User Manual

xFlow Lite v1.x

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PART I

XFLOW LITE

1.) Introduction

This manual contains step-by-step directions on how to setup and use the xFlow Lite for your online business. Through this manual you will learn exactly how to setup all features of the xFlow Lite, and manage your entire membership database with ease. The xFlow Lite allows you to quickly and easily setup a fully featured online business, with full support for an unlimited number of members, membership billing, commissions, genealogy tracking, plus much more.

This manual assumes you already have xFlow Lite installed on your web server, and have access to the Admin Control Panel. If you do not, please contact your supplier to have the software installed. Otherwise, you may view the full installation manual by visiting the Online Documentation site at http://docs.envex.com/.

1.1 Server Requirements

In order to use the xFlow Lite you must already have a web hosting account which supports the following requirements:

- UNIX / LINUX web server with SSH access
- Perl 5 or higher
- One (1) clean mySQL database
- Crontab privileges
- Ability to set the *DefaultType* in Apache through the .htaccess file
- Ability to execute CGI scripts outside of the /cgi-bin/ directory
- gcc Complier

The server must also have the following Perl modules installed. Most web hosting companies will install the Perl modules for you at no charge.

- IO::Socket
- Digest::MD5
- Crypt::SSLeay *(Net::SSL)*
- DBI
- DBD::mysql

2.) Getting Started

This chapter will take you step-by-step through the setup process of xFlow Lite, and teach you how to setup all needed aspects of your online business. After this chapter, your new online business should be fully operational and ready to launch. To begin, login to your Admin Control Panel which you should already have access to.

2.1 Quick Setup Guide

This section is only meant for experienced users of xFlow Lite, and provides a quick reference guide of all steps that need to be completed in order to fully setup the xFlow Lite.

1. Complete First Time Setup *(Setup->First Time Setup)*
2. Create member types *(Setup->Member Settings)*
3. Create upgrade fees *(Setup->Member Settings)*
4. Define compensation plan *(Setup->Program Settings)*
5. Define bonus settings *(Setup->Bonus Settings)*
6. Create payment methods *(Setup->Payment Settings)*
7. Update self replicating web site *(Setup->Manage Web Site)*
8. Setup Member's Only Area *(Setup->Manage Member Area)*
9. Add links to signup form and Member Area login
10. Create e-mail notifications *(Communicate->Notification Settings)*
11. Create your first member *(Database->Create New Member)*

2.2 First Time Setup

Once the software has been installed, you first need to complete First Time Setup. This allows you to define many settings that shape how the overall software will work, such as your member database, how transactions are processed, and so on. Once you have logged into your Admin Control Panel, go to the *Setup->First Time Setup* menu to begin First Time Setup. The rest of this section explains all aspects of First Time Setup in detail.

2.2.1 Administrator Information

Three fields are contained within this section, which ask for the name and e-mail address of the main administrator, and a customer support e-mail address. The name and e-mail address for the administrator are only used for system messages, such as when modules and upgrades are installed, an error occurs during automated backups, and so on. An e-mail will be sent to the customer support e-mail address every time a member submits the *Contact Support* form within the Member Area.

2.2.2 General Settings

1.) Which date format would you like all dates displayed in?

This question allows you to specify the exact date format would you would like all dates displayed in. Every date displayed by the software will be displayed in the format you select here.

2.) Would you like every member to receive their own personal hit tracker? The software will log all traffic to their self replicating web site, which can later be viewed through the Member's Only Area.

If you select yes, the software will automatically track all traffic to every member's self replicating web site. Members can then view detailed statistics on all traffic to their web site through the Member Area. The only downfall to this feature is it requires additional disk space on your server, but not enough to cause a concern.

3.) When the software sends an e-mail message, would you like it to automatically wrap lines that are over 60 characters long? This helps ensure e-mail messages can be read in all e-mail clients.

It is recommended that you set this option to Yes, as it will ensure all members will be able to read e-mail messages sent from the software. The software will automatically word wrap all e-mail messages sent, to ensure people using e-mail clients that don't automatically word wrap e-mail messages will still be able to read them.

4.) Which currency sign would you like displayed in front of all amounts?

This is the currency sign that will be placed in front of all amounts displayed by the software.

5.) Please enter the home page of your self replicating web site(s)? Please note, this should only be the name of a web page, and not a full URL.

This is the home page of your member's self replicating web sites. If someone visits a member's self replicating web site without specifying a web page *(eg. http://www.domain.com/members/jsmith/)*, the software will automatically display the web page specified here. Please note, this should only be the name of a web page, and not a URL.

6.) Enter the username of a default member for the software. When someone views a self replicating web site, for which the member doesn't exist, the software will display the web site using this members information. Leave this field blank if you do not want to assign a default member:

This should be the username of the first member you will create in your database, who will be the member representing the company itself *(eg. admin, company, etc.)*. This will be the top member of your program.

7.) Would you like the software to automatically contact the Envex Developments server every 24 hours, to check for any newly released upgrades, and automatically install them?

If yes, the software will automatically contact the upgrade server every 24 hours and install any new upgrades that are available. It is recommended you set this option to yes.

2.2.3 Downline Structure

This section contains three fields allowing to you define the exact genealogy structure that all downlines will be placed in. You may choose between a *Network (unlimited width)* or *Forced Matrix* structure, and specify the number of levels deep and wide. If you do not wish to track downlines, leave this fields blank.

2.2.4 Newuser Form Settings

1.) When new members join, would you like the software to automatically force their username to lowercase?

It is beneficial to select yes for this setting, as it helps make member management easier. By having all usernames lowercase, when you need to lookup a member in the database, you know their username is all lowercase. This also prevents two members from having almost identical usernames such as *jsmith* and *Jsmith*.

2.) Would you like a random six character password generated for all new members?

This is only beneficial if you would like to ensure all members have a valid e-mail address. By having a random password generated for all new members, the only way for a new member to receive their password is through e-mail, helping ensure their e-mail address is valid.

3.) Would you like the software to place a cookie in visitor's browsers, to track which member's self replicating web site they originally visited? This way, if someone joins at a later date, the original member will get credit, regardless of what web site they joined from.

If yes, the software will automatically place a cookie in a visitor's web browser when they first visit a member's self replicating web site. If that visitor joins at any future date, their sponsor will be the first member's web site they visited, regardless of which member's web site they join under. This helps ensure that members receive credit for people who visit their self replicating web site first. This setting is personal preference.

2.2.5 Database Information

This section only contains one text field, asking how many fields you would like your member database to contain. If you are unsure, on a sheet of paper write down all information you would like to store on all members, and enter that number of fields here. Please note, by default the software stores the username and sponsor of each member in the database, and there's no need to include them in this number.

You must have a minimum of three fields in your member database, for the name, e-mail address and password of each member. On the next page you will be able to specify the name and type of each database field.

2.2.6 Transaction Settings

1.) After how many days would you like pending transactions to automatically expire?

This section is only applicable if you're using third party payment processors, such as PayPal, INTGold or 2CheckOut. When a member submits a payment, it is first adding to the database as pending, and they are redirected to the appropriate payment processor. If they don't physically send the payment immediately, they will have this number of days to do so before the software automatically declines the payment.

2.) When new members first join and pay a membership fee via credit card, how would you like the initial transaction processed?

This question is only applicable if you are using a real-time credit card processor such as AuthorizeNet, and allows you to specify how credit cards are processed when a new member first joins. Having the credit cards only authorized means you will have to manually approve all new credit card payments through the *Trasnaction->Pending Deposits* menu of the Admin Control Panel, but this also allows you to check for fraudulent transactions.

If a credit card is only authorized, the card will not be charged until you approve the payment through the *Transaction->Pending Deposits* menu. On the other hand, if you select to immediately charge the credit cards, they will be automatically charged without any manual work on your behalf.

3.) When recurring (eg. monthly) transactions are charged to a member's account, how would you like the credit card transaction processed?

Same as the above question, except this only applies to recurring credit card charges. For example, if you are charging a monthly membership fee, this is how all credit cards will be charged.

4.) Would you like to change the member status according to the status of any membership fees owed by the member? This means when a member first joins they will be Pending, and will not become an Active member until their membership fee has been approved. This will also ensure a new member is not added into the downlines until they have paid their membership fee.

It is recommend that you set this setting to yes, as it will ensure members to not receive access to the Member's Only Area, or be added into the downlines until they have paid their membership fee. It will also ensure that if a member's recurring fee is ever declined, their account will be automatically deactivated.

5.) When charging members, would you like the software to deduct the amount from the commissions owing to the member?

This setting is personal preference, and allows you to define whether or not would you like membership and product fees deducted from a member's commission owing or not. If yes, the software will deduct all membership fees from the member's commission balance, instead of charging them. If no, the software will always charge the member the full membership fee amount regardless of how much commission they are owed.

6.) Would you like to restrict the software so it only adds commission to Active members?

If yes, the software will never add commission to a member who does not have an active status. The downfall of this is, if a member is only temporarily deactivated for a few days, they will lose all commissions earned during those few days.

2.2.7 E-Mail Settings

This section only contains one question, asking you which method of sending e-mail you would like to use. It is highly recommend you select *Sendmail* as your method of sending e-mail. You should now be completed the first page, and can submit the form, which will bring you to the second page of First Time Setup.

The first section on the next page allows you to specify either the location to Sendmail or the SMTP server used to send e-mail. The software has already tried to determine this for you, but check to ensure it is correct. If you are unsure, please contact your server administrator for this information.

2.2.8 Member Database Fields

This section allows you to define your member database. The table contains one row for every database field you defined in the previous page, and allows you to specify the name of each database field. The field names can not contain spaces or special characters, but can contain underscores which will be shown as spaces when displayed throughout the software.

For each database field, you can also choose the field type. Using the select boxes provided, select the type of each database field, depending on the type of information being stored. If you select either *Select List* or *Radio Buttons*, you will be able to define the exact option available on the next page.

The table also contains four additional columns, each of which contains a checkbox. The first two columns allow you to specify which database fields members can view and edit through the Member's Area. When a member manages their account within the Member Area, they will only be able to view and edit information in the checked fields.

The last two columns allow you to specify which fields are required, and which fields a duplicate check should be performed on. When a new member joins, the software will ensure they specified something for all required fields, and if any are left blank, the software will give off an error message. For all checked duplicate fields, the software will ensure no two members have the same information in that field. This is useful if you never want to have two members with the same e-mail address.

The second page of First Time Setup should now be completed once you have defined all fields of your member database. Submit the form to continue on to the third page.

2.2.9 Database Information

This sections contains one table that asks which fields in your member database contain various information. This is to help the software determine exactly where in your database information is stored, so it can properly retrieve the information when needed. Go through each row in the table, and select the member database field that contains the specified information.

The only three fields you are required to select are the name, e-mail address and password. Other than those three fields, the rest can be left blank, as they are not required by the software. Any of the select lists that begin with *Not Applicable*, you're welcome to leave blank.

2.2.10 Member Database Option Fields

This section contains one table, and is only applicable if you chose either *Select List* or *Radio Buttons* on the previous page for any database fields. This table contains one row for each applicable database field, and allows you to select which type of options the member will be able to choose from.

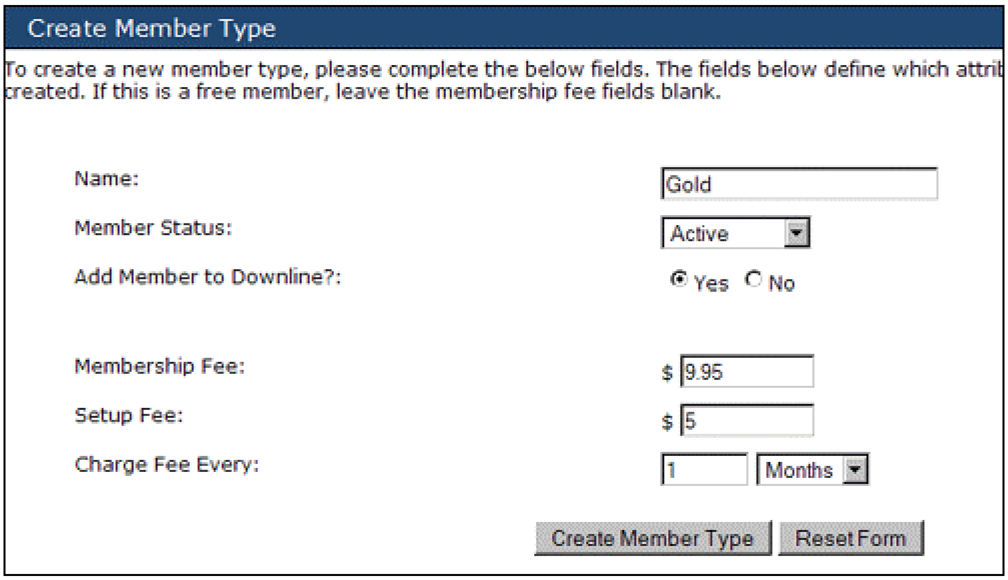
There are three pre-defined sets of options that you can select from, if the database field is meant for the country, or state / province of your members. Otherwise, you can select *Custom Options List*, and on the next page a large text box will be displayed allowing you to define all options for the list. If the next page is displayed, you simply need to enter one value per line in the text boxes for each value the member may select. When displayed in the web browser, the member will only be able to select one of these options.

2.2.11 First Time Setup Complete!

The First Time Setup process should now be fully completed, and you should be at a screen saying the process was successful. There are still several other actions that need to be completed before your business is fully operational, which are explained throughout the rest of this chapter.

2.3 Create Member Types

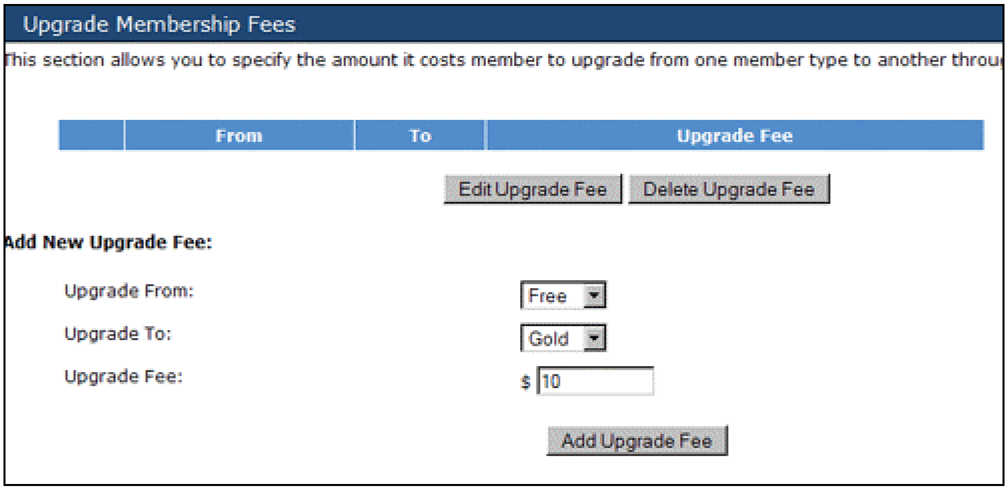
Now that First Time Setup is complete, you need to create all member types for your online business. Go to the *Setup->Member Settings* menu, and the second section will look like:



Complete the section shown in the above image for every member type you require. With the above example, the member type is named *Gold*, and will be automatically charged a membership fee of $9.95 every month with an additional $5 setup fee when they first join. Continue this process until all needed member types have been created for your online business.

2.4 Create Upgrade Fees

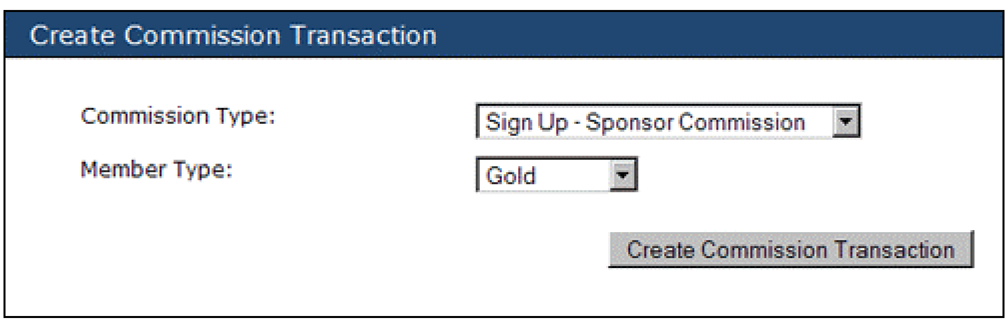
This step is only applicable if you would like to give members the ability to automatically upgrade from one member type to another through the Member's Only Area. To setup upgrade fees, go to the *Setup->Member Settings* menu, and at the bottom of the page you will see:



Complete the form shown above for all different upgrade fess you require. Through the Member Area, members will be able to automatically upgrade their membership, and will be shown all options you create in this section. Members will be able to choose the desired option, immediately pay the appropriate fee, and will be automatically upgraded to the appropriate member type.

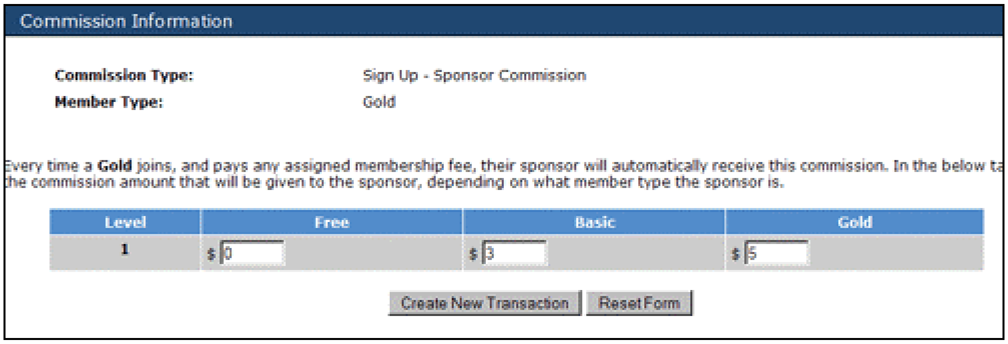
2.5 Define Compensation Plan

If you would like commissions added when members recruit other members, go to the *Setup->Program Settings* menu to define your compensation plan. The bottom section on this page allows you to create new commission transactions, and looks like:



This small forms asks for the commission type and member type for the new commission transaction. Sign Up commissions are added immediately after a new member joins and pays their membership fee, while recurring commissions are added after a member has paid their recurring (eg. monthly) membership fee. The member type allows you to specify which member type must join and pay their membership fee in order for this commission to be added.

Using the above example, the commission will be added to the member's sponsor every time a *Gold* member joins. The next page shown after you submit the form allows you to define the exact commission amounts that will be added. This page will look something like:

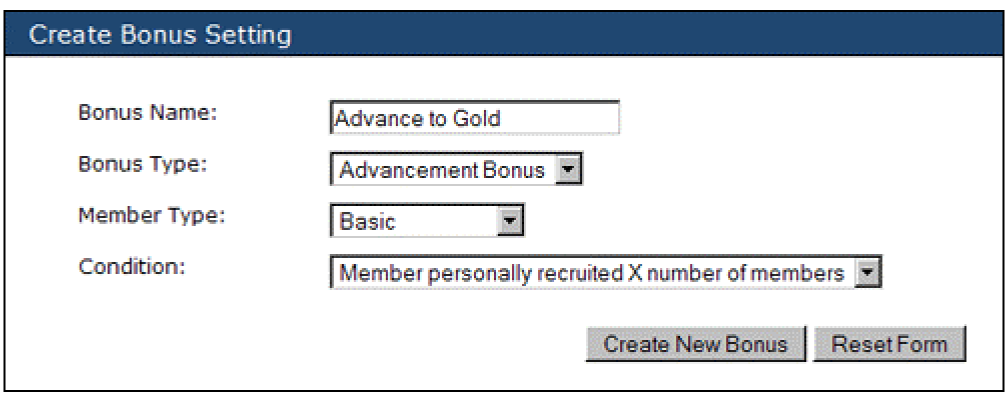


The table contains one column for each member type in the database, and one row for each needed downline level. The commission amounts you specify in this table will be added to the sponsor / upline, depending on the member type the sponsor is. Using the above example, every time a new *Gold* member joins, if their sponsor is a *Basic* member they will receive $3 in commission, and if their sponsor is a *Gold* member they will receive $5 in commission.

Continue the above process until you have created all needed commission transactions for your online business.

2.6 Define Bonus Settings

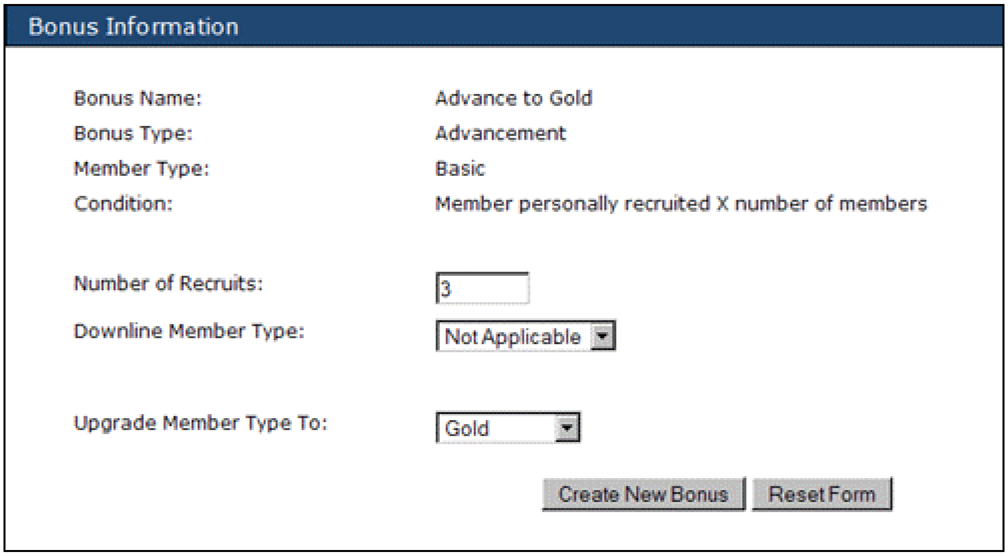
Bonus settings allow you to award bonuses to members when they meet a certain condition. For example, you can advance someone to another member type or award a commission bonus once a member has recruited a certain number of members. You can define all bonus settings through the *Setup->Bonus Settings* menu. The bottom section on this page allows you to create new settings, and looks like:



You can enter any name you wish for the bonus setting. There are two different bonus types available; an advancement bonus which is used to automatically advance someone to another member type, and a commission bonus which is used to award commission. You are not required to define a member type, but can if you only want a certain member type to receive this bonus.

The last select box on this form allows you to specify one of three conditions which must occur in order for the bonus to be awarded. You will be able to further define the new bonus setting on the next page. Using the above example, this bonus will be awarded everything a *Basic* member personally recruits a certain number of members.

Once you have completed the four questions, submit the form and a second page will be displayed allowing you to complete the bonus setting. The contents of this page depends on what you defined for the bonus setting, and will look something like:

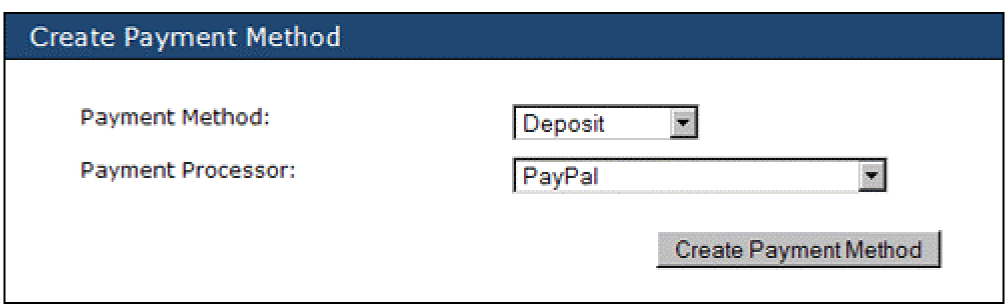


The first part of this page asks for specific information regarding the condition, such as the number of member someone must recruit. The second section asks for either the member type to advance the member to, or the commission amount to award to the member. Using the above example, once a *Basic* member personally recruits 3 members of any member type, they will be automatically advanced to a *Gold* member.

Once you have completed this page, submit the form to create the new bonus setting. Continue creating all needed bonus settings for your online business using the same process as above.

2.7 Create Payment Methods

Next you need to create all payment methods, which can be done though the *Setup->Payment Settings* menu. The second box on the page allows you to create a new payment method, and looks like:



There are two different types of payment methods that can be created:

- **Deposit** - Payment methods used to physically charge members for things such as membership fees and products.
- **Withdraw** – Payment methods used to send funds to members for commission payouts.

Using the two available select boxes, select which payment method and processor you would like to create. If your desired payment processor is not in the list, select the *"Other – Manual Processing"* option. The next page will ask specific information regarding the payment processor you chose, such as the account ID# and password.

Depending on the payment processor you chose, there may be some additional things you must do. Below explains all specifics on the different payment processors.

NOTE: If the payment processor is not listed below, then nothing extra needs to be done. The payment processor doesn't require anything additional to be done, in order for it to be integrated with xFlow Lite.

2.7.1 PayPal

In order to use PayPal's automation features (IPN), you must have either a Business or Premier account. If you don't, you must upgrade your PayPal account. You must also activate IPN and specify the IPN URL, which can be done by completing the below steps:

1. Login to your PayPal account through https://www.paypal.com/
2. Click on the Profile tab
3. Under "Selling Preferences", click on the *Instant Payment Notification Preferences* link
4. Click on the Edit submit button, located in the bottom right hand corner of the screen
5. Make sure the checkbox is checked, to activate IPN
6. Enter the IPN URL, which will be the following URL. Of course, replace domain.com with your actual domain name.
   http://www.domain.com/cgi-bin/xlite/remote/paypal.cgi

7. Click on the Save submit button to activate IPN, and save the changes.

2.7.2 2CheckOut

If you're using 2CheckOut, you must specify your secret word and return URLs. To do this, complete the following steps:

1. Login to your 2CheckOut account through http://www.2checkout.com/
2. Go to the *Account Details->Return* menu
3. You need to specify the Return URL for both, "repurchase.2c Passback Parameters", and "cartpurchase.2c Passback Parameters". The rest of the Return URL fields can be left blank. The Return URL you must specify in the two fields will be:
   http://www.domain.com/cgi-bin/xflow/remote/2checkout.cgi

   Of course, replace domain.com with your actual domain name. Also make sure you select Yes to the questions asking if you would like a routine sent back after a payment is processed.

4. Near the bottom of the page, under the "Overall Passback Parameters" section, make sure the Direct Return box is set to Yes.
5. Under the "Overall Passback Parameters", there is also a field allowing you to enter a Secret Word. This is to help prevent fraudulent transactions, and can be anything you wish. Please make sure the secret word you enter in 2CheckOut is the same as xFlow Lite.
6. Click on the "Save Passback Parameters" submit button to save the changes.

2.7.3 2CheckOut (recurring payments)

There are two technical problems with using 2CheckOut for recurring (eg. monthly) payments. First, the 2CheckOut server will only notify xFlow Lite after the first payment, but will not for recurring payments. This means xFlow Lite has no way of knowing if recurring payments were successfully processed or not. Because of this, you will be required to manually approve all recurring payments through the *Transaction->Pending Deposits* menu of the Admin Control Panel.

Second, the 2CheckOut server requires you to first create all recurring products through their system, and requires the product information with every payment request. For every recurring transaction you need to process through xFlow Lite, you will need to create a recurring product with the same information in the 2CheckOut system.

Every time you create a *Membership Fee* transaction through the *Setup->Member Settings* menu, that transaction will be assigned an ID#. You must create a recurring product in the 2CheckOut system with the same ID#, and amounts.

2.7.4 StormPay

In order to use StormPay, you must define your notification URL and secret code. You can do this by completing the following steps:

1. Login to your StormPay account
2. Go to the Profile / Setup section, then the IPN Configuration menu
3. Change the URL to the following. Of course, change domain.com to your actual domain name.
   http://www.domain.com/cgi-bin/xflow/remote/stormpay.cgi
4. Specify a secret word of your choosing, and make sure the status is set to Active
5. Make sure only the two following check boxes are checked:

   - Payments received through ‘Buy’ or ‘Check Out’ buttons
   - Subscriptions payments received
6. Submit the form to save your changes

2.7.5 PaySystems

You must have a TPP-Pro account in order to use PaySystems. If you are not currently setup on the TPP-Pro system, you can do so by completing the following steps:

1. Go to http://www.revecom.com/ and create a TPP-Catalog test account.
2. Wait for a confirmation e-mail, which contains your company ID, and password.
3. Contact the PaySystems merchant support department, and ask for your account to be changed to TPP-Pro.

2.7.6 WorldPay

In order to use WorldPay, you must have a Junior Select Installation ID#. If you do not have one, please contact WorldPay customer support and request one. If you would like to process recurring (eg. monthly) payments with WorldPay, you must have FuturePay enabled on your account.

You must also specify the callback URL, and a secret word. To do this, complete the following steps:

1. Login to your WorldPay account

2. Go to the Admin section
3. Make sure the Callback checkbox is checked, and specify the Callback URL, which will be the following URL. Of course, change domain.com to your actual domain name.
   http://www.domain.com/cgi-bin/xflow/remote/worldpay.cgi

4. If you're accepting recurring transactions, and have FuturePay enabled on your WorldPay account, make sure the FuturePay Callback checkbox is checked.
5. You must contact WorldPay customer support, and give them a secret word to be used. This is to prevent fraudulent transactions, and must be the same as the secret word you specify in xFlow.
6. Submit the form to save the changes.

2.7.7 Ikobo

In order to use Ikobo, you must define your IPN URL and password. To do this, complete the following steps:

1. Login to your Ikobo account
2. Click on the Sell Online tab, and once there, click on the 'Instant Payment Notification' link under the Account Features box.
3. Make sure the checkbox is selected to enable IPN, leave the IPN Format field at "Ampersand (&) Delimited)", and change the IPN URL to:
   http://www.domain.com/cgi-bin/xflow/remote/ikobo.cgi
4. Enter any password you would like for your IPN password. Remember the password, as you will need to enter it again when creating Ikobo as a payment processor through the Admin Control Panel.
5. Submit the form to save the changes.

2.7.8 Linkpoint

In order to use Linkpoint, you must upload your .PEM file, which you will receive from Linkpoint once your account is opened. Upload this file to your server at the location */xlite_data/linkpoint.pem*.

2.7.9 Quickbooks Check Generation

You can use Quickbooks, offered by http://www.intuit.com/, and have xFlow create IIF files of commission payouts, allowing you to import the file into Quickbooks, and automatically have all commission checks ready to be printed.

Within Quickbooks, you must create both, a bank account which commissions are withdrawn from, and an expense account which commissions are drawn against. You must specify the name of both accounts in xFlow Lite, when creating the payment method.

2.8 Upload Self Replicating Web Site

You now need to upload your self replicating web site, which can be done through the *Setup->Manage Web Site* menu. This is the personalized web site that each of your members will receive. This feature works just like a file manager, and allows you to upload and manage all files within your web site.

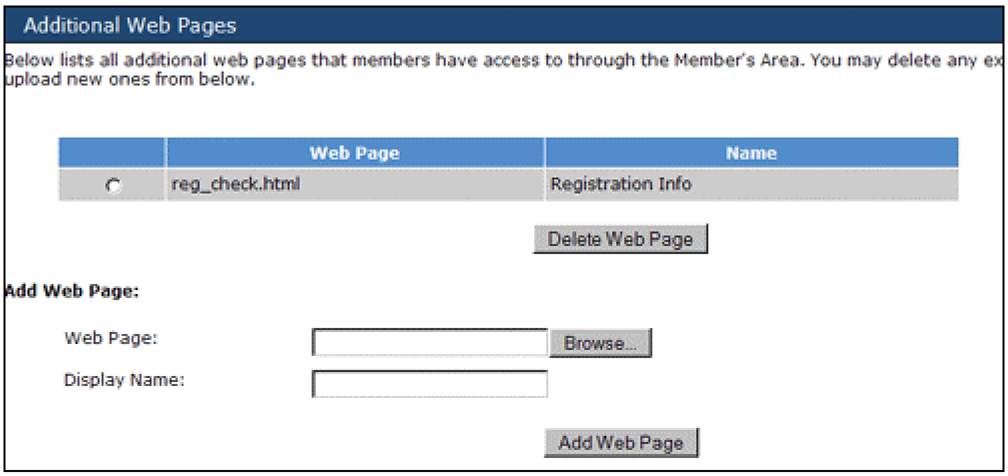
For full information on the self replicating web site, please visit *Chapter 3. Self Replicating Web Site*. If you have never uploaded a self replicating web site using xFlow Lite before, please read this chapter as it contains a great deal of important information.

2.9 Setup Member's Only Area

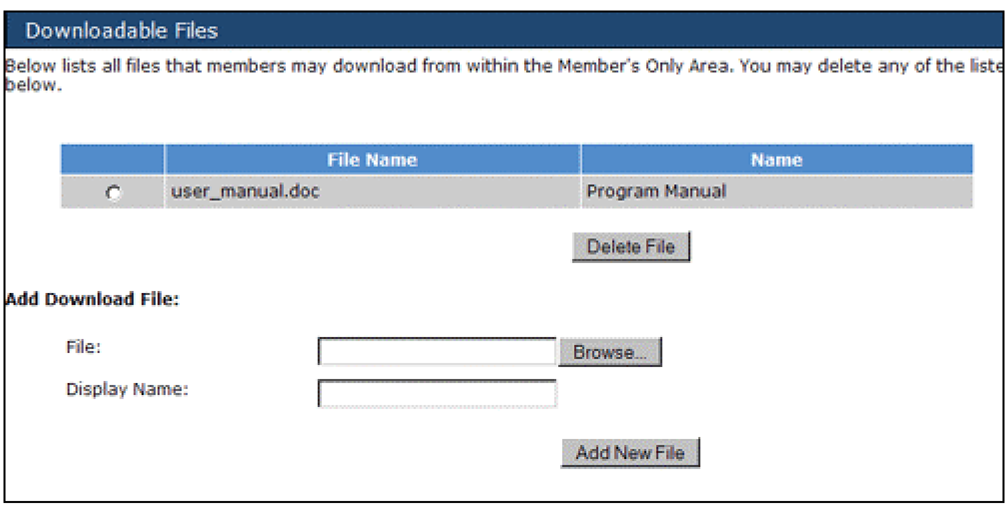
xFlow Lite comes with a pre-setup Member's Only Area which requires almost no work, and also supports additional web pages and file downloads. Even though the Member's Only Area is pre-setup, it is also fully customizable. For full information please see the Developer Manual which can be found on the Online Documentation site at http://docs.envex.com/.

You can manage all aspects of the Member Area through the *Setup->Manage Member Area* menu. The first section on this page contains one table, which allows you to select the actions that members can perform through the Member's Area. When a member logs into the Member's Area, they will only be able to perform the actions you check in this box.

The second section on this page allows you to manage additional web pages, and looks like:



This section allows you to upload additional files that members can view through the Member's Only Area. When a member views the Member's Only Area, they will see a small table listing all additional web pages you upload in this section. The last section on this page allows you to manage all downloadable files within the Member's Only Area and looks like:



This section allows you to upload all desired downloadable files, which members can download from within the Member's Only Area. This is useful for things such as e-books, PDF and zip files, or any other file you would like members to download. Continue uploading all additional web pages and downloadable files as needed for your Member's Only Area.

2.10 Add Links to Signup Form and Member's Area

Now that your self replicating web site is uploaded, you need to add the appropriate links into your web site so members can signup and login to the Member's Only Area. To all members to signup, simply place the following link anywhere in your self replicating web site:

http://www.domain.com/cgi-bin/xlite/signup.cgi?reseller=~username~

When someone clicks on the above link from within a member's self replicating web site, they will be taken to a signup form where they can immediately join your program and pay any required membership fee. To allow members to login to the Member's Only Area, place a link anywhere within your web site to:

http://www.domain.com/cgi-bin/xlite/member_area/index.cgi

Make sure to replace *domain.com* in the above URLs to your actual domain name. When someone visits the above URL, they will be prompted to enter their username and password to the Member's Only Area. If you wish, you may fully customize all aspects of the signup and login forms. For full information on how to do so, please visit the Developer Manual located within the Online Documentation site at http://docs.envex.com/.

2.11 Create E-Mail Notifications

Next you need to create all needed notifications that will automatically send out personalized e-mail messages at the appropriate times. The notification system is very flexible, allowing you to define a specific condition for each notification. Every time that condition occurs, the e-mail message will be automatically sent out.

2.11.1 Create Notifications

To start, go to the *Communicate->Notification Settings* menu. The bottom of the page allows you to create a new notification. There are three different types of notifications you can create, which are explained in the below table:

Notification Type	Description
Database Modification	Used for general database actions, such as when members are created / deleted, when their member type changes, and so on. This notification type is for things such as new member welcome messages, to notify the sponsor when a member joins under them, and so on.
Commission / Membership Fee Processed	When other miscellaneous actions occur such as when a coupon code is generated, or payment method added.

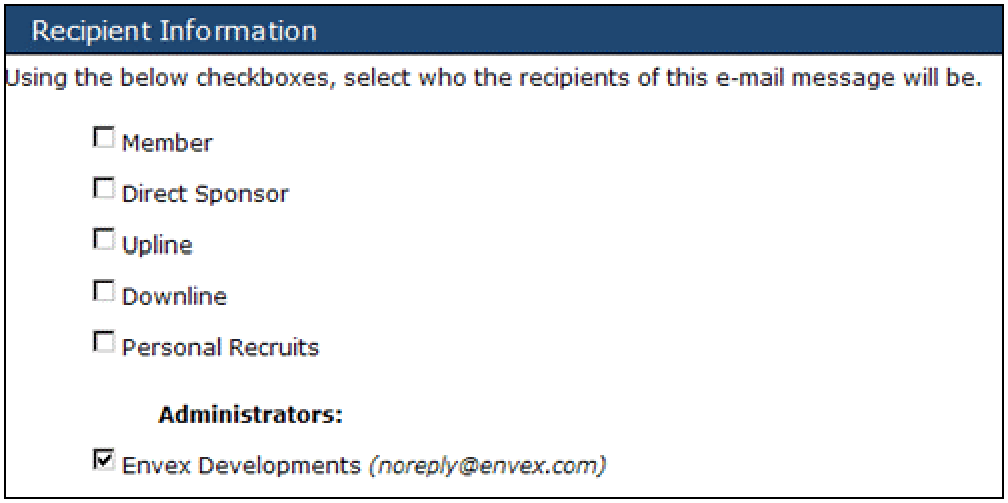
Select the notification type you could like to create, and submit the form. The next page asks for different information on the new notification:

Condition Information

This section asks for various information, allowing you to specify exactly when the notification will be automatically sent. Complete these fields with the desired information, and every time that action occurs, the notification will be automatically sent.

Recipient Information

The second section asks for recipient information, and looks like:

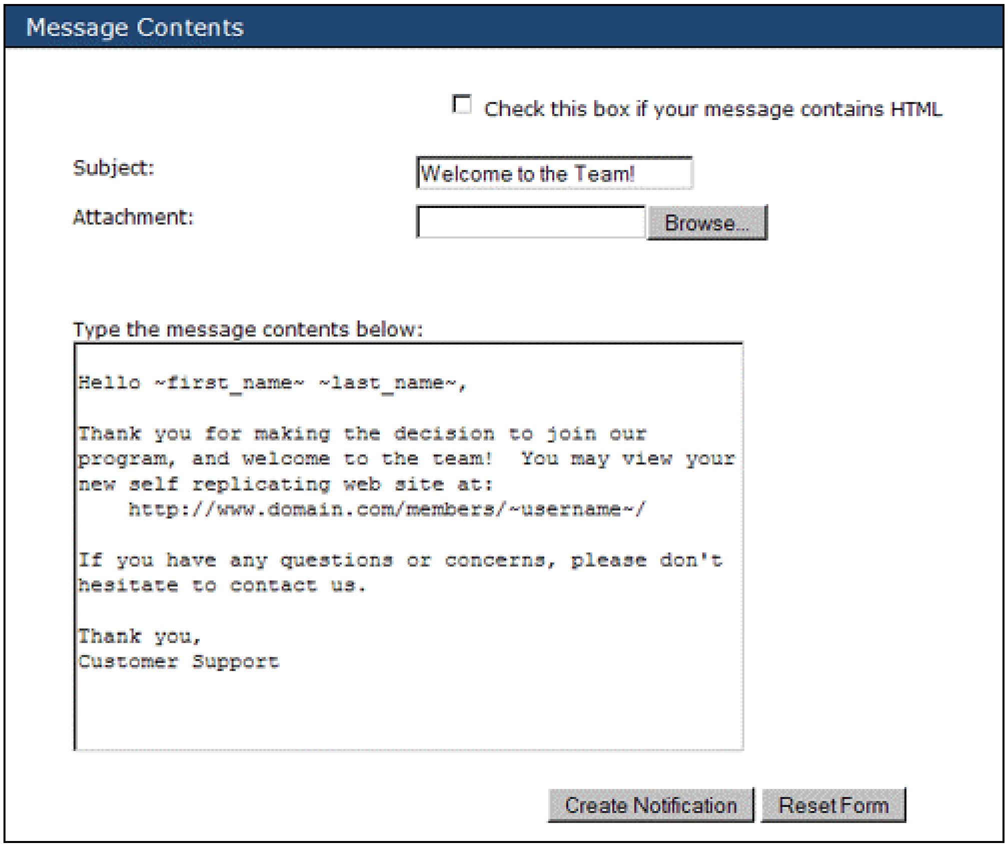


This section allows you to select exactly who will receive the e-mail message when the notification is processed. The recipients are relative to the member who the notification is being processed against. For example, if you select *Upline*, the e-mail message will be sent to the entire member's upline.

Sender Information

The last section on this page asks for the sender information, and looks like:

This section allows you to specify who the sender of the e-mail message is. Simply select who you would like placed in the *'From:'* line of the e-mail message, and submit the form to continue. The next page allows you to specify the contents of the e-mail message, and looks like:



Enter the contents of the e-mail message in the provided box. You may personalize the e-mail message by using merge fields. At the top of the screen, there are several boxes containing various fields that the e-mail message can be personalized with. Click on one of the fields, and the needed merge field will be automatically placed inside the contents of the e-mail message. When the e-mail message is sent, the merge field will be automatically replaced with the appropriate personalized information.

Once you've entered the contents of the e-mail message, submit the form to save the notification. Continue creating notifications as described above, until you have created all desired notifications for your business.

2.11.2 Password Reminder Message

You should also specify contents for the password reminder e-mail message that is sent when members request their password be e-mailed to them. Go to the *Communicate->Notification Settings* menu, and click on the *"View Details"* link for the System Notifications. The only e-mail message contained in this section is the password reminder message, which you can edit.

2.12 Create Your First Member

If you have successfully completed all above steps, your new online business should be fully setup within xFlow Lite and ready to launch. The last step is to create your first member, which can be done through the *Database->Create New Member* menu. For the username, you should use the username of the Default Member you specified during First Time Setup. Leave the sponsor field blank as there is no sponsor for this member, and complete the rest of the form with any information you would like.

Once you have filled out all fields, submit the form and your first member will be instantly created in the database. The next page will also provide a link to the member's self replicating web site as well. Thank you for making the decision to use xFlow Lite for your online business, and we hope our software has met your expectations.

3.) Self Replicating Web Sites

This chapter explains all details of your self replicating web site, and how to integrate it with xFlow Lite. The software supports virtually any web site with the only exception being that your web site can not contain server-side programming. This includes things such as PHP, ASP, Frontpage extenstions, ColdFusion, and so on. Other than this one exception, xFlow Lite will fully support any existing web site.

3.1 Personalize Your Web Site

Personalizing your self replicating web site with member's personal information is as simple as adding merge fields into your web pages. A merge field is nothing more than the name of a field in your member database surrounded with **~** marks. For example, if you have a field in your member database named *first_name* or *email*, you can add the merge fields *~first_name~* and *~email~* anywhere within your self replicating web site.

When someone views the web site, the merge fields will be automatically replaced with the member's personal information. During First Time Setup you defined the fields for your member database. You can use any of these database fields as merge fields within your self replicating web site, by simply placing **~** marks around them.

3.2 Image Links

You should never upload images into your self replicating web site, and instead, should use conventional methods such as FTP to upload images to your server. You should only have one copy of images on your server, which should be stored in the standard */images/* directory, or similar.

All image links throughout your web pages must be absolute URLs as well, and not relative URLs. For example, you may currently have image links within your pages such as:

```
<img src="images/title.gif">
```

These image links need to be changed to:

```
<img src="http://www.domain.com/images/title.gif">
```

All images in your web pages must be changed to absolute URLs as explained above, or else they will not show up correctly on your self replicating web site.

3.3 HTML Links

All HTML links must also be formatted in a certain way, so people stay on a member's self replicating web site, to ensure your members always get proper credit for new signups. All HTML links must be absolute URLs. For example, if you have an HTML link which looks like:

```
<a href="page.html">
```

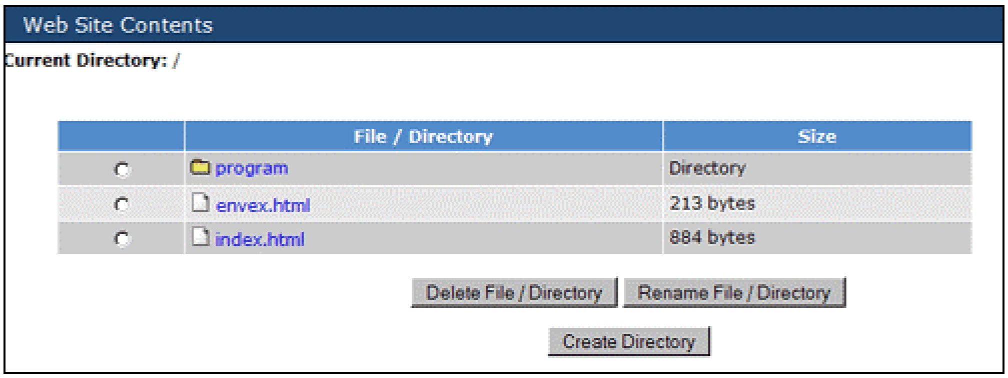
That needs to be changed to:

```
<a href="http://www.domain.com/members/~username~/page.html">
```

When somebody visits the web page, the ~username~ merge field will be replaced with the member's username. This ensures nobody will ever stray from the member's self replicating web site, and the member will always receive full credit for all signups.

3.4 Managing Your Web Site

You can upload and manage all pages within your self replicating web site through the *Setup->Manage Web Site* menu of the Admin Control Panel. The first section on this page contains a list of all files and directories contained within your web site that you can manage, and looks something like:



This table allows you to perform various actions against the displayed files and directories. You may enter a directory and manage the files inside by clicking on the name of the directory, and you may update a web page by clicking on the name of the web page. You can also delete and rename files, and create a directory by clicking on the appropriate submit button in this section.

The second section on this page allows you to upload up to ten files at once to your self replicating web site. Using the provided text fields, select the needed web pages from your computer and submit the form to upload them. Any changes made to your self replicating web site will immediately take affect on all member's web sites.

3.5 Member URLs

By default, your member's self replicating web sites will be located at:

http://www.domain.com/members/USERNAME/

If you would like, you may rename the */members/* in the URL to anything you wish, such as */rep/*, */id/*, or anything else you would like. This can be done by completing the below steps. If you are unsure of how to do this, please contact either your server administrator or customer support.

1. Login to your server via FTP, and change directories to your document root where the *members* file is located. Rename the *members* file to anything you wish, such as *reps*, *id*, or anything else.

2. Go to the *Setup->General Settings* menu of the Admin Control Panel, and click on the *System Settings* submit button at the top of the page. At the bottom of the next page, you will see a field asking for the *"URL to /members/ Directory"*. Change the ending of this field, and replace the */members* to whatever needed, such as */reps* or

/id.

If you have successfully completed the two steps above, the URL to all member's self replicating web sites will now be changed as needed.

3.5.1 Sub-Domain Replication

xFlow Lite also supports sub-domain replication, meaning the URL to your member's self replicating web sites can be located at *http://USERNAME.domain.com/*. However, this does require changes to the server configuration which your server administrator or hosting company will need to complete. You can setup sub-domain replication by completing the following steps:

1. Wildcard DNS must be setup for your domain name. This allows *ANYTHING.domain.com* to resolve in your web browser.

2. A new <VirtualHost> directive must be created within Apache for your domain. The new directive must be placed below all others for your domain name, with the document root being the full path to the *show.cgi* script on your server, and should look something like:

   ```
   <VirtualHost 64.21.76.23:80>
           ServerName *.domain.com
           DocumentRoot /home/username/public_html/show.cgi
   </VirtualHost>
   ```

3. Go to the *Setup->General Settings* menu of your Admin Control Panel, and click on the *"System Settings"* submit button at the top of the page. At the bottom of the page, change the field asking for the URL to the /members/ directory to:

   http://~username~.domain.com/

   The ~username~ merge field must be present in the URL, which informs the software sub-domain replication is being used.

If you have successfully completed the above three steps, then sub-domain replication will be activate on your installation. The URL to all member's self replicating web sites will now be located at http://USERNAME.domain.com/.

3.6 <INCLUDE> Tags

If wanted, you may use *<INCLUDE>* tags within your self replicating web site, which allow you include contents from another file. For example, this allows you to easily place a standard header and footer into every web page of your web site. The *<INCLUDE>* HTML tags work very similar to Server Side Includes.

First, upload the files you would like to include to your self replicating web site through the *Setup->Manage Web Site* menu. Then any where in the web pages of your self replicating web site, place the HTML tag *<INCLUDE filename.html>*. When someone views a member's self replicating web site, the HTML tag will be automatically replaced with the contents of *filename.html*.

For example, if you uploaded the web page *header.html* to your self replicating web site, you could have it automatically included in any other web page by placing the following HTML tag:

```
<INCLUDE header.htmlt>
```

4.) Member Management

xFlow Lite contains full features to easily manage your entire membership database, while making everything as automated as possible. Through the Admin Control Panel you can easily create, manage and search members. This chapter explains how to use all membership management features of xFlow Lite.

4.1 Creating Members

You can manually create new members through the *Database->Create New Member* menu. The page contains four different sections allowing you to specify full information for the new member. The first section asks for the new member's profile, and contains all member database fields you defined during First Time Setup.

You must specify a unique username of the member, which will be used to identify the new member throughout the database, and will also be used for their self replicating web site. The sponsor field allows you to enter the username of the new member's sponsor. If the new member does not have a sponsor, leave this field blank. After you have completed the first section with the new member's information, the second section asks four basic questions including the member type.

The last two sections on this page allow you to specify both, deposit and withdraw payment information. If you do not wish to define payment information for the member, you may override these sections by checking the box at the top of each section. The deposit payment method is used to charge the member for all membership fees, and the withdraw payment method is used to send funds to the member such as commission pay outs.

Once you have completed all sections, submit the form and the new member will be automatically created. The next page will show a summary of the new member, including the URL to their new self replicating web site.

4.2 Manage Members

You may view full details or update a member's profile through the *Database->Manage Member* menu. This feature allows you to specify the username or ID number of a member, and will display a full summary of their account. The summary includes the URL to the member's self replicating web site, full profile information, and a summary of the member's genealogy and transaction account.

Through this menu you may view full details on the member's web site statistics, update their profile, view their downline members, and manage their transaction account.

4.3 Deleting Members

You can instantly delete members from your database through the *Database->Delete Member* menu. This feature will first ask you to specify the username or ID number of a member you would like to delete, and then ask you to confirm the information. You may also select how previously added commissions should be handled.

Please note, once you delete a member all of their information will be permanently removed from the database, and this operation can not be undone. This includes the member's full profile, genealogy, transaction account, and every other piece of information throughout the database relating to the member.

4.4 Manage Genealogy

You can view full details on a member's downline through the *Database->Manage Genealogy* menu. This feature shows full information on all upline sponsor's of the member, and a small summary listing the number of downline members on each level. You can then view details on all individual downline members by clicking on the *View Details* link beside each downline level.

4.4.1 Change Sponsor

You may also change a member's sponsor through the *Database->Change Sponsor* menu. This feature first asks for the username or ID number of a member, and the next page allows you to specify the new sponsor and exactly what how you wanted the sponsor changed. When changing a member's sponsor, you can either select to delete their entire downline and re-enter them under their new sponsor, or move their downline organization with them under the new sponsor.

5.) Commissions and Fees

Through xFlow Lite, each member receives their own transaction account, which acts like a mini bank account. All funds relating to a member flow throughsic their transaction account, including membership fees, commissions, product purchases, and so on. Every individual transaction against a member's account is either a deposit or withdrawal, just like a bank account.

5.1 Transaction Accounts

As stated above, each member receives their own transaction account. You can view full details on a member's transaction account through the *Transaction->Manage Account* menu. This feature displays a full monthly summary of the member's account, plus a list of all pending transactions and recurring withdrawals assigned to the account.

You may view a detailed list of all individual transactions assigned to a member's account by clicking on the appropriate month in the summary list. Every transaction is either a deposit or withdraw, and the ending balance can be seen beside each transaction.

5.2 Membership Fees

A different membership fee can be defined for each member type through the *Setup->Member Settings* menu. When a new member joins, xFlow Lite will automatically charge them the membership fee associated with their member type. The membership fee consists of both, a withdrawal and a deposit transaction. The withdrawal transaction is to deduct the needed funds from the member's account, and the deposit transaction is for the physical payment.

In other words, in order to withdraw the membership fee from the member's account, the funds must first be there. For this, a deposit transaction is added to the account as well, which is the physical payment. Once the payment has been received, the deposit transaction will be approved which will also immediately approve the withdraw transaction for the membership fee as well.

If you chose to have member status handled accordingly with membership fees during First Time Setup, when a member first joins they will first be created with a status of Pending. This simply means their account is pending, as their membership fee has not yet been approved. Once their membership fee is approved, their account will be immediately activated. This is done to help ensure new members don't receive access to the Member Area until they have paid their membership fee.

5.3 Physical Payments

Every time a member submits payment through xFlow Lite, regardless of the payment processor, a new deposit will be added to their transaction account for the amount of the payment. If the payment is being made through a third party processor such as PayPal, INTGold, or 2CheckOut, it will first be added to the database as a pending deposit.

For third party processors, the member will be automatically redirected to the payment server such as PayPal, to submit payment. Once the member has submitted payment, a request will be automatically sent to xFlow Lite, which will approve the payment. This entire process happens automatically within seconds, and no manual work is required.

If the member is submitting payment through a through a real-time credit card processor such as AuthorizeNet or VeriSign, xFlow Lite will automatically send the payment transaction behind the scenes to the payment processor and charge the credit card. The member is never redirected to another payment server, and everything stays on the same server as xFlow Lite. This entire process happens automatically within seconds.

5.4 Commission Transactions

Through the *Setup->Program Settings* menu you can define your compensation plan. Commissions are only ever added once a membership fee has been approvedg , to ensure that commissions which are not accounted for are never added. When a member first joins, once their membership fee has been approved all appropriate *Sign Up* commissions will be immediately added to the sponsor / upline.

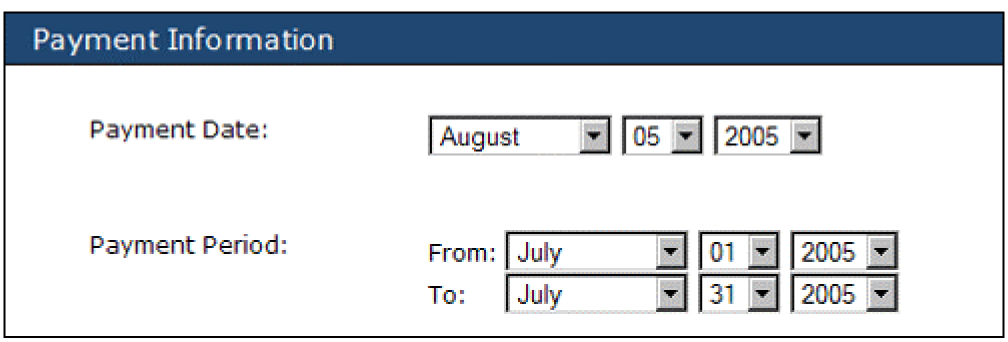
Every commission added to member is added as a deposit transaction into their account. Full details of all commissions added can be viewed through the *Transaction->Manage Account* menu of the Admin Control Panel, or the *Transaction History* feature of the Member's Only Area.

5.5 Commission Pay Outs

Ever so often you will need to pay out all commissions owed to members. The commission features within xFlow Lite have been made to automate this process as much as possible, while ensuring all commission pay outs can be reviewed among other things. This is a three step process, as explained below.

Step 1 – Calculate Commission Pay Outs

The first step is to calculate exactly how much is owed to each member, which can be done through the *Transaction->Pay Commission* menu. At the top of this page, you can define the exact payment date and period for the commission pay out. This section looks like:

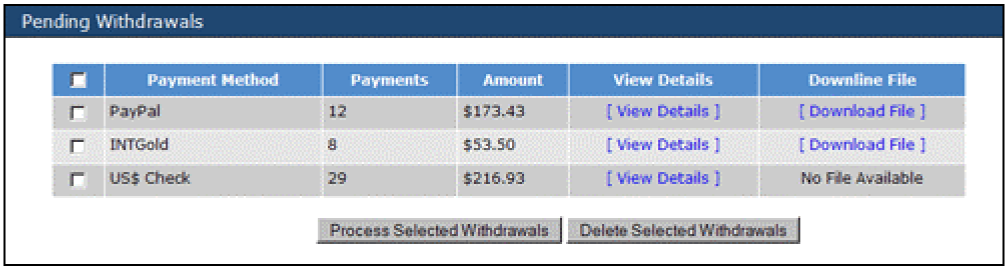


The Payment Date you specify should be the date members are physically sent their funds, and the Payment Period should be the period for which commissions are being paid. The next two sections on this page allow you to either pay commissions to a single member or all members in the database. If you choose to pay all members in the database, you can select the member status, type and minimum commission payout amount.

Once complete, submit the form and xFlow Lite will go though all appropriate member accounts and calculate how much commission is owed to each member. One pending withdrawal transaction will be added to each member's account for commissions owed.

Step 2 – Physically Send Commissions

Now that the amount to pay each member has been determined, you need to physically send the funds to your members. Go to the *Transaction->Pending Withdrawals* menu, which will display one table listing all payment methods and how much in payments is pending for each method. This page will look something like:


Pending Withdrawals

	Payment Method	Payments	Amount	View Details	Downline File
	PayPal	12	$173.43	[View Details]	[Download File]
	INTGold	8	$53.50	[View Details]	[Download File]
	US$ Check	29	$216.93	[View Details]	No File Available

Process Selected Withdrawals | Delete Selected Withdrawals

If there is a *Download File* link beside a payment method, you may click on it and xFlow Lite will automatically generate the appropriate batch file for that payment processor. You can then import the generated file into the payment processor, and have the payments immediately sent. Otherwise, you can click the *View Details* link to see full details on exactly how much is owed to each member.

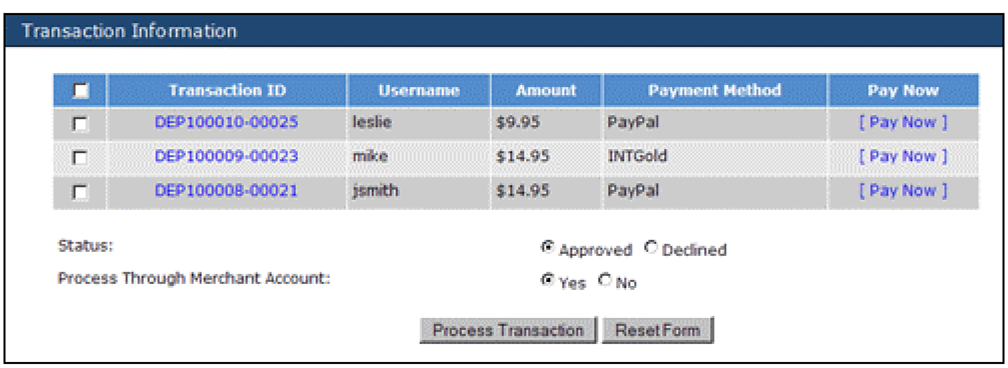
Step 3 – Process Pending Withdrawals

Once you have physically sent all payments to your members, you can process them through the *Transaction->Pending Withdrawals* menu. Select the appropriate payment processors for which you have already sent funds, and submit the form. At this point, xFlow Lite will approve the selected pending withdrawals, and add them to the member's actual transaction accounts.

5.6 Pending Deposits

Pending deposits are either physical payments from members for which payment hasn't been received yet, or credit card payments that have only been authorized and are awaiting your approval. For example, if a member selects to send payment through PayPal, but doesn't actually submit the funds through PayPal, the payment will be a pending deposit.

You can manually process all pending deposits through the *Transaction->Pending Deposits* menu, which will look like:


Transaction Information

	Transaction ID	Username	Amount	Payment Method	Pay Now
	DEP100010-00025	leslie	$9.95	PayPal	[Pay Now]
	DEP100009-00023	mike	$14.95	INTGold	[Pay Now]
	DEP100008-00021	jsmith	$14.95	PayPal	[Pay Now]

Status: Approved Declined

Process Through Merchant Account: Yes No

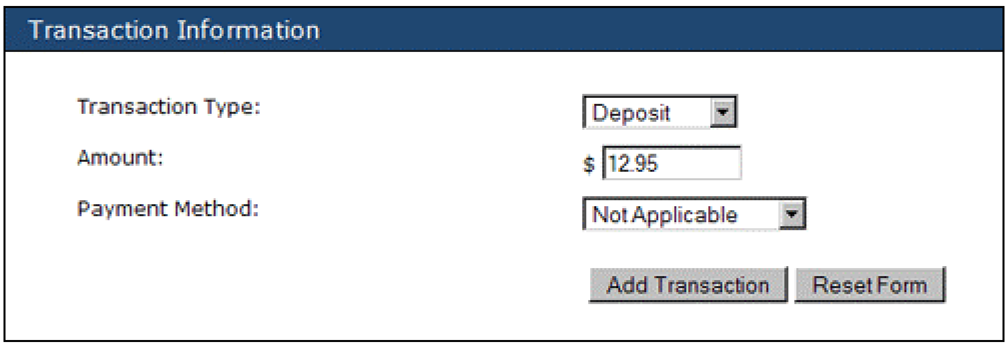
Process Transaction | Reset Form

This table shows all list of all pending deposits in the database that are waiting to be processed. Approving a pending deposit through this menu is the exact same as if a member physically submits the payment. You can process pending deposits by simply checking the desired transactions, and completing the few simple fields on the HTML form.

The *"Process Through Merchant Account"* field is only applicable if you're using a real-time credit card processor, and specifies whether or not to send a request to the merchant account to capture the funds on the credit card. Generally, this option should always be set to yes. This will automatically send a request to the merchant account behind the scenes, the capture the previous authorization and actually charge the credit card.

5.7 Adding Transactions

You can manually add a transaction or modify the balance of a member's account by adding an individual transaction through the *Transaction->Add Transaction* menu. This feature first asks you for the username or ID number of a member, and the next page allows you to specify information about the transaction, and looks like:



For a transaction type you can select either a deposit, withdraw or payment. A deposit or withdraw will modify the member's account balance accordingly, and a payment will physically charge the member the specified amount. The amount of the payment will only be deposited into the member's account once it has been approved. The Payment Method field is only required if you are adding a payment to the member's account.

6.) Additional Features

There are various additional feature contained within xFlow Lite to help you manage your online business with ease and efficiency. These features include many things such as a fully featured notification system, multiple administrators, automated database backups, plus more. This chapter explains all additional features of xFlow Lite.

6.1 Installing Upgrades / Modules

At times Envex Developments will release upgrades or new modules for the software. These can be automatically installed through the *Setup->Install Upgra. des / Modules* menu of the Admin Control Panel. The first page contains a submit button, allowing you to retrieve a list of all available upgrades and modules. When you click this button, xFlow Lite will automatically contact the Envex Developments upgrade server, and request all needed information.

The next page will display a list of all available upgrades and modules for the software. Select the desired upgrades / modules, and submit the form, which will place them into an installation queue. Within 30 minutes a script on your server will automatically execute, download the needed upgrades / modules from the Envex Developments server and automatically install them on your server.

6.2 E-Mail All Members

You can instantly send a personalized e-mail message to all members of your database, or just a select group of members through the *Communicate->E-Mail All Members* menu of the Admin Control Panel. The first page of this feature allows you to specify the exact group of members you would like to send an e-mail to. If you would like to e-mail all members in the database, leave all fields as is and submit the form.

The next page allows you to specify the exact contents of the e-mail message to send. Once you have completed the e-mail message, submit the form, and you will be able to preview exactly what will be sent to all members. Once you have confirmed the e-mail message to be sent, it will be immediately sent to all selected members.

6.3 Reporting Features

Several reporting features have been built into xFlow Lite, allowing you to view the overall status and growth of your online business. All reports can be accessed through the *Reports* menu of the Admin Control Panel. The features within this menu allow you to export the entire member database into a text delimited file, view a growth summary of all members that have joined, view a transaction summary of all funds that have been processed through the software, and also view a summary of all combined traffic to all member's self replicating web sites.

6.4 Database Backups

Your entire database is automatically backed up every night, and all backup archives are stored within the */cgi-bin/backup/* directory of your server. To help conserve disk space on your server, backup archives are kept for five days before they're deleted from your server. Even though the database is backup up every night, you may also perform a manual backup through the *Other->Backup Database* menu.

If you ever need your database reverted to a backup, please contact customer support and we will be happy to assist you. Alternatively, you can view detailed instructions on how to revert the database to a backup through the Developer manual of the Online Documentation site at http://docs.envex.com/.

6.5 Multiple Administrators

xFlow Lite fully supports multiple administrators, which can be managed through the *Other->Manage Administrators* menu. Each administrator has their own username and password to access the Admin Control Panel. Please note, each administrator can only be logged in once at the same time, so if multiple people will be access the Admin Control Panel, it's best to create a separate administrator for each person.

6.6 Import EIF File

The *Other->Import EIF File* menu allows you to import an EIF *(Envex Import Format)* file into xFlow Lite, and perform multiple actions at once. This feature is very useful if you need to import a large number of members at once, process a large number of transactions, and so on. For full information on EIF files and how to create them, visit the EIF Specifications manual which can be found though the Online Documentation site at http://docs.envex.com/.

6.7 Manage Database Fields

You can easily manage all fields contained within the member database through the *Setup->General Settings* menu, and once there, click on the *Manage Database Fields* submit button. Through this section you can manage all fields in your member database, and also add a new field.

PART II

SHOPPING CART MODULE

7.) Overview

A fully featured Shopping Cart is available with xFlow Lite, allowing you to easily and professionally sell products to your members and the public. The Shopping Cart module fully supports an unlimited number of products, customizable customer database, full shipping features, commissions, plus more.

You can also define different product amounts for each member type, allowing you to give discounts on products to your members. Once a member has logged into the Member's Only Area, they can add products through the web site, and will automatically receive the discounted rate. Once a member checks out, the software will display the appropriate order form allowing them to transfer the funds through their main transaction account.

8.) Getting Started

This chapter explains how to setup and use the Shopping Cart for your online business. Once you have completed all steps in this chapter, the Shopping Cart will be fully operational and ready to use.

8.1 Installation

The Shopping Cart is an additional module, and is not installed on your server with xFlow Lite. If you would like to use the Shopping Cart, it can be automatically installed through the *Setup->Install Upgrades / Modules* menu. Select the Shopping Cart from the list of available modules, and within 30 minutes you will receive an e-mail message saying it has been successfully installed on your server.

8.2 Reload Crontab File

In order for the Shopping Cart to work correctly, mainly recurring payments, you must reload our crontab file after the module has been installed. To do this login to your server through SSH, change directories to the */xflow_data/* directory, and type the following at the SSH prompt:

```
crontab xflow.crontab
```

If you do not receive any message after typing the above command, then the crontab file has been successfully loaded. If you are not sure how to do this, please contact customer support and we will load your crontab file for you.

8.3 Move order.cgi Script

This step is completely optional, and only required if you have access to an SSL server, and want to make sure all orders are placed on the SSL server. To do this, you need to move the order.cgi script on your server. FTP into your server, and change to the /cgi-bin/xlite/modules/shop/bin/ directory on your server. You will see an order.cgi script in this directory that you can download, then re-upload to your SSL server. Please make note of the URL of the order.cgi script after you've moved it through the *Setup->General Settings* menu.

8.4 General Settings

Now that the Shopping Cart module has been installed, a new *Shopping Cart* button will appear under the Installed Modules section of your Admin Control Panel. When you click on this button, you will enter the Admin Panel menu for the Shopping Cart menu. Go to the *Setup->General Settings* menu and look over all settings to ensure they're correct. Make any needed changes to the settings for your specific online business.

With installation, the customer database is already defined using general contact information for customers. If wanted, you may click on the *Manage Customer Fields* submit button at the top of the page, and modify your customer database as needed. You may also do the same with the product database through the same page.

8.5 Create Payment Methods

Next you need to define all payment method which customers can submit payment with. This can be done through the *Setup->Payment Settings* menu, and works exactly the same as the main xFlow Lite menu. For full details on creating payment methods, please refer to *Section 2.7. Create Payment Methods*.

8.6 Tax Settings

The Shopping Cart fully supports taxes, which can be managed through the *Setup->Tax Settings* menu. This feature allows you to define all needed taxes, and allows you to specify exactly which members to charge and how much to charge them. You can define whether the tax is a fixed dollar amount or a percentage, and also define the exact customer information in order for the tax to be added.

For example, if you would like to add 7% GST for all Canadian customers, you could create a tax setting so every time the country field is *Canada*, the 7% would be automatically added to their order. Continue creating all needed tax settings as stated above, and continue to the next step.

8.7 Create Shipping Methods

This step is only applicable if you're using the shipping features of the Shopping Cart, and allows you to define the exact shipping methods that will be used. In order to use the shipping features, you must first turn them on through the *Setup->General Settings* menu. All shipping methods can be managed through the *Setup->Shipping Methods* menu, which allows you to create, edit and delete shipping methods.

Simply enter the name of all shipping methods that will be used, such as *UPS, FedEx*, and so on. When creating products you will be able to specify a different amount for each shipping method. When a customer places an order, the software will automatically calculate the shipping fee, and allow the customer to choose which shipping method they would like to use.

8.8 Manage Customer Area

The Shopping Cart comes with a full password protected Customer Area, allowing customers to manage their account and view their order history. You can setup the entire Customer Area through the *Setup->Manage Customer Area* menu. This feature works almost identical to managing the main Member's Only Area, and allows you to specify the actions customers are allowed to perform, and upload and additional web pages and downloadable files.

8.9 Notification Settings

Next you need to create all notification settings for the Shopping Cart, which can be done through the *Communicate->Notification Settings* menu. This allows you to define all e-mail messages that will be sent by the Shopping Cart, and exactly when they will be sent. This works exactly the same as the main notification system.

For further information on exactly how to create e-mail notifications, please visit *Section 2.11. Create E-Mail Notifications*. Continue this process until you have created all needed notifications for the Shopping Cart.

8.10 Create Product Categories

Now that all settings for the Shopping Cart have been setup, you can begin adding products into the database. To start, you need to first create all needed product categories through the *Products->Manage Categories* menu. Through this menu you can create all needed categories for your product. Categories allow you to sort and group products as needed.

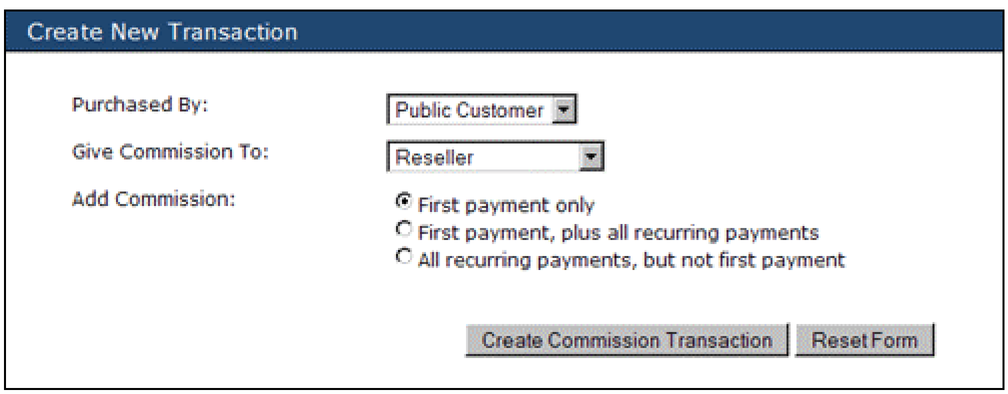
8.11 Create Products

Next you need to add all products into your database, which can be done through the *Products->Add New Product* menu. This page asks for basic product information such as the product name, amount, recurring interval, and so on. Depending on your settings, there may also be a section allowing you to enter shipping amounts, and another section allowing you to define different amounts for each member type.

Continue completing the form as many times as necessary to add all needed products into your database.

8.12 Manage Product Commissions

This step is only applicable if you wish to award commissions when a product is purchased through the Shopping Cart. You can define different commission amounts for each product, and can define all commissions through the *Product->Manage Commissions* menu. You will be first asked to specify a Product ID, and the bottom section of the next page allows you to create a new commission transaction for the product, and looks like:



For each commission transaction, you can select who it must be purchased by, who will receive the commission, and for which payments the commission should be added. The next page will allow you to specify the exact commission amounts for each member type. Every time the product is purchased by the selected person, the commission will be automatically added.

8.13 Generate HTML Links

Now that the Shopping Cart is fully setup with all products in the database, you need to add links into your web pages to link to the Shopping Cart. This can be done through the *Setup->Generate HTML Forms* menu, which allows you to generate the various links and HTML code allowing people to add products to their cart, checkout, and other things.

Alternatively, you can manually create the needed HTML links for your web site. Below explains exactly how to create the various links to link your web site into the Shopping Cart.

8.13.1 Add Product to Cart

You can allow people to add products into their shopping cart by placing a link to the following URL in your web site:

http://www.domain.com/cgi-bin/xlite/modules/shop/bin/add_cart.cgi

To specify the exact product you're adding, you must place additional information in the query string. The below table explains all variables you can specify within the query string.

Variable	Description
product_id	The ID# of the product that is being added to the person's shopping cart. You can add multiple products by separating the product IDs with a comma.
quantity	The quantity of the product to add to the person's shopping cart. If you're adding multiple products, this field can also be separated with commas to specify the quantity of each product being added.
reseller	The username of the reseller for this order. Assuming the link will be placed within the self replicating web site, the value of this should always be *~username~*, to help ensure the appropriate member is always given commission for the order.

For example, to add the product ID# CD029 to the shopping cart, you would link to the following within the self replicating web site:

add_cart.cgi?product_id=CD029&quantity=1&reseller=~username~

For another example, if you're adding product ID# SER032, and three of the product ID# CD318 you would place the following link within the self replicating web site:

add_cart.cgi?product_id=SER032,CD381&quantity=1,3&reseller=~username~

8.13.2 Browse Category

You can allow people to browse all products within your database by category by placing the following link into your web site:

http://www.domain.com/cgi-bin/xlite/modules/shop/bin/browse.cgi

You may also define a specific product category to view by specifying the category ID# within the query string. Go to the *Products->Manage Categories* menu to find the exact ID# of the category you need, and place it within the query string as shown below. For example, if you wanted to view the category ID# 13, you would place a link such as:

browse.cgi?catid=13

8.13.3 View Shopping Cart

You can allow people to view and manage the contents of their shopping cart by placing the following link into your web site:

http://www.domain.com/cgi-bin/xlite/modules/shop/bin/view_cart.cgi

8.13.4 Check Out Link

You can allow people to checkout and place an order for their products by placing the following link in your web site:

http://www.domain.com/cgi-bin/xlite/modules/shop/bin/checkout.cgi

No query string is required for this link if products have already been added to the shopping cart. Alternatively, you may allow a customer to immediately check out without having to manually add products to their cart by using the below link. This allows customers to purchase a specific product by clicking on a link, without having to add it to their shopping cart.

checkout.cgi?override=1&product_id=CD082&quantity=1&reseller=~username~

Using the above link as an example, the customer would be immediately brought to the order form to purchase the product ID# CD082. You may also add multiple products into the query string by separating the product ID and quantity by a comma.

8.14 Setup Complete

If you have successfully completed all above steps, the Shopping Cart module should now be fully setup and integrated into your web site. People should now be able to browse all necessary products from your web site, add them into their shopping cart, and checkout to place their order as needed.

9.) Processing Orders

The Shopping Cart module allows for order to be easily placed and processed. This chapter explains the details of how orders are managed within the database, including everything from the customer's public shopping cart to recurring payments.

9.1 Public Shopping Cart

Full public shopping cart features are contained within the software, which allow customers to add products to their shopping cart and manage them. The public shopping cart uses cookies, which must be enabled in the customer's browser in order for the cart features to work. If a customer does not have cookies enabled, they will not be allowed to add products into their cart.

The first time a customer places a product in their cart, the software will create a new session for them. At this time, the software also determines who the reseller of the order will be, who will remain the reseller until the customer places their order. This allows a customer to stray off a member's web site, while still keeping the same reseller.

9.2 Submitting Orders

When you checkout, an order form is displayed where you can fill out your contact and payment information. If you specified to ask for returning customers during First Time Setup, the software will first ask the customer if they've purchased before, and allow them to enter their Customer ID#. If they enter a valid customer ID#, they will be prompted to confirm the information, then will be brought to the order form. This way, the customer does not have to enter their contact information again, and only has to enter their payment information instead.

Once an order is submitted, the shopping cart will first determine the total amount to charge the customer. All products within the customer's cart are first added up, then any applicable taxes and shipping charges are added to the order as well. If the customer's contact information matches any tax settings you defined through the *Setup->Tax Settings* menu, the software will automatically add the appropriate tax to the order amount.

The payment is then physically processed. If the customer is paying through a third party payment processor such as PayPal or 2CheckOut, the order will be added to the database with the status of pending, and the customer will be automatically redirected to the needed payment server. Once the customer has submitted payment, the third party payment processor will contact the shopping cart on your server, which will automatically approve the new order.

Otherwise, if you have a real merchant account and accept credit cards on your server, the credit card will be authorized / charged behind the scenes in real time. If declined, the customer will receive an error saying their credit card has been declined. If approved, the order will be added to the database with a status of either approved or pending, depending on your settings.

9.3 Member Orders

Depending on your settings, you were able to specify different product amounts for each member type when creating products through the *Products->Add New Product* menu. After a member has logged into the Member's Only Area, they can visit the web site and place any needed products in their cart just as a customer would. Members will see their specific amounts for products when they add products to their cart and view the contents of their cart. Once a member checks out, the software will recognize they're currently logged in, and will display a separate order form that doesn't require contact information, and displays a list of all payment methods assigned to the account.

All orders submitted by members are recorded in their main transaction account, instead of through the Shopping Cart as customer orders are tracked. If a member submits an order that is pending, it can be processed through the *Transaction->Pending Deposits* menu of the main Admin Control Panel instead of through the Shopping Cart module.

9.4 Processing Pending Orders

If during First Time Setup, you setup the shopping cart to only authorize credit cards for new orders, then all new orders submitted will have a status of pending. Otherwise, the only orders that will appear as pending are those paid though an unsupported / manual payment processor, and those paid through a third party payment processor who haven't submitted payment yet.

You can manually process all pending orders through the *Orders->Process Pending Orders* menu of the Admin Control Panel. This page contains two tables, listing all new orders and recurring payments that are pending. Simply select all orders you would like to process, and complete the form. If you select Yes to the question asking to process through your merchant account, the software aill automatically send a request behind the scenes to your merchant account to capture the previously taken authorization on the credit card.

When the process orders, all needed e-mail notifications will be automatically sent out that you created through the *Communicate->Notification Settings* menu. If the order is approved, all appropriate commissions will also be automatically added that you created through the *Products->Manage Commissions* menu.

9.5 Processing Shipments

If you are using the shipping and tracking features of the Shopping Cart, when a customer places an order they will be asked to select which shipping method they would like to use. Once the order has been approved, a new pending shipment will be added to the database which can be processed through the *Orders->Pending Shipments* menu. This feature contains one table that lists all pending shipments in the database. Simply check all shipments you would like to process, and enter any applicable tracking ID for the shipment.

9.6 Processing Refunds

You can process a refund through the *Orders->Process Refund* menu, which first prompts you for the ID# of an order. This page contains a table that lists all payments processed for the specified order. The first payment is always the initial payment, which the customer was charged when the order was first placed. All other payments are recurring payments for the order.

Simply select all payments you would like to refund, and complete the form. If this order was paid with by a credit card through a real merchant account, there'll be a question asking if you would like to process the refund through the merchant account. If Yes, the shopping cart will contact your merchant account behind the scenes, and physically credit the customer's credit card for the needed amount. Otherwise, you will need to manually send the funds to the customer through PayPal or any other payment processor you are using.

9.7 Recurring Payments

The Shopping Cart fully supports recurring orders, such as monthly payments for a service. When a new order is submitted and approved, all recurring subscriptions will be created. Once every night a script will automatically run via crontab, and process all needed recurring payments. If the customer is paying through a third party payment processor, such as PayPal or 2CheckOut, the payment will be added to the database as pending. However, every time the member is charged by the third party payment processor, the next payment date for the recurring subscription is automatically updated accordingly, so the script may never add the recurring payment as pending.