are added.

Additionally, you will need to enter the following for each option selection:

1. **Choice Name** – The name of the selection, displayed on the drop-down list and in the shopping cart and on order invoices.
2. **Price** – This is the amount that will be added to the base price for the product.
3. **Weight** – Amount added to the base weight of the product. Used for weight-based shipping calculations.
4. **SKU Number** – SKU number, if any, for this option selection. Please note that only one option per product can adjust the SKU number.
5. **Num in Stock** – The amount in stock for this selection, used for inventory tracking. Only one option can be used for inventory as well.
6. **Order** – This sets the order for the option choice. Leave blank unless you want to re-order your option choices.
7. **Show?** – Used to toggle this specific option choice on and off.
8. **Delete** – Check this if you want to delete the option choice. This option will be disabled if the option has orders in the system used for inventory tracking.

Click Add Custom Option to add the option. Any choices not filled with at least a name will not be added to the option.

When editing a custom option, you have the option to add new selections to the list. Just enter the number of additional selections you need when prompted and the new rows will be added to the screen. You can also remove an option choice by clearing the Name field for that choice or clicking the Delete box.

PRODUCT ADDONS

Addons are somewhat similar to product options but instead of selectboxes, they offer a variety of other types of entry boxes for your customer to use. They cannot be used for inventory tracking or SKU numbers and are displayed separately from any options the product might have. The types of addons currently available are:

1. **Textboxes** – A single-line textbox that can allow up to 255 characters
2. **Textfields** – Multi-line textbox allowing large amounts of text
3. **Checkbox** – Simple checkbox to add something with that product
4. **Quantity Box** – Entry box for a number to add multiple items to an order (can be used to create a custom donation box for instance)
5. **Calendar** – Textbox with a calendar popup to select a date

Like options, you can use either standard addons, for multiple products, or custom addons for that specific product only.

To add a standard addon, be sure to first create it in the Standard Addon Manager. From the product's Addon tab, click on *Add a Standard Addon*. Enter the following items:

4. **Select Addon** - Choose the standard addon you wish to use for this product (created in the *Standard Option Manager*).
5. **Display** – Allows you to turn this addon off and on.
6. **Priority** – Used to determine the order of the addon if there are multiple ones for the product. If no priority is entered, addons will be displayed in the order they are added.

Click *Add Standard Addon* to add it to the product.

Now let's try adding a custom addon. From the Addon tab, click *Add a Custom Addon*. Enter the following information:

1. **Message to Display** – This is the prompt that will be displayed to the user with the addon.
2. **Description in Cart** – This is the description of the addon that will be displayed in the shopping cart. Generally you will want to enter something here to describe what the addon is, whereas it is often not necessary with product options.
3. **Addon Type** – Select the type of addon you wish to create.
4. **Priority** – Used to determine the order of the addon if there are multiple ones for the product. If no priority is entered, addons will be displayed in the order they are added.

5. **Amount Added to Price** – Amount that this addon will add to the price of the product if it is selected/filled out. For quantity boxes, this amount will be multiplied by the number entered in the box.
6. **Amount Added to Weight** – Amount that this addon will add to the weight if it is selected/filled out. For quantity boxes, this amount will be multiplied by the number entered in the box.
7. **Product quantity multiplies price and weight** – This setting allows you to determine if the price and weight will also be multiplied by the quantity of product being ordered. For instance, if you wish to set up an addon for a one-time setup fee, you would set this to 'no'. The customer could order 10 of this item, but will only be charged once for the addon.
8. **Required** – If set to 'Yes' the store will require the customer to select/fill out this addon. Otherwise, it is optional. Typically not used with checkboxes, as there's really no reason to have a mandatory checkbox!
9. **Display in Store** – Allows you to toggle this option on and off.

Click *Add Custom Addon* to create the addon for this product.

Product Images

In addition to the normal product images you set up on the display tab, you can add any number of additional images to a product, to create a gallery of product images. These will be displayed on the detailed product page using thumbnail images which the customer can click on to view the full-size image. To add a product image, enter the following:

1. **Image File** – Click the *Browse* button to select the fullsize image file from your computer. The image will be uploaded to the 'Products' directory under your images directory. Note that only gif, jpeg and png images can be uploaded.
2. **Subdirectory** – By default, product images are saved in the "products" directory under your image directory. If you wish to further sort them out (for larger stores) you can enter an additional directory path below that here.
3. **Thumbnail Image** – You can upload the thumbnail image manually, or leave this field blank and the store will automatically create the thumbnail from the fullsize image using the built-in image component function. If using a gif for the product image, you would need to upload your own thumgnail as gifs cannot be automatically resized.
4. **Gallery** – Images can be assigned to either a Public or Private image gallery. Public images are viewable to all customers, private ones are only viewable to customers that are currently logged in. You can easily modify the code for this feature to use the private gallery for other specific user groups.

5. **Priority** – As throughout the store, priority will determine the sort order of the images.
6. **Caption** – You can enter a caption to be displayed below the photo on the full-size image popup.

Click on *Upload* to add the image to the gallery. You can also *Update* or *Delete* images that have been added previously.

Related Products

The Related Products tab allows you to link other products to the currently selected product. These products will then show up in a special section on the product detail page as well as on the shopping cart when the product is purchased. This is known as "cross-selling", where you sell a customer more products based on what they have purchased.

Adding related products is very simple. You will be provided with the same options for searching and browsing the categories as on the main Product Manager page. Use these to locate the products you wish to link to, check off the box in front of each one and click *Add Products*. Please note that adding a product here will make it show up as a related product for the product you are editing ONLY, it does not work in reverse. If you wish to relate the product you are currently editing to the selected products, you will need to go to their edit screens and add it there. For related products to show up, they must be in stock (if using inventory control), set to display, and with an accessible access key.

A list of the Currently Related Products will also be displayed. You can *Remove*, *Edit* or *View* the related products from this list.

Standard Product Options

Select this option from the main Admin Menu to add and edit the standard options in your store to use for products. A list of the current Standard Options available will be displayed and a link to *Add Option*. You can also search for options by their name, display and required settings.

Adding a Standard Option is similar to creating custom product options. You will be prompted for the number of choices you need for the option. A form will be created for that number of selections. Enter the following information for the option:

1. **Name for the option** – This is unique to standard options, it's the name that will be used to refer to the option, both in the Standard Options Manager and when adding standard options to your products.
2. **Message to Display** – This is the prompt that will be displayed to the user on the option.
3. **Description in Cart** – The description to use for the option in the shopping cart. Leave blank if you just want to display the choice selected by the shopper.
4. **Require a Selection** – If set to 'Yes' the store will require the customer to select one of the choices for this option. Otherwise, it is optional.
5. **Display in Store** – Allows you to toggle this option on and off instead of deleting it permenently. Turning off the option will turn it off for all products currently using the option.
6. **Show Price on Selections** – These settings are used for how the option will display prices. You can set it to hide prices (usually used if the option does not adjust the price), show the amount added (for instance, +$1, +$2, etc.) or show the total product price with this selection. Generally with the last setting, you would hide the price on the product page as well.

Additionally, you will need to enter the following for each option selection:

1. **Name** – The name of the option, displayed on the drop-down list and in the shopping cart and invoice.
2. **Price** – This is the amount that will be added to the base price for the product.
3. **Weight** – Amount added to the base weight of the product, used to calculate shipping charges.
4. **Order** – The sort order for the option choice. You can leave this blank unless you need to re-order your option choices.
5. **Show**? – Used to toggle this specific option choice on and off. This will apply to all products using this option, if turned off.
6. **Delete** – Check this if you want to delete the option choice. This option will be disabled if the option has orders in the system used for inventory tracking.

Click *Add Option* to save your settings and add the standard option.

When editing an option, you can change each of these settings, which will then affect all the products currently using the option. As with custom options, when editing a standard option, you will be prompted for if you wish to add additional choices to the option.

Deleting an option will remove the option from all products currently using it so be careful when deleting that you really want to do this!

STANDARD PRODUCT ADDONS

Select this option from the main Admin Menu to add and edit the standard addons in your store to use for products. A list of the current Standard Addons available will be displayed and a link to add a *New Addon*. You can also search for addons by their name, type and display settings.

Adding a Standard Addon is like creating a custom product addon. Just enter the following information:

1. **Name for the addon** – Used specifically for standard addons, this is the name that will be used to refer to the addon, both in the Standard Addons Manager and when adding addons to your products.
2. **Message to Display** – This is the prompt that will be displayed to the user with the addon.
3. **Description in Cart** – This is the description of the addon that will be displayed in the shopping cart. Generally you will want to enter something here, whereas to describe what this addon is for.
4. **Addon Type** – Select the type of addon you wish to create.
5. **Amount Added to Price** – Amount that this addon will add to the price of the product if it is selected/filled out. For quantity boxes, this amount will be multiplied by the number entered in the box.
6. **Amount Added to Weight** – Amount that this addon will add to the weight if it is selected/filled out. For quantity boxes, this amount will be multiplied by the number entered in the box.
7. **Product quantity multiplies price and weight** – This setting allows you to determine if the price and weight will also be multiplied by the quantity of product being ordered. For instance, if you wish to set up an addon for a one-time setup fee, you would set this to ‘no’. If set to YES, this will further multiple a quantity box by the amount entered in the box along with the product quantity.
8. **Required** – If set to ‘Yes’ the store will require the customer to select/fill out this addon. Otherwise, it is optional. Please note that while the javascript form checking will make any addon type required, checkboxes are not verified by the store if the customer has javascript disabled, since there is not much reason to have a checkbox required!
9. **Display in Store** – Allows you to toggle this option on and off.

Click *Create Addon* to save your settings and create the standard addon.

You can also *Edit* the Addon at any time to make changes to these settings, or *Delete* the Addon. Deleting a standard addon will remove it from all products currently using it.

CUSTOM PRODUCT FIELDS

Custom fields are another way to add some additional information to products in your store and add additional information to the Google Base export. The information can be publicly viewable, or used for internal use only. You can even add some custom code to your store to create new uses for the custom fields or can add them to your searches.

Some common examples of custom fields might be for a bookstore, to add fields for author, ISBN and publication date. Or for a store selling movies, you could add fields for a movie's genre, director, year and actors. Pretty much any additional and unique information that you want to label for your products is a good candidate for a custom field.

An example using some extra custom coding would be to create products that link to another store as products in your own store. Create a product with the link in a custom field. Set the product to not display the price, and not for sale, and add a little code to check for an entry in the custom field. Use it to display the link on the page. You could use this, for instance, to give your customers links to a site where you receive affiliate percentages. Contact your site developer to help with these kinds of modifications.

You can have any number of custom fields. Just click the button labeled *Add Another Field* if you need to add more fields to the current list. For each field, fill in the following information:

1. **Field Name** – This is the name that will be used for the field for entering the information on the product screen, and the label used when displaying information to the customer if displayed.
2. **Google Code** – This is the google label for the field, used if you wish to include it in your Google Base export.
3. **Display** – This toggles the display of the field on the product detail page. Turn this off if you do not want the customer to see the information in the field.
4. **Send to Google** – Set this on if you want to include this custom field information in your Google Base export.
5. **Remove** – Check this if you wish to remove the custom field. This will also remove all information for any products currently entered in this field as well.

Click *Update* to save your changes to the custom fields.

Use your imagination, there's all kinds of neat things you can do with custom fields!

PRODUCT COPY

The product copy feature allows you to quickly add new products using a current product as the template. The copy will be added to the same categories as the original product. All the major attributes of the product will be copied…all the text, pricing information, options and addons. The main product images will be copied, however gallery images are not copied as these are related to one product only. Related products are also not copied as these are specific for each product.

After clicking *Copy*, the new product is created and you are taken to the edit screen. By default, the product display is turned off until you activate it. Change the product name and any other information and save your changes before turning on the new product.

PRODUCT REVIEWS

Product reviews allow your customers to rate and leave comments about the products in your store. You will be able to set the requirements for posting reviews and moderate and approve posted reviews. The first set is to configure the main settings for reviews by clicking *Product Review Settings* on the admin menu. This option will only be available if you have Product Review admin permissions. The following options will be available to configure reviews:

1. **Use Product Reviews** – This is the main setting to turn reviews on in your store. No product review options or other admin links will be viewable until this has been turned on.
2. **Approval Required** – If this is turned on, reviews will not be posted live to the site until an admin has read and approved them.
3. **Check Reviews** – Generally used as an alternative to Approval Required, this setting will flag all new reviews so the admin can still review them, however new reviews will be posted immediately to your site.
4. **Who Can Write a Review** – This determines what kind of user can write reviews. You can set this to anyone, which allows any visitor to your site to add reviews (generally not recommended unless you have approval required or your site is closed to public users), Registered Users which will allow only logged in users to add reviews, Verified Users, which will require a login and a verified email address (you generally will want to turn on email verification in your user settings for this, otherwise users will have no way to verify their email in order to create reviews) and Purchasers to only allow customers who have purchased an item to review it.
5. **Login Required to Rate** – This setting determines which users can rate reviews as helpful (or not). If left off, a basic IP comparison will be used to prevent multiple votes on reviews.
6. **Reviews Per Product Page** – This determines the number of reviews to show on the main product page. The customer will be given a link to a “Reviews” page to view any additional reviews. This does not include any editor-tagged (admin) reviews.

Click *Save Changes* to save your settings.

REVIEWING PRODUCTS

The links for viewing and adding reviews will appear on product pages for any products you have designated as reviewable (see product display page for this setting). After clicking *Write a Review*, the customer will be taken to the review form which will show the product name, teaser image (if any) and short description, and will be given a form to fill out the following information:

1. **Product Rating** – Their 1-to-5 star rating of the item.
2. **Title** – Title for the review.
3. **Comments** – Their detailed comments on the product.
4. **Name** – They can select to fill in their name, or post an anonymous review. For logged in users, this will be pre-filled with the name from their account.
5. **Email** – If the user is not logged in, they will be prompted to add their email address.
6. **Location** – They can optionally add information about where they live.

After saving their review, the customer is prompted that the review has been saved and according to your store settings, whether it has been posted or is pending review.

From their account area, the customer will be able to access all their reviews and edit or delete them.

Posted reviews will have additional links for other customers to mark them as helpful or not. A summary of the number of helpful votes will be posted. Customers cannot vote for their own reviews.

Administration of Reviews

Once product reviews are activated, admins with permissions will see information on the admin menu when reviews need approval. They can also search and view any of the reviews in the store. The admin menu link for Reviews Pending will take you to directly to the Edit Form view with all reviews that are pending approval.

The Product Review Manager (List View) has the following search fields available:

1. **Product ID** – The product ID to search for reviews on.
2. **Title, Comment Search** – Enter a word here to search for in the title or comments of the review.
3. **Order By** – This determines the sort order for the results if more than one review is found.
4. **Editorial** – Search for editor (admin) created reviews.
5. **Display** – This gives you some additional search criteria. *Check* will find reviews needed to be checked, *pending* are reviews pending approval, while *editor* will find ones that need either type of editor review. *Day*, *week* and *month* will find reviews posted within these time frames from the current date.

A link to view *All* reviews in the system is also provided.

For each review, the following information and links are provided:

1. **Review ID** – The ID number for the review with a link to go to the Edit screen.
2. **Review Info** – First displayed is the review's title, with a link to the review in the store. Below this is the date of the review and the product it is for, with a link to the product page.
3. **Rating** – The rating given to the product by the customer posting the review. Below this is the helpful votes summary.
4. **Editorial** – Any editor label given to the review.
5. **Status** – The current status of the review, active, pending or (needs) check.

Click *Edit Form* to switch to the quick-edit form for making bulk changes to the reviews. You will also be taken to the quick-edit form when you click the *Reviews Pending* link in the admin menu, with any reviews needing approval or checking pre-selected. This form again lists the reviews with the ID linked to the admin edit form, and a summary of the review with the additional comment text so you can easily check many reviews at once from a single page. This form also provides the following fields you can edit:

1. **Editorial** – The editor label for the review, if any. You can use the default labels or add your own under Option Pick Lists. Editor reviews are displayed first and separately from any user reviews on the product detail page.
2. **Approved** – Check here to approve the review and post it to the site.
3. **Needs Check** – Uncheck this once you have reviewed the product review and approve it.

Clicking the *Edit* link on either of the list pages will take you to the admin form for editing a review. This is similar to the customer review form, with some additional information and fields. The fields on the admin Edit form are:

1. **Review ID** – The system ID for this review. Not editable.
2. **Username** – The user that posted the review. You may re-assign the review to another user if you wish.
3. **Anonymous** – Select if this review will be displayed as anonymous.
4. **Display Name** – If not anonymous, the name to display on the review.
5. **Anon Email** – Email address if the review was posted from a user without an account. Not displayed, available only for admin use.
6. **Location** – The optional entry from the user about where they live.
7. **Title** – Title for the review.

8. **Comments** – Their detailed comments on the product. The admin will have the WYSIWYG editor with basic HTML tags. See the guide for information on using the editor.

9. **Rating** – Their 1-to-5 star rating of the item.
10. **Date** – The original date this review was posted.
11. **Updated** – The date this review was last modified.
12. **Helpful** – The number of helpful and total votes for this review.
13. **Approved** – Check if the review has been approved and can be posted.
14. **Needs Check** – Check if this review is still waiting to be checked.

Click *Update* to save any changes and *Delete* to remove this review from the system.

Viewing Reviews

From the product page, a visitor can step through a number of different screens for viewing product reviews. The product page will have a review summary at the top below the product pricing information. An average rating for the product is shown (star rating) and the number of total reviews that is based on, followed by the links to *read the reviews* or *write a new review*.

By default the link to *Read Reviews* will take the user down to the section of the product page where reviews are displayed. You (or your web developer) can change this to direct the user to the page listing all the reviews for the product by modifying the setting in the product/listings/put_orderbox.cfm page (change attributes.putlink from 'thispage' to 'reviews').

At the bottom portion of the product page, the reviews will be displayed, with a maximum per section as you have set up in the Product Review Settings. First, any editor reviews will be displayed, using the type of editor review as the header. After that will be the customer reviews. The most recent reviews are listed first. If the user viewing the page is a product review admin, they will see links to edit and delete the review. Clicking these will open up an admin window to perform these functions.

If there are more reviews for the product than the maximum allowed per page will allow, a link will be displayed to view all reviews for the product. This Product Reviews page shows the product summary at the top (teaser image, name and short description) along with links to *Write a Review* and *View Details* to return to the product details page. A sort is also provided so the visitor can view the reviews by date added (oldest or newest first), rating (highest or lowest first) and helpful rating (most helpful or least helpful first). The reviews are then displayed below.

When viewing reviews, you can also click on the user's name (if given) to go to a list of all their reviews. This list will show the title of each review and the product it was for, with the rating and Helpful voting results. The sort is again provided to selectively sort the list.

User Management of Reviews

Users that have posted reviews can view and edit their reviews from the User Account page. A link to My Reviews will take them to the list of reviews. The sort for date posted, rating, and helpful votes is again provided. Each review will have a link to Edit and to Delete. Clicking *Edit* will return the user to the Product Review form where they can make modifications to their reviews. Clicking *Delete* will take them to the confirmation page to verify that they wish to permanently remove their review.

STORE SPECIALS AND DISCOUNTS

From time to time, you may want to offer your customers special prices and discounts on your products. Or perhaps you want to reward customers that spend a certain amount at your store. You may even want to send out a coupon to bring in new customers or reward special customers in your store. Discounts allow you to do all this and more!

The Discount Manager shows all discounts currently available in your store, with some search fields to help find specific discounts.

1. **Name** – The name of the discount as referred to in the admin area.
2. **Coupon Code** – If this is a coupon discount, the code assigned to it.
3. **Access Key** – Discounts that require a specific access key to use.
4. **Display** – The description of the discount as displayed to customers.
5. **Active** – Determines whether the discount is being used currently or not. Choices for this are:
    a. **All** – Displays all discounts
    b. **Current** – Currently active discount
    c. **Scheduled** – This discount will be active in the future
    d. **Expired** – The expiration date for this discount has passed

Click the *ALL* link to view all discounts in the store and the *New Discount* to create a new discount. The *Edit* link next to each discount will allow you to make modifications to existing discounts. Enter the following information for each discount:

1. **Type of Discount** – This determines how the products will be grouped when calculating the discounts. The options are:
    a. **Single-Item Discount** – The discount is calculated against each individual item in the order. For instance, if the discount is 10% off if you order 2 or more of any book, and the customer orders 3 of one book and 1 of another, they would receive 10% off the first 3 books only.
    b. **Multi-Item Discount** – All items that are assigned to the discount are grouped together to apply it. For instance, 10% off all books if you order 2 or more books from the store. It doesn't matter which 2 books they order, they get the discount. So in this case, if the customer ordered 3 of one book and 1 of another, they would receive 10% off all 4 books.
2. **Discount Level** – This determines the store level at which you are applying the discount. This can only be set when creating the discount, it cannot be changed for an existing discount.
    a. **Product** – The discount is specifically assigned to the products you wish to include.

b. **Category**– The discount is assigned to a category and will apply to all the products in that category. It will not apply automatically to any subcategories (if any) of the category, so be sure to add the discount to any sub-categories you wish to include.
c. **Storewide** – The discount applies to all products in the store.
d. **Order** – This discount is a little different because it is always determined by the total amount or number of items in the order, so is calculated after the entire order is totaled up. It is also handled separately than other discounts, so that a customer can get both a regular product discount, and an order-level discount as well (although only one can be using a coupon as customers can only use one coupon at a time). Please note however that since taxes and shipping are applied at a product-level (as they can vary from product to product), an order level discount is applied AFTER these are calculated so be sure to consider this when deciding whether to use order or store level discounts.

3. **User Level** – This determines if the discount applies to all customers, or only to ones in a specific group. To apply a discount to a specific group, you must be sure to both apply it to the products and/or categories as normal, as well as to the specific user group. It's a good idea to test your discount first on the product before trying to restrict it to certain user groups.
4. **Name** – The name of the discount as it is referred to in the admin area.
5. **Display to Users** – The message to display to users in the store for this discount.
6. **Coupon Code** – If you wish to require a code to use this discount, enter it here. Note that the discount will not be displayed or applied until the user enters the code in the checkout area. Be sure to also turn on coupons in the Shopping Cart Settings! Only one coupon can be used at a time on any order.
7. **One-Time Only** – If this setting is on, the store will only allow this discount to be used once. You will need to use a coupon code and set the store to require logins in order for this to work properly.
8. **Access Key** – This will require the user to have this access key in order to use the discount. This allows you to create discounts that will only be available to specific groups of users or ones that purchase a membership.
9. **Start** – Starting date for this discount. Leave blank if this is not a scheduled discount.
10. **Expire** – Expiration date for this discount. Leave blank if this is not a scheduled discount.
11. **Discount Amount** – The discount can be either a specific amount off, or a percentage off. Enter only one of these.
12. **Discount Range** – You can calculate the discount based on the amount spent, or the specific number of items ordered.
13. **Minimum** – Enter the minimum amount or number to order.

14. **Maximum** – Enter the maximum amount or number to order. Leave blank if no maximum.

Click *Add* to create the new discount.

Some Additional Tips on Discounts

- Previous CFWebstore versions could only track coupons for order-level discounts. Version 6 and higher however can now track any type of coupon-based discount.
- The store will always try to determine the best discount for any particular item being ordered. This means you can have a store-level discount, product-level discount and user-specific discount that all apply to the same product, and the store will pick the best discount for that particular customer. The order-level discount is applied separately regardless of any other discounts the customer receives, as are quantity discounts on products.
- Since the store allows you to create and add any number of taxes to products, and order-level discounts are based on a final order total, the tax has to be determined prior to taking off the order-level discount. There's really no easy way to solve this issue (it would require trying to split the discount across all the products, most likely resulting in rounding issues) so just be aware of it when selecting the type of discount to use.
- Be sure after creating the discount to then apply it to the products/categories/user groups as necessary! Usually if a discount is not working, you have forgotten to apply it somewhere. Store and order level discounts do not need to be applied to products to work.
- Please note that discounts do carry a bit of overhead in terms of processing time. If you find your store is taking awhile to process the shopping baskets, you may need to decrease the number of discounts you are using.

PRODUCT PROMOTIONS

Product promotions work very similarly to discounts with one major difference. With discounts, the sale price is given to the same items (and to all of them) that determine the discount. With promotions, you use one group of products to determine if the promotion is given, but a different item actually receives the discount. It might be an additional item of the same product, or a different product altogether. This allows you to create promotions like “Buy 1 get 1 free” or “Buy 2 of item X and receive 50% off item Y”. Between discounts and promotions you can set up a wide range of special sales for your customers!

The Promotion Manager shows all the promotions currently available in your store, with some search fields to help find specific ones.

1. **Name** – The name of the promotion as referred to in the admin area.
2. **Coupon Code** – If this promotion has a coupon associated, the code assigned to it.
3. **Access Key** – Promotions that require a specific access key to use.
4. **Display** – The description of the promotion as displayed to customers.
5. **Active** – Determines whether the promotion is being used currently or not. Choices for this are:
    a. **All** – Displays all promotions
    b. **Current** – Currently active promotions
    c. **Scheduled** – This promotion will be active in the future
    d. **Expired** – The expiration date for this promotion has passed

Click the *ALL* link to view all promotions in the store and the *New Promotion* to create a new promotion. The *Edit* link next to each promotion will allow you to make modifications to existing promotion. Enter the following information for each discount:

1. **Promotion Type** – This determines how the products will be grouped when calculating the promotion and whether it will apply to the same product. The options are:
    a. **Single-Item Promotion** – The promotion is calculated against each individual item in the order and applies to the same product. For instance, if the promotion is Buy 5 Get 1 Free the customer must buy 5 of the same item to get the promotion.
    b. **Cross-Item Promotion** – The promotion is calculated against each individual item in the order and applies to a different product. For instance, you can have a promotion like Buy 2 items and get our special item free. The customer must buy 2 of the same item to get the free item, which is a different item.
    c. **Multi-Item Promotion** – All items that are assigned to the promotion are grouped together to apply it, and a separate selected item is used for the discounted amount. In this case, your Buy 5

Get a Free item would group all the products together to determine if the customer has bought 5 to qualify for the free product**.**

d. **Order-based Promotion** – With this type of promotion the entire order total is what determines the promotion, rather than individual products. So you can offer a promotion like "Spend $50 in our store and get a free mug!". With this type of promotion, the product marked to discount will be excluded when calculating the qualifying amounts for the promotion.

2. **User Level** – This determines if the promotion applies to all customers, or to ones in a specific group. To apply a promotion to a specific group, you must be sure to both apply it to the products as normal, as well as to the specific user group. It's a good idea to test your promotion first before trying to restrict it to certain user groups.
3. **Name** – The name of the promotion as it is referred to in the admin area.
4. **Display to Users** – The message to display to users in the store for this promotion.
5. **Coupon Code** – If you wish to require a code to use this promotion, enter it here. Note that the promotion will not be displayed or applied until the user enters the code in the checkout area. Be sure to also turn on coupons in the Shopping Cart Settings! Only one coupon at a time (either discount or promotion) can be used on an order.
6. **One-Time Only** – If this setting is on, the store will only allow this promotion to be used once. You will need to set a coupon code and set the store to require logins in order for this to work properly.
7. **Access Key** – This will require the user to have this access key in order to use the promotion. This allows you to create promotions that will only be available to specific groups of users or ones that purchase a membership.
8. **Start** – Starting date for this promotion. Leave blank if this is not a scheduled promotion.
9. **Expire** – Expiration date for this promotion. Leave blank if this is not a scheduled promotion.
10. **Qualify Based On** – This determines what calculation method to use when checking if a user qualifies for this promotion. You can calculate the promotion based on the amount spent, or the specific number of items ordered.
11. **Qualifying Amount** – For item-based promotions, how many items the customer must purchase to qualify. For promotions based on amount, how much the customer must spend on the qualifying products (or order) to qualify.
12. **Number of Items to Discount** – This sets the number of items you want to discount.
13. **Discount Amount** – The promotion can be either a specific amount off, or a percentage off the discounted product. Enter only one of these.
14. **Promotion Amounts can Multiply** – By toggling this setting on, the customer can earn additional promotional discounts for each additional qualifying amount they purchase. For instance with this setting on, a

promotion of “Buy One Get One Free” will earn a customer two free items for two items purchased.

15. **Add the Discounted Product** – By turning this setting on, when checking the shopping cart for an item to discount for each qualifying purchase, the software will automatically add the product to the cart if it is not already in it (and not already being discounted by another promotion). Generally you would only turn this setting on when giving free items (versus a percentage off another item).

Click *Add* to create the new promotion.

Some Additional Tips on Promotions

- The store will always try to determine the best promotion for any particular item being ordered, according to the amount that gets discounted. It will not necessarily find the top promotion for the discounted item, if many products discount the same item, so keep that in mind when creating your promotions.
- Be sure after creating the promotion to add the qualifying products and discounted product as necessary, as well as any user groups for user-based promotions! Usually if a promotion is not working, you have forgotten to apply it somewhere.
- Please note that promotions do carry a bit of overhead in terms of processing time. If you find your store is taking awhile to process the shopping baskets, you may need to decrease the number of promotions you are using. A few dozen promotions though should not be a problem for most sites.

GIFT CERTIFICATES

In addition to discounts, promotions and coupons, you can also offer gift certificates to your customers. Gift certificates are basically redeemable for credit in the store. When a customer purchases one, you use the Gift Certificate Manager to generate a code which is then given to the customer (either by email or on a printed certificate). It can then be used by them or the recipient upon placing an order. Please note that if you use the Shift4 payment gateway, you can offer their gift cards instead and process them like credit cards.

The first step to using gift certificates is to set up a product in the Product Manager to sell them. You will probably want to add options such as amount of the certificate, delivery type (email or printed) and possibly an option for the type of printed certificate to use (birthday, Christmas, etc.). Alternatively you can use the product type of "certificate" to automatically generate codes and email them to the customer (codes are sent immediately for valid credit card orders, and require admin approval for offline orders).

The Gift Certificate Manager gives you a search form similar to the other admin areas. Enter any of the following to find specific entries:

1. **Code** – Any portion of the gift certificate code
2. **Customer** – The customer that purchased the gift certificate, any portion of the name will match
3. **Amount** – The current amount of the gift certificate
4. **Order No** – The order number that the certificate was purchased on
5. **Valid** – Selects for certificates that are currently valid or invalid.
6. **Active** – Determines whether the certificate is currently available or not. Choices for this are:
    a. **All** – Displays all certificates
    b. **Current** – Currently active certificate
    c. **Scheduled** – This gift certificate will be active in the future
    d. **Expired** – The expiration date for this certificate has passed.

Click the *ALL* link to view all gift certificates in the store and the *New Certificate* to create a new one. The *Edit* link next to each certificate will allow you to make modifications to existing ones. Enter the following information for each gift certificate:

1. **Customer** – The person/group purchasing the gift certificate.
2. **Order No** – The order number that the certificate was purchased on.
3. **Start Date** – The start date that this certificate will be valid. Leave blank if not needed.
4. **End Date** – The expiration date for the gift certificate. Leave blank if no expiration.

5. **Certificate Amount** – The value of the gift certificate. When editing a gift certificate, you will be able to enter both the initial value and the current value.
6. **Valid** – This determines if the certificate will be accepted by the store. It will automatically be turned off once the full amount of the certificate has been used. You can use it to manually disable a certificate.

After saving a new gift certificate, the code will be generated and displayed. The code is a random string of 15 letters and numbers and should be pretty difficult for someone to guess; however, please remember that gift certificates are essentially money and need to be careful regarding their use.

Be sure if you are offering gift certificates that you turn on the option for the Coupon/Certificate field in the Shopping Cart Settings. Otherwise your customers will have no place to enter their code! Unlike earlier versions, CFWebstore® version 6 allows a customer to use both a discounts/promotion coupon along with a gift certificate on a single order. Upon entering the code in their order form, the amount of the certificate will be subtracted from the order, not including tax and shipping, and for no more than the cost of the order.

After placing the order, the amount being redeemed will be subtracted from the certificate's value. Once the value reaches 0, the certificate will be marked as not valid in the Certificate Manager. If for some reason a mistake on the order was made and you wish to let the customer use the certificate again, just find the certificate and edit it, to switch it back to valid, and add the amount redeemed back to the current value. You can also at any time change the customer's name on it, the start and end date, and the value of the certificate. For certificates that have been redeemed, any order numbers it was used on will appear on the edit screen as well (as long as those orders still exist in the database) as well as on the order invoice itself. You can also delete certificates once they have been used and you no longer need the information on them, even if you still wish to retain their associated order(s).

ADDING STORE FEATURES

Features are used to add categorized, hierarchical content to your site. They can be linked to products to add additional pages of information for your product, and can be protected with access keys to require subscriptions. With features, you can create a complete online magazine, or use it as a simple CMS system. Using access keys and memberships, you can even sell subscriptions to your content! Dealing with features is fairly similar to products, as they both fall under the same category structure.

FEATURE LIST

As with products, the Feature Manager starts you at the Home level, displaying the subcategories available. Click on the category name to open it and show any subcategories and/or features assigned to that category. You also have the following search fields and filters:

1. **Name, Author, Text** – This search box will allow you to find features with this word or words in the title, author or text fields. Any portion of the word will match.
2. **Order By** – Allows you to sort the list of features.
3. **Type** – You can assign different feature types to a feature (defined in Picklists). Select a type to show only these types of features.
4. **Access Key** – Shows features protected with a specific access key
5. **Display** – For features, you have some special options for the display filter. The choices available include:
    a. **Off** – Features whose display setting is turned off
    b. **Editor** – Feature still needing approval
    c. **Current** – According to the start and end date for the feature, it is currently being displayed
    d. **Scheduled** – Feature set to display at some point in the future
    e. **Expired** – Feature whose expiration date has passed
6. **New** – Select features that are marked or not marked as 'New'

Links are available for other Feature Manager functions. After using a search, you'll see the link to return to the *Browse Categories* view. While browsing, you will have a link to add a *New Feature* to the current category (or home level for uncategorized features). Finally, while in the list view, you will have a link to switch to the *Edit Form*. The Edit Form gives you a form to perform quick edits on all the features in the list at once. The fields include the following:

1. **Priority** – The sort order for the feature on the subcategory pages. 1 is the highest priority, then 2 and so on down. Use 0 or leave blank for no priority setting.

2. **Start** – The start date for publication of this feature. Leave blank to display immediately.
3. **End** – The end date for publication of the feature. Leave blank if no expiration date.
4. **Display** – Use to manually turn the feature on and off.
5. **Approved** – Features that have been approved by a user with editor permissions.
6. **New** – Features marked as 'New'

Feature Form

The form for adding features consists of a main information tab, and additional sections for relating the feature to products and/or other features. Only the first tab will be available when adding a new feature. The fields for a feature are as follows:

1. **User** – The user adding the feature. Only users with permission for adding features will be displayed.
2. **Type** – The type of feature, selected from the picklist for features.
3. **Title** – The title of the feature
4. **Author** – Author of the feature
5. **Copyright** – Any copyright information you wish to display for the feature
6. **Date** – Publication date for the feature
7. **Category** – Select the category to display this feature in. Features can be assigned to multiple categories. Only categories with a template type that accepts features will be shown in the list.
8. **Display** – Manual toggle to turn the feature on and off
9. **Approved** – Users with editor permissions can approve the feature to be shown in the store
10. **Start** – The start date for publication of this feature. Leave blank to display immediately.
11. **Expire** – The end date for publication of the feature. Leave blank if no expiration date.
12. **Priority** – The sort order for the feature on the subcategory pages.
13. **Access Key** – Sets the access key to use if you wish to protect this feature.
14. **New** – Mark the feature as 'New'
15. **Allow Comments** – If feature reviews are enabled, this sets the feature as one that will allow customers to add comments/reviews.
16. **Display Title** – For features, you can turn off the title display and link to the content page so as to just show the teaser text of the article on a page, by setting this to 'No'. See the demo store at cfwebstore.com for an example of this.
17. **Title Image (Teaser)** – A graphic to use for the title of the feature on category pages.

18. **Image (Teaser)** – A small image to use along with the title of a feature on category pages.
19. **Teaser Text** – The teaser text to display on category pages. With features, if the teaser is left blank, the full text will be displayed instead. See the sample store for some examples of how to use this feature to easily create a regular featured column with archives.
20. **Title Image (Content)** – Graphic title to use on the main content page of the feature.
21. **Image or PDF (Content)** – Image to display along with the feature title. Alternatively, you can upload a PDF here to use as the content page for the feature.
22. **Text** – The main text for the feature. A fully integrated WYSIWYG editor is offered for users to help build their pages. This will not be used if you upload a PDF for the feature. See the guide for information on using the editor.
23. **Parameters** – Parameters are used to pass additional settings to your template and can be customized. The default feature template has settings to adjust the text for related features and products.
24. **HTML Title** – Custom text to use as the HTML title for this feature page, useful for search engine placement.
25. **Meta Description** – A description specific to this feature to be used for search engines; otherwise the default description set up in the Main Settings will be used.
26. **Keywords** – Enter the keywords for this feature for search engines; if none are entered the store default will be used. The meta description and keywords will also be used for feature searches.
27. **Custom Palette** – Select the palette to use for this feature, by default the palette selected as the default in the Main Settings will be used.

The bottom of the Edit page also has the option to *Delete* the feature. You will need to confirm the deletion before it is completed.

Related Features

The Related Features tab allows you to link other features to the currently selected feature. These features will then show up in a special section at the end of the feature page.

Adding related features works much like doing related products. You will be provided with the same options for searching and browsing the categories as on the main Feature Manager page. Use these to locate the features you wish to link to, check off the box in front of each one and click *Add Features*. Please note that adding a related feature here only works one-way. If you wish to relate the feature you are currently editing to the selected features as well, you will need to go to their edit screens and add it there.

A list of the Currently Related Features will also be displayed. You can *Remove*, *Edit* or *View* the related features from this list.

RELATED PRODUCTS

The Related Products tab allows you to link the current feature to selected products. The feature will then show up as a link on the detailed product information page and the product will show up for the feature (assuming the product is turned on to be displayed and in stock, etc.)

The related products function works the same as in the Product Manager. You will be provided with the same options for searching and browsing the categories as on the main Product Manager page. Use these to locate the products you wish to link to, check off the box in front of each one and click *Add Products*.

A list of the Currently Related Products will also be displayed. You can *Remove*, *Edit* or *View* the related products from this list.

FEATURE REVIEWS

Feature reviews are similar to product reviews but are somewhat simplified and can be thought of more as article comments than reviews. You will be able to set the requirements for posting comments and moderate and approve posted comments. The first step is to configure the main settings for comments by clicking *Feature Review Settings* on the admin menu. This option will only be available if you have Feature Review admin permissions. The following options will be available to configure reviews:

1. **Use Feature Reviews** – This is the main setting to turn reviews on in your store. No feature review options or other admin links will be viewable until this has been turned on.
2. **Approval Required** – If this is turned on, reviews will not be posted live to the site until an admin has read and approved them.
3. **Check Reviews** – Generally used as an alternative to Approval Required, this setting will flag all new reviews so the admin can still review them, however new reviews will be posted immediately to your site.
4. **Who Can Write a Review** – This determines what kind of user can write reviews. You can set this to anyone, which allows any visitor to your site to add reviews (generally not recommended unless you have approval required), Registered Users which will allow only logged in users to add reviews, and Verified Users, which will require a login and a verified email address (you generally will want to turn on email verification in your user settings for this.

Click *Save Changes* to save your settings.

COMMENTING ON A FEATURE ARTICLE

The links for viewing and adding reviews will appear at the bottom of the page for any features you have designated to allow comments (see feature form page for this setting). After clicking *Post Your Comment*, the customer will be taken to the review form which will show the feature title and teaser text, teaser image (if any), and will be given a form to fill out the following information:

1. **Rating** – Their 1-to-5 star rating of the article.
2. **Title** – Title for the review.
3. **Comments** – Their detailed comments on the article.
4. **Name** – They can select to fill in their name, or post an anonymous comment. For logged in users, this will be pre-filled with the name from their account.
5. **Email** – Email address if the review is being posted from a user without an account.
6. **Location** – They can optionally add information about where they live.

After saving their comments, the customer is prompted that the review has been saved and according to your store settings, whether it has been posted or is pending review.

From their account area, the customer will be able to access all their reviews and edit or delete them.

Unlike product reviews where other customers can rate the helpfulness of the review, with feature comments they can leave an additional comment in response to another customer's review. This new comment will be shown under the previous comment, the end result being a tree-like structure of comments (threads) which customers will be able to step through and add comments at any level to.

ADMINISTRATION OF REVIEWS

Once feature reviews are activated, admins with permissions will see information on the admin menu when comments need approval. They can also search and view any of the reviews in the store. The Feature Review Manager has the following search fields available:

1. **Feature ID** – The feature ID to search for reviews on.
2. **Title, Comment Search** – Enter a word here to search for in the title or comments of the review.
3. **Order By** – This determines the sort order for the results if more than one review is found.
4. **Editorial** – Search for editor (admin) created reviews.
5. **Display** – This gives you some additional search criteria. *Check* will find reviews needed to be checked, *pending* are reviews pending approval, while *editor* will find ones that need either type of editor review. *Day*, *week* and *month* will find reviews posted within these time frames from the current date.

A link to view *All* reviews in the system is also provided.

For each review, the following information and links are provided:

1. **Review ID** – The ID number for the review with a link to go to the Edit screen.
2. **Review Info** – On the top line is the review's title, with a link to the review in the store. Below this is the date of the review and the feature article it is about, with a link to the feature page.

3. **Date/Rating** – On the top line is the date the comment was posted, Below this is the rating given to the article by the customer posting the review.
4. **Editorial** – Any editor label given to the review.
5. **Status** – The current status of the review, active, pending or (needs) check.

Click *Edit Form* to switch to the quick-edit form for making bulk changes to the reviews. You will also be taken to the quick-edit form when you click the *Reviews Pending* link in the admin menu, with any reviews needing approval or checking pre-selected. This form again lists the reviews with the ID linked to the admin edit form, and a summary of the review with the additional comment text so you can easily check many reviews at once from a single page. This form also provides the following fields you can edit:

1. **Editorial** – The editor label for the review, if any. You can use the default labels or add your own under Option Pick Lists.
2. **Approved** – Check here to approve the review and post it to the site. If this review already has children, the checkbox will be hidden.
3. **Needs Check** – Uncheck this once you have reviewed the comment and approve it.

Clicking the *Edit* link on either of the list pages will take you to the admin form for editing a review. This is similar to the customer review form, with some additional information and fields. The fields on the admin Edit form are:

1. **Review ID** – The system ID for this review. Not editable.
2. **Username** – The user that posted the review. You may re-assign the review to another user if you wish.
3. **Anonymous** – Select if this review will be displayed as anonymous.
4. **Display Name** – If not anonymous, the name to display on the review.
5. **Anon Email** – Email address if the review was posted from a user without an account.
6. **Location** – The optional entry from the user about where they live.
7. **Title** – Title for the review.
8. **Comments** – Their detailed comments on the feature. The admin will have the WYSIWYG editor with basic HTML tags. See the guide for information on using the editor.
9. **Rating** – Their 1-to-5 star rating of the article.
10. **Date** – The original date this review was posted.
11. **Updated** – The date this review was last modified.
12. **Approved** – Check if the review has been approved and can be posted.
13. **Needs Check** – Check if this review is still waiting to be checked.

Click *Update* to save any changes and *Delete* to remove this review from the system.

Viewing Comments

From the feature page, a visitor will be shown a list of the various top-level comments that have been posted. When they click on the title of the comment, they will go to a page with the full text of the comment and a tree of any discussions related to that article. An arrow will display on the tree where the current comment is located. The user can click on the other comments in the tree to read them as well.

When viewing a comment, the following will be displayed:

- If the author of the comment was not anonymous, a link on their name will take the visitor to a list of all their article comments
- A link back to the original article
- A link for the visitor to add their own comment to the article
- A link for the visitor to add a reply to this comment
- A link for the visitor to alert the editor if an offensive comment has been posted.
- If there are other comments on the article, navigation links will be shown to go to the previous and next comments, and the total number of comments is displayed as well.

Unlike product reviews, users do not have access generally to edit their comments. The tree structure of comments makes it difficult to remove comments that have replies, so editing is disallowed to prevent issues.

PROTECTING YOUR CONTENT

One of the most powerful and unique features in CFWebstore® is the ability to control access to areas and content on your store. In addition, you also have the ability to sell this access to your content via memberships. This allows you to do things like have sections of your store only viewable to certain users, offering member-only discounts and promotions or creating an online magazine that users can subscribe to. To restrict access to a certain area, you create an access key, which you can then assign to certain users, groups, or sell memberships to with a store product.

ACCESS KEYS

The Access Key section on the Content Access menu shows the current keys for your site. Click *Add Access Key* to create a new key, or *Edit* to change the name or delete a current key. Keys that are currently in use may not be deleted. There is also a system access key "Log in Required" that cannot be deleted.

Once you have added an Access Key, protecting your content is simple. Assign the access key to the categories, products, features, pages, discounts, etc. that you wish to protect. Please note that assigning an access key to a category will also protect the products and features in that category automatically, even if they are also assigned to un-protected categories as well.

Once you've protected your content with the access key, you have two ways to provide access to it. You can assign the key to individual users or to groups of users (under their *Permissions*) or you can sell memberships to your content.

MEMBERSHIPS

Memberships are created and sold as products in your store (see the Product Pricing Tab for more information). Downloadable software is also treated as a membership for purposes of approval and expiration. The Membership section of the admin area allows you to view and manage the memberships purchased in your store, as well as manually process any recurring memberships.

The Memberships Manager provides you with a list of memberships in the system, with those requiring approval listed first, then sorted by the start date. Memberships (or software downloads) purchased offline will require approval, while those purchased with credit cards will be automatically approved. Purchases with PayPal will be approved if the transaction was completed; pending transactions will need to have the membership approved once the transaction is completed.

By default, the last week's activity will be displayed. Search fields and filters are also available to view the memberships. These include the following:

1. **Username/Email** – The customer's username or email that purchased the membership.
2. **Type** – The membership type. Select membership for site access memberships, product for site downloads and promo for promotional memberships you add in the admin area manually.
3. **Product** – The product name for this membership that was purchased
4. **AccessKey** – For memberships, the access key ID that this membership provides.
5. **Expired** – Search according to the expiration status of the membership. Choices are:
    a. **All** – Find all regardless of status
    b. **Current** – Currently available memberships
    c. **Recurring** – All memberships that will renew automatically
    d. **Expired** – Expiration date for the membership has passed
    e. **Future** – Memberships that will become active in the future.
    f. **Suspended** – Memberships that have been temporarily suspended by the admin
6. **Used** – Display memberships whose access count has (or has not) been used up. Generally used to find software downloads, since access counts are not used with memberships.
7. **Valid** – Display valid or invalid memberships.

Links are also provided to show *ALL* memberships or *Recent* (created in the last week) and to add a *New Membership*.

The following information is displayed for each membership on the list:

1. **No.** – The membership ID number, and a link to *Edit* the membership.
2. **User/Product** – The first line under this heading will show the username for the customer that the membership is assigned to (generally the person that purchased it) with a link to the user summary page for that user. On the second line, it will show the membership type (membership, download or promo) and the product ID and name for the membership.
3. **Key(s)** – The access key(s) ID (number) assigned to this membership. The access key ID can be viewed in the access key admin area.
4. **Days** – Number of days the membership is valid for. This is taken from the product information and used for calculating the expiration date for the membership.
5. **Accesses** – This generally applies only to downloads, shows the number of times the product has been downloaded and the number allowed. If this is a recurring membership product, it will show "RECUR" here. If the

membership recurs to another product the ID for that product will be displayed.

6. **Start|Expire** – The start date and expiration date for the membership.
7. **Valid** – This will contain information on the status of the membership and links to process it. If the membership is current and valid, “Current” will be displayed. If it is current, but hasn’t been validated (such as an offline order) there will be a link to validate it. Expired memberships will show “Expired” and if the user’s account has been disabled it will show “Fraud”. If this is a recurring membership, an additional line will be displayed. If the user’s credit card on file is not valid, it will show “Bad Card”. If their card is valid, there will be links to manually renew the membership, either with an online order, or offline order.

The form for creating or editing memberships includes the following:

1. **Membership ID** – Displayed when editing, this is the system ID assigned to the membership
2. **Order ID** – Displayed only when editing memberships created in your store, this is the order number the membership was purchased on.
3. **User** – The username this membership is assigned to.
4. **Product ID** – Select the product assigned to this membership. All membership and download products in the store will be displayed. While this selection is optional, for downloads you should select a product or the download link for the customer will not work properly.
5. **Type** – The type of membership. Select membership for site access memberships, product for software/file downloads and promo for promotional memberships you add in the admin area manually.
6. **AccessKeys** – Select the access keys to assign to this membership. For downloads, you would set this to “none”.
7. **Start** – Start date for this membership. Can be left blank for no start date.
8. **Expire** – Expiration date for this membership. Can be left blank if no expiration date.
9. **Days** – Number of days the membership is valid for. This is informational only, the start and expiration dates determine when the membership is active.
10. **Accesses** – Number of accesses allowed for software downloads. Not used for content access.
11. **Access Used** – Displays the number of accesses to the download the customer has used.
12. **Recurring** – Sets whether this membership will automatically renew. Currently only the Shift4 gateway is supported for recurring memberships, by using secure tokens for recharging the user’s credit card.
13. **Renew to Different Product** – Used if this membership is a one-time offer and will renew to a different product. Select the membership product from the list of available ones you have created in the products section.

14. **Valid** – Activate or turn off the membership. Memberships purchased in the store using a valid credit card will automatically be validated, ones that are purchased using offline methods or purchase orders will have to be manually validated.
15. **Suspend Starting** – For memberships that are current, you can temporarily suspend it for a customer using this feature. Select the date here to start the suspension. They will not be able to access the membership features starting on this date.
16. **Suspend Ending** – The ending date for the suspension. Any remaining time on the membership will start on this date.

Click *Update* to save your changes or *Delete* to remove the membership record.

ADDITIONAL NOTES FOR RECURRING MEMBERSHIPS

If you are planning to use recurring memberships and wish the store to automatically bill customers as their memberships are expiring, you should use the settings to store credit card tokens for the user (currently supported only for Shift4). You will also need to set up the daily task that checks for these memberships and renews them. It will send the customer a reminder that they will be billed 3 days ahead of time so that they can cancel if they wish, and you will also have links in the membership section to cancel the renewal manually.

The template for running the daily tasks is found in the admin/scheduled directory. You will find daily, weekly and monthly templates which you can use for any other scheduled tasks you might need to run. For the recurring memberships, the necessary code has already been added to the daily.cfm page. You will need to set up a scheduled task in the CF admin (or have your host add it) that will call this file at least once a day in order to process these functions. Just set the scheduled task to call the file directly (not through a fuseaction) sometime between midnight and 1 am:

http://www.storeurl.com/storedirectory/admin/scheduled/daily.cfm

By default, the template is set to run once a day and will renew any memberships that will expire that upcoming day. Alternatively you can set it to run throughout the day, like every 2 or 3 hours, giving the customer more time to cancel the membership before it renews. To do this, set the schedule to run it every x hours in the CF admin (be sure to still start it between 12 and 1 am as the code runs certain functions at that hour only) and change the setting for “run_interval” at the top of daily.cfm to match the interval you are using.

Shopping Cart Settings

Now that you've set up your store, you're ready to start taking orders. Not so fast! You now need to configure the settings that control your shopping cart and checkout area. There are a number of admin areas for these settings, so let's get started! The Shopping Settings controls the various options for shopping and checkout processes and is broken down into various sub-sections.

Shopping Options

1. **Show Cart Between Orders** – If turned on, the customer will be shown the shopping cart page after placing an item in the cart. Otherwise, the item will be added, but the current page will be redisplayed.
2. **Use Gift Registry** – This turns on the gift registry functions. You will need to turn this on to view and use the gift registry tools in the admin section as well.
3. **Use Wishlists** – This turns on the wishlist feature. Users will be able to add products to a wishlist versus the shopping cart, and will have a link to view their wishlist in thei account section. Wishlists are only viewable to the user that creates them, for public shopping lists, use the Gift Registry feature.
4. **Offer Gift Wrapping** – This turns on the gift wrapping options in the shopping cart. You'll need to configure this with the various gift wraps you offer.
5. **Use Coupons/Certificates** – This gives the customer a field for entering a coupon code or gift certificate number (generated by the Gift Certificate Manager). You may want to leave this turned off if you don't use these features.

Checkout Options

6. **Minimum Order Total** – This allows you to configure a minimum amount that a customer must order to checkout.
7. **International Orders** – Use this setting to configure your store to allow orders from outside your home country.
8. **Skip Address Form** – This option will skip the address form during checkout if the user is logged in and has valid addresses entered. They will still be able to go back and edit the addresses from the shipping options screen but this will streamline the checkout process for existing users.
9. **Require Login to Checkout** – You can set your store to require a user account when the customer checks out, or otherwise they have the option to checkout as a guest.

10. **Use Gift Cards** – This setting will give the customer a field to enter a gift message for their order.
11. **Use Delivery Date** – Allows the customer to enter a desired delivery date for their order.
12. **Allow Backorders**? – This determines if a customer will be allowed to place an order for items that are not in stock.
13. **Base Order Number** – This is the starting number you wish to use for order numbers. This should not be changed once your store is live. For new stores you may wnt to enter a value here so your invoice numbers do not start at "1".

TERMS AGREEMENT

If you have terms you need the customer to agree through before purchase, enter them here. The terms will be displayed when the customer begins the checkout process and they must agree to them to continue. Version 6.50 also saves these terms to the database so you can refer to them should any question arise over the terms in place at the time the order was placed.

CUSTOM CHECKOUT FIELDS

CFWebstore gives you some custom fields to ask your customer for additional information when checking out. You can add three text fields and/or two selectboxes. For text fields, enter the label for the field which will prompt the user for what they should enter. For selectboxes, enter the label and then a comma-separated list of choices to display. For each custom checkout field you create, you can also specify whether to make the field required or not.

EMAIL CONFIRMATIONS

These settings determine which types of email confirmations will get sent out when orders are placed.

1. **User Confirmation** – Sends an email confirmation to the user with their order details.
2. **Merchant Confirmation** – Sends an email confirmation to the merchant with the customer information and order details.
3. **Affiliate Confirmation** – Sends an email to the affiliate when a customer orders after having followed one of their links.
4. **Drop-Shipper Emails** – This enables automatic emails to the drop-shippers, to send an email with the shipping information and order details.

5. **Email Drop-Shipper When** – Determines when the emails to the drop-shippers are sent in the ordering process. You can send the email when the order is placed, when it is marked as in-process or when it is filled.
6. **Order Email** – Address used to send the merchant confirmation and to use as the return address for other emails.
7. **Drop-Shipper Email** – Default address to send drop-shipper emails to. This is the address that is used for any items not assigned to a specific vendor in the Product Manager. You must have something entered here to send drop-shipper emails, even if all your products are assigned to vendors!

TAX SETTINGS

CFWebstore® has a very flexible tax system to allow for use with a wide variety of tax systems and countries. You create a tax code for each type of tax and then configure how the tax will be applied. Each product in the store can have any number of tax codes applied (or none at all if tax-exempt).

TAX CODES

The first step in setting up your taxes is creating tax codes. The store should have a default tax code set up for you which may be all you will need. Generally you need to create additional tax codes if you have any products that are taxed differently than others. For instance, if you have some items which are taxed at 4% and other products that are taxed at 5%, you would need to set up a tax code for each of these. You will not though have to set up different tax codes if the products have different tax rates for different states, countries, etc. as you can configure all of these separately for each tax code. The first tax code on this screen will be used as the default for all new products; you will need to edit the Pricing screen for any product with additional, different or no taxes applied to override this default.

The main tax code screen will show a list of current tax codes, with fields to edit the calculation order and cumulative setting. Just enter the new settings and click *Update Codes* to save your changes. See below for more information on these settings.

Next to each code is a button to Edit or to view the Rates for the code. Let's first look at the Edit screen for a tax code (the same page is displayed when adding new codes):

1. **Code Name** – The name of the code as it will be referred to in the tax section and on product pages and order reports. You should use a unique name for each tax code that is detailed enough to know what it is used for.
2. **Display Name** – The name for this tax when displayed to the customer during checkout. You can use the same name for multiple tax codes to combine them during checkout as one tax.
3. **Tax All Users**? – By turning this on, any products using this tax code will be applied to all customers in your store (other than tax-exempt users). If turned off, you will need to set up tax rates according to the customer's location (state/country/zip).
4. **Show on Products**? – This setting is generally used for VAT taxes. The amount of the tax as entered for the tax code will be displayed on product pages and in the shopping cart as an "estimated" tax. Product pages will show the product price both with the tax added and with it excluded.

5. **Tax Amount** – Enter the tax amount here if using the Tax All Users setting, or as a default amount to Show on Products (if enabled).
6. **Tax Shipping** – Used if the Tax All Users setting is turned on, or for estimated tax costs in the shopping cart if using the Show on Products setting. This determines if shipping costs are included when calculating the tax.
7. **Address Used For Tax** – If not taxing all users, this determines which address is used when checking for what rates to use, the billing address or the shipping address.
8. **Order for Calculation** – This setting is used if you have multiple tax rates and need to set the order they are used in. Generally this only has an effect if you have cumulative tax rates, or multiple VAT taxes, to determine the one that is used as default.
9. **Cumulative**? – This is turned on if this tax includes previous tax amounts when being calculated. You will need to make sure the calculation order is set correctly, with higher numbers including the lower numbers in the order when calculating.

Click *Update* to save your changes or *Delete* to remove the tax code (and any associated tax rates for countries/states/etc).

TAX RATES

After creating your tax codes, you will need to add tax rates for any codes that are not applied to all users. To do this, click the *Rates* button next to the tax code listing. By default, the Tax Rates screen will show the ***state tax rates***, with tabs to edit and add other rates. Any currently assigned state rates will be displayed, with links to *Edit* or *Delete* the rate. To enter a new rate, fill in the form and click *Add Rate*. The fields entered are:

1. **State** – Select the state this rate will be for. By default, the store includes the US states and Canadian provinces. For other countries, you will need to modify the database to add the states you need.
2. **Tax Rate** – Enter the percentage to charge for this state.
3. **Tax Shipping?** – Check this if the state charges tax on the shipping charges as well.

County taxes allow you to add taxes for counties by state. To use counties, be sure to turn on the setting to include the county form in the User Settings. Once you enter counties, when a user selects the associated state in the address form, the county drop-down will be updated with the list of counties for that state. To enter a new county rate, fill in the following information:

1. **State** – Select the state this county is located in. Again, US states and Canadian provinces are included, you will need to add your own states for other countries.
2. **County** – The county name.
3. **Tax Rate** – Enter the tax percentage to charge for this county.
4. **Tax Shipping?** – Check this if the county charges tax on the shipping charges as well.

Local taxes allow you to enter tax rates for specific postal codes. Enter the following information:

1. **Zip Code** – Enter the zip or postal code to apply this rate to, or range of zip codes. For US zip codes, enter just the 5 digit code for each. For Canadian postal codes, enter the code in all caps and *without* spaces. The store will convert the customer's entry to this format when applying rates. Please note that you can only use postal code ranges for numeric (zip) codes only.
2. **Tax Rate** – Enter the percentage to charge for this location.
3. **Tax Shipping?** – Check if tax is charged on the shipping rate as well.

The ***country tax*** is an additional tax rate charged to all customers located in a specific country. Enter the following:

1. **Country** – Select the country this tax rate applies to
2. **Tax Rate** – The percentage to charge
3. **Tax Shipping?** – Check if tax is charged on shipping as well.

On any of the tax rates screens, you have options to *Edit* or *Delete* current tax rates, or to return to the main Tax Codes screen.

SHIPPING CHARGES

Setting up the shipping for your store is an important and sometimes complicated process. You have a variety of options in how to handle the shipping calculations for your store, and with a little custom coding, you can come up with even more possibilities. There are two main classifications of shipping types: custom shipping types in which you configure how the amounts will be calculated and automated methods that rely on external shipping APIs to calculate the shipping.

Version 6.50 now includes the ability to use multiple shipping types, along side each other. Please note that you can still only use one custom shipping method at a time, as those all use the same database table to hold their shipping rates. Of course, if you really want to use more than one of these, you can always custom code the store to do so (typically the only reason to do this would be to use a different shipping method for different products, which itself requires custom coding).

SHIPPING TYPES

The initial screen when you enter the Shipping Manager is the list of Shipping Types for your store. Every site should have at least one shipping type set up, unless you will not have any products configured to use shipping (for instance you only sell downloadable products. The table displays a summary of information about that shipping type: the name, the base shipping rate, handling percentage, if you offer in-store pickup, show an estimator, and if it uses drop shippers.

To add a new shipping type, click the Add Shipping Type button. Or click Edit to edit an existing setup and Delete to remove it. Please note that the delete will permanently remove the shipping type so be sure that you want to do this before using it!

The Add Shipping Type and the Edit button both take you to the Shipping Settings screen, where you will set up and configure that type of shipping. You may want to also visit the CFWebstore Blog for some articles and examples on setting up shipping.

SHIPPING SETTINGS

This is the screen where you configure the shipping type. Some settings are global to all shipping types, and then each type will have its own additional screens to further configure the shipping type. First, you will need to select the type of shipping to configure, the options are:

1. **Amount Added by Total Price** – Uses a shipping table you set up yourself where the shipping cost is determined by the total price of the order. For instance, orders between $10-100 getting charged $7 shipping.
2. **Amount Added by Total Weight** – Uses a shipping table you set up where the shipping cost is determined by the total weight of the order. For instance, an order between 1 and 5 pounds will be charged $5 shipping.
3. **Amount Added per Item** – The shipping cost is determined by the number of items in the order. The shipping cost you configure is used to calculate the shipping, which you can configure as the specific cost, or the amount to add for each item. For instance, an order between 10 and 20 items being charged $1 per item. You can also configure this type of rate to be cumulative…for instance $5 for the first item, $2 for each additional item.
4. **Percentage Added by Total Price** – Uses a shipping table you set up where the shipping cost is determined as a percentage of the total price of the order. For instance, an order of $50 configured with a $3 charge would incur a shipping cost of $1.50.
5. **Percentage Added by Total Weight** – Uses a shipping table you set up where the percentage used is determined by the total weight of the order, and the shipping cost is that percentage of the total order amount . For instance, an order between 1 and 5 pounds is configured for 5% shipping. If the order total was $100, the shipping amount is $5.
6. **Automated UPS Shipping Rates** – Uses the UPS shipping rates API to calculate the shipping charges. Requires registration with UPS, be sure to see the additional information on setting up and configuring UPS rates..
7. **Automated USPS Shipping Rates** – Calculates US Postal Service rates using their API. Only available to US merchants, be sure to see the additional information on setting up and configuring USPS rates.
8. **Automated FedEx Shipping Rates** – Uses the FedEx shipping rates API to calculate the shipping charges. Requires registration with FedEx, be sure to see the additional information on setting up and configuring FedEx rates.
9. **Multiple Shippers using Intershipper**– Uses the Intershipper service to offer multiple shippers and shipping methods. Additional service fees charged by Intershipper, but these allow for the greatest flexibility and reliability of shipping rates. Be sure to set up your Intershipper settings and methods as well.

Now enter the rest of the global shipping settings:

1. **Offer In-Store Pickup?** – This will give your customer the additional option during checkout to select in-store pickup with no shipping charges. If using multiple shipping types, you only need to enable this on one of them.

2. **Show Estimator** – This will put a shipping estimator form in the shopping cart so your customer can estimate their shipping costs prior to checkout. The fields used will be determined by the type of shipping used. If you are using multiple shipping types, the estimator will include all of them.
3. **Use Drop-Shippers?** – This option is only available if you are using one of the API methods. Turning this on will allow you to split an order according to the drop-shippers on it and calculate the shipping for each separately (giving the total amount to the customer). Be sure to enter valid addresses for all your drop-shippers (under the User Accounts section) when using this feature! Also note that this may often result in several API calls to external servers needing to be made which can really slow down your checkout processes, so be careful of splitting your orders to lots of different drop-shippers. Be particularly careful of using this setting turned on along with the previous one for the shipping estimator, as that one will also be making regular API calls as well.
4. **Base Amount** – This is an amount you can append to the shipping rate for any of the methods. A merchant might use this, for instance, to cover the additional cost of packaging materials for each shipment.
5. **Handling Percentage** – You can also charge a handling percentage on orders which is also added to the shipping charge. The handling percentage is charged on the order total before shipping and tax.
6. **Allow No Shipping** – This determines if you will allow orders to be placed when the shipping cannot be calculated. This generally occurs with international orders, particularly if you are using custom shipping methods and don't have rates set up for some locations. If allowed, you generally will contact the customer with their shipping amount and then modify the order with that amount. Please note that most credit card gateways do not support increasing the charge on the card over what was authorized, so take that into consideration and make sure you are able to handle this situation in-house if need be.
7. **Admin Message** – Enter the text you wish to display for orders when shipping cannot be calculated. The message 'No Shipping' is used for orders with no/free shipping charges so a different message than that would be suggested.
8. **Customer Message** – This is the text the store will display to the customer when the shipping is not calculated. Include your policy for such orders and any further instructions for the customer.

Click ***Save Changes*** to save your settings before proceeding. In particular, if you change the shipping method you are using, be sure to save your changes before continuing with the *Rate Calculation* section! Click ***Back to List*** to return to the list of all shipping types for the store.

CUSTOM SHIPPING RATES

All of the custom shipping types, by price, weight or number of items, have basically the same settings, with a few extra settings for Shipping by Item. In addition to configuring the global settings, all custom shipping types MUST have at least one entry in the shipping table and one shipping method set up (even if these are configured for $0). You will also need to set up a country rate which enables shipping to whatever countries you are able to ship to. If any of these 3 pieces are not set up, the the store will not be able to calculate a shipping rate and will display an error message.

Your first step is to configure these basic settings which determine how your shipping will work in the store:

1. **Show Shipping Table** – This will display a table of your rates below the shopping cart in the store. This works best with price and weight methods, depending on other settings.
2. **Calculate Per Item** – This option is only displayed for Shipping by Item. This determines if the amount you enter in the shipping table for ranges of items will be multiplied by the number of items. For example, if you have a amount of $5 for 2-3 items, and the customer orders 2 items, if this is turned on the shipping amount will be $10, otherwise it will be $5.
3. **Cumulative Amounts** – Another option only for Shipping by Item. This option allows you to set if the shipping table amounts are cumulative as you go from one level to the next with the number of items. For instance, if you have an amount of $5 for 1 item and $3 for 2-5 items and this setting (and the previous one) are turned on, the shipping amount if 2 items is ordered will be $8 ($5 + $3) and would be $11 for 3 items ($5 + $3 + $3). If it is turned off (previous setting still turned on), shipping would be $6 for 2 items and $9 for 3.
4. **Methods Multiply Shipping** – If turned on, the amounts entered in the Shipping Methods section will multiply the shipping amount from the shipping table. If turned off, the amount will just be added to the base shipping cost. This setting is only useful if you are using anything other than $0 for the shipping method.
5. **Debug** – This will display the shipping arrays and structures during checkout, useful if you are debugging your shipping calculations. This should be turned off on live sites.

SHIPPING TABLE

If you choose to use one of the custom shipping types, after configuring your settings, you will need to set up your shipping table. This will determine the base shipping amounts to use for different price, weight or item ranges. The shipping table will look a little different for the different methods, but the idea is basically similar for each. You might need only one entry in the shipping table, but at least one is necessary for any of the custom shipping types. The amount calculated from the shipping table is then used as a base when adding additional amounts from the custom methods and/or the country rates.

When you click on Shipping Table, your current ranges will be displayed, as well as a form for adding new ranges. You will also have links to *Edit* or *Delete* the current ranges. You should be certain not to have overlapping ranges or your shipping calculations may not behave as expected. Your lowest range should start at 0.01 (or 1 for number of items) otherwise shipping will be applied to all orders, even those with an amount of 0 (which is generally an order with only items with free shipping). For each entry in the table you will need to enter the following:

1. **Minimum Amount** – The minimum amount for this shipping charge. For shipping by price, this will be in the currency defined for your store. For shipping by weight, this will use the weight unit defined for your store. For shipping by items, this will be the number of items ordered.
2. **Maximum Amount** - The maximum amount for this shipping charge. For shipping by price, this will be in the currency defined for your store. For shipping by weight, this will use the weight unit defined for your store. For shipping by items, this will be the number of items ordered. If you want to have no upper limit, just make it a very large number.
3. **Shipping Amount/Percentage** – The amount of shipping to charge or percentage to use for the calculation.

Please note that if you change the main shipping method, the shipping table may require modification to work properly. For instance, if you switch from an Amount Added method to Percentage method, the shipping table will have some really high percentages until they are changed!

Country Shipping Rates

The country shipping rates are used to determine which countries you will ship to and the percentage added for that country. By default, the home country will be added here, with a percentage of 0% added. You cannot delete the home country rate, doing so would prevent shipping in your own country. To allow shipping to a country, enter the following:

1. **Country** – Select the country you wish to ship to.
2. **Percent Added** – This will be the additional shipping charge added for the country. The percent added is based on the normal shipping charge as calculated from the shipping table. For instance, if the shipping charge for an order as determined from the shipping table is $10 and the percent added for the country is 50%, the shipping total will be $15.

Click *Add Rate* to enter the rate for the country. You can also *Edit* or *Delete* the rates for countries that have been added.

Alternatively, you can set all country rates at the same time. This is useful if you wish to enable shipping to all countries and don't want to add them one at a time. Please note that the rate entered will be saved for ALL countries including any you have already added, so you may need to edit any countries that you wish to use a different rate after using this function.

To set all the country shipping rates, just enter the percentage to use and click *Go*. You will be asked to confirm that you wish to set all the countries to use this rate before the changes are saved. There's no easy way to remove them all (other than having your DBA delete them in the database!) so be sure you really want to include all countries before using this option.

Shipping Methods

The shipping methods section is used for all types of custom shipping. This section allows you to offer different shipping service types. You *MUST* have at least one method turned on or your store will not be able to determine a base shipping cost. If you use multiple methods, the customer will have the option of selecting their choice of shipping when placing their order (and in the shipping estimator if you have it turned on). You can also now designate specific methods as domestic and/or international and they will be offered as such according to the shipping address on the order. Make sure if you wish to ship outside your home country that you designate at least one method/service for international shipping (the same shipping method can be both domestic and international).

From the main screen listing the different shipping methods, you can modify which shipping methods are active (used), and also enter the sort order (Priority) to determine the order to display them. After entering your changes, click the *Update Used* to save your changes.

To make changes or remove an individual shipping method, click the *Edit* button next to the method. You can also add new ones by clicking *Add Method* at the bottom of the page. Enter the following information for each method:

1. **Description** – The text to describe this type of shipping, as displayed in the store and to the customer.
2. **Method Cost** – This is the amount that you will add to (or multiply by) the shipping cost for this type of shipping. Whether the cost is added or multiplied is determined by the setting in the Custom Shipping Settings.
3. **Priority** – The sort order for this shipping method, when displaying more than one shipping method to a customer.
4. **Domestic** – Sets this as a method that will be available to customers in your home country.
5. **International** – Sets this as a method that will be available to customers outside your home country.
6. **Used** – Used to toggle the shipping method on and off.

Click *Save* to add or update the method, or click *Delete* if you wish to permanently remove this shipping method.

Free Shipping Promotion

For all shipping types, you can set up a free shipping promotion for your store. Basically, you select the shipping methods you wish to offer for the promotion (your currently active shipping methods only will be shown) and enter the order total required to receive these types of shipping for free. The customer will still be offered the other shipping methods at their normal price. If you use multiple shipping types, you can set a promotion for each of them.

Additional Information on Shipping Rates

Shipping rates can be one of the more troublesome areas of the store, and is probably the area most commonly modified. There are a probably a hundred different variations on how to offer shipping so don't be surprised if you find you need to do a little custom coding here to get exactly what you want! Here are some tips to keep in mind.

- Most of the automated shipping rates (as well as some payment processors) make use of the CFHTTP tag in ColdFusion. This tag may not work properly on some older ColdFusion servers, or over a proxy server. In some cases you may need to have your ISP update the server certificates for a particular API if it isn't working. Be sure to establish that this is not the issue if you are having any problems.
- There are lots of other things that can also cause your store to have problems returning shipping rates. First, make sure you have correctly set your Home Country and that you did not delete the rate for the home country in the country rates (normally set to 0). Make sure you have at least one shipping method turned on, and that it is one that will be returned (domestic shipping rate versus international rate). Be sure that the products being ordered all have weights entered and shipping turned on. And when using UPS, FedEx, USPS or Intershipper, make sure the sites are up and functioning and that you have entered the correct account information. If you are using drop-shippers, be sure they all have valid addresses entered.
- The UPS, FedEx, USPS and Intershipper tags can be configured to send debug information or log their transactions. This will show the actual message being returned by the servers and can be very useful in debugging issues.

UPS SHIPPING

CFWebstore® uses the UPS API to automatically retrieve rates for your customers based on the total weight of their order and present a list of available UPS shipping methods. You will also be able to use UPS address verification and tracking features. You will need to go through a number of steps to get your store set up with the UPS shipping.

UPS DEVELOPER API SETTINGS

To use the UPS rates in CFWebstore you will need to register for the UPS Online Tools and get a developer API access key, username and login. This information will be used to give you access to the online rates and tracking tools. You can register online at https://www.ups.com/upsdeveloperkit.

Once you have registered, enter your access information in the form and save it to configure the store to use the UPS tools.

UPS SETTINGS

The next step is to configure your basic UPS settings. Be sure to do this before trying to configure your shipping methods! Click *UPS Settings* from the main Shipping Settings screen to view these settings:

1. **Maximum Package Weight** – The maximum weight to include in a single package for shipping. Once an order exceeds this weight, it will be split into multiple packages (of equal weight). If you are using drop-shippers, the packages will be split for each drop-shipper separately.
2. **Units of Measurement** – The weight and dimensional units to use for your store. These should match what you configured in the Main Settings and should be appropriate for your country or the UPS API may not be able to properly determine rates.
3. **UPS Account Type** – The account type to use in determining rates, sets if you drop off packages or have a pickup account with UPS.
4. **Package Type** – The package type to use in determining rates, typically this is set to use your own packaging.
5. **Shipper's Zip/Postal Code** – The default postal code packages are being shipped from. This is required information for any country that uses postal codes.
6. **Shipper's City** – The default city that packages are being shipped from. This is only used for shippers in countries that do not use postal codes.
7. **Shipper's Country** – The county packages are being shipped from.

8. **Origin for Rates** – UPS groups shipping rates by “origins”. Select the one that matches the country you are shipping from. It’s important you set the correct origin here for accurate rates!
9. **Use Address Verification** – This is only available for US merchants. This will run an address verification test on the shipping address of the customer during checkout to see if it is valid. If invalid, a list of possible corrections will be given.
10. **Log Transactions** – This will log all API transactions to and from the UPS server to a file in the logs directory. Since this file can get really large with normal store use, this setting is typically left off unless you need to debug a shipping issue with a live store.
11. **Debug** – If this setting is turned on, the API transactions to and from the UPS server as well as some internal shipping structures will be written out to the page during checkout. This is generally only turned on for development purposes and shouldn’t be used with a live store.

Click *Save* to save your settings and *Cancel* to return to the main Shipping Settings screen.

UPS Shipping Methods

The Shipping Method section will automatically be configured according to the Origin for Rates as selected in the UPS Settings area. A list of available methods will be displayed, for each you can select if this is a method you want to offer to customers and you can also enter the sort order to determine what order to display them in. UPS does not allow any modification to the names of the shipping methods as per their licensing agreement, so this is set internally, along with the API codes. Be sure that you have at least one shipping method turned on or your store will be able to calculate any rates. Also note that not all methods are available to all addresses. If you are shipping overseas for instance, ground methods would usually not be available. You can use the logging feature to see exactly what methods are being returned for a particular address.

After entering your selections for methods to use and the sort order (if any) click *Update Used* to save your changes.

U.S.P.S. SHIPPING

CFWebstore® can calculate both domestic and international U.S.P.S. rates using their rates API. You can also use the address verification and tracking tools with your store. To use the USPS shipping methods, you first need to sign up to use their API. Just go to http://www.usps.com/webtools/, and register for the USPS Web Tools.

You will initially be assigned to their test server. In order to run test transactions, you have to send a very specific request to the USPS server, which can be a bit tough to do with CFWebstore®. An example of a test transaction is Express mail from a merchant zip code of 20770 to a destination zip of 20852, package weight of 10 pounds. Since CFWebstore®.has already been tested for you, it's usually best to just request they move you immediately to the production server.

U.S.P.S. SETTINGS

After completing the registration and receiving your account information, configure the USPS Settings for CFWebstore®.

1. **Account User ID** – The account name assigned to you by USPS
2. **Shipper's Zip/Postal Code** – The default postal code packages are being shipped from.
3. **Maximum Package Weight** – The maximum weight to include in a single package for shipping. Once an order exceeds this weight, it will be split into multiple packages (of equal weight). If you are using drop-shippers, the packages will be split for each drop-shipper separately.
4. **Use Address Verification** – This will run an address verification test on the shipping address of the customer during checkout to see if it is valid. To use USPS Address Verification you will need to complete an additional registration at https://www.usps.com/business/webtools-address-information.htm.
5. **Log Transactions** – This will log all API transactions to and from the USPS server to a file in the logs directory. Since this file can get really large with normal store use, this setting is typically left off unless you need to debug a shipping issue with a live store.
6. **Debug** – If this setting is turned on, the API transactions to and from the USPS server as well as some internal shipping structures will be written out to the page during checkout. This is generally only turned on for development purposes and shouldn't be used with a live store.

Click *Save* to save your settings and *Cancel* to return to the main Shipping Settings screen.

U.S.P.S. SHIPPING METHODS

This section allows you to configure which shipping methods will be available to your users. From the main shipping methods screen, a list of available methods will be displayed, for each you can select if this is a method you want to offer to customers and you can also enter the sort order to determine what order to display them in. Be sure that you have at least one shipping method turned on or your store will not be able to calculate any rates. If you ship internationally, be sure to have both a domestic method and an international method on as USPS uses different rates for each. Also note that not all methods are available to all addresses. You can use the logging feature to see exactly what methods are being returned for a particular address.

After entering your selections for methods to use and the sort order (if any) click *Update Used* to save your changes.

Click *Edit* to modify an existing shipping method or *Add Method* to add a new method to the store. The following fields are available for shipping methods:

1. **Type** – Select whether this is a domestic or international shipping method
2. **Description** – The name of the shipping type that you wish to use in your store.
3. **Code** – The API code for the shipping method. This is the name of the shipping as returned by the USPS API.
4. **Priority** – The sort order for the shipping method. This determines the order the shipping types will be displayed in the checkout section.
5. **Used**? – Toggles the shipping method on and off in the store.

Click *Save* to add or update the shipping method and *Delete* if you wish to remove it.

IMPORTANT NOTE ON U.S.P.S. SHIPPING RATES

The US Postal service rates tend to change every year and the “code” may have to be updated to match any changes to that service rate name. Since that API does not return a unique code for each rate, in order to selectively turn them on and off, the software has to match on the name so if it changes, that will break the rate and it won’t be shown. You can use the debug and logging features to see all the rate names being returned and check for this possibility.

FEDEX® SHIPPING

CFWebstore® includes access to FedEx web services. This allows you to automatically retrieve rates for your customers based on the total weight of their order and present a list of available FedEx shipping methods. You will also be able to use FedEx address verification and tracking features. In order to use FedEx shipping, you will need to register for a FedEx account, from http://www.fedex.com.

FEDEX® WEB SERVICE SETTINGS

In order to use the FedEx functions in CFWebstore®, you will need to enter the web services registration information. You can register online at http://www.fedex.com/us/web-services/webservices.html. Once you have your user ID, password, and meter number, enter it in the form and save your information to configure the store to run Fedex rates.

FEDEX SETTINGS

The next step is to configure your basic FedEx settings. Click *FedEx Settings* from the main Shipping Settings screen to view these settings:

1. **Maximum Package Weight** – The maximum weight to include in a single package for shipping. Once an order exceeds this weight, it will be split into multiple packages (of equal weight). If you are using drop-shippers, the packages will be split for each drop-shipper separately.
2. **Units of Measurement** – The weight and dimensional units to use for your store. These should match what you configured in the Main Settings and should be appropriate for your country or the FedEx API may not be able to properly determine rates.
3. **FedEx Account No.** – Your FedEx account number. Should be the same as what you used to subscribe.
4. **Package Type** – The package type to use in determining rates, typically this is set to use your own packaging.
5. **Dropoff Method** – Sets the kind of pickup or drop-off method you use.
6. **Shipper's Zip/Postal Code** – The default postal code packages are being shipped from. This is required information for any country that uses postal codes.
7. **Shipper's State/Province** – The state/province for the default shipping address. Required for US and Canada.
8. **Shipper's Country** – The county packages are being shipped from.

9. **Shippers Used** – FedEx offers 2 sets of rates, Ground and Express which use separate API calls; you can use either or both of these. Note that this setting will override any shipping methods turned on.
10. **Log Transactions** – This will log all API transactions to and from the FedEx server to a file in the logs directory. Since this file can get really large with normal store use, this setting is typically left off unless you need to debug a shipping issue with a live store.
11. **Debug** – If this setting is turned on, the API transactions to and from the FedEx server as well as some internal shipping structures will be written out to the page during checkout. This is generally only turned on for development purposes and shouldn't be used with a live store.

Click *Save* to save your settings and *Cancel* to return to the main Shipping Settings screen.

FEDEX SHIPPING METHODS

This section allows you to configure which FedEx shipping methods will be available to your users. From the main shipping methods screen, a list of available methods will be displayed, for each you can select if this is a method you want to offer to customers and you can also enter the sort order to determine what order to display them in. Be sure that you have at least one shipping method turned on or your store will not be able to calculate any rates. Also make sure that if you are using both ground and express methods that both of these are turned on in the FedEx Settings. Note that not all methods are available to all addresses. You can use the logging feature to see exactly what methods are being returned for a particular address.

After entering your selections for methods to use and the sort order (if any) click *Update Used* to save your changes.

Click *Edit* to modify an existing shipping method or *Add Method* to add a new method to the store. The following fields are available for shipping methods:

1. **Shipper** – Select if this is a method for FedEx Ground or FedEx Express.
2. **Description** – The name of the shipping type that you wish to use in your store.
3. **Code** – The API code for the shipping method. This must match the shipping code used by FedEx for the rate to work.
4. **Priority** – The sort order for the shipping method. This determines the order the shipping types will be displayed in the checkout section.
5. **Used**? – Toggles the shipping method on and off in the store.

Click *Save* to add or update the shipping method and *Delete* if you wish to remove it.

INTERSHIPPER SHIPPING

Intershipper is a web sevice that provides shipping rates for a variety of shippers, including UPS, US Postal Service, FedEx, DHL, Airborne Express, etc. You will need to sign up for an account at www.intershipper.net. Please note that while Intershipper does allow for use of multiple shippers and rates, the service does come with a cost, depending on your level of traffic.

INTERSHIPPER SETTINGS

After configuring the store to use Intershipper Shipping, click on Intershipper Settings and enter the following information:

1. **Shippers** – Select the shippers whose rates you will be offering. You will be able to selectively choose the methods and shippers used, but by removing shippers here that you do not use, it will greatly speed up the time needed to retrieve rates from Intershipper.
2. **Services** – Like the setting for shippers, this allows you to filter out shipping types that you do not use, to speed up the time needed to retrieve rates.
3. **Account User ID** – Your account name assigned by Intershipper
4. **Account Password** – Your account password assigned by Intershipper
5. **Maximum Package Weight** – The maximum weight to include in a single package for shipping. Once an order exceeds this weight, it will be split into multiple packages (of equal weight). If you are using drop-shippers, the packages will be split for each drop-shipper separately.
6. **Units of Measurement** – The weight and dimensional units to use for your store. These should match what you configured in the Main Settings and should be appropriate for your country.
7. **Shipper's Zip/Postal Code** – The default postal code packages are being shipped from. This is required information for any country that uses postal codes.
8. **Pickup Method** – Select the type of pickup you use for shipments
9. **Log Transactions** – This will log all API transactions to and from the FedEx server to a file in the logs directory. Since this file can get really large with normal store use, this setting is typically left off unless you need to debug a shipping issue with a live store.
10. **Debug** – If this setting is turned on, the API transactions to and from the FedEx server as well as some internal shipping structures will be written out to the page during checkout. This is generally only turned on for development purposes and shouldn't be used with a live store.

Click *Save* to save your settings and *Cancel* to return to the main Shipping Settings screen.

INTERSHIPPER SHIPPING METHODS

This section allows you to configure which shipping rates will be available to your users. From the main shipping methods screen, a list of available methods will be displayed, for each you can select if this is a method you want to offer to customers and you can also enter the sort order to determine what order to display them in. Be sure that you have at least one shipping method turned on or your store will not be able to calculate any rates. Also make sure that any rate you wish to use has its Shipper and Service level turned on in the Intershipper Settings. Note that not all methods are available to all addresses. You can use the logging feature to see exactly what methods are being returned for a particular address.

After entering your selections for methods to use and the sort order (if any) click *Update Used* to save your changes.

Click *Edit* to modify an existing shipping method or *Add Method* to add a new method to the store. The following fields are available for shipping methods:

1. **Name** – The name of the shipping type that you wish to use in your store.
2. **Code** – The API code for the shipping method. This must match the shipping code used by Intershipper for the rate to work.
3. **Priority** – The sort order for the shipping method. This determines the order the shipping types will be displayed in the checkout section.
4. **Used**? – Toggles the shipping method on and off in the store.

Click *Save* to add or update the shipping method and *Delete* if you wish to remove it.

PAYMENT SETTINGS

An important part of setting up any online store is configuring it to take payments from the customers. CFWebstore® offers a number of payment options and additional ones can easily be added as well, using the existing files as a template. You can accept orders using credit cards, PayPal payments, purchase order numbers, or offline methods such as phone or fax. It also includes integration with external payment gateways, allowing you to take credit card payments with very minimal security or liability risk of your own.

Please note that it is your responsibility to know your merchant bank requirements and what you are allowed to do in terms of taking payments. You should not make modifications to what the store does without following all PCI compliance regulations and rules for the handling of credit card data. You absolutely should NOT modify the store to store any card data, CVV2, etc. This requires a great deal of expense to properly protect the card data including dedicated servers, encryption devices, office handling of data, etc. and you will be liable for very large penalties should the card data be breached. Just don't do it.

First you will need to configure exactly how your store will accept payments. The Payment Settings are as follows:

OFFLINE ORDERS

1. **Offline Orders** – An offline order is one that the customer places without providing online payment. The customer will then mail or call in with their payment information. This is a nice option to offer for customers that don't like paying online. Turn this setting on to offer offline orders as an option in your store. Such orders will require manual approval of such items as memberships, gift certificates and electronic downloads.
2. **Use Purchase Orders** – This will allow the customer to enter a purchase order number to complete checkout. The order will be treated like an offline order and require manual approval of memberships, gift certificates and downloads.
3. **Offline Receipt Message** – If a customer places an offline order, this is the additional text that will be sent to them with details on how to complete their order.

PAYPAL ORDERS

CFWebstore® can process payments through either PayPal Standard or PayPal Pro. This section allows you to configure your PayPal settings and turn on a PayPal order button to allow checkout through PayPal. PayPal Pro is considered a Payment Processor since it accepts credit cards from within your store so is turned on under the Credit Cards Orders section. PayPal Pro includes automatic enabling of PayPal Express so you will want to leave the “Use PayPal” setting turned off. However, you will want to configure the rest of the settings to properly set up your store for handling Express payments.

PAYPAL SETTINGS

1. **Use PayPal** – Set this to Yes to enable PayPal in your checkout. You can use it as the sole payment method, or as an option to credit card payments
2. **PayPal Method** – CFWebstore includes both Standard and Express methods. Standard will present a PayPal payment button at the end of the checkout process, before generating a final receipt. With Express, the customer chooses the PayPal option at the beginning of checkout, goes to the PayPal site to select their shipping address and payment type, and then returns to your store to complete the order. With Express, the customer’s billing information is kept confidential. If you have problems getting the IPN transactions to work reliably, Express is a good option to use.
3. **PayPal Server** – You can configure your store to run either live or sandbox transactions to PayPal. Please note that if using the sandbox, you will need to use the sandbox merchant account below, and be logged into the sandbox when running your test orders.
4. **PayPal Account** – This is your PayPal account that will be receiving the payments. Please note that if you have multiple emails set up, it needs to be the primary email address on the account.
5. **PDT Token** – PayPal includes two different ways to return information to your store, PDT and IPN. While you can use only one or the other, we find that configuring both gives the best results and most reliable results. To enable PDT, go to Profile – My Selling Settings – Website Preferences and click Update. Set Auto Return to ON, and add the Return URL listed below under IPN settings. Set Payment Data Transfer to On. Set all the other settings as you prefer and save. You will be given the PDT token to enter on this screen.
6. **Log Messages** – This will log the results of all PayPal transactions, including those received by IPN. It can be particularly helpful to debug any issues with payments not being received or orders failing to complete. Keep in mind that this is a plain text file that will continually grow over time so is best turned off unless you are tracking a problem or plan to manually clean it out from time to time. The log file is found in the “logs” directory of your store.

PAYPAL INSTANT PAYMENT NOTIFICATION (IPN)

IPN is the method used to send transaction information from PayPal to your store. It will complete the order in the event that the customer doesn't return to the store after payment, as well as automatically update your orders with information on refunds, chargebacks, rejected payments, etc. To user IPN, you will need to enable it for your PayPal Profile. After logging into your PayPal account, go to Profile – My Selling Tools - Instant Payment Notification and click the Update link. Click the button to Choose IPN Settings if shown. Check the box to receive IPN notifications, for the URL enter the following (set it for http or https as appropriate for your site):

https://www.mystore.com/index.cfm?fuseaction=shopping.checkout&step=ipn

The store will also send this address to PayPal as part of the checkout process, as well as cancel and return links, so be sure your Secure and Store URLs are entered correctly in the config.cfm file, as they are used to create these.

PAYPAL EXPRESS

If you are using PayPal Pro, or set the PayPal checkout to use Express, you will receive an additional tab in the Payment Settings to configure the Express Checkout process. First, you will need to enable API access and generate an API signature. Go to your PayPal account and go to Profile – My Selling Tools – API Access and click the Update link. If this is your first time using API settings, click on the link to Request API credentials. Otherwise it should just say View API credentials. After clicking the link to Request API Credentials, you will have the option of using API signature or API certificate. For CFWebstore you will use the API signature methods. Click Agree and Submit to generate the API username, password and signature key. Now return to CFWebstore and fill out the PayPal Settings tab as follows:

1. **Username** – The PayPal API username from the API Access section
2. **Password** – The PayPal API password from the API Access section
3. **Signature** – The PayPal API signature from the API Access section
4. **Transaction Type** – Sets your account to immediately capture the funds, or if you have to handle back orders, set to authorize only.

Credit Card Orders

CFWebstore® has support for many popular payment gateways built-in so that you can take online credit card orders. Support for new tokenization technology is also provided for processors that support it (currently through Shift4 payment gateway only). It also has advanced support for delayed billing, allowing you to authorize cards at the time of sale and then batch process them later when orders ship. The latest release also includes support for gateways that handle the credit card data collection on their server, instead of yours, which resolves most current PCI compliance requirements. The following settings are available to configure your store for accepting credit cards:

1. **Use Credit Cards** – This turns on the form for taking a credit card payment. You can leave this off if you only take offline or PayPal standard orders.
2. **Use CRESecure** – This is a new service that "wraps" the credit card form automatically in your store layout so it's virtually unnoticeable to the user that the credit card form is being handled by another site. This gives you the best possible security, and also provides support for additional gateways that CFWebstore does not handle. Please note that if you wish you use features like the Billing Tab and refunds you will still need to select your processor and configure it, otherwise you can leave the rest of the settings alone, as the gateway is configured at the CRE Secure site.
3. **Online Processor** – Select the credit card processor you wish to use. A processor must be used for credit card orders but for demo modes you can leave this set to 'None'.
4. **Cards Accepted** – Select the credit cards you are able to accept.
5. **Use CVV2** – Use this to require the customer to enter the 3-digit CVV2 code from the back of their card. This setting may be required for some online processors, and is widely supported now. PayPal Pro for instance requires that you have it turned on. In many cases, use of the CVV2 will lower your merchant rates as well.
6. **Store Tokens** – Currently CFWebstore only supports storing of card data for payment processors that support tokenization (currently Shift4), as PCI Compliance regulations do not allow saving card data without extensive encryption setups and expensive secure server maintenance. Please note that the card token is only saved while the order is pending, once it is moved to In Process or Filled, the card data is removed and only the last 4 digits is saved. This information is all that is generally needed for processing any returns with online gateways. If you want to save the token for re-charges or recurring billing, turn on the Save Card feature in the User Settings as well.
7. **Use Billing Tab** – This feature activates the Billing tab in the Order Manager and its related features. Most stores will charge the customer's

credit card for full order amount at the time of purchase. However, some stores choose to only authorize the credit card at the time of purchase and actually capture the funds when the order is shipped. When the Billing tab is turned on, credit card orders are not automatically set to "paid" upon checkout (it is assumed that they have only been authorized. The orders which are not paid will then appear under this tab available for capture. This is useful to integrate with batch processing for your credit card processor (built in already with certain processors, see below for information).

CARD PROCESSING

After saving your payment settings, you can configure your payment gateway by clicking on the *Card Processing* tab. The settings will vary according to the gateway you are using.

1. **Authorize.Net** – Authorize.Net is the recommended processor to use as it is easy to set up, reasonably priced and widely used. The custom tag is built into the store so there is nothing to install. Just enter your account settings in the Payment Settings and configure your AuthNet account as to which AVS and CVV2 transactions you wish to decline.
2. **EZIC** – The EZIC tag is also built into the store. This is a good alternative if you don't want to use Authorize.Net.
3. **Skipjack** – Another lowcost alternative, the tag is built in as well. At this time, EZIC and Skipjack do not support billing tab options.
4. **Verisign PayFlow Pro** – Now owned by PayPal, PayFlow payments offers two types of service, PayFlow Pro and PayFlow Link. Only PayFlow Pro is supported. This is a more expensive gateway than some but is preferred by some merchants who do large amounts of business and need very reliable service.
5. **SkyPay** – A popular processor for merchants in the UK. The tag is built into the store. You can configure it to process payments immediately or later (authorization only) and to use a AVS and CV2 check (be sure to turn on the CVV2 field to use the card check).
6. **Shift4** – Shift4's $$$ On the Net offers a number of features you won't find with other processors. They have a direct link to American Express servers which allows you to use the card check code unlike other processors like Authorize.Net. They use tokenization so if you need to do recurring billing, you can do this without storing credit card data and putting your customer's information at risk. You can also use their gift card feature on your store. The newest version of CFWebstore also includes support for split payments and their new i4Go service which handles payments on their server, much like CRESecure, but without additional fees. See Shift4's web site at www.shift4.com for current product information and pricing. The proxy settings are optional and only required

if your web server uses a proxy server for outbound communication. Most web servers do not use proxy servers. Leave Server Name blank if unused. Contact your ISP or system administrator if you are not sure.

7. **USA ePay** – A newer processor, includes delayed capture support.
8. **PayPal Pro** – This setting will configure your store to use PayPal Pro for processing credit card orders. In addition, your customers will have an option for checking out using PayPal Express. See the section above on PayPal Express and how to configure the API settings.

Additional Notes: For stores that ship physical goods, you are usually required to use an Authorize Only setting at the time the order is placed, and capture funds when it is shipped. For Authorize.Net, PayFlow Pro, SkyPay, USA ePay and Shift4, you can use the Billing Tab feature to capture funds. For other processors, you will need to manually capture the funds using the online merchant tools for your gateway.

For web stores that sell subscriptions, services or downloadables, you can capture funds at the time of sale and the 'Use Billing Tab' option can be disabled. (By using these settings, you will lose the order details with Shift4.)

GIFT REGISTRIES

CFWebstore® includes the ability for you to offer customers a full-fledged gift registry. Unlike the simple wish list feature, gift registries allow them to save full details on the items they would like, print a copy to distribute, email friends the registry link and keep track of what items in the registry have been purchased. Registries can be used for baby or wedding showers, birthdays, Christmas, etc.

To use Gift Registries, you will need to first enable them in the Shopping Settings and provide a link to the registry home page in your store (fuseaction=shopping.giftregistry). The following functions will be available from this page:

1. **Search** – This function allows visitors to search for a registry by name, location or ID. The software will match any portion of the name for the registrant or co-registrant. Results will be displayed in a list, and a message presented if no results found (or no criteria entered).
2. **Create** – This will give the visitor a link to create their own registry. If not logged in, they will be re-directed to log in first.
3. **Edit** – A link to view and edit the user's current registry(s). Once again, they will be prompted to log in first if necessary. The following actions are available for each registry:
    a. Edit Registry Info – this allows the user to edit the information about the registry, such as date and location of the event, expiration, etc. This is the same form used to create the registry
    b. Add Products to Registry – this simply takes the user to the store root category to browse and add products to the registry
    c. View the Registry – displays the items currently in the registry and allows the user to update the quantity needed, or remove items from the registry (if not purchased yet)
    d. Print Registry – this opens a new window with a printable version of the registry, useful to take to a store as a shopping list
    e. Notify Friends – this takes the user to an email form where they can enter emails for their family and friends and send them the link to the registry. Be sure you have your Store URL entered in the config.cfm file so that the full address to the registry is filled in.

ADD/EDIT REGISTRIES

When the user clicks the link to *Create* or *Edit* the registry, the form will give them the following information to fill out:

1. **Event Type** – The type of event/registry. The possible selections here can be edited under Option Picklists.
2. **Event Name** – The name of the event, to be displayed as the name of the registry.
3. **Event Date** – The date for this event.
4. **Event City** – City where this event will be given.
5. **State** – State where this event is being given.
6. **Registrant** – The person that is registering this event (such as the bride, mother-to-be, etc.)
7. **Co-Registrant** – If there is another person involved in the event (such as a spouse) enter their name here.
8. **Message** – Message that will be displayed to visitors to the registry.
9. **Private Registries** – A private registry is hidden when visitors use the search feature. They will need a direct link (provided by the Notify feature) to access the registry.
10. **Order Notification** – This setting allows the use to receive email notification when someone purchases items from their registry.
11. **Expire Registry** – This determines when to expire the registry from the system. Expire registries can be removed by an admin function.
12. **Active** – Turns the registry on and off in the system.

VIEW THE REGISTRY

Both links to view the registry (for visitors and for the registrant) show similar information. The event title, date and registrant(s) will be displayed at the top of the page, along with any message entered about the event. A list of the selected items for the registry is then displayed. Each item is listed (with a link to the product in the store) along with its SKU and any selected options and addon. The number of each item requested and still needed is also displayed.

For visitors, the price of the item is shown and then a box to enter the number of each item they wish to purchase, with a button to *Add to Cart* to place the items in their shopping cart. After purchase, the number purchased is updated, and if the notify feature is turned on, the registrant will be emailed about the purchase.

For the registrant user, a box is displayed to *Add* additional quantities to the number needed for each item. A checkbox to *Remove* the item is also displayed. Items that have already been purchased cannot be removed, so using this checkbox will just set the amount needed back to zero.

ADMINISTRATION OF GIFT REGISTRIES

If the user has admin access to gift registries, they will be able to view and edit registries and the included items. From the main admin gift registry page, the following search parameters are available:

1. **ID** – The system ID of the registry
2. **Name** – Searches the event title and registrant(s) names
3. **City/State** – The location of the event
4. **Type** – The type of registry/event
5. **Event Date** – The date of the event
6. **Status** – Filters by current status of the registry. Options include:
    a. all – no status filter applied
    b. off – registries currently set to private only
    c. upcoming – events that have not occurred yet
    d. over – events that have past
    e. expired – registries that have passed their expiration date

This information will also be displayed for each registry in the list, with links to edit and view the registry and linked items. There is also a link for viewing *All* registries and to add a *New Registry*. The fields for admin users are the same as for store users, with the additional field for entering the user to link the registry with.

When viewing the list of products associated with the registry, the admin user will also have a link to *Add a Product* to the registry. This will pop-up a separate window where they can search for the item by SKU or name and then select the options and addons for the product to add it to the registry.

Gift Registry admins will also have a link to *remove expired registries*. This will delete all registries from the system that expired over a month ago.

IMPORTANT NOTE ON GIFT REGISTRIES

At this time, CFWebstore® does not have the capability to fully update the price of items being ordered from a gift registry. It will check the base price of the item and apply the current base price when items are ordered, but it cannot update the pricing (or weights) on the options and/or addons placed on the item if those have changed. Wholesale and/or group pricing will be applied if the user ordering qualifies for them but the option and addon prices will always be the same as when they were added to the gift registry, as currently we don't have a way to track the actual option choice selected. So keep that in mind when using registries, if you use prices on options and update them frequently. This issue is something that will be addressed in the future but will require some reworking of how options and addons are stored.

GIFT WRAPPING

CFWebstore® allows youto offer your customers gift wrapping on items they purchase from your store. Admins with access to this option will be able to upload images of the papers available and set prices for each. You will need to have Gift Wrapping enabled in the Shopping Settings in order for this option to be displayed to customers.

The main screen of the Gift Wrapping Manager will show a list of current gift wraps in the store, with their price, priority (for sorting) and option to turn them on and off (e.g. seasonal papers). You can click *Edit* to view or change any of the current gift wraps or *Add Giftwrap* to add a new paper to the system. The *List Edit* form will allow you to modify the settings for all papers at once, useful to quickly change sort orders and pricing on multiple papers.

When adding or editing a gift wrap, the following fields will be available:

1. **Name** – The title or name to give to this particular paper.
2. **Image** – The digital image file for this paper. Click the *Image Manager* to upload a new file or select one from your server. Generally it's best to use the same image size for all your gift wrap images.
3. **Description** – Detailed description of this paper, if desired.
4. **Price** – Amount to add to the product price for this gift wrap.
5. **Weight** – Amount to add to the product weight for this gift wrap.
6. **Priority** – Sort order, if any for this wrap
7. **Display** – Sets whether this gift wrap is currently available to customers

When gift wrapping is turned on, customers will see a link below the products in their cart to add (or remove) it. Note that the gift wrap will only be available for normal product types (not membership, downloads, etc.) and must have the gift wrap setting in the pricing tab turned on. After clicking the *Giftwrap This* link, the customer will be taken to a page showing the available gift wraps, with pricing and information on each. They can click on an image or gift wrap name to select it or No Giftwrapping to return to the cart with no wrapping added. Gift wraps are added to the shopping cart in the same way a product addon would be and will be appended to any current addons. Items with gift wrap added will have a link to *Change* the wrap which allows the customer to select a different gift wrap or remove it altogether.

MANAGING YOUR ORDERS

Once your store is set up, the Order Management section is where you will spend the most time day-to-day, processing and handling your orders. The flexibility and features of this section allows you to do this in a variety of ways, whatever best suits your needs. As the order progresses through the system, different options and searches are available according to its current status. Let's go through each of the sections of the Order Manager.

PENDING ORDERS

By default, the pending orders in the system are displayed when you first enter the Order Manager. All new orders received in the store will show up on this screen, until their status is changed. Using the search fields and filters, you can locate specific orders, process them, view their invoice, print invoices and/or packing lists, etc. The search fields and filters for the pending orders are:

1. **Order Date** – Select the order date for the orders. You can view orders from today, yesterday, this month, last month, and this year.
2. **Customer** – Search field to find orders placed by a specific customer. You can search using the first name, last name, or company name for the customer. Any portion of these names will match.
3. **Paid** – Filter orders according to their payment status. The store settings will determine this setting for orders when they are placed. If you use the Billing tab feature, credit card orders are marked as unpaid until the funds are collected. Offline orders will be marked as unpaid until you change their status. For PayPal orders, the PayPal server will mark the order as paid when it is completed.
4. **Shipping Status** – The user-defined shipping status of the order. You can use the Picklists to create the list of available statuses, or edit the ones available by default.
5. **Sort** – The sort field in the Order Manager plays two roles – it sorts the orders being displayed, and it displays additional information according to the selection. The choices include:
    a. **Order No** – The default sort order, no additional information displayed
    b. **Print Inv** – Shows which orders have had the invoice viewed/printed.
    c. **Print Pack** – Shows which orders have had the packing list viewed/printed.
    d. **Customer** – Sorts by the customer and provides a link to view the customer's previous order history (filled orders).
    e. **Payment** – Sorts by and displays the payment method – Online, Offline, Purchase Order, BillUser (saved CC), Auto Rebill, and PayPal.

f. **Shipping** – Sorts by and displays the shipping method for the order. Links to the screen for filling the order and emailing the tracking information to the customer.
g. **Status** – Displays and sorts by the user-defined status of the order

There is also a link to show *ALL* pending orders and a field to enter an order number to go directly to the details screen for that order.

The following information is displayed on the list for each pending order:

1. **Order No** – The order number as assigned by the store. Click on the Order Number to go to the Order Details screen.
2. **Order Date** – The date the order was placed.
3. **Customer** – The name of the customer that placed the order. If the customer was logged in when the order was placed and you have user admin permissions, click on the customer name to view their user summary page. Below the customer name a summary of the order will be shown, with the number of unique products ordered and total items in the order.
4. **Paid** – Shows the payment status of the order.
5. **Sort** – Shows any additional information as controlled by the sort field (see above).

The list of orders can also be used to perform various batch actions. This allows you to quickly print and/or process multiple orders at once, rather than having to work on a single order at a time. You can check the specific orders you wish to include in the batch, or select to include all orders that are still pending. The batch actions are:

1. **Print Invoices** – This will open up a new, secure window with order details suitable for printing. The orders will be marked as having the invoice printed.
2. **Print Packing Lists** – This will open up a new window to print packing lists for the order. If you order has purchase orders for drop-shipping vendors, those items are not included on the packing list.
3. **Move to In Process** – Changes the status of the selected orders to In Process. This is generally used for orders that are being processed, but not yet shipped.
4. **Move to Filled** – Changes the status of the selected orders to Filled. Filled are orders that have been completed.
5. **Void - Cancelled** – Cancelled orders are marked as Filled but inventory amounts are returned and the orders are not used for sales reports. These are generally for orders the customer has cancelled.
6. **Void - Fraud** – This setting works basically like the Void-Cancelled status, but is used for orders that are removed due to fraud.

In Process Orders

The In-Process orders screen is very similar to Pending Orders. You have the same search fields, the same information displayed on the screen and the same batch actions (with the exception of move to in process, instead you can move back to pending). Also, by default the In Process screen sorts by and displays the shipping information. This allows you to quickly jump to the Order Shipping screen where you can fill the order and email the tracking information to the customer. You can use the sort to reorganize the page and display other information as with Pending orders.

Billing Tab

The billing tab is activated in your Payment Settings. When the billing tab is activated, credit card orders in the store will be marked as not paid when the order is placed. These orders will appear on the billing tab so you can capture the funds when the order is ready to be shipped. The software includes support for batch captures for Authorize.Net, Payflow Pro and Shift4.

The search fields available on the billing tab are a bit different than pending and in process orders. The options include:

1. **Order No** – Enter an order number to search for a specific order.
2. **Customer** - Search field to find orders placed by a specific customer. You can search using the first name, last name, or company name for the customer. Any portion of these names will match.
3. **Date Filled** – Searches for orders by the date they were filled. This date field uses a special format. Enter just the year to find all orders for a particular year (i.e. 2004). Enter the year then the month to find all orders for a specific month (i.e. 2004-02). Finally, enter the year, then the month, then the day to find orders filled on a particular day (i.e. 2004-02-01).
4. **Payment** – Search according to the type of payment used for the order. Selections are Online, Offline and PayPal.

You also have a link to show *ALL* payment pending orders.

As with Pending orders, you have links on each order number to view the order details and on the customer name to view their user summary.

To process your payments, check off the orders you wish to capture. Select *Charge Credit Cards* if you want to capture funds (and your processor is supported) or click *Mark as Paid* if you just want to mark the order as paid.

PURCHASE ORDERS/DROP SHIPPING TAB

The PO/Dropship screen is where you can manage all the current purchase orders that have been created for your drop shippers. While most of the information and actions available here can be performed from the individual order details pages, this section allows you to find all your purchase orders easily and manage them from one place. You can manually create purchase orders, or by using the options on the Shopping Cart Settings and the vendor options on the Product Pricing tab, you can automatically generate purchase orders for your vendors and email them a packing slip as well. The PO screen allows you, or your vendors, to view purchase orders, fill the orders, email tracking information to the customer, add notes, etc.

Once again, you have some search fields to help you locate your purchase orders.

1. **Order No** – The order number the purchase order is linked to.
2. **Account** – The vendor account for the purchase order(s).
3. **Date Created** – The date the purchase order was created. This might be the date you generated the purchase order, or the date it was created according to the order being placed, processed or filled. This date field uses a special format. Enter just the year to find all orders for a particular year (i.e. 2004). Enter the year then the month to find all orders for a specific month (i.e. 2004-02). Finally, enter the year, then the month, then the day to find orders filled on a particular day (i.e. 2004-02-01).
4. **Status** – The status of the purchase order. You can modify the choices for status using Picklists.
5. **Date Shipped** – The date the PO was marked as shipped. The date field uses the same format as the *Date Created* field.
6. **Open** – Allows you to search for open or closed purchase orders. By default, only open purchase orders are shown.

As with other tabs, you also have a link to show *ALL* purchase orders.

The information shown for each purchase order is as follows:

1. **Purchase Order No** – The purchase order number, by default this will be the order number, plus a number for each purchase order on that order, i.e. 1024-1, 1024-2, 1024-3, etc. You can click on the PO order number to go to the Purchase Order status screen.
2. **Order No** – The order number for the purchase order. You can click on the order number to go to the Order Details screen.
3. **Account** – The vendor assigned to this purchase order. If you have access to the user administration area, you can click on the vendor name to view/edit their account information.
4. **Date Created** – The date the purchase order was opened.

5. **Status** – Current status of the purchase order.
6. **Date Shipped** – If this purchase order has been filled, the date will be displayed here.
7. **Fill** – Click on this link to take you to the screen to fill a purchase order. You can email the customer with tracking information, mark the PO as closed, add notes, etc.
8. **View** – Clicking on this link will open up a new window with the packing list for the purchase order, suitable for printing.

PURCHASE ORDER STATUS SCREEN

The purchase order status screen is used to make changes to the purchase order information and status. The following information is available:

1. **Order No** – The order this purchase order is linked with.
2. **Account** – The vendor assigned to this purchase order.
3. **Purchase Order No** – The purchase order number, you can enter your own number here.
4. **PO Date** – The date the purchase order was opened. You can change this date if you wish.
5. **Open** – You can set a purchase order as open or not. By default, the PO/Dropshipping tab only shows open POs.
6. **Status** – The status of the purchase order. This will be set to emailed if you are using automatic notifications, you can manually add other statuses using Picklists.
7. **Notes** – You can enter any additional notes on the purchase order here.

FILLING PURCHASE ORDERS

This form is used for filling a purchase order and sending shipping information to the customer. The following fields are available on this page:

1. **Purchase Order** – The purchase order number
2. **Account** – The vendor assigned to this purchase order
3. **PO Date** – The date the purchase order was created
4. **Order** – The order number linked to this purchase order
5. **Customer** – The customer that placed the order. A link to the customer's email is provided.
6. **Send Email** – This determines if the store will send the customer an email notifying them that the items have been shipped.

1. **Shipper** – The shipper for the purchase order.
2. **Tracking Numbers** – Enter a comma-separated list of tracking numbers here. The email to the customer will include these tracking numbers as

well as the link for the shipper's tracking page. Leave blank if you do not want to include tracking information.

3. **Additional Notes to Customer** – You can enter any additional text you wish to include in the email to the customer.
4. **Keep PO Open** – Usually you will want to close the PO once it is filled. You can check this to leave the PO open.
5. **Status** – The status of the purchase order.
6. **Notes** – Enter any additional notes on the purchase order here.

FILLED ORDERS

The filled orders screen is used to search and view orders that have already been filled. As with the other Order tabs, there are a variety of search fields and information displayed. The search fields include:

1. **Order Date From** – Select the starting date for the orders you wish to display.
2. **Order Date To** – Select the ending date for the orders you wish to display. The Order Date From and Order Date To fields are only used if the rest of the search fields are left blank.
3. **Order No** – Enter an order number to view that particular order.
4. **User ID** – Enter a user ID to view all filled orders for that user.
5. **Customer** – Enter the customer's first, last or company name to view their orders.
6. **Date Filled** – Enter the date filled to search using the special date format. Enter just the year to find all orders for a particular year (i.e. 2004). Enter the year then the month to find all orders for a specific month (i.e. 2004-02). Finally, enter the year, then the month, then the day to find orders filled on a particular day (i.e. 2004-02-01).
7. **Affiliate** – Enter an affiliate ID to find orders linked to that affiliate.
8. **Void** – You can use this setting to find orders that have been voided, due to either cancellation or fraud. Or select to show non-voided orders.

A link is also provided to show *ALL* filled orders.

The information displayed for the orders is as follows:

1. **Order No** – The order number for this order. Click on this link to view the Order Details screen.
2. **Order Date** – The date the order was placed.
3. **Customer** – The customer that placed the order. If you have user admin permissions, you can click on the customer name to view their user summary page.
4. **Date Filled** – The date the order was filled
5. **Affiliate** – The affiliate for the order, if any.

6. **Void** – If the order was voided, shows the void reason.

The filled screen also has functions for removing orders. You can individually check off orders and click *Delete Checked* to permanently remove them from the database. All related information such as guest customer accounts and purchase orders will also be deleted.

Alternatively, you can purge an entire month's worth of filled orders from the database at once. This is useful to do to keep your database size down if you have a lot of old orders in the system. Just select the month and click *Clear Month* to remove these orders.

SEARCH TAB

The search orders tab is used to search and view orders regardless of their status. This is useful if you need to find an order but are not sure of its status or wish to find orders with other specific criteria. The Search tab has many of the same search fields as the filled order tab, with some exceptions. The search fields include:

1. **Order Date From** – Select the starting date for the orders you wish to search.
2. **Order Date To** – Select the ending date for the orders you wish to search. Unlike the Filled Orders tab, the date fields will always be applied when searching, so be sure to select an appropriate date range here.
3. **Order No** – Enter an order number to view that particular order.
4. **User ID** – Enter a user ID to view all orders for that user.
5. **Customer** – Enter the customer's first, last or company name to view their orders.
6. **Product ID** – Enter a product ID here to find all orders that included this product.
7. **Affiliate** – Enter an affiliate ID to find orders linked to that affiliate.
8. **Status** – This allows you to also filter the search by a specific order status.

A link is also provided to show *ALL* orders in the system.

The information displayed for the orders is as follows:

1. **Order No** – The order number for this order. Click on this link to view the Order Details screen.
2. **Order Date** – The date the order was placed.
3. **Customer** – The customer that placed the order. If you have user admin permissions, you can click on the customer name to view their user summary page.

4. **Order Summary** – Shows the number of unique products and total items purchased on this order.
5. **Affiliate** – The affiliate for the order, if any.
6. **Status** – The current status of the order.

REPORTS

The final tab of the Order Manager is the Reports section. A variety of store reports are available to give you information on your orders. Choose the date range you would like to view and select from the following list of reports:

1. **Sales Summary** – Basic sale totals for your store
2. **Product Totals (by ID)** -The total units sold and amount collected for each product, sorted by the Product ID.
3. **Product Totals (by SKU)** – Same as product totals, but used if you have SKUs assigned to product options or wish to sort by SKU number.
4. **Top Products by Quantity (by ID)** – Displays the top 50 selling products for the date range, according to the number of items sold per each product ID.
5. **Top Products by Quantity (by SKU)** – Same as Top Products by Quantity but used if you have SKUs assigned to product options or wish to sort on SKU.
6. **Top Products by Total Sales (by ID)** – Displays the top 50 selling products for the date range, according to the sales amount for each Product ID.
7. **Top Products by Total Sales (by SKU)** – Same as Top Products by Total Sales, but used if you have SKUs assigned to product options or wish to sort by SKU.
8. **Sales Tax Report** – Shows the amount of tax collected for the date range for each tax code. Taxes are broken into state/local (displaying the state and local tax amounts for each state), county (displaying the county and state for any county tax collected) and country taxes. Any tax collected for all users will be displayed separately.
9. **Affiliate Sales** –Calculates the total amount of orders referred by an affiliate, and the amount they earn according to their assigned percentage. Affiliate sales are *only* calculated on orders that have been marked as filled and the date range is set according to the date filled, not the date ordered. This is done for two reasons. First, it is assumed that you would only pay affiliates for an order that has made it through to completion. Second, this allows you to retrieve a specific date range of orders without having to deal with orders that might be in process and then filled at a later date.
10. **Coupon Totals** - This is used if you have set up any coupon-based discounts and wish to see a summary of orders placed using the coupon/s. For all coupons, the coupon code will be displayed and the

number of orders using that coupon. For order-based discounts, the order subtotal, amount discounted, and net sales will also be shown. For product discounts, the number of discounted items, amount of those items sold, discount amount and net sales will be shown. For promotions, the number of promotional items given or discounted is shown with the total discounted amount received by promotions.

From any report screen you have the option to *Select a New Report* or *Print this Report* which will open a separate window with a printable version of the report.

VIEWING AND EDITING ORDERS

From most of the order management tabs, you will have a link to go to the Order Details screen. This is where you can view a detailed summary of the order as well as perform many order management and editing functions. The exact functions you will have access to will depend on your admin permissions.

At the top of the invoice you'll find navigation links. These allow you to go to the next invoice on the list of orders, back to the previous one, or to return to the list of orders. This allows for quick review of a number of orders. You'll also see the Order Number and Date.

CUSTOMER DETAILS

This section provides customer information for the order. The following information/actions are available here:

1. **Email Customer** – This will open up the admin email form page, with the customer's email pre-selected.
2. **Email Ship To** – If the order has a separate shipping address, this button will be available, to allow you to send an email to the shipping account, using the admin email function.
3. **User Summary** – For non-guest orders, this takes you to the User Summary screen when you can view and edit all user information and view previous order history.
4. **Print Invoice** – Pops up a separate window displaying the invoice suitable for printing.
5. **Bill To** – The customer's billing information. If you have access to the user admin area, you can click *Select* to select a different address from the customer's address book or *Edit* to make changes to the address.
6. **Ship To** – The customer's shipping information. If you have access to the user admin area, you can click *Select* to select a different address from the customer's address book or *Edit* (if an address was entered) to make changes to the current shipping address.
7. **Comments** – Displays the comments entered by the customer on their order.
8. **Giftcard** – Displays a giftcard message entered by the customer, if any.
9. **Delivery Date** – Displays the requested delivery date for the order, if any.
10. **Coupon** – Shows the coupon used on the order, if any.
11. **Gift Certificate** – Shows the gift certificate used on the order, if any.
12. **Affiliate** – If referred by an affiliate, displays their information and the referring URL.
13. **Custom Fields** – If you use custom checkout fields, any information entered by the customer for them is displayed here as well.

ORDER STATUS

Next we have the order status information. The actions/information here are:

1. **Edit Status** – Click here to edit the status information (see below for more information).
2. **Payment Status** – The current payment status for the order (paid/not paid).
3. **Invoice Number** – Displayed for stores using online processors. This is the number assigned to your order when sent to your gateway.
4. **Payment Type** – Shows the credit card information and/or payment details. Information can include:
    a. For PayPal orders, shows the PayPal transaction number, PayPal status, and any additional messages from PayPal
    b. For credit card orders, displays the credit card information and authorization number. Only the last 4 digits of the credit card number is shown, as full data is not saved.
    c. For credit card orders that were authorize only and have not been captured, a link will be shown to capture the funds. This will only work on gateways for the Billing Tab (see above).
    d. Order paid by purchase order will displayed the number entered.
    e. Offline orders are noted as such
5. **Order Status** – The current status of the order as defined in the store (pending, in process, filled, void). Also displays any user-defined shipping status or void reason.
6. **Gift Certificates** – If any gift certificate products were purchased on this order, this will display a message if an email with the codes was sent, or will give a link to send them for orders that were pending approval.
7. **Last Update** – If any updates to the order have been made, the username and date/time of the last update will be shown.
8. **Notes** – Any administrator or system notes will be displayed.

SHOPPING CART DETAILS

Here's some important information – the items your customer ordered! Some additional actions and information are available:

1. **Add Product** – This button allows you to add another product to the order. A window will be opened up to search for the product, and you will then be able to select options and add it to the cart. The store will automatically update the order totals but you will need to edit anything else like shipping and taxes. Please note that most CC processors will not allow capturing a higher order amount than was authorized.
2. **Edit Products** – This button will open up a form to edit the customer's shopping cart. You will be able to edit the product quantities, prices,

discounts, options, addons, etc. As when adding products, be sure to update shipping and taxes if necessary after making your changes. You will need order editing permission to enter do these edits. See below for more information.

3. **Edit Order** – This button allows you to edit the freight and shipping on customer's order, or to apply a store credit. You will need order editing permission to enter this area. See below for more information.
4. **Edit Taxes** – This button will allow you to edit the taxes on an order. You will only be able to edit the taxes if a single tax code was applied, multiple tax codes are not able to be edited. See below for more information.
5. **Drop Shipping** – Takes you to the basket drop-shipping screen where you can assign line items to specific vendors and/or edit the automatically generated drop shipping information. You will need drop shipping permissions to enter this area.
6. **Basket Items** – The line items for the order are displayed, showing the quantity ordered, the item name, options and addons, the item number (SKU), price for one item, and total for this item.
7. **Drop Shipping Info** – After each basket item will be displayed its current drop shipper information, if any.
8. **Order Totals** – Finally, the subtotal for the order, shipping, freight, tax, credits, order total and other order credits/debits will be shown.

Shipping Information

The next section shows the shipping information for the order, unless this is an order not requiring shipping (determined by the shipping setting for the items ordered). The action buttons here will only be available if the order has not yet been shipped.

1. **Print Packing Slip** – Brings up a new window with a packing slip for the order suitable for printing to include with the shipment. Note that if the order includes drop-shipped items, only the items not assigned to a vendor are included on the packing slip, as the vendors will have their own packing slips to print from the Purchase Order tab.
2. **Fill Order** – This button takes you to the Order Shipping Screen where you can enter tracking information and notify the customer that the order has been shipped.
3. **Ship By** – Displays the shipping method selected by the customer
4. **Shipped On** – If the order has been filled, displays the shipping date.
5. **Shipped By** – The shipper selected when filling the order.
6. **Tracking Numbers** – Tracking numbers for this order, if any.

PURCHASE ORDERS

The last thing displayed on the order details screen is the drop shipping information and purchase orders. You will need Order Editing permissions to access this area, and will need Drop-shipping permissions to make any actual edits to the purchase orders. Any current purchase orders assigned to the order will be listed and any waiting to be created manually (if for instance, you modified an order and added a drop-shipper to an item). You should have one purchase order for each drop-shipper on the order. Click *Open Purchase Order* to manually create the purchase order. This will take you to the Purchase Order screen where you can edit or add any information to the purchase order after opening it. For purchase orders that already are open, the following will be available:

1. **PO Number** – The currently assigned purchase order number. By default this will be the order number, plus a number for each purchase order on that order, i.e. 1024-1, 1024-2, 1024-3, etc.
2. **Date** – Date the purchase order was opened.
3. **Status** – The current status of this purchase order.
4. **Edit** – This link will take you to the Purchase Order Status Screen where you can update the PO status, change the PO number, add notes, etc.
5. **View/Print** – Opens up a new window with the purchase order, suitable for printing.
6. **Fill** – This link will take you to the screen for Filling Purchase Orders. You can send shipping and tracking information to the customer, change the status, add notes, etc.

EDIT ORDER STATUS FORM

Clicking Edit Status on the Order Details Screen will open the Order Status Form where the status information is normally displayed. From here you can enter the following information:

1. **Paid** – Check if the order has been paid for. This is generally used to change the payment status on Offline or PO orders.
2. **Affiliate** – Select an affiliate you wish to assign this order to.
3. **Move To** – You can change the current status for the order here. These are the same statuses available from the Pending and In Process lists.
4. **Shipping Status** – The user-defined shipping status for the order. You can use the Picklists to create the list of available statuses.
5. **Printed** – Check if the invoice and/or packing list have been printed. The system will mark these as printed when you open a print window for them.
6. **Notes** – A section is also provided for you to add any additional notes you wish to on an order. These are saved into the Admin Notes field.

Click *Update Order* to save your changes.

PRODUCTS EDIT FORM

Clicking Edit Products on the Order Details Screen will open up the Products Edit Form where the basket is normally displayed. The form allows you to edit the following information for each item in the order:

1. **Quantity** – Number of this product to purchase.
2. **Price** – Base price for the product for this customer (after any quantity discounts).
3. **Discount** – Any additional product discounts to apply.
4. **Options** – For options, you enter the list of option descriptions (and selected choice) and the total price of the options selected.
5. **Addons** – If the product has addons, they will displayed here in a text box form you can edit. For addons, you can edit both the price multiplied by the quantity and the price that is not (see product addons for more information).

Please note that changes on the basket edit form will not change any amounts charged by the system to credit cards or PayPal. These are internal changes only.

ORDER EDIT FORM

Clicking Edit Order on the Order Details Screen will open up the Order Edit Form where the basket is normally displayed. The form allows you to edit the following information for the order:

1. **Freight Charges** – Any freight charges on the order.
2. **Shipping** – Allows you to modify the shipping description and amount.
3. **Store Credit** – This section is used to make an additional modification on the order. Enter a description and the amount of the credit. You can enter a negative amount to increase the amount charged on the order.

Please note that changes on the order edit form will not change any amounts charged by the system to credit cards or PayPal. These are internal changes for reporting and viewing purposes only.

TAX EDIT FORM

Clicking Edit Taxes on the Order Details Screen will open up the Tax Edit Form where the basket is normally displayed. The form allows you to edit the following information for the order taxes:

1. **Tax Code** – Select the tax code used on the order. Please note that if the order originally had multiple tax codes applied, you will not be able to adjust the taxes, as currently there is no interface to handle multiple rates.
2. **Address Used** – Sets if the tax is based on the customer's billing or shipping address.
3. **Taxed Products Total** – This is the total taxable amount of the order, basically the subtotal after any product discounts after any non-taxed items are removed.
4. **Tax (All Users)** – Enter the tax amount here if it is a tax that would apply to all visitors to the store. This should match the settings for the tax code selected, and all other tax amounts left at 0.00.
5. **Local Tax** – Enter any local tax amount for the order here. This would be based on the zip/postal code according to the address used as selected above.
6. **County Tax** – Enter any county tax for the order here. This would be based on the address used as selected above.
7. **State Tax** – Enter any state/province tax for the order here. This would be based on the address used as selected above.
8. **Country Tax** – Enter any country tax for the order here. This would be based on the address used as selected above.

Please note that changes on the tax edit form will not change any amounts charged by the system to credit cards or PayPal. These are internal changes for reporting and viewing purposes only.

DROPSHIPPING FORM

Clicking the Dropshipping button on the Order Details Screen will open up a form allowing you to edit the drop-shipping information for the items in the order. If you are using the automatic dropshipping features, this information will be pre-filled for you. (See the Shopping Cart Settings and Product Pricing Tab for more information on automatic drop-shipping.) For each item in your cart, enter the following information:

1. **Quantity** – Enter the amount of this product that will be shipped from the vendor. You must enter at least '1' for the purchase order to be created.

2. **Vendor** – Select the vendor to assign this product to. You can create vendors in the Accounts section.
3. **Vendor Part** – The part number (SKU) this vendor uses for the product.
4. **Vendor Price** – The vendor's price for this product.
5. **Note** – You can enter any additional notes on the product here.

After filling out the drop-shipping for each of the products, click Update Dropshipping to save the information. You will now have a link to Open the Purchase Order, or depending on your setting for when drop-shippers are emailed, it may be created for you.

ORDER SHIPPING SCREEN

This is the screen used for filling an order and sending the customer an email regarding their order status. It is accessed from the *Fill* button on the Order Details screen or from the In-Process tab. The following information is available:

1. **Order No** – Displays the order number you are filling.
2. **Order Date** – The date the order was placed.
3. **Customer** – The customer that placed the order. You can click on their name to send an email in your default email program.
4. **Send Email** – This determines if the store will send the customer an email notifying them that the order has been shipped.
5. **Shipper** – The shipper for the order.
6. **Tracking Numbers** – Enter a comma-separated list of tracking numbers here. The email to the customer will include these tracking numbers as well as the link for the shipper's tracking page. Leave blank if you do not wish to included tracking information
7. **Additional Notes** – You can enter additional notes to include in the email to the customer.

User Management

The final section of the administrative area we'll look at is user management. This is where you can create user groups, edit user and customer accounts, set up user permissions, send emails to customers and much more.

User Settings

When you first set up your store, you'll want to take some time to review the User Settings and decide how you want your store to work. Most of these settings can cause problems for your customers if they are changed on a live store, so it's best to set them before you make your store live. The settings are broken into different sections according to the type of user function they affect.

Login Settings

1. **Strict Logins** – This ensures that only one user logs into an account at one time. If someone else logs in on that account, the previous user will get logged out. This is useful on membership sites to prevent sharing of accounts, but typically would be left off. Please note that this option uses some undocumented ColdFusion functions that may not work on all servers, so be sure to test after enabling it.
2. **Max Daily Logins** – This sets a maximum number of times a user can log in per day. Also useful to prevent sharing of accounts. By default, user 'admin' is excluded from this check.
3. **Max Failed Logins** – This will lock an account if there are too many failed attempts to login. The account will reset after an hour. This helps prevent hack attempts. The admin can manually reset an account for any legitimate users that get locked out.

Address Settings

1. **Use State List** – Displays the list of states and provinces on customer address forms. You can disable this for stores outside the US and Canada.
2. **Use State Box** – Displays a text box for the user to enter their state (region/county/etc.) Disable if your store sells to customers that do not need to enter a state (US only for instance).
3. **Require County** – If you enter counties in the tax codes section, this will make a customer in a state with counties entered required to select one from the list. You would enable this only if you have all the counties for a state entered. Counties you don't collect tax for would have a tax rate of 0% entered.

4. **Use Country List** – Shows the list of countries. Disable this if you wish to sell only within your home country.
5. **Allow Shipping Address** – Displays the shipping address entry form that allows for a different shipping address, otherwise the billing address and shipping address will always be the same.
6. **Use Residential Box** – Displays a checkbox to set if addresses are residential, useful for more accurate API shipping rates (UPS, FedEx, Intershipper). If turned off, default is for all addresses set as residential.

Login Accounts

1. **Use Email as Username** – As it says, this will use the customer's email as their username, rather than making them create a different username. Some people prefer a shorter username, while some feel emails are easiest to remember. Please note that changing this on a live store will not change accounts that have already been created, so the customer may be confused when asked to enter their email for the username.
2. **Use Group Code** – This will display a textbox on account registration forms for the user to enter a group code to automatically assign themselves to a user group. The group code is defined on the *Group Edit* form.
3. **Use Birthdate** – Displays a birthdate field on the registration form. This might be used if you are selling products or services that require the user to be a certain age.
4. **User Credit Cards** – This will give the user a form for entering their credit card to keep on file. This is generally only used if you are using memberships and wish to enable the recurring billing features. Currently this feature is only supported on Shift4 using tokens which allows for recharging the credit card, without actually storing sensitive card data details.
5. **Subscribe Box** – This turns on the box on registration pages that allows the user to subscribe to your mailing list. You can disable this if you do not wish to use a mailing list.
6. **Email Confirmations** – Sends the user an email confirmation with a link to activate their account. Ensures that the email address for the account is valid.
7. **Member Notifications** – Sends an email to the administrator when a new login account is created.
8. **Affiliate Signups** – This setting will turn on the link in the Account area for customers of your site to make themselves affiliates. The ***percentage*** you enter will be the percentage they will receive, of the order total. This can be edited in the User area. If affiliate signups are turned off, you can still manually create affiliates in the User administration.

Business Accounts

1. **Require Accounts** – This setting requires all users to create a business account. This might be used for instance, if your store is only intended to be used by wholesalers.
2. **Account Signups** – This setting will turn on the link in the Account area for customers to sign up as wholesalers. You can also create business accounts manually in the admin area.
3. **Show Accounts** – This will display the business account information on the My Account page, with the ability to edit as well. In some cases, particularly if you are managing the accounts manually, you may want this turned off.
4. **Show Directory** – This will allow users to view the information and edit it for the Store Directory page.
5. **Account Notifications** – Sends an email to the administrator when a business account is created. Generally used if you have enabled Wholesale Signups in the Main Settings.
6. **Use Terms** - Adds the terms and conditions in the registration form that the user must agree to. You might wish to use this, for instance, if you are selling subscriptions to content and need to be certain the user understands conditions of use.
7. **Terms Text** – If Use Terms is activated, enter the text here that you wish to display for the terms and conditions.

Click *Save Changes* to update your User Settings.

USER MANAGER

The User Manager is where you perform various functions with users: assigning them to groups, making them an affiliate, changing their account information, etc.

By default, the list of users will show accounts with activity in the last week. You can use the search fields and filters to locate specific users as follows:

1. **Username** – The username for the user. Any portion of the name will match.
2. **Email** – The email address for the user. Any portion of the address will match.
3. **Email Status** – Select from the following:
    a. **All** – show all regardless of status
    b. **Good** – email accounts that are currently verified and valid

   c. **Lock** – If you are using email verifications, these are accounts that have not been verified yet.
   d. **Bad** – Email accounts that have been marked as bad.
4. **Real Name** – Enter any portion of the user's real name to search for them.
5. **Affiliate** – Select to see users that are affiliates, or not.
6. **Group** – You can search for users in a specific group, or currently unassigned to a group.
7. **Bill|Ship** – Search for users by their currently assigned customer address. Enter the ID for the address to find accounts with this address assigned to the billing or the shipping address.
8. **Account** – Enter an account number to find the user assigned to that account (if any).

You also have links to view *All* user accounts or *Recent* activity and a link to add a *New User*. There is also a link to switch to the *List Edit* view for performing batch actions on the users. Simply check off the users you wish to include and click on *Batch Move* to move these users to a new group or *Batch Delete* to remove these users from the system.

On List View, the following information and actions are available for each user:

1. **User ID** – The system ID for this user, with a link to edit the user account.
2. **Username** – The username for this user, with a link to the User Summary page. Disabled accounts will be flagged in red.
3. **Email** – The email for this user, with link to the admin email function to send them an email. If the username is the same as the email, only one will be displayed, linked to the User Summary. The email will also be flagged by color, using red for bad emails, and yellow for unverified addresses.
4. **Real Name** – The name associated with the user account, if any
5. **Affiliate** – The user's affiliate status
6. **Group** – The user's currently assigned group. If the user is not assigned to a group currently, the list of groups will be shown, select one from the list to move the user to that group.
7. **Addresses** – Displays the Customer ID for the user's billing address and shipping address. Click on the link to go to the *Customer Addresses* screen to view all addresses for this user or to add new addresses for them. You must add an address before you can assign it to the user on the user form.
8. **Account** – Number of business accounts associated with this user. Click on the link to view a list of these in the Account Manager.
9. **Affiliate** – Click the affiliate link to view and edit the current information for this user if they are an affiliate, or to make them a new affiliate.
10. **Permissions** – If you have access to edit user permissions, click the link to assign permissions for this user. If the user is assigned to a group, they will receive all permissions that the group has, PLUS any additional

permissions you assign to them here. See the Permissions Settings for more information.

When editing a user or creating new users, the following information can be entered:

1. **User ID** – Assigned by the system, displayed for informational purposes
2. **Username** – Username assigned to this user
3. **New Password** – Passwords in CFWebstore® are hashed so are not viewable. If your customer loses their password, you can reset it by entering a new password here, or click *Send New Password* to email them a randomly-generated password.
4. **Email** – Email address for the user. Click *Send Mail* to go to the Admin Mail form.
5. **Subscribe** – Subscribes the user to receive your mailing list.
6. **Group** – Group the user is assigned to. They will receive all permissions and discounts assigned to that group.
7. **Birthdate** – Birthdate for this user, if enabled
8. **Credit Card Data** – See below for the optional credit card data fields.
9. **Disable** – You can disable an account which will prevent this user from being able to login.
10. **Admin Notes** – This will display any system-generated notes on the user and allow you to add your own.

In addition, the following fields/information are available when editing users.

1. **Bad Email** – You can mark email accounts as bad to prevent sending emails to this user
2. **Email Lock** – If you are using email verifications, this will show the current status of the verification.
3. **Customer ID** – If the user has addresses entered, select the record to use for their customer (billing) address.
4. **Ship To** – If the user has addresses available, select the record to use for their shipping address.
5. **Affiliate ID** – Displays the current affiliate information for the user, with a link to edit it.
6. **Last Login** – The last time the user logged into your store
7. **Login Statistics** – This will display login information on this user: Total logins, logins for today, failures since last login.
8. **Reset Last Day** – This allows you to reset the counts for today. Used if a user is locked out accidentally.
9. **Created** – The date the user account was created.

If you have the setting for keeping credit cards on file for users, the following fields for credit card information will be available (supported only on Shift4):

1. **Card is Valid** – Shows if the card has been approved and is available for use.
2. **Card Type** – Mastercard, Visa, etc.
3. **Card Name** – Name of the card holder
4. **Card Number** – Number on the card
5. **Card Expire** – The expiration date of the card
6. **Card Zip** – Billing zipcode of the card holder

Upon saving the order, a small $1 transaction will be sent through to retrieve a token, which is then stored for the user. The transaction is then reversed.

You can also *Delete* user accounts that are not currently in use by the system.

User Summary

The user summary page allows you see and edit all the information on a user from a single page. It allows you to quickly jump to any user-related information rather than having to search through other admin forms to find it. Included on this page are:

1. **User** – The username and a link to edit the user information.
2. **Email** – Email for this user with a mailto link for emailing them
3. **Address Book** – Jumps to the Customer Address admin area listing all addresses associated with this user
4. **Subscribe** – If subscriptions are being used, will show the current subscription status of this user.
5. **Birthdate** – If birthdates are being used, will show the user's birthdate as entered
6. **Group** – The currently assigned group for this user
7. **Last Login** – Date this user last logged into the site
8. **Total Logins** – Total times this user has logged in, with their signup date (if available).
9. **Affiliate** – Displays the current affiliate status for the user. If the user is an affiliate, you can edit their affiliate percentage and view affiliate reports for them. For non-affiliates, you will have a link to add them as an affiliate.
10. **Billing Address** – Displays the user's currently selected billing address, with a link to edit.
11. **Ship To** – Displays the user's currently selected shipping address, with a link to edit.
12. **Credit Card on File** – If you are storing credit cards for users, displays the card details (last 4 digits of the card number) and a link to run a test authorization if the card is not yet activated.

13. **Active Memberships** – Lists all current memberships/downloads for this user. Displays the current date range of the membership and provides a link to edit it.
14. **Notes** – Shows any admin/system notes on this user.
15. **Other** – If your store uses reviews, you will have links to view the list of the user's product and/or feature reviews.
16. **Account** – If the user has account information, it will be displayed here with a link to edit the account.
17. **Order History** – Lists all orders placed by this user, with the order total, date placed, current order status, and links to view the invoice and view the Order Details screen.

USER GROUPS

User groups are a way to quickly assign permissions to certain users as well as provide special discounts and other incentives. Any user assigned to the group automatically receives the permissions and discounts entered for the group.

Search for groups using the following filters:

1. **Name** – The name assigned to the group
2. **Description** – Description of the group, any words from the description will match.
3. **Wholesale** – Select groups that use or do not use wholesale pricing.
4. **Discounts** – Select groups that have or do not have discounts assigned.
5. **Promotions** – Select groups that have or do not have promotions assigned.

A link is also provided to show *ALL* groups and to create a *New Group*.

The following information for each group is show on the List View:

1. **Group ID** – The system assigned ID for the group, with a link to *Edit* the group.
2. **Name** – The group name and its description.
3. **Wholesale** – Shows whether the group receives wholesale pricing or not.
4. **Discounts** – Shows the Discount ID for any discounts assigned to the group. If you have Discount Admin permissions, you can click on the link to view the discount information and edit form.
5. **Promotions** – Shows the Promotion ID for any promotions assigned to the group. If you have Promotion Admin permissions, you can click on the link to view the promotion information and edit form.
6. **View Users** – Click this link to view a list of the users assigned to this group.

7. **Permissions** – If you have access to edit user permissions, click the link to assign permissions for this group. See the Permissions Settings for more information.

The form for editing or adding a group includes the following:

1. **Name** – The name for this group, used to refer to it elsewhere in the admin area.
2. **Description** – Description of this group, describe the types of users that will be assigned to it, etc.
3. **Group Code** – You can enter a group code that a user can enter while registering, that will allow them to automatically assign themselves to the group by filling in the code . Be sure to activate the use of Group Codes in the User Settings if you wish to use this feature.
4. **Wholesale** – This setting determines if users in this group receive wholesale prices or not. You must enter a wholesale price for any product you wish the group to receive at a discounted price.
5. **Tax Exempt** – If this is turned on, users in this group will not be charged tax while checking out.
6. **Shipping Exempt** – If this is turned on, users in this group will not be charged shipping or freight while checking out.
7. **Discounts** – If you have created any user-specific discounts in the Discount Manager, select the ones here you wish to apply to this group. For product and category-level discounts, you must also apply them to the products and categories for them to work.
8. **Promotions** – If you have created any user-specific promotions in the Promotion Manager, select the ones here you wish to apply to this group. For product and category-level discounts, you must also apply them to the products and categories for them to work.

A link is also provided to *Delete* the group; when deleting a group, the users in the group will be left in the system as unassigned.

Setting Permissions

You can assign permissions to groups and/or users. Users in a group will receive the permissions assigned to the group, plus any permissions you assign them individually as well.

After clicking the *Permissions* link on either the user list or group list, you will be taken to the Permissions form. The permissions are divided into types according to the areas of the store and admin area that they control. Select all the permissions you wish to assign to the user or group and click *Set Permissions* to save your settings. The types of permissions are:

1. **Access Keys** – This allows you to assign access keys to user(s) without having to create a membership for them.
2. **Access Admin** – Permissions related to site and admin access
3. **Category Admin** – Creating and editing categories
4. **Feature Admin** – Creating, editing and approving features
5. **Page Admin** – Creating and editing store pages and menus
6. **Product Admin** – Creating and editing products and product-related functions like discounts and promotions.
7. **Shopping Admin** – Shopping-related settings and all the various order admin permissions
8. **Users Admin** – Main site administration and user admin settings

Here's some more information on each of the individual permissions available for each of these sections:

Access Admin

1. **Assign Permissions** – Ability to assign permissions to groups and users
2. **Manage Access Keys** – Ability to set up and edit access keys
3. **Manage Memberships** – Create and edit memberships

Category Admin

1. **Category Admin** – Create and edit categories, view admin links on category pages

Feature Admin

1. **Feature Admin** – Create and edit your own features. Cannot approve features for viewing on the website but can view all features.
2. **Feature Editor** – View all features, admin links on feature pages in the store, approve features for viewing on the site.
3. **Feature Author** – Can add features, but cannot approve them.
4. **Feature Reviews** – Access to change review settings, and to approve and edit reviews.

Page Admin

1. **Page Admin** – Create and edit store pages and menus. Shows the admin links on pages and menus

Product Admin

1. **Full Product Admin** – Has full access to create and edit all products in the store.
2. **User Products Admin** – This is a special, limited-access product admin. They can create products, but will only have access to products they have created themselves. Their product images and files will be saved into a separate directory, they will not be able to view or use other user's files. They will also need to create and modify their own standard options and addons.
3. **Discount Admin** – Ability to create and modify store discounts.
4. **Promotion Admin** – Ability to create and modify store promotions.
5. **Product Import** – Access to the product import function for adding products to the store.
6. **Product Export** – Access to the product export function.
7. **Product Reviews**– Access to change review settings, and to approve and edit reviews.
8. **Site Feeds** – Access to the functions for exporting site feeds (Google, Bizrate, etc.)

Shopping Admin

1. **Cart Admin** – Access to set all the settings related to shopping: Shopping Cart Settings, Payment Settings, Shipping Settings, Tax Settings
2. **Order Access** – This is the basic permission for the order processing area. All the other order permissions should have this one as well.
3. **Gift Certs Admin** – Ability to create gift certificate codes.
4. **Order Approve** – View the Pending Orders and can approve them for shipping, print invoices, etc.
5. **Order Process** – View the In Process tab, can fill orders and print packing lists and invoices
6. **Order Dropship** – View the dropshipping tab, can edit and fill purchase orders and fill orders.
7. **Order Edit** – Edit the basket on an order, can change the payment and shipping status of the order, view the billing tab if enabled
8. **Order Reports** – Access to filled orders and the order reports
9. **Order Search** – Access to the order search tab
10. **Gift Registry Admin** – Ability to set gift registry settings, view, add and modify store registries.
11. **Place Orders as Customer** – Access to the Login As Another User function, to place orders as an existing customer.

User Admin

1. **Site Admin** – Main Settings, palettes, store templates, pick lists
2. **Admin Menu** – Gives the user access to the admin menu, sections shown according to the rest of their permissions. Generally this is on for all store admin users.
3. **Group & User Admin** – Ability to set up and edit users and groups
4. **User Export** – Access to the user export functions

Click *Update Permissions* to save your permission settings for this user/group.

CUSTOMER ADDRESSES

The users in your store can have any number of addresses assigned to their account, to use as billing and/or shipping addresses on their orders. You can also use customer addresses for accounts, to assign to your vendors, retailers etc. as their account address. The Address Manager allows you to search for addresses to use when creating accounts, or to make changes as necessary to your customer/business addresses.

By default, the Customer Address list will show addresses with activity in the last week. You can use the search fields and filters to locate specific addresses:

1. **User** – The username this address is associated with. Any portion of the username will match.
2. **Name (first or last)** – Enter either the first name or last name on the address listing. Any portion of these names will match.
3. **Company** – Enter any portion of the company name on the address record.
4. **Address** – Enter any portion of the address for the record. Any portion of the address, address line 2, city, state, zip or country will match.
5. **Phone** – Enter the phone number for this address. Any portion of the number will match. Please note that the formatting of the number must match as well.
6. **Email** – Enter the email account for this address. Any portion of the email will match.
7. **Last Use After** – Enter a date to search for customer accounts that have been used since that date. Invalid date entries will be ignored.

Links are also available to view *ALL* customer addresses as well as Recent activity. You also have a link to create a *New Customer Address*.

The same information as the search fields is displayed for each address on the List View. You also have links to edit the address and the associated user account. The form to edit or add an address includes the following:

1. **Customer ID** – The ID assigned by the system to this address.
2. **Username** – The user this address is associated with
3. **First Name** – First name of the person this address is for
4. **Last Name** – The last name for the address
5. **Company** – The company name at the address
6. **Address** – Street address
7. **Address Line 2** – Additional street address
8. **City** – City
9. **State/Province** – Select the state for the address. This will be available to admins even if it is disabled for your store, as are the State free-entry textbox, and country list.
10. **Other State** – Enter the state here if not available on the state list.
11. **County** – If any entered for the state, the county for the address.
12. **Zipcode** – The zip or postal code for the address.
13. **Country** – The country for this address.
14. **Phone** – The phone number at the address.
15. **Other Phone** – Additional phone number for the address.
16. **Fax** – Fax number at the address
17. **Email** – Email of the customer at the address
18. **Residential** – If this is a residential versus business address

You also have a link on the form to *Delete* the address. The address cannot be deleted if it is currently being used on an order in the system. The system will allow addresses to be removed even if they are being used by a user or an account, so be certain that you do not need the address before deleting it.

Accounts

Accounts serve a number of roles in the store. There are three main types of system accounts: vendors, manufacturers and retailers. You can add additional types of accounts using the Picklists, which can be used just for informational purposes, or for custom coding.

Once again, you have filters and search fields to find specific accounts in the store. The filters available are:

1. **Username** – The user this account is associated with.
2. **Account Name** – The name of the account, this is how it is referred to in the store and admin area.

3. **Customer ID** – The address ID for this account. This is used for packing lists, drop-shipping rates and for the Store Locator page.
4. **Account Type** – The type of account. The system-available account types are:
    a. **Manufacturer** – Used for products, show manufacturer logo on product page
    b. **Vendor** – Used for drop-shipping. Can assign to products along with additional information used for drop-shipping and to calculate separate shipping rates
    c. **Retailer** – Used for the Store Locator page (Account Directory), these are suppliers for your products.

    Other accounts types you have added to the *Picklists* will also be available as a choice here.
5. **Directory** – Show which accounts are designated to appear on the Store Directory page. Mainly applies to Retailers although you can configure this setting for any account.

The same information will be displayed on the list of accounts, with links to edit the account, associated user and linked address. You also have links to view *ALL* accounts and create a *New Account*. The following information will be available when creating or editing the account:

1. **Account ID** – The ID assigned to the account by the system
2. **User** – The user this account is assigned to, if any
3. **Account Name** – The name of the account as it will be referred to in the store
4. **Type** – The type of account. This can only be selected when creating the account.
5. **Customer ID** – The address used for this account. You will need to create the address under Customer Adddresses and then enter the ID here. This is required for drop-shippers if you wish to calculate shipping rates for them.
6. **Description** – Enter any additional information on the account here, will be displayed on the Store Locator page.
7. **Policy** – Available for you to enter any information on the store policy for this account
8. **Logo** – Graphic to use for the logo of this account. Used on the Store Locator page and on product pages for manufacturers.
9. **Company URL** – The homepage for this business.
10. **Store Map** – A link to a map for this business, generally used for retailers to show on the Store Locator page.
11. **Rep** – Store rep for this account. You can add/edit the store of reps on the Picklists page.
12. **Terms** – Available for you to use for terms on this account
13. **Dropship Email** – Used for vendors, to send drop-shipping emails

14. **P.O. Note** – Additional note to include on purchase orders for this account (used for vendors).
15. **Directory Live** – Used to determine if the account will be shown on the Store Locator page. Used for retailers.

You also have a link on the form page to *Delete* the account. Accounts will not be deleted if they are associated with an order or purchase order as a vendor. The account will still be deleted if it is a manufacturer associated with products, those products will no longer have a manufacturer assigned.

MY ACCOUNT PAGE

Let's take a quick look at the account page for users. This page is available to users once they are logged in.

The first section displays the login information for their account. They can click on a link to change their login information and password, and if the email is not being used for logins, they have a link to edit that as well. Also available is a link to logout of the system.

If birthdates are activated, the current entry will be displayed and a link to change the date will be available. If you have the setting for keeping a credit card on file, they will also have a link for updating this information. Be sure if you are saving credit card numbers, that you understand the implications of this and have SSL setup on your site!

If subscriptions are activated, the current subscription status of the user will be shown, with a link to toggle this on and off.

The next section will display the user's account information, if this is activated in the user settings. They will have a link to change their account information and if you have the directory information turned on, they can edit their address for the account as well.

Next are the address sections. These show the currently selected billing and shipping addresses for the account. When the user clicks on the link to change the address, they are taken to the *Address Book*. This displays all the addresses for this account, and allows the user to select the address to use, or to enter a new address. There is also a link to edit any of the addresses in their address book.

The last section of the page displays links to various other pages and actions for the user. First is a link to their order history. This page displays a list of all the user's orders in the system, with the date ordered and current status and a link to view the order invoice.

If you have set the store to allow wholesale signups and the user does not currently have an account, they will next see a link to the account signup page.

If you have set the store to allow affiliate signups, and the user is not currently an affiliate, they will have a link to the affiliate signup page. If they are already an affiliate, they will have a link to their affiliate area, where they can view information on creating affiliate links and get sales reports on their affiliate orders.

The next two links provide the user with information on their site memberships and downloads, with links to download any active software purchases. You may wish to enable or disable these links according to what you provide in your store (by editing the user/manager/dsp_manager.cfm file).

If you have product reviews turned on in your store, a link will be provided for the user to view and edit their reviews. More information on this is found in the Product Reviews section of this manual.

PLACE ORDERS AS A CUSTOMER

A new feature in CFWebstore 6.50 is the ability to easily log in and create orders as a store customer. To enable this for an admin user, you will need to update their permissions (or group permissions) to add the new permission. Log out and then back in to load the new permission into the session.

If you are using the standard CFWebstore layout, you will now see the new option on the sidebar for “Login as Another User”. Otherwise, you can access the option from the My Account page. Click the link to go to the user selection screen.

You’ll now have a search screen similar to the User Management screen. Please note that this feature requires the user to have created a login account. Locate the user and click the Login As link. You will now be logged in as that user and can create an order that will appear in their account. The admin status of the original user is tracked so that they can login as another user at anytime, including under the original admin account, which is always shown first on the user list for easy access.

STORE EMAILS

The store also contains a function to send bulk emails to your users. This function can also be used to modify store emails and to create your own email templates as well. Click *Send Emails* in the User Admin menu to access this function.

BULK EMAILS

Using the search features, you can select the specific users you wish to email, then enter the message you wish to send them. The search fields are as follows:

1. **Email Verified** – If you are using email verification with your store, you can select to send only to accounts that have or have not been verified.
2. **Subscribed** – You can send the email to users that have or have not subscribed to your mailing list.
3. **Username** – Enter a specific user here to email them directly
4. **In Group** – Select a specific group of users to email
5. **Is an Affiliate** – You can select to email users that are or are not affiliates
6. **Has Account** – Select users that have or do not have a linked account
7. **Last Login** – You can search for users whose last login was before, after or on a specific date.
8. **User Created** – You can search for users whose account was created before, after or on a specific date.
9. **Member** – Finds users with a current membership purchased from your store.
10. **Product ID** – Find users that have ordered a specific product by its store ID.
11. **Product SKU** – Find users that have ordered a specific product by its SKU number.
12. **Date Ordered** – Search for users who placed orders before, after or on a specific date.
13. **Date Filled** – Search for users whose orders were filled before, after or on a specific date.

After selecting your search criteria and clicking *Continue*, you will be taken to the email form which will tell you how many emails were found, and allow you to enter the subject for your email and the message to send. If you have created any custom email templates, they will be available under Standard Text. Just select the template from the list and its text and codes (if any) will be filled into the boxes for you.

Click the box to preview your message before sending if you wish to review it first. This will display the email on the next page, with the form to edit it before sending. Click *Reselect Emails* if you wish to return to the main email search page.

STANDARD EMAIL TEXT

The standard email text tab allows you to create custom email templates as well as modify most of the emails used by the store. Any custom emails you have created will be listed first, then the system emails included with the software. The system emails include the following:

1. **Email Conformation** – The email sent out to users to confirm their registration.
2. **Forgot Password** – Sent to users after using the function to reset their password.
3. **Gift Certificate Purchase** – The email sent when a user has purchased a gift certificate, which will include the certificate code.
4. **Gift Registry Purchase Notification** – Sent to a user when someone purchases an item from their gift registry (if this option is turned on).
5. **Membership Auto-Renewal Billed** – Not currently used, but can customize to use with recurring billing.
6. **Membership Auto-Renewal Cancel** – Sent to users if they cancel a membership that auto renews.
7. **Membership Renewal Reminder** – Email sent to users to remind them that their membership is expiring and needs to be renewed.
8. **New Affiliate Admin Notification** – Sent to the admin when a new affiliate registers, if notification is turned on in the User Settings.
9. **New Member Admin Notification** – Sent to the admin when a new member registers, if notification is turned on in the User Settings.
10. **Order Received Affiliate Notice** – Email that the affiliate receives if someone places an order through their site.
11. **Order Received Customer Notice** – Email that is sent to customers after placing an order.
12. **Order Shipping/Tracking Information** – Email that is sent to the customer when their order ships, that includes tracking information.

The following fields are available to fill out when creating or modifying emails:

1. **Message Name** – The name you use to refer to this email template.
2. **System Name** – A code for this email template. This should be unique for each email and is used when calling the template in store code.
3. **Subject** – The subject of the email, this will appear in an email reader as the title of the email.

4. **Text** – The text of the email. A full WYSIWYG editor is provided to create your email. Be sure that if you include things like images and styles that you edit the source to include full URL links to these. See the guide for information on using the editor.

Click *Add* if creating a new email template and *Update* if modifying a current one. If this is a custom email template, you will also have the option to *Delete* the template.

CFWebstore® also provides you with a variety of merge fields to use in creating your email templates. Basically a merge field is a code used in the template that the store will replace before sending the email. The fields usually available are:

1. **%SiteName%** – The name of your site, from the Main Settings.
2. **%SiteURL%** – The URL of your site, from the config.cfm file.
3. **%Merchant%** – The merchant address, from the Main Settings.
4. **%MerchantEmail%** – The merchant email address, from the Main Settings.
5. **%Date%** – The current system date.
6. **%MergeName%** – The user's full name. Available when the user is logged in.
7. **%MergeContent%** – For system emails, if the email includes additional text generated by the store, this field will insert the text.

Some additional merge fields are available when sending user-related emails. These include:

1. **%Email%** – The user's email address
2. **%Username%** – The username of the account.
3. **%EmailLock%** – The email unlock code, used when your store is set to require validation of accounts.
4. **%LastLogin%** – The date the user last successfully logged in.
5. **%Created%** – The date the user account was created.

IMPORT/EXPORT FUNCTIONS

CFWebstore® comes with a number of functions for importing and exporting data from your store. These various options will be available according to your user permissions and can be found on the Import/Export admin menu.

PRODUCT IMPORT

The product import is used to add products to your store using an export from another database. Your products will need to be in csv format with one product per row. The product fields are all optional other than the product name which must be included. Note that the import does not handle any additional product attributes like options and addons, and images will need to uploaded separately. The form for imports includes:

1. **CSV file to Import** – Select the csv file from your computer which contains the import information.
2. **First Row Contains Headers** – If your csv has a header row, set this to 'yes' to skip this row during import.
3. **Add to Category** – This allows you to select the category(s) to add these products to. You may want to split your csv files into separate files according to the category you wish to add them to.
4. **Import Field Selector** – The field selectors allow you to select the data that is in your import file, in the order they appear. All editable products fields are included. You'll find a list of fields and their descriptions in an excel spreadsheet in the documentation directory.

After selecting fields and clicking Add Products, the user will be shown a list of the products and the data to be imported, to verify for correctness. Any products that failed to import will also be shown.

PRODUCT EXPORT

The product export works similar to the import, but in this case creates an export file that is sent for you to download. You select the category(s) you wish to export and the fields to include and click *Create Export* to download the .csv file.

Google Base Data Feed

The Google Base option is available to users with Product Feeds permissions. This allows you to create an export of your store suitable for submitting to Google Base. This is a replacement for the previous Froogle export but conforms to the current standards and allows for additional information to be sent. The Google Base fields are found on the product Info Tab, and additional fields can be added through the Custom Product Fields feature. Clicking the Google Base export link will send down a tab-delimited file of all products with links to images and all the Google Base information as entered for each item. Please note that the Google Base export simply sends the base price on each product, it cannot factor in any additional option or addon prices.

Google Sitemap

This export creates an XML file of the store categories, products and features for use with Google Sitemaps. The links use SES format, so be sure this has been properly configured for your site, and that you have entered your full Store URL in the config.cfm file.

Bizrate Data Feed

Bizrate requires that you submit your products correctly coded using *their* category numbers. To achieve this, you must first correctly code each of your product categories with corresponding Bizrate category ID. Edit each product category by entering "Bizrate=xx" in the category's parameter field where "xx" is the corresponding Bizrate category ID.

Your feed will include all products in the categories that have a Bizrate entry in the category Parameter field. If a product is placed in more than one category on your site, then the feed may list that product more than once as well.

As with Google Base, the Bizrate export does not separate out items with prices on options or addons, it simply sends the base price.

Download Orders

The export order function is useful for bringing your order data into other programs, like accounting or shipping label software. You will need Order Download permission to access this function. The following options are available when exporting orders:

1. **Order Numbers** – The range of orders to download. By default, the next order after the ones previously downloaded will be pre-entered. This information is saved to a text file which is updated with each order export.
2. **Date Range** – Alternatively, you can enter a date range of orders to download. Dates use the format YYYY-MM-DD. You can enter just a start date, or a start and end date. You can use partial dates to do a quick search by month or year, such as 2006-03 to get March 2006 orders.
3. **Output Format** – Three types of order exports are available. The first outputs each order on a single line, with all the order data and items in the order included in separate comma-separated columns. The second format is basically the same but using tab-separated columns. The third option exports each order item on a separate line, with each including the associated order information, comma-separated.

Users Export

This export function is available to users with the User Export permission. This is just a simple export of your user's data, clicking on the link will download an Excel file with usernames, addresses, group and last login information for the users in your system. Please note that if you have problems with this, you may need to check the mime types on your web server and make sure they are configured properly for Excel files.

USING FCKEDITOR

CFWebstore® uses the popular WYSIWYG editor FCKeditor for the various content sections in the administrator. The editor is developed by a team led by Frederico Caldeira Knabben (hence the product name) and is regularly updated with new features and support. You can view information on this editor at the FCKeditor homepage and view a complete User's Guide as well.

The current release of FCKeditor is supported on the following browsers:

1. IE 5.5+
2. Firefox 1.5+
3. Safari 3.0+
4. Opera 9.5+
5. Netscape 7.1+
6. Camino 1.0+

The integration of FCKeditor in CFWebstore has some important differences from the default FCKeditor:

1. The image and file upload functions do not use the connectors included with FCKeditor, but use the image/file manager created for CFWebstore
2. Some buttons/functions are disabled in the editor, as they do not apply to CFWebstore. These include things like Save Page and New Page and all the form buttons. If for any reason you need these, you can always re-enable them in the fckconfig.js file.
3. Some additional buttons on the Basic toolset which is used for teaser text input boxes. You can add additional buttons to this toolbar in the fckconfig.js file if you need more than are provided.
4. The styles available in the editor correspond to the styles in the css/default.css file and are defined in css/fckstyles.xml. To use a different style sheet you would change the EditorAreaCSS setting in the fckconfig.js file and add/edit any of the definitions in the xml file.

Here are some basic keystrokes that may help you in entering text in FCKeditor (these make work or not according to your other browser/OS settings):

1. ENTER will create a new paragraph
2. SHIFT-ENTER will create a line break
3. SHIFT-SPACE will insert a non-breaking space
4. BACKSPACE will delete the previous character
5. CTRL-BACKSPACE will delete the previous word
6. CTRL-A will select all text
7. CTRL-B will bold text
8. CTRL-C will copy text to the clipboard

9. CTRL-I will italic text
10. CTRL-L will open the link dialog box
11. CTRL-U will underline text
12. CTRL-V or SHIFT-INSERT will insert text from the clipboard
13. CTRL-X or SHIFT-DELETE cuts the highlighted text
14. CTRL-Y will redo the last action
15. CTRL-Z will undo the last action.
16. CTRL-ALT-ENTER will toggle the full screen view
17. CTRL-TAB shows the source view

Some additional tips:

1. It’s generally best to avoid much use of fonts, use styles instead which will typically display better across multiple systems.
2. Many functions in the editor have additional settings available by right-clicking on the item you inserted. For instance, after inserting a list, you can right-click and bring up a dialog to change the type of list bullets to use.
3. Keep an eye out for additional pages of options when adding items like links and images. Some of these options may not make sense if you are not a web developer, but you’ll find some settings that allow you to do some advanced functions, like creating a link that opens in a new popup browser window. See the FCKeditor User’s Guide for full details.
4. When CFWebstore inserts an image into your content, it will use the full URL path to the image, using the store URL as defined in your config.cfm file. This is necessary so the image is visible in the editor. Be aware however, that if you change your store URL, you will need to update any links created with the editor (or do a search-and-replace on them in your database).
5. To enter a link to another page in your store, select the text you wish to add the link to and click the Link button. Leave the link type set to URL and in the box for protocol select “<other>”. Then enter the link in the URL box (it should typically start with ‘index.cfm’).
6. The version of the editor included with version 6.31+ of CFWebstore now encodes email links so they are less visible to spam bots. If you are using these in any of your text and have updated from an older version, you may want to update the links by right-clicking on the link and selecting Edit Link.
7. The new version also includes an option to open a link when you right-click on it. Be sure your browser is configured to allow pop-ups for your site for this to work.
8. For advanced users, you can click on Source to view and edit the actual HTML source code being created by the editor.

PROGRAMMER'S GUIDE

The last section of this manual is a short guide to the software structure, to help you in custom coding or just learning how the software works. It assumes you already have a basic understanding of Fusebox and how Fusebox 3 applications are laid out. You should know what a circuit and fuseactions are, among other things. You'll find more information on Fusebox at Fusebox.org and halhelms.com and tutorials included in the CFWebstore® documentation directory.

DIFFERENCES FROM BASIC FUSEBOX

There are a few ways that the CFWebstore® code differs a bit from Fusebox. These are just some conventions we have used in the store to extend its capabilities and make it easier to follow the code.

1. **config.cfm file** – This file in the top directory is used for easy setup of store settings. It is not part of a standard Fusebox structure, but allows you to easily separate out the settings that apply directly to just your site.
2. **fbx_Switch.cfm files** – Typically these files use a cfswitch/cfcase structure to determine what fuses to run. However, it was discovered that cfswitch is not very efficient when comparing text strings (versus numbers). So main level switches are coded using cfif/cfelseif/cfelse for better performance under load.
3. **admin/index.cfm files** – Each circuit has an admin fuseaction which calls the index.cfm file from the admin directory. This file uses the additional parameters being passed to determine the exact admin actions to perform. You can kind of think of it as a circuit for the admin functions. As an example, the fuseaction "product.admin&do=edit" performs a product edit admin function. The one exception to this is the home circuit, which uses the fbx_Switch.cfm file in the admin directory to handle the admin actions. This allows you to get to the main admin menu page with the link "www.yoursite.com/admin"
4. **shopping.checkout fuseaction** – This fuseaction calls the do_checkout.cfm file in the checkout directory which works a little differently than most fuses. This page performs all the functions for the checkout area. It is broken into two main sections, the processing section and the display section. The variable "step" is used to determine where in the process the user is, and based on what happens in the process section, this variable will get set to determine the display page that is needed as a result.

The rest of the code basically follows Fusebox 3 standards. Let's take a look at the different circuits and what is available in each one.

Home Circuit

The top circuit for the site mainly contains a number of important admin functions, most of which are called using the **home.admin** fuseaction. This fuseaction with no other parameters will display the full administration menu with whatever sections the user has permissions for. This menu can also be called from www.yoursite.com/admin. This fuseaction also handles additional functions for various site-related functions. These functions include the following:

1. **home.email** – Used to send site emails for functions like Email a Friend.
2. **home.verity** – This will reindex the verity collection for the site. Useful to put into a scheduled task to run each day.
3. **home.senderror** – Sends the webmaster email for site errors.
4. **home.nojs** – Used to display the error if javascript is disabled and the user is trying to access an admin function.
5. **home.admin&colors=list** – Access the color palettes defined for the site. A default color palette is set for the site overall and for individual categories, pages, etc. individually. This is also where you define different layout pages to use.
6. **home.admin&catcore=list** – List the category and page templates for the site. This is an advanced function allowing you to create your own template pages for outputting store content.
7. **home.admin&picklists=edit** – The picklists appear as options in pull-down selections lists in forms throughout the site. This page allows you to edit the lists.
8. **home.admin&settings=edit** – This is the page for the Main Settings of the site.
9. **home.admin&schema=view** – Displays the database schema for the store.
10. **home.admin&select=image** –Access the image/file manager for selecting and managing images and file downloads
11. **home.admin&error=list** – Displays the current list of site errors generated by the error handler.
12. **home.admin&cache=reset** – This clear all cached queries and components and resets the application scope. Useful particularly when you are doing any development work on the site, or have made any changes directly to the settings in the database, to reset them on the site.

Access Circuit

The access circuit is used to control access to site areas, in various ways. There are the built-in site access permissions, access keys that you can create, software downloads that you sell, and areas requiring the user to be logged in (such as wishlists). Some of the fuseactions available here are:

1. **access.memberships** – A list of the current user's memberships. A link to this page is found on the My Account page.
2. **access.download** – A list of the current user's files ready for download. This feature is used to fulfill purchases of downloadable software. A link to file downloads is included on the My Account page.
3. **access.cancelrecur** – Used to cancel recurring billing of a membership.
4. **access.test** – A debugging tool to view the values of your (the currently logged in user) access keys.
5. **access.admin** – Displays the menu of content access admin functions. These include the following:
    a. **access.admin&accessKey=list** – An administrator list of all access keys. Access Keys are created to "lock" site content. Keys are given to groups or individual users OR they can be "sold" in the form of a membership. Only users who possess a key can access the content locked with that key. From this page you can access the admin functions to create and modify the access keys.
    b. **access.admin&membership=list** – Administrator listing of all memberships. Memberships are usually purchased by users for access to site content and software downloads. From this page you can also create new memberships and edit existing ones.
    c. **access.admin&report=recurring** – Used to list memberships that are set to renew.

An important page found in the access circuit is secure.cfm. This is the page that is used for securing areas of the site, whether with access keys or standard site permissions. It also validates that the user has been validated and filled out all required information. You can call this page anywhere in your code that you wish to secure from unauthorized access. Complete instructions on the use of this tag are found in the code comments at the top.

A similar page in the access circuit is useraccess.cfm. This page helps protect access to functions that only allow a specific user to access it, such as gift registries and user-based products. You would pass in the type of check to run and the ID of the item, and the page will check if this user has access to it.

CATEGORY CIRCUIT

This section is where you will find the pages responsible for outputting category-related information as well as setting up and editing the store categories. Categories provide a hierarchal structure to the site. A category consists of a header section followed by a listing of content such as sub-categories, products or features. In fact, sub-categories, features and products can all be listed on a single category page. The fuseactions available from this circuit include:

1. **category.display** – This is the main function for displaying a category page. It requires the category ID for the category you wish to display. The actual pages used to display the category are determined by the category template you choose for the category. For instance, the standard category template for products uses the catcore_products.cfm page in the products directory.
2. **category.topcatmenu** – This has been replaced in version 6 with a CFC component for doing menus.
3. **category.subcatmenu** - Called as a custom tag on the layout page to insert a menu of the child categories of the currently displayed category. This fuseaction can accept a parameter, menu_text, to override the use of small title images and use text only. Also passed is the ID of the parent category to display the menu for.
4. **category.related** – This tag is used to output the listing of categories that a feature or product appears in. It is displayed at the bottom of the detail page with links to return to the categories. It requires two parameters, the detail type (product or feature) and the detail ID.
5. **category.admin** – The category admin function is where you can edit and add categories. The value of the category variable on the URL determines the admin function to be performed. For instance, fuseaction=category.admin&category=add is used to create a new category.

Page Circuit

Site pages provide editing of the text and menus for the homepage, shopping cart, search and results pages, contact us and other non-content store pages. It also is where you can set up the site menus. The fuseactions available here include:

1. **page.menu** – Not used in version 6, this is now run by a CFC component for doing menus.
2. **page.display** – Displays the requested page. Requires the page ID for the page to be shown. This fuseaction can be called as a custom tag as well. For instance, the shopping.wishlist fuseaction calls this tag to display the text for the wishlist page.
3. **page.admin** – The admin functions for pages and menus. From here you can create and edit the pages and their menus for the site. The variable “do” is used in this section for the action to take. For instance, fuseaction=page.admin&do=list will display the list of pages and their information.

Feature Circuit

Features are text content pages that you can use throughout your site. They can be assigned to categories just like products or be linked to a product or another feature. The fuseactions available to your for features include:

1. **feature.list** - Features are usually listed in one or more category. However, this link can be called directly or as a custom tag on template pages to produce a list of features. This page also provides the results for feature searches. The number of features per page on this is determined by your store setting for max features per page, which can be modified by passing the displaycount parameter when calling this tag.
2. **feature.search** – Displays a form to search features, and displays the results of the search. You can call this as a custom tag on a template page to display the search box.
3. **feature.display** – Displays the feature page. Requires the feature ID to be shown. Features are all displayed using the template, dsp_feature.cfm
4. **feature.related** – Called as a custom tag to output related features for a product or feature. It require two parameters, the type of item the feature is related to, and the ID for that item.
5. **feature.reviews** – Runs the various feature review functions. The variable "do" will determine the review function to perform. All the code for running reviews will be found on the feature/reviews/index.cfm page.
6. **feature.admin** – The admin functions for features. The variable "feature" is used to determine the admin function to perform. In addition to the usual list, add and edit functions, you also have 'feature=related' to add related features and feature=related_prod to add related products. There is also "feature=listform" for the Edit Form view.

Products Circuit

The products circuit controls the display of all your store products. Products are essentially the goods and services that you are offering for sale. The admin section not only takes care of creating and editing products, but also various product-related items such as options, addons, custom fields, etc. There are a variety of custom tags and features found in this section, so let's take a look at what is available:

1. **product.list** -This fuseaction can be called directly or as a custom tag on template pages to produce a list of products. This page also provides the results for product searches. The number of products per page on this is determined by your store setting for max products per page, which can be modified by passing the displaycount parameter when calling this tag.
2. **product.search** - Displays a form to search products, and displays the results of the search. You can call this as a custom tag on a template

page to display the search box. Includes a link to browse by category that will take the user to the category you specific as the product root category in the Main Settings.

3. **product.display** – The main fuseaction to display the detailed product information. Requires the Product ID for the item to display. Products are displayed using the dsp_product.cfm template.
4. **product.related** - Called as a custom tag to output related products for a product or feature. It require two parameters, the type of item the product is related to, and the ID for that item.
5. **product.productofday** – This is generally called as a custom tag on a layout page, and displays a randomly-selected product each day. You can pass a parameter to the tag to specify the type of product layout to use (standard, short or vertical) and/or a category ID to list only products under that parent category.
6. **product.tease** – Another useful custom tag to use in your layouts. This is used to output a box of selected "special" products according to the parameters you pass to the tag. You can specify to show highlighted, sale, or hot products, products of a specific type, in a certain category, by a certain manufacturer and also set a limit on the number of products to display. You can enter the title for the teaser box and/or a link to an additional page with more products.
7. **product.qty_discount** – This is called as a custom tag from the orderbox page to output the quantity discounts for a product. It requires the Product ID and whether to use wholesale prices or not. It is called by the orderbox template to display the quantity discounts.
8. **product.reviews** – Runs the various product review functions. The variable "do" will determine the review function to perform. All the code for running reviews will be found on the product/reviews/index.cfm page.
9. **product.admin** – The fuseaction used to run all the product-related admin functions. This fuseaction with no other parameters will display the product admin menu. The product\admin\index.cfm page will check for which additional parameters are being passed and the values of them to determine the action. The options are as follows:
    a. **product.admin&do=** is used for all the product admin functions. There are quite a lot of admin functions for products. These include:
        i. list,listform,actform – the product list and the list edit form
        ii. add,edit,act – for creating and modifying products. Also performs product deletions
        iii. copy – creates a copy of the product
        iv. price,act_price – updates the product pricing information
        v. info,act_info – processes the product information tab
        vi. grp_price – updates the product group pricing information
        vii. qty_discounts – updates the quantity discounts for the product
        viii. options – displays the product options
        ix. addons – displays the product addons

x. images –product image gallery
xi. related – add or remove related products
xii. froogle – performs the Froogle (Google base) export
xiii. googleSiteMap – performs the google site map export
xiv. bizrate,bizrate_download – performs the Bizrate export
xv. import,doimport – runs the product import functions
xvi. export,export – runs the product export functions

b. **product.admin&option=** is used for adding and editing product options. The actions available include:
   i. addcust – add a custom option
   ii. addstd,std2 – add a standard option
   iii. act,act2 – saves the option information
   iv. change – modify a product option
   v. delete – delete a product option
c. **product.admin&addon=** is used for adding and editing product addons. The actions available here are:
   i. addcust – add a custom addon
   ii. addstd – add a standard addon
   iii. act – saves the addon information
   iv. change – modify a product addon
   v. delete – delete a product addon
d. **product.admin&stdoption=** is used for adding and modifying the standard options available in your store. These include the basic admin functions: list, add, edit, delete, act
e. **product.admin&stdaddon=** is used for adding and modifying standard addons. The functions are the same as those available for standard options.
f. **product.admin&fields=** is used for updating the custom product fields. The functions here are edit and act.
g. **product.admin&discount=** View, add and modify the discounts available in your store.
h. **product.admin&promotion=** View, add and modify the promotions available in your store.
i. **product.admin&review=** View, add and modify product reviews.

SHOPPING CIRCUIT

The shopping circuit is one of the most complex in the store due to all the important functions performed here. Like other circuits, you have a number of custom tags available as well as an extensive admin area.

1. **shopping.order** – This is the fuseaction called to add items to the shopping cart. It requires the Product ID for the item being ordered. An

optional addon text string can also be passed. After this fuseaction runs, it redirects to either the shopping basket, or back to the store page.

2. **shopping.basket** – This fuseaction will display the customer's shopping cart. You can also perform a number of actions on the shopping cart using the 'action=' parameter.
    a. **action=recalculate** – recalculate the shopping cart.
    b. **action=clear** – clear the shopping cart
    c. **action=keep shopping** – returns the user to the store page they were on previously
    d. **action=checkout** – begins the checkout process
3. **shopping.wishlist** – View, edit and add to the wishlist. The customer will be required to log in when viewing this page.
4. **shopping.quickorder** – This pages provides a "quick order" form where the user can enter the catalog numbers (SKUs) and quantity for the products they wish to order on a single page. Please note that this does not use options or addons so cannot be used if you require these on your products.
5. **shopping.giftwrap** – This fuseaction is used for adding giftwrap to an item (or removing it). It presents the user a list of giftwraps to choose from and links the selected one to the item in the shopping cart.
6. **shopping.basketstats** – this is a custom tag you can use in your layouts to display a short summary of the basket totals (items and order total). You can pass a style sheet class to use when displaying it.
7. **shopping.tracking** – Used with automated shippers, this will run tracking API calls and display the tracking information for all the shipments on an order. The customer enters their order number and zip/postal code to retrieve the tracking information.
8. **shopping.history** - Lists the user's order history and allows users to track the status of their order. A link to Order History is provided on the My Account page. Passing a specific order number to this fuseaction will display that order's invoice. You can also pass a specific user ID to the tag to view any user's history (for administrators).
9. **shopping.clear** – Used to clear the shopping cart. Returns the user to the page they were on previously. Requires the parameter 'clear=yes' to be completed.
10. **shopping.discountmess** – This is a custom tag used to display discount messages. It requires the discount type (store, product or category) and for product or category discounts, the ID for the item. You can also pass a style to use when displaying the message. You can use this tag in layouts to display storewide discounts; it is also used by the orderbox tag to display product discounts.
11. **shopping.checkout** – This is the main fuseaction that performs the entire checkout process. It is run by the do_checkout.cfm page in the shopping\checkout directory. As mentioned in the introduction to this section, this page works somewhat differently than most. It is divided into two main sections, the process and the display. The variable 'step' is used

to determine where the customer is in each section and is changed in the process area as necessary to display the correct page. Thus, the 'step' you see on the URL may not be the step that is displayed on the page. The various steps in the process include:

a. **empty** – Shows an error message if a empty shopping cart is found
b. **terms** – Displays the terms of purchase for the site, if used
c. **address** – Display the customer address form(s)
d. **register** – If user is not logged in, provides them an opportunity to register. Registration can be required with a store setting and for downloads and membership purchases, is always required.
e. **shipping** – Displays the shipping options and entry form for additional order information such as gift card, coupons, and delivery date
f. **payment** – Final order review and payment information
g. **receipt** – Displays the order invoice when the order has been placed and saved.

12. **shopping.giftregistry** – The gift registry function allows uses to create a list of products to share with friends and family. The functions for the gift registry are called from the giftregistry\index.cfm file under the shopping circuit, similar to the admin functions. Calling this fuseaction directly will display the search form for registries, and links to create and edit registries. The variable 'do' is used for public actions, and 'manage' for editing functions. These include:
    a. **do=results** – Displays the list of gift registries from a search
    b. **do=display** – Show the registry and items on its list
    c. **do=cart** – Adds a gift registry item to the shopping cart
    d. **manage=list** – Displays a user's current gift registries
    e. **manage=add/edit/act** – Add and edit a gift registry (main info)
    f. **manage=additem** – Adds a product from the store to the user's gift registry
    g. **manage=additems** – Moves a user's entire shopping cart to their gift registry
    h. **manage=items/actitems** – View the items in the gift registry and modify quantities needed or delete items
    i. **manage=print** – View and print the registry
    j. **manage=notify** – Email the registry link to friends
13. **shopping.affiliate** - Affiliate functionality allows users to sign up as a store affiliate and earn commission on sales that come from users who are referred by them from their web site. The functions for affiliates are called from the affiliate\index.cfm file under the shopping circuit, similar to the admin functions. The variable 'do' is used to determine the action to take. These include:
    a. **do=register** – Allows the user to sign up as a new affiliate
    b. **do=report** – Displays the reports of affiliate sales
    c. **do=links** – Shows the information on how to create affiliate links

14. **shopping.admin** – The shopping.admin fuseaction controls all the shopping and order related settings and functions. Like the products admin function, the shopping\admin\index.cfm page will check for which additional parameters are being passed and the values of them to determine the action to perform. There's a lot of stuff in here, so let's go through it carefully.
    a. **shopping.admin&cart=** View and edit the Shopping Cart Settings.
    b. **shopping.admin&payment=** Used to modify the payment settings for the store.
    c. **shopping.admin&certificate=** View, add and modify gift certificates.
    d. **shopping.admin&giftwrap=** View, add and modify available gift wrap papers.
    e. **shopping.admin&giftregistry=** View, add and modify store gift registries.
    f. **shopping.admin&shipping=** Contains all the functions related to setting up your store shipping. The possible selections here include:
        i. settings – configure the store shipping types.
        ii. editsettings – modify the settings for individual shipping types
        iii. customsettings,custom – used to set up the custom shipping rates
        iv. methods,method – used to view and modify custom shipping methods
        v. country – add and modify country shipping rates
        vi. upswizard,upsinfo,upslicense,upsregister – used in running the UPS registration wizard
        vii. ups,upsmethods – modify the UPS settings and shipping methods
        viii. fedexregister – Runs the FedEx subscription request
        ix. fedex,fedex_methods,fedex_method – modify the Fedex settings and shipping methods
        x. usps,usps_methods,usps_method – modify the USPS settings and shipping methods
        xi. Intershipper – modify the Intershipper settings
        xii. intship_methods, intship_method – view and modify the Intershipper methods
        xiii. free – view and modify the free shipping promotion
    g. **shopping.admin&taxes=** This section controls all the tax codes and related taxes for your store. Actions available include:
        i. codes,editcode – display and update the tax codes
        ii. local – display and edit local tax rates
        iii. state – display and edit state tax rates
        iv. county – display and edit county tax rates
        v. country – display and edit country tax rates

h. **shopping.admin&order=** This section controls all the order management and fulfillment processes. The actions available include the following:
   i. display – used to display the order details screen. Requires a valid Order Number to display. This section is also responsible for performing all the additional order editing functions, according to forms submitted to it, such as updating the order and shipping status or modifying the basket.
   ii. print – displays the order invoice in a separate window for printing. Requires a valid Order number to print.
   iii. pending – displays the list of pending orders and runs the batch process for them
   iv. process – displays the list of in process orders and runs the batch process for them
   v. billing – displays the billing tab, with orders pending payment. Runs the batch process to complete payment on the orders
   vi. search – displays the search orders tab for finding orders of any status
   vii. shipping – displays and processes the order shipping screen, used when filling orders
   viii. filled – displays the list of filled orders and performs the purge functions for deleting them
   ix. reports,printreport – displays, runs and prints the order reports
   x. download – download a csv file with store orders, for import into other programs
   xi. cleartemp – clears the temporary database tables

i. **shopping.admin&po=** These functions control purchase order creation and management. The actions here include:
   i. list – displays the list of purchase orders (PO tab in Order Management)
   ii. print – displays the purchase order in a separate window suitable for printing. Requires a valid PO number.
   iii. add – creates the purchase order. This function is called manually when the admin creates drop-shipping information in the shopping cart, or automatically in the store according to the drop-shipping settings.
   iv. edit,act – edit the purchase order information
   v. ship – displays and processes the form for filling purchase orders

USERS CIRCUIT

The last main circuit in the store is the users circuit. There are lots of functions in here for the average store user as well as a number of important admin functions. This section controls users and groups and their permissions, accounts, addresses, etc. Let's take a look at the fuseactions in here:

1. **users.login** – A basic login form. The form will be submitted through a secure link (assuming you have installed and configured your secure server) to protect the user's account information. The user will generally be redirected back to their previous page after logging in.
2. **users.logout** – This will log the user out of the system. If the 'Remember Me' feature is turned on, it will also delete the cookies to remember the user. Provided as a link on the My Account page and on the login box.
3. **users.loginbox** – This is a custom tag that inserts a persistent login/logout box on the site layout. You can pass a parameter to the tag for the type of loginbox to display.
4. **users.purgecookie** – Used to verify that the user wants to logout and delete the cookies used to remember them
5. **users.directory** – Custom tag called to output listings of accounts. You can pass a variety of parameters of this tag to filter the listings to show. For instance, the Store Locator page outputs account listings of type 'retailer'.
6. **users.manager** – This calls the My Account page which provides a user with all their user information and allows them to check their orders, update their information and create affiliate and wholesale accounts.
7. **users.register** – This is the default registration method. It takes the user step-by-step through the required portions of the registration. In general, most stores will be fine with this registration form, but some other alternatives are available if you need them, according to the type of store you are setting up.
8. **users.newuser** – This action is called from the checkout area when the user is creating a new account. It presents the user with a registration form and then returns them to the checkout when it is completed. It can also be used for stores where you do not require customer addresses for users.
9. **users.member** – This fuseaction can be used as an alternate registration page. It includes all the registration information on one form (login account, address, credit card, etc.). It can also be used to prompt the user for additional information they still need to enter. See the comments on the dsp_member_form.cfm page for more information on its use.
10. **users.account** – Another alternate registration form, this is used for a single-page registration for business accounts. If the user is already logged in, this page is used to create a new account for them. The account form contains a number of fields for accounts that you may not need for your store, these can simply be commented out on the form.

11. **users.forgot** – Provides a form where users can enter the email address they registered with and have their username and password emailed to them. This link is provided on the login form.
12. **users.addressbook** - Users can create multiple addresses. The address book lists all the users' addresses and allow the user to define which address will be used as the default shipping, billing and account address.
13. **users.address** – Displays the form to edit or add customer addresses. Requires the User ID for this address to be linked with.
14. **users.email** - A form to allow users to update their email address. Provided as a link on the My Account page.
15. **users.unlock** – This form is used for unlocking accounts if you are using email verification of accounts.
16. **users.sendlock** – Resends the user an unlock link.
17. **users.password** - A form to allow users to change their username and/or password. Provided as a link on the My Account page.
18. **users.birthdate** – A form to allow users to edit their birthdate. Provided as a link on the My Account page if activated in the User Settings.
19. **users.ccard** – The form to enter credit card information to be saved with the user's account.
20. **users.deleteccard** – Deletes the credit card information, from the edit form.
21. **users.subscribe** – Toggles the subscribe flag for the user on and off.
22. **users.kill** – A useful command when doing custom work and testing on your store, this will log you out of the store completely and clear all session variables.
23. **users.loginAsAnother** – runs all the functions to allow administrators to login as regular customers and place orders.
24. **users.admin** – The fuseaction for the users administration functions. This fuseaction with no other parameters will display the users admin menu. Like the last two circuits, the users\admin\index.cfm page will check for which additional parameters are being passed and the values of them to determine the action to perform. Let's take a look at what you can do in here:
    a. **users.admin&settings=** allows you to modify the User Settings for the store. Various options related to handling users and accounts are available here.
    b. **users.admin&user=** is used for creating and modifying users. There are a variety of functions available for users:
        i. list, listform, actform – the user list and list edit form
        ii. add, edit, act – for creating, modifying and deleting users
        iii. permissions – used to set user permissions
        iv. unlock – unlocks the account if using email verifications
        v. resetpw – reset the user's password and email to them
        vi. affiliate - create an affiliate account for the user.
        vii. authorize – used to run a test authorization to validate a credit card.

viii. unblock – resets the login count for a user that is locked out of their account
ix. summary – displays the user summary page.
x. loginreport – displays a report of users that have logged in during the last month

c. **users.admin&group=** is used for creating and modifying groups. Like the users, you have the list, add, edit and act functions as well as permissions for setting the group permissions.
d. **users.admin&customer=** handles the customer address management. Here you have the basic list, add, edit and act functions.
e. **users.admin&account=** handles the account management section. Again, you have list, add, edit and act functions here.
f. **users.admin&email=** controls the function for sending emails to your users. Actions here include:
    i. select – select the users to send email to
    ii. write,send – compose, preview and send the email
g. **users.admin&mailtext**= used to add and modify store email templates. Actions include basic list, add, edit, and act functions.
h. **users.admin&download=** This runs the function to download your customer addresses to an excel spreadsheet. This function uses the query2excel tag in the customtags directory.

CUSTOM TAGS

The store includes a variety of custom tags that are used throughout the code and that you can use as well in custom coding. You'll find these tags in the customtags directory of the store. A number of these tags have been developed by other ColdFusion developers that have shared their work with the rest of the CF community and for that, we thank them.

SESConverter – A standard custom tag used with Fusebox sites, this is used to convert the sitemap links to a format the store can understand. It is called in the main index.cfm page of the site, you shouldn't need to do anything else with it. If you have problems on your site with SES links, you may need to make sure your server is properly configured to handle them. First, make sure that IIS is set to not check the validity of URLs. Otherwise it will throw a server error for SES links since they do not actually exist on the server. Also note that the SESConverter file relies on various CGI variables as well as expecting your SSL to be on port 443. In some cases, this may return invalid results on some servers. You may need to dump your CGI variables and check what port your SLL (https) runs on and customize the file to make sure it's returning a valid base href for both locations on your server.

AvarTree – This custom tag can be used to output scoped variables from your store (application,session, request, URL, etc.) The default layouts include this tag for administrators only by adding a 'Debug=Yes' to the store URL. You can click "help" on the output of the tag to view additional parameters you can set for the tag (such as restricting it to specific IP addresses). By default, the tag is output using the put_debug.cfm page.

PutTitle – A simple custom tag for outputting titles on store pages

PutText – Custom tag used for outputting text in the store. Particularly useful when outputting teaser and detail text for store pages when they include links to other store pages, as it will append the Session information to any .cfm links for users with cookies turned off. You can pass additional parameters to this tag, such as the class to use for the text and whether to add a line break at the end.

PutImage – Custom tag used when outputting images in the store. There are a variety of attributes you can pass to this tag for things such as the image alignment, link on the image, alt tag, etc. You can make modifications to this tag to change how images are output throughout your site.

Format_Box – Used to wrap content on a page in a formatted box with a title header. Use the attributes for the tag to set things such as the colors for the box, the title text, width of the box, border size, etc. The tag is called using a cfmodule wrapped around the text to be inside the box. Example:

```
<cfmodule template="../customtags/format_box.cfm"
box_title="Sample Formatted Box"
border="1"
align="left"
Width="480"
HBgcolor="CCCCCC"
Htext="000000"
TBgcolor="FFFFFF">

        Text to go inside the box is entered here.

</cfmodule>
```

Format_Input_Form – This custom tag works basically the same as the format_box but is used for forms. It has some additional parameters you can pass that are specifically for forms.

Format_Output_Box – Another box custom tag, very similar to the format_box but uses different color defaults.

PageThru – Used for pages that show a maximum number of records per page. There are a variety of parameters you pass to this tag to configure how it will work, and a number of variables returned by the tag. For instance, you pass the number of records in the query, the page you are currently on, the maximum records per page, text or images to use for the navigation, etc. The tag will return the start and end rows for the page as well as the output for the navigation which you can use anywhere on the page you would like. You can see the comments on the tag for detailed information on its usage, but here's an example:

```
<cfmodule template="../../../customtags/pagethru.cfm"
totalrecords="#qry_get_memberships.recordcount#"
currentpage="#currentpage#"
templateurl="#cgi.script_name#"
addedpath="#addedpath##request.token2#"
displaycount="20"
imagepath="#request.appsettings.defaultimages#/icons/"
imageheight="12"
imagewidth="12"
hilitecolor="###request.getcolors.mainlink#" >
```

NextItems – This tag is used when displaying items to show links for the next and previous items in the list. It is currently used in the store when displaying orders and for products. There are two modes you can use with this tag. One is to set the list (stored in a session variable) and the other is to display the links. An example of calling the tag to display links would be:

```
<cfmodule template="../customtags/nextitems.cfm"
        mode="display"
        type="product"
        ID = "#attributes.product_ID#"
        class="section_footer"
        >
```

StringSearch – This is a useful tag for database searches. You pass any number of words and whether to include all the words or any of them in the search, and the name of the column to search and it returns the SQL commands needed for the search. It is used for the full store SQL search and the product and feature searches. An example of this tag in use is as follows:

```
<cfmodule template="../customtags/stringsearch.cfm"
        sql_col_ref="long_desc"
        search_string="#Search_string#"
        all_words="true">
```

The SQL returned would then be used in your query like this:

```
<cfquery name="qry_search" datasource="#Request.DS#">
        SELECT * FROM MyTable
        WHERE 1 = 1
```

```
        AND #PreservesingleQuotes(SQL_Output)#
</cfquery>
```

SetImages – This tag uses the current color palette for a page to set the store images: the think and thick lines, sale, new and hot images, etc. Simply call it after running queries/qry_getcolors.cfm to set the images.

QForms – QForms is an advanced javascript library for form validation. It has been used throughout the store wherever form validation is needed. You can add your own custom validations and make adjustments to the validations very easily as needed. Full documentation and all the library files for QForms is found in the includes directory.

CFFormProtect – This is a ColdFusion component that has been added to the contact form templates in CFWebstore® to help prevent spam. The main CFC (modified for use with the software) can be found in the cfcs/tags directory. The rest of the files that run and configure the spam checking are found in the includes/cffp directory. If you wish to modify the settings, these are found in the cffp.ini.cfm file. Among other things, you can set which text strings to consider spam and configure use of the Akismet service for checking for spam. You can also configure the tag to email you a copy of any trapped emails.

Feature List - You can use a custom tag to output lists of features on your site; for instance, you could display the latest headlines for your site on the homepage.

```
<cfmodule template="../#self#"
fuseaction="feature.list"
new="1"
featureCols ="1"
searchform="0"
searchfooter="0"
>
```

The attributes that you can set include:

- category_id – selects features from a specific category
- new – selects features marked as new
- featureCols – sets the number of columns to display
- searchform, searchfooter – turns off these sections used for feature searches

Product List – Likewise, you can also include a custom tag in a template or layout for outputting a product list, such as this:

```
<cfmodule template="../#self#"
fuseaction="product.list"
new="1"
productCols ="1"
searchform="0"
searchfooter="0"
listing="short"
>
```

The attributes that you can set include:

- undercategory_id – selects products from a specific category
- onsale – selects products marked as on sale
- new – selects products marked as new
- hot – selects products marked as hot
- notsold – selects products marked as not sold
- type – the product type to list
- productCols – sets the number of columns to display
- searchheader, searchform, searchfooter – turns on/off these sections used for product searches

CATEGORY MENUS

CFWebstore has two different options for building menus, both using a component to create the data or menu strings. The component is menus.cfc found in the cfcs/layout directory and is typically stored into application memory as objMenus.

The first option calls a menu function similar to the custom tag found in previous versions. The following parameters (with the default values in parens) are available:

1. **rootcat** – Parent ID for the categories you wish to display (use 0 to show top-level categories). This setting allows you to display sub-menus under another category. (0)
2. **menu_class** – CSS style class to use for text menus (menu_category)
3. **menu_text** – Use a text menu, turn off to use images from the small title image settings (1)
4. **menu_orientation** – Determines whether to use a vertical or horizontal menu (vertical)
5. **menu_type** – Menu type, either a normal list menu, or a selectbox menu that will jump to the one selected (normal)

6. **separator** – The separator to use for a horizontal menu (&##183;)

Here's an example of how to output a horizontal, image menu on a page:

```
<cfset CatMenu =
Application.objMenus.dspCatMenu(menu_orientation:'horizontal', menu_text:0',
menu_class:'menu_footer')>

<cfoutput>#CatMenu#</cfoutput>
```

The second option is to use the function for creating an XML export of the category tree for your store. This is called by the function:

```
Application.objMenus.xmlCatTreeCreator();
```

You can then use this XML to create any kind of cascading menu. The store comes with code that can easily be used for any nested-list based cascading menu (CSS/DHTML style menu). This code is found in the layouts/do_catmenu.cfm page. See the section below on Customizing Store Menus for more information.

Page Menus

Like categories, you have two methods for building page menus for your store, using the built-in menu component. An example of creating a basic page menu similar to previous CFWebstore versions would be as follows:

```
<cfset PageMenu =
Application.objMenus.dspPageMenu(menu_orientation:'horizontal',
menu_class:'menu_footer', parent_id: 0)>

<cfoutput>#PageMenu#</cfoutput>
```

The arguments for the page menu are similar to the category, with no menu_type option and using parent_ID for the top-level page ID.

As with categories, you also have the option to use the XML export function. This is called using:

```
Application.objMenus.xmlPageTreeCreator();
```

As with categories, this XML export is then used for whatever style menu you wish. A sample of code creating a CSS/DHTML menu from this XML is found in the layouts/do_pagemenu.cfm page. See Customizing Store Menus in the Programmer's Guide for more information on customizing this code and using it for other styles of menus.

CUSTOMIZING STORE MENUS

CFWebstore® now comes with a number of options for building your store menus. The old-style menus using a custom tag to create text or image-based menus, and a new menu-building set of functions ideal for cascading DHTML menus.

The menus are generally broken into 2 sections – the category menu and the page menu. The category menu is created from the categories you set up for your store, which would have your products, feature articles, etc. The page menu is all the stand-alone pages for store functions like the shopping cart, search, user account, etc. as well as any additional store content pages. You can use the Pages & Menus section to create a similar cascading menu for pages as you can for categories.

An example of using the old style menus can be found in the *put_sidemenus.cfm* page in the layouts directory. These menus are created by the menu component in the cfcs/layout directory. You have a variety of arguments you can send into the component to set things like style class, orientation, image versus text menus. You can also modify the component to do a recursive call, to create submenus (typically done for categories). By default this page stores the created menu into session memory to improve performance. This will be updated when the user logs in or out of the system. This can be changed if you use menus that change from page to page for a user. See the category menus and page sections above for more information on the various attributes you can use with these methods.

A method of doing more complex, DHTML-based menus is demonstrated in the *do_dhtml_menus.cfm* page (used with the lay_menus.cfm layout file). These menus use a new function in CFWebstore® which takes your categories and/or pages and outputs them into XML. You can then use that XML to create any type of menu, be it CSS-based, javascript, or even Flash. The store comes with code that will recursively parse the XML and create a nested list from it which can then be used for a CSS/DHTML menu. Let's take a closer look at how this is done and how you can customize it for your own needs.

The first line of code in do_dhtml_menus.cfm includes the *menufunc.cfm* file. This includes the two functions that will take our XML category tree and create the nested list from it. The next lines are used to print out the menu javascript file and the desired style sheets to the header of the page. For the example, we are using a style sheet for a vertical category menu, and a horizontal Office-style css for the page menu. The file *do_catmenu.cfm* contains the code for creating the category menu. The doCatMenu function is where you can customize the html that gets output for the nested list for whatever menu you are using. Define the code used for the start and end of the menu, start and end of submenus, and for menu items. Make sure the styles match the ones used in the style sheet you are using. You can also customize the call to the XML function at the bottom of this page to use a different starting point for the menu, and specify the number of levels.

The last two lines of the file are what build the menu. The first line calls the function that builds the XML tree from your categories. The second line passes this XML and the doCatMenu function that you have customized into the recursive menu building methods. The resulting html gets saved into the 'CatMenu' variable which you can then output to your layout page. The example code saves it into a Session variable so these functions only need to run once per user.

The Page menu function works pretty much the same way. The *do_pagemenu.cfm* has the doPageMenu function which you can customize with the desired styles and/or html you wish to use for your menu.

CFWebstore® comes with some example styles, found in the includes/hiermenu directory. These have been graciously provided by Massimo Foti and can be also seen at http://www.massimocorner.com. Please note that these are designed to work for only 3 levels of categories/pages. If you decide to use these on your site, please drop by Massimo's site and send him a donation for his excellent work.

A good tutorial on doing CSS-based menus can be found at HTML Dog:

http://www.htmldog.com/articles/suckerfish/dropdowns/

Here are some additional sources of CSS-based menus:

1. **CSSPlay** – http://cssplay.co.uk/menus/
2. **DynarchMenu** – http://www.dynarch.com/products/dhtml-menu/
3. **SmartMenus** – http://www.smartmenus.org/
4. **OpenCube QuickMenu** – http://www.opencube.com/quickmenu.asp
5. **Freestyle Menus** – http://www.twinhelix.com/dhtml/fsmenu/

One important note on menus. If you make any changes to the menus.cfc file, be aware that this component is normally stored in application memory. To have your changes show up, you will need to use the Reset Cache option on the admin menu.

SHARED SSL

While CFWebstore allows the use of Shared SSL, it's recommended you purchase your own secure certificate which looks more professional, doesn't cost much (from places like GoDaddy.com), and is necessary for PCI Compliance due to security issues with passing session IDs on the URL (see the security section below for more information). However if you want to use Shared SSL for prototyping a site, or otherwise don't need your own certificate, be very diligent about any store links you create yourself, in your layouts and menus. They MUST have the request variables added on the end to properly maintain sessions. For any links that start with 'Request.SecureURL', use Request.AddToken on the end, and for any that start with 'Request.StoreURL' (or nothing) use the Request.Token2.

EMAIL FORMS

The software provides a number of email forms you can use on your site. You can use the Contact Us templates to add an email form to a category or page (with or without attachment support). These allow the user to send an email to the company email address set up in the Main Settings or you can customize the form using parameters to send to other email accounts.

You also have a special email function that allows the user to send a link from your site to a friend, or to send an email to the site editor (for online magazines, for instance). The page is called using 'http://www.yoursite.com//index.cfm?fuseaction=home.email' and takes several parameters, such as the URL to send to your friend, or to email the site editor. See the email\act_mailform.cfm page for more information on its use.

USER REGISTRATIONS

Customers can, of course, register during the checkout process. However, they can also choose to register before. There are 4 different types of registration forms that can be used when a new user chooses to register on the site by clicking the 'create account' button. The default form is set on the fbx_settings.cfm template in the root directory. As an alternative to the standard registration process, several single page forms are provided to simplify the registration process, depending on the site's needs.

```
<CFPARAM NAME="request.reg_form" DEFAULT="register">
```

- **register** - The standard sign-up process which takes the user from form to form as required: login form => customer form => shipto form (if used) => account form (if used)
- **newuser** - Creates only a user login
- **member** - Login and customer address on a single form.
- **account** - Login, customer and account info on a single form.

If you choose to turn on email confirmations, you will also need to decide how you wish to protect the site until the user confirms their account. You can do this using a call to the secure.cfm tag; if the validation fails, the form to enter the confirmation code will be shown. By default, the User Manager page will be protected and you will find the code in the users\fbx_Switch.cfm page already set up with comments on how to adjust this.

DATABASE SCHEMA

Available to site administrators only, this admin option allows you to view the current database schema for your store. This is for information only, no editing is available from this view. The database schema view will work for SQL server and other databases that support the Information_Schema standard (such as MySQL 5.0 and higher). It is not currently supported by Access.

RESET CACHE

Another option for site admins, this admin option will completely clear all the cached queries for the site and reset all information stored in application memory included all components. If you make any changes to the database directly, or are doing development work on the CFCs you may need to use this option to reset them in stored memory. This option is also useful for updating the admin menu and resetting all the pending item counts.

ERROR HANDLERS

CFWebstore has several error handlers you can use on your site to catch errors and provide you with information to help determine their cause. The error handler being used is defined in fbx_Settings.cfm. The available handlers (found in the errors directory) are as follows:

1. **fullhandler.cfm** – This is the full-featured error handler that is set by default. It works by generating a static page on your server with a wide range of information from the ColdFusion server….all the error information, application and session variables, all internal page variables, query information, etc. Due to the sensitive information in the file, the webmaster is only emailed the basic error information, and will need to log into the site in order to view the complete error page, which will be displayed over the secure server. From there, they can save a local copy of the error, or delete the errors from the server. CFDirectory will need to be enabled to access these generated errors and CFFile needed to write them to the server.
2. **emailexception.cfm** – Since the default error handler uses cffile and cfdirectory tags, some merchants may not be able to use it due to restrictions from their hosting. The emailexception page provides a decent alternative, only emailing the basic error information and not generating any pages on the server. It should work well for most situations.
3. **emailhandler.cfm** – This is a backup error handler that is used when the previous two error handlers fail. It cannot provide any detailed information, and since CF tags are not allowed, it relies on the user to send the email to the webmaster.

STORE SECURITY

There's a lot of attention to keeping your store secure, but keep in mind that no internet application is ever 100% secure. There are some things you can do to improve security in your site even more. Let's look at some various areas.

- **Credit Card Security** – As mentioned in the Payment Settings, CFWebstore no longer allows storage of credit card data, unless using tokens (i.e. Shift4 processing). This is due to tightening of PCI Compliance regulations that make storing card data highly risky and impossible to do at a strictly software level. It requires extensive security and encryption procedures to be in place and should only be done with the assistance of a highly skilled security specialty firm. It is important to note however, that if you take credit cards on your site (versus taking them only on an external site like PayPal) you will still need to fulfill Level 4 PCI compliance which generally requires a yearly scan of your web server to check for vulnerabilities.
- **Cross-Site Scripting** – Cross-site scripting (XSS) is a method of attacking a site through javascript embedded into areas of the page that get output to the screen. An example of this might be a form that refills itself when submitted, or a web forum that allows code embedded into the posts. CFWebstore uses a variety of methods to prevent such attacks but new methods of getting around such protection are always being found.

One thing you can do to improve protection on your site is to enable the built-in CF protection. You can do this if you are running on CF7 or higher by adding the scriptprotect setting to the cfapplication tag at the end of config.cfm. See the CF documentation to learn more about this setting and the various options for it. Keep in mind that this setting will affect your entire site. If you need to embed something like a flash movie into content areas of your store, setting scriptprotect to "All" or "Form" will prevent that.

- **Session Sharing or Crossing** – CFWebstore version 6.40 is now coded with a new setting for whether you use a shared SSL or not. If you can set up your SSL to match your store domain exactly, you can leave this setting turned off, which will make session spoofing and sharing less likely to occur. If you use a shared SSL, the store will need to append session IDs to the URL when crossing from the non-SSL to SSL areas of your site. Occasionally you may run into an issue where customers report seeing other user's data when in your store. This is caused by them using a link to enter the site that has the Session identifiers on it (CFID and CFTOKEN). CFWebstore is coded to prevent search engines from using such a link, but occasionally a user will send out a link unknowingly including these session tokens. CFWebstore is coded to detect and prevent this issue, but it is less likely to occur if you use a dedicated SSL and do not have to put the session IDs on the URL. If this is not possible however, be aware that the code that will clear the session uses an internal variable to check for javascript redirects. To prevent the software from accidentally logging users out, be sure that any internal javascript code that redirects the user (such as a location.href function) contains 'redirect=yes' on the URL. Admin links that run in the main content window should also contain the string 'inframes=yes' to prevent breaking out of the admin frameset.

ADDING NEW PAYMENT GATEWAYS

CFWebstore includes code to handle some of the more popular gateways currently being used. You may find however that you need to add a new gateway to support your customer's needs. This section will give you some basic information on the pages and sections to modify to add a new gateway.

1. Add the new gateway to Online Processor selection in the Payment Settings. This is done on the shopping\admin\payment\dsp_cards.cfm page.
2. Create a new dsp_xxx.cfm page for the settings needed for this processor. You can use one of the existing gateway settings pages as a template for your new page. Generally, this page will have settings for the type of authorization (authorize only or capture funds), test mode, etc.
3. Add the cfinclude for your new settings page on the dsp_process.cfm page.

4. Now you are ready to update the checkout section to include your new gateway. The shopping\checkout\creditcards directory contains the custom tags and action pages for running payment gateways. If the gateway does not already have a ColdFusion tag available, you will need to write your own. Depending on the service you are using, you may be able to base the code on an existing tag in the store. The authorizenet30.cfm page for instance is used for AuthorizeNet and sends a form post to the server and receives back a response. Generally the tag will take input such as the customer information, charge amount, card information, etc. and return authorization information or an error information to the calling page.
5. After creating a tag, you will need to create the action page for the gateway (act_xxx.cfm). This is the page in CFWebstore that retrieves the settings for your gateway, calls the custom tag, and processes the response. You can base your code on any of the existing gateway pages.
6. After adding your custom tag and action page, you just need to update the checkout section to include the new option. That would be the shopping\checkout\act_pay_form.cfm. Now you're all ready to process credit cards with your new gateway!

RUNNING CFWEBSTORE INSIDE MURA CMS

Version 6.50 of CFWebstore can be run inside Mura CMS as a drop-in include on a Mura page. To run the software this way, you will need to make some simple changes to the application as follows:

1. Create a new directory under the "includes" directory for the Mura site you wish to install CFWebstore into. For example, in our Mura install, we have a site called "dogpatch" and we create a directory with the path "dogpatch/includes/store" to hold the CFWebstore install.
2. Copy all the CFWebstore files into this directory.
3. Setup the database as instructed in the Database Setup section.
4. Add a ColdFusion mapping to the CFWebstore "cfcs" directory.
5. Open the fbx_Settings.cfm file and add the following line after the cfsilent line:

   ```
   <cfinclude template="config.cfm">
   ```

6. Open the setapp.cfm file and remove the cfapplication line.
7. Delete the Application.cfm file.
8. Log into your Mura site and go to the Site Navigator. Add a page for the location you wish to load the store into. For instance, I might add a page called "Store".

9. For the content of the page, use the following mura tag, with the location to where you installed your store:
    a.
10. Open the config.cfm file and enter the settings as follows:
    a) Enter the datasource name for the database you created for the Request.DB setting. Add username and password if necessary.
    b) Modify the dbtype and servertype as needed
    c) The StoreURL and SecureURL will be your Mura site URL plus the name of the page you added for the store. For instance: “http://www.mymurasite.com/index.cfm/store/”

TYPICAL FILES USED FOR A CATEGORY PAGE

Here’s an example of a typical category page and the files used to display it. This is just a basic walkthrough of one of the main types of pages and how all the different files are pulled in to play their part of the puzzle. If you are new to Fusebox, this should help you learn how to step through the file structure to find specific code used by a page.

1. The fuseaction called is *category.display*. First, we run the fbx_Settings files for the home directory and the category circuit. This will generate all the store-wide settings that we need.
2. Next, we check the fbx_Switch.cfm file in the category directory, and find the section for “display”.
3. The first page called is *qry_get_cat.cfm*. This retrieves all the information on the selected category. This will be a cfif tag doing a CompareNoCase against “display”. In this case, it will be the first one in the page.
4. After making sure that we have a valid category, we retrieve the list of subcategories for this category with *qry_get_subcats.cfm*. If the category was not found, *errors/dsp_notfound.cfm* will be displayed.
5. Next we check to see if a custom palette was selected for this category. If a custom palette was chosen, we use *queries/qry_getcolors.cfm* to retrieve the information on this palette, and *customtags/setimages.cfm* to reset the main store images on this page.
6. Next we check for any parameters passed to this category page. These may be used by the template file for the category, for instance to set the type of product listing to use. The *includes/parseparams.cfm* is a standard page used to parse out any parameters that are passed.
7. Using the access.secure custom tag (calls *access/secure.cfm*), we check that the user has permissions to view this category page. The contentkey_list says to check the user’s list of access keys, and compare against the access key set for the category.
8. If the user has permission, we continue by displaying the category header using *dsp_catheader.cfm*. This page creates the meta tag headers and

outputs the title and description for the category. This page calls the following:

   a. *customtags/putimage.cfm* is used to output the large image and title for the category, if any
   b. *customtags/puttitle.cfm* is used to output the category title
   c. *customtags/puttext.cfm* is used to output the main category description
   d. *qry_get_catcore.cfm* retrieves the information for the page template this category uses
   e. *access/secure.cfm* is used to determine whether to output admin links for the category and what types of links to show.

9. Unless turned off with a page parameter, a line will be displayed after the header using *customtags/putline.cfm*.
10. The next page called is the selected page template (catcore) for this category. Let's take a look at the basic products template page. This template uses the *products/catcore_products.cfm* page.
11. The first page called by the template is *queries/qry_get_products.cfm*. This page will run the query that retrieves the products in the category, along with all the options, addons and custom fields associated with them. It calls the *safesearch* custom tag when running searches, *qry_stock_amounts.cfm* to get stock amounts if using cached product queries*, qry_get_opt_choices.cfm* to get all the option choices, and calls the *nextitems.cfm* page to set the list of products, used for the 'next/previous' browsing.
12. A cfmodule call to *customtags/pagethru.cfm* is used to limit the number of products output on the page, and determining which products from the recordset to output for this specific page. It creates the navigation links to move from page to page as well.
13. The parameters passed to the page are used to determine the options for the search header and search form at the top of the page. Any search form results are output using *put_search_header.cfm*, and *put_search_header.cfm* show the basic search form. An alphabetic browsing header can be shown by *put_search_header_alpha.cfm*. The search form uses *query/qry_getpicklists.cfm* to retrieve the list of product availabilities, which are then output using *customtags/form/dropdown.cfm*.
14. Depending on the settings for the category page, the subcategories or products can be output first. Let's go with subcategories. These will be output by *category/dsp_subcats.cfm*.
15. Dsp_subcats.cfm loops through each subcategory to output its listing. *customtags/putimage.cfm* is used to display the small image and/or small title for the category. *customtags/puttext.cfm* outputs the teaser text. *customtags/putline.cfm* is used for putting the lines between each subcategory. And a call to access/secure.cfm is used to determine whether to output the admin link to edit the category.
16. Back to catcore_products.cfm, now we output the products. This is done with *dsp_products.cfm*. We loop over the list of products to output the

listing for each one. This page accepts a parameter passed by the category page that specifies the type of product listing to use. Let's look at the standard product listing, which is the most extensive. This is called by *listings*/*put_standard.cfm*.

17. *do_prodlinks.cfm* is called first to create the product links, based on the search-engine safe settings for the site.
18. *queries/qry_get_prod_info.cfm* is then called to get the information specific to this product, using query-of-query functions.
19. *customtags/putimage.cfm* is used to output the teaser image and title for the product. *customtags/puttext.cfm* outputs the teaser text.
20. *access/secure.cfm* is again used to determine whether to output admin edit links.
21. Unless the product is not sold, *put_orderbox.cfm* is called to create the orderbox. The orderbox is used to output the form to order the product, as well as options, addons and pricing information.
22. From put_orderbox.cfm we call the discounts and promotions components (in cfcs/shopping) to determine any discount and/or promotion messages to output for the product.
23. put_price.cfm is used to output pricing information. This sets prices according to retail, wholesale, and group prices, and shows the price with VAT tax (if any set) and currency exchange price.
24. The *product.qty_discount* fuseaction is called to output a table of any quantity discounts for the product.
25. If the product does not have any options or addons and the orderbox is not turned on, *customtags/putimage.cfm* is used to output the order button image.
26. If product reviews are turned on and available for this product, the *product.reviews* fuseaction will display the review summary and links.
27. *put_options.cfm* is used to create the product option selectboxes and *put_addons.cfm* is used to create the product addons.
28. A final call on dsp_products.cfm to *customtags/putline.cfm* to output a line between product listings and we're done!

ADDITIONAL CODE TIPS

Here's just some additional tips and information on the coding in CFWebstore.

1. The variable "webpage_title" is used throughout the store to set the browser title for the page. You'll see the output of this variable in the put_layouthead.cfm layout file.
2. If you make manual changes to the database you may need to reset the variables on the store by using the Reset Cache link in the admin menu. This will update any cached queries and components for the store. This also works for changing the Product of the Day.
3. You can also refresh most cached queries by adding a "Refresh=Yes" to the URL. This will refresh most cached data, other than the CFCs stored in application memory. Allowing these to be refreshed from a URL can leave a store open to denial-of-service attacks.
4. The users section contains a wide range of options and capability for customization. See the comments on the users/fbx_Switch.cfm page for some more information.
5. If your categories aren't showing up when you go to add products, you probably forgot to set the page template properly. Categories in CFWebstore® can be used for various things, so you need to be sure to choose a template that can display products.
6. If your products aren't showing up, double-check your inventory settings. If your store is set to not show out-of-stock items, you need to enter stock amounts for all products for them to show in the store.
7. The go.cfm page can be used to provide users with a "shortcut" link to a particular page on your site, such as go.cfm?ID=8. By default, it is used for product pages but you can customize it for a different type of page if you wish.
8. Invoices and packing lists are displayed using a custom letterhead tag. Customize this page (customtags\format_letterhead.cfm) with your store logo, address, etc.
9. For more tips and commonly asked questions, visit the FAQs page at cfwebstore.com.

Other Useful Sites And Products

1. Fusebox.org – Homepage for the Fusebox project and a good place to get more information or discuss Fusebox with other users
2. Beyond Compare – My favorite file comparison tool. Indispensible for performing upgrades
3. ExamDiff Pro – Another good file and directory comparison tool.
4. TOAD for MySQL – Nice freeware tool for managing MySQL databases
5. SearchEngine Watch – Top site for search engine optimization strategies
6. Fusebox Logs – Open source log software for Fusebox
7. FCKeditor – Homesite for the WYSIWYG editor used for CFWebstore
8. qForms – Homesite for the javascript form validation routines
9. SESConverter – Information on the custom tag used for the sitemap page (SES links). Contains additional setup information if your web server does not process these links properly.