



The CartIt Commerce System Upgrade Guide

UNIX 4.x to 8.0 on UNIX/Linux

Version 8.0

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Introduction

This document provides instructions for both the developer and the merchant, although both roles may apply to you. It is provided in this format so CartIt Commerce Developers may also use this document when assisting clients.

What You Should NOT Do

1. DO NOT open any of the pages mentioned in this file in a visual HTML editor, including FrontPage. While some of these files have an HTML extension, they are not true Web pages.
2. DO NOT install the new CommerceBuddy until you have reviewed these instructions in their entirety.
3. DO NOT install CartIt until you reviewed these instructions in their entirety.

Procedure 1 - Developer (Upload New Data Files)

Open each of these files and remove the name of the file from the file. We placed the name of the file in each of the files so that when new users install the software, they will see the file names on the shopping cart pages. You can also edit these files as you need to.

NOTE: *checkoutheader.html* is displayed at checkout in non-secure mode. This file currently exists with the release of CartIt for UNIX on your server, so you do NOT have to upload this again. We mention it only because it can be easily confused with the following files, as the file is part of the same family.

`checkoutfooter.html`

The footer of the checkout pages displayed in non-secure mode.

`checkoutsslheader.html`

The header of the checkout pages displayed in secure mode.

`checkoutsslfooter.html`

The footer of the checkout pages displayed in secure mode.

The following files do not have to be edited. However, you may want to look at the contents of each file, as each file contains a message or instructions for the shopper.

`checkout_billing_address.html`

Displayed just under the text that asks for the billing address.

`checkout_cc_extend.html`

Displayed just under the credit card number input. This also has the HTML required to ask your shopper for the phone number on the back of their credit card. This file contains partial HTML and partial tables, so only professional CartIt Commerce Developers should edit this file.

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checkout_form_reject_error.html

The full Web page that is displayed to your shopper if they enter invalid information or omit information, for example, if they forget to select a payment method.

The following files are examples of how to use the `dynamic_cartit` CFO; they are not required:

dynamic_cartit_quick.html

dynamic_cartit_ref.html

dynamic_cartit_frame.html

cartit_customer_invoice.html

This is a full Web page and ImpactObject template that is sent to the shopper. This is a FULL HTML document; CartIt now sends HTML invoices since this is the most common method of receiving e-mail for most Internet users.

shopper_banned.html

This file is displayed to your shopper if they are banned from using the CartIt checkout system online. This file serves no purpose if you are not using the Real-time Credit Card Processing method, since only this method has the option to ban a shopper.

currency_options_header.html AND currency_options_footer.html

These two files are for the header and footer of the Currency options page. Currency options are displayed to your shoppers only if you enter and update the Currency settings on the Web site.

header_empty_but_saved.html

If your shopper has no items in their shopping cart, but they do have items in their Saved for Later shopping list, this document is used as the header of the cart instead of header.html. Thus, this document should be similar to header.html, but should contain text that explains to the shopper that they can move items from their Saved for Later list to their active shopping cart.

Where we are now

At this point, you have uploaded all of the new HTML files to the data directory. CartIt is undisturbed, as these files have no impact on the older CartIt system.

Procedure 2 - Developer (Prepare for Server Install)

1. Download all of the cgi scripts from the cgi-bin to back them up.
2. Open the OLD cartitcf.cgi and use it for reference on how to configure the new cartitcf.cgi and cartitimg.util AND configure cartitcf.cgi and cartitimg.util NOW.
3. Enter the NEW license number for CartIt in cartitcf.cgi.

4. Double-check your editing in this file.
5. Note the path to PERL in the OLD scripts you have downloaded and open each of the NEW cgi scripts to make sure the path to PERL in them is correct.
6. Make sure you entered the path to PERL in ALL of the cgi scripts.
7. Please note that many of the configurations for cartitcf.cgi have moved to cartitimg.util and to CommerceBuddy, the desktop program. For example, the URL to the cgi-bin and the URL to the SSL cgi-bin are now entered in CommerceBuddy.

Where we are now

At this point, all of the new html files are on the server in the data directory. The new CartIt system is configured and the first line of each script points to PERL, the same path that the old scripts had. **The Old CartIt is still on the server, and again, is not disturbed. You have not uploaded the NEW scripts at this point.**

Procedure 3 - Merchant (Prepare for Upgrade)

Download the New CommerceBuddy **BUT DO NOT INSTALL IT.** We put this procedure here only so that you have as little down time as possible. The download can take a long time on a slow connection, so download CommerceBuddy now.

Start the OLD CommerceBuddy, the only one you currently have installed on your system.

1. Check for orders [Online] -> "Retrieve Orders and Information" then click "Start Session".
2. Immediately after checking for orders, click "Maintenance" -> "Lock CartIt" then click "Start Session".
3. Finally, use the "Poll the Server" option then click "Start Session".
4. Read the list of results from the poll server; it should say "No New Orders", "No New Accounts" and "Site is Locked".
5. If you have orders or accounts, repeat Steps 1-4 again until you see "No New Orders" and "No New Accounts".

The goal here is to make 100% sure that you have no pending orders, no pending accounts and to lock CartIt to prevent new orders and accounts from being created while the Developer is installing the new CartIt system. The Lock CartIt feature was designed for this purpose.

Where we are now

Your Web Site is up and running but CartIt is not running, the cart is locked. While this may give you cause to rush, don't! The next procedures are critical.

Procedure 4 - Merchant (CommerceBuddy Installation)

1. Double check to make sure you have the domain name the software will be licensed to and the NEW registration number for CartIt 8.0 (this is also the CommerceBuddy registration key) and the registration number for the Gift Module if you have chosen that option.
2. Close CommerceBuddy if it is running.
3. Backup (DO NOT MOVE NOR REMOVE) your old CommerceBuddy databases, these databases are found in the 'data' sub folder of the installation directory, THIS IS STRONGLY ADVISED! You do not have to back up the '\html\' folder that is in the data folder, this folder has a lot of files that can take a very long time to back up and CommerceBuddy will not make any changes to these HTML files.
4. Install the new CommerceBuddy into the exact same location that the old CommerceBuddy was installed, NOT the data folder but the folder the data folder was in, C:\CartIt Corporation\CartIt CommerceBuddy by default.

NOTE: During the beta period of CartIt 5.0 through 8.0, we found that some merchants accidentally installed CommerceBuddy into the wrong folder. If this is done and you start CommerceBuddy, it will not be the correct install and you may have problems. To be very clear, you want to install CommerceBuddy into the folder that `commercebuddy.exe` is in now.

5. Once you have installed CommerceBuddy, you must run the CommerceBuddy Database Repair Utility. It will be on the Start menu, usually in a folder called CartIt Corporation. **DO THIS NOW!**
6. Start CommerceBuddy, look in the bottom right corner of the screen, it should say "Unregistered!"
7. Click "Help" -> "About CommerceBuddy".
8. Enter your domain name and Registration Number(s) then click "OK".
9. Look in the bottom right corner of the screen, it should now show as registered.
10. Click the "Orders" view and you should see all of your orders. If so, then you have done a successful install. If not, then you most likely installed into the incorrect folder. If this is the case, you must click "Start" -> "Settings" -> "Control Panel" and uninstall CommerceBuddy. Then start over at Step 4.

11. In CommerceBuddy, on the "Options" menu, the first menu item is "Vital Configs." Click on EACH of these configurations under the main "Options" menu and configure them NOW. Some of these configurations will remain the same. However, the path to the cgi-bin and the secure cgi-bin will come from cartitcf.cgi.
12. Double-check and configure all of the options in the software.
13. Close CommerceBuddy and tell your Developer that they can start the final installation process, as you are now up and running.
14. Do not use CommerceBuddy until your CartIt Commerce Developer has completed the final installation process.

Procedure 5 - Developer (CartIt Installation)

1. Upload the CartIt CGI script to the cgi-bin.
2. chmod 755 the cartit_quick.cgi, cartitshiplib.cgi, and cartitcclib.cgi scripts. The other scripts should maintain their file permissions. If they do not, then chmod 755 all of the CGI scripts.

Procedure 6 - Merchant (Unlock and Test Site)

1. Start CommerceBuddy.
2. Click the "ONLINE" button, then select "Maintenance" -> "Unlock CartIt" then click the "Start Session" button. Wait for the session to complete.
3. Click "Get Orders & Information" then click the "Start Session" button. Wait for the session to complete.
4. Click "Publish Options & Configurations" then click the "Start Session" button. Wait for the session to complete.
5. Test all aspects of this site. Place several orders using different payment methods (Check, C.O.D., Credit Card, etc.). Read all screens.

Congratulations!

You have now upgraded to a faster and more powerful shopping cart system!