



Setting up and Maintaining the  
**Beanstream Basic Shopping Cart**

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For further information please contact Beanstream customer support at (250) 472-2326  
or [support@beanstream.com](mailto:support@beanstream.com).

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## Getting Started

The Beanstream Basic Shopping Cart is designed for merchants that require a simple way of selling a larger list of products or services online. Contact our support team if you cannot access the Shopping Cart of Inventory Management items through your member area. These extra services are enabled for merchants that have signed up for the basic cart at the time of application.

In addition to this guide, we recommend you also review the following useful system features in our [merchant resource centre](#).

### Email Receipts

Email receipts can be sent to the customer automatically if an email address has been included with the transaction. Navigate to *administration* → *account settings* → *email receipts* in the Beanstream member area to customize your receipt settings.

### User Rights

Beanstream allows merchants to create an unlimited number of staff user accounts with unique log-in credentials and security permissions. To add, remove or modify staff user accounts, navigate to *administration* → *user manager* in the member area. Make sure that each staff user has the required security permissions to access the tools they need.

### Login Restrictions

Log-in restrictions allow merchants to limit access to the Beanstream member area by workstation or IP address. To implement this feature, navigate to *administration* → *account settings* → *login restrictions* in the member area.

### Company Contact Details

Beanstream relies on merchants keeping their company contact details including primary contact email addresses up to date. We use this information to forward important service bulletins and processing reports. Navigate to *administration* → *company info* in the Beanstream member area to customize to update your contact information before you start processing.

# 1 Shopping Cart Basics

The *Beanstream Shopping Cart* includes four different components which can be configured to match the look and feel of your company website.

- ✓ *Product pages* list the items that you wish to sell online. Hosting your product pages with Beanstream is optional – if preferred, merchants may design their own product pages and use the basic cart only for the basket, checkout and payment areas of their site.
- ✓ A *shopping basket* page is used by customers to keep track of their purchases while they browse your site.
- ✓ A *checkout page* is used by customers to enter their billing and shipping information when they are ready to complete a purchase.
- ✓ A *payment page* used to confirm the total costs of an order and to collect credit card information in the final stage of a purchase.

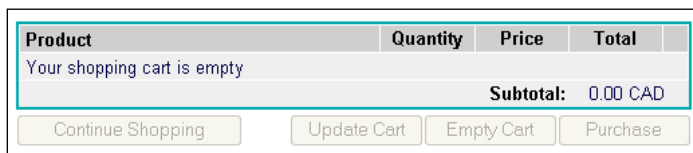
All four pages are configured to Beanstream default settings when you first apply for *Shopping Cart* service.



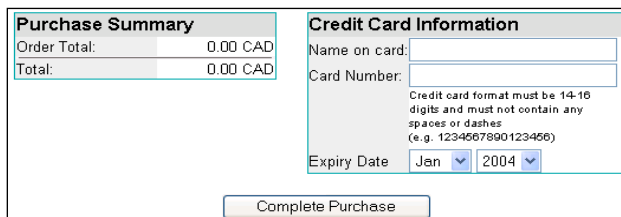
Product pages



Purchase page



Shopping Basket



Checkout

## 2 Hosting Product Pages with Beanstream

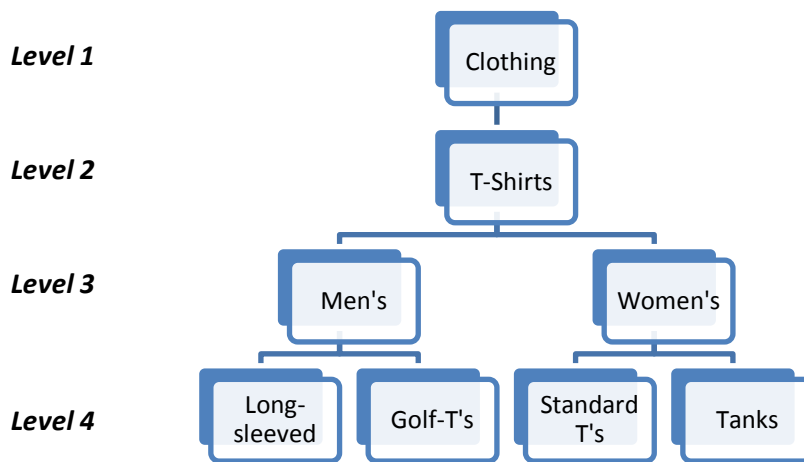
This option provides you with an easy way to set up and customize shopping cart features with minimum technical intervention and upkeep. You will have to log into your Beanstream account and upload your inventory onto our server. You can then customize your page layout using our design templates and create a simple link from your site to your product list.

### 2.1 Creating your Inventory

All items maintained in the Inventory Manager will be displayed on your Beanstream Basic Shopping Cart product page. Use this tool to write product descriptions and upload images to customize your online store. You'll also receive additional functions for tracking sales, in-stock quantities, purchase prices, resale profits and shipping fees.

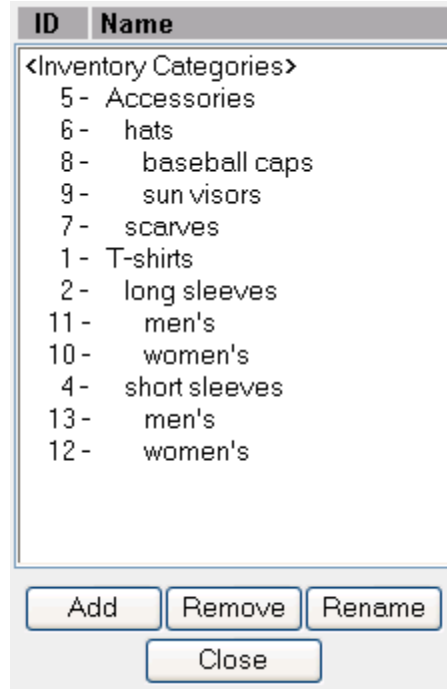
#### 2.1.1 Inventory Categories

If you have an extensive product list, you may wish to create a number of categories to make it easier for purchasers and store administrators to navigate your inventory. Merchants may create as many as four levels of categorization for their store.



Navigate to configuration → inventory in the left menu.

Click on the *Categories* button at the bottom of the page. A new window will appear. If you have not entered any information, this window will be blank except for the title *Inventory Categories*.



#### **To add a Level 1 category:**

- ✓ Click on the heading *Inventory Categories*.
- ✓ Enter the name of one of the *Level 1* categories you would like to see in your dropdown menu.
- ✓ Click *Add*. Repeat this process to add as many Level 1 categories as you would like.

#### **To add sub categories:**

- ✓ Click on a category from your list. Your new sub category will be filed directly under the option you choose.
- ✓ In the pop-up window that appears, enter the name for your new sub-category.
- ✓ Click *Add*. This new item will be listed, with an indent, under the parent category.

### **2.1.2 Adding Manufacturers**

For your convenience, products may be filed by manufacturer as well. Select the *Manufacturers* button at the bottom of the inventory product page to add a list of product manufacturers to the menu on your inventory product page.

### 2.1.3 Adding Products

Go to *Configuration* → *Inventory*. Click on the Refresh button to view your entire inventory. You can use the search and sort functions at the top of the screen to refine the list of items that appears. If you have not yet entered any inventory items, there will be no products listed on this screen. Choose the *New Product* button to add an item to your inventory. To modify an existing product file, use the search and sort fields on the Inventory Manager page to locate your product and then click on the line item to access the full product file.

**The following screen will appear:**

**Product Profile**

ID (SKU): 1235678

Category:

Name: Bob-s T-Shirts

UPC:

Manufacturer:

Model Number: 0988765

Weight: 0 Pounds

Dimensions: 0 x 0 x 0 Centimeters

Quantity: 0

Cost: 0.00

List Price: 0.00

Shipping: 0.00

Taxes:  Apply GST/HST  
 Apply PST

Image File/URL:

Image Preview:

Product Description:

Include this product in the Shopping Cart product listing  
 Allow customer to add this product to their Shopping Cart

Return Image New Product Delete Update Generate href tag

Use the fields on this page to enter everything you need for a complete product description. Save any changes by clicking on the Add Product button at the bottom of the page (if you’re modifying an existing product file, click on the Update button instead).

- ID (SKU)** Enter a product identification number for your records. This code will be a unique identifier and cannot be changed once entered. This is the only mandatory field on the inventory product page.
- Category** Choose a category from the dropdown list. If you don’t wish to use categories, leave this option blank.
- Name** Enter the name of your product as you would like it to appear to customers.
- UPC** Use this field to add or update the UPC number for a product.
- Manufacturer** Enter the name of the product’s manufacturer if desired.
- Model** Use this field to enter or update a model number if desired.
- Weight** Record information on product weight if you wish to keep track this information to manage shipping fees. Choose between pounds, kilograms or grams.
- Dimensions** Record the height, width and depth of a product. Choose between inches or centimeters.

- Quantity**                      Enter quantity of product that you have in stock.
- Cost**                              Use this field to record your product related costs.
- List Price**                      This is the price that will appear to purchasers on your online store.
- Shipping**                      Enter any shipping fees that you want to apply only to this specific product. For Basic Shopping Cart customers, this fee will be applied to the purchase total based on the merchant’s Shipping Module settings.
- Taxes**                              Check the boxes beside this heading to automatically charge tax on a customer order for this specific item in the inventory. For Basic Shopping Cart customers, taxes will be calculated based on the merchant’s Tax Module settings.
- Image File/URL**              Use the Image upload button to add an image to the product file. The image link will be displayed in this field after upload.
- Description**                      Use this field to enter a full text description of your product. This text will appear to customers.
- Image Button**                      Click on this button to add an image to the product file. This image will be displayed on the Shopping Cart product page.

## 2.2 Designing your Product Pages

The product page lists all of the items that are on sale in your online store. There are two main components to the default Beanstream product page. On the left hand side of the screen there is a dropdown menu listing all of the different categories of products that you sell. This allows customers to easily browse only the specific products they are interested in. The main body of the page will display a list of your products including any descriptions or images you have uploaded to your inventory.



Sample page (before customization)

### To customize your product page:

Go to *Configuration* → *Shopping Cart* → *Products*. A product page configuration screen will appear.



### Product Page Settings

Use Categories: <input type="radio"/> Yes <input checked="" type="radio"/> No	Image Width: <input type="text" value="20%"/>
Products/Page: <input type="text" value="4"/>	Desc Width: <input type="text" value="70%"/>
Title Text: <input type="text" value="bobs shirts"/>	Price Width: <input type="text" value="10%"/>
Category Text: <input type="text" value="Products"/>	Division Height: <input type="text" value="6"/>
Sort By: <input type="text" value="Manufacturer"/>	

Title Font: Type <input type="text" value="Arial"/> <input type="text" value="Arial"/> Size <input type="text" value="Four"/> Style <input type="text" value="Bold"/> Color <input type="text" value="444444"/>	Name Font: Type <input type="text" value="Arial"/> <input type="text" value="Arial"/> Size <input type="text" value="Two"/> Style <input type="text" value="Bold"/> Color <input type="text" value="000077"/>
Cat Font: Type <input type="text" value="Arial"/> <input type="text" value="Arial"/> Size <input type="text" value="Two"/> Style <input type="text" value="Bold"/> Color <input type="text" value="004488"/>	Desc Font: Type <input type="text" value="Arial"/> <input type="text" value="Arial"/> Size <input type="text" value="Two"/> Style <input type="text" value="Normal"/> Color <input type="text" value="000000"/>
Page Font: Type <input type="text" value="Arial"/> <input type="text" value="Arial"/> Size <input type="text" value="Two"/> Style <input type="text" value="Normal"/> Color <input type="text" value="000000"/>	Price Font: Type <input type="text" value="Arial"/> <input type="text" value="Arial"/> Size <input type="text" value="Two"/> Style <input type="text" value="Bold"/> Color <input type="text" value="0000AA"/>

After a product is added to the cart, go to the:

Products Page  
 Shopping Cart page

Use the fields on this page to change the design of your page.

- Use Categories                      Remove the list of product categories from your page by clicking No.
- Products / Page                      Choose the number of products to display per page.
- Title Text                              Give your page a unique title.
- Category Text                        Rename the Category field. This is a title for a dropdown search menu on your product page.
- Sort By                                 Choose to list your products by size, SKU, name or manufacturer.

You may also choose to modify the size, style, color and type of font to be used on the various areas of your page by using the dropdown menus. Change the layout of the page further by customizing the width and height of your listed images, product descriptions and prices.

Use the *Header* and *Footer* text boxes to add text above or below the main body of the products page.

Select *View Preview* to see a copy of your newly customized page and click *Update Live* to finalize your changes.

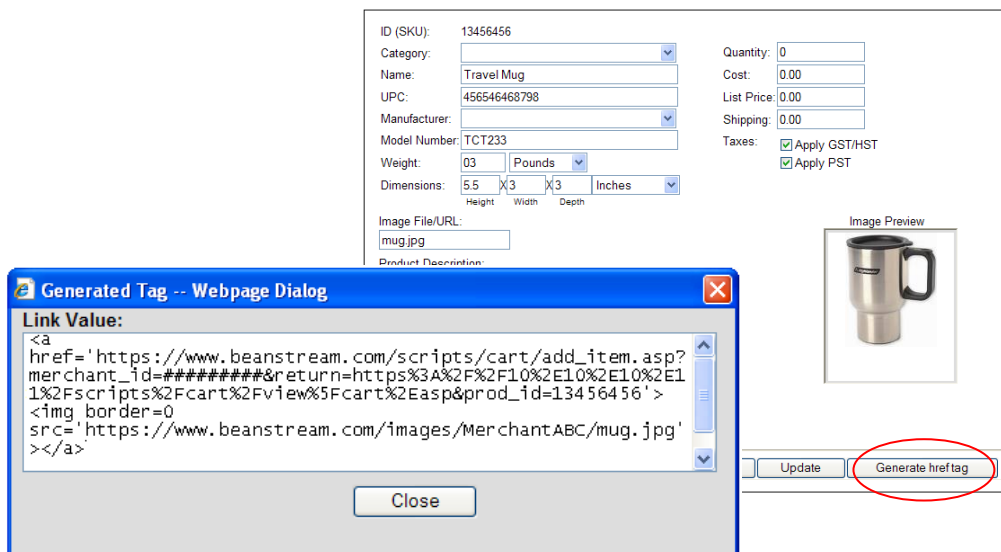
### 2.3 Linking from your Site

To link your site to a basic page listing all of your products, point your website to the following URL:

[https://www.beanstream.com/scripts/cart/view\\_products.asp?merchant\\_id=#####](https://www.beanstream.com/scripts/cart/view_products.asp?merchant_id=#####)

You will have to replace the merchant ID number with your own unique 9-digit number.

To link your site to individual product pages, go back to configuration → inventory in the member area. Use the search and sort fields to locate a list of products. Click on a line item to open a product file. You'll see a "generate Href tag" button at the bottom of the product page. Click on this button – you'll see exactly the information you need to paste into your web page to link to that particular product.



### 3 Designing your own Product Pages

In the merchant managed Shopping Cart, you create a product page from scratch. While this option requires more technical ability, it also gives you the chance to custom design your product pages exactly as you want. With this setup, when a shopper selects the *Add to Cart* button on your custom designed product page, he or she should be directed to Beanstream’s basket page to continue their purchase. If customers wish to keep shopping once they have added an item to their basket, they can be returned back to your web store by clicking on a *Continue Purchase* button.

If you are just looking for design flexibility, you can still use the Beanstream inventory module to host your product information. Other merchants may prefer to host all product pages on their own site. Note that you must use Beanstream’s inventory module if you wish to use our “inventory tracking” feature.

### 3.1 Linking to the Add to Cart page

To connect to the Beanstream Cart you must link each *Add to Cart* button on your product page to [https://www.beanstream.com/scripts/cart/add\\_item.asp](https://www.beanstream.com/scripts/cart/add_item.asp) and add a string of product specific variables.

**To create your own script**, use the following parameters:

Parameter	Description
merchant_id	The ID number of the merchant. This is a fixed value and will be assigned by Beanstream.
prod_id	The ID number or SKU of the product to be added.
prod_name	The name or description of the product.
prod_qty	The quantity of the selected item to be added to the cart.
prod_cost	The cost of the selected item.
prod_tax1	Set to 'yes' or 'no' to determine whether tax1 should be applied to the product.
prod_tax2	Set to 'yes' or 'no' to determine whether tax2 should be applied to the product.
prod_shipping	The cost of shipping for an individual product. This parameter is used only by merchants who wish to use the "Add per item shipping costs," option available through the Inventory Manager.
return	The URL to return the shopper to upon adding the item to their cart. *If return URL is posting to view_cart.asp, the merchant_id parameter should not be added as part of the URL.

**A sample code could look like:**

```
<a href="https://www.beanstream.com/scripts/cart/add_item.asp?merchant_id=108200000&
prod_id=MON-PANA-21&prod_name=Panasonic+S110+21+inch+monitor&prod_qty=1&
prod_cost=1495.95&prod_tax1=yes&prod_tax2=no&return=http://www.yourdomain.com/products.html
">
Add to Cart</a>
```

### 3.2 Linking to a View Cart Page

On your custom designed product page you may also wish to create a button allowing customers to review the contents of their cart along before they finish browsing your site.

For customers to make use of this option, you must link to the following address passing only your merchant\_id: [https://www.beanstream.com/scripts/cart/view\\_cart.asp?merchant\\_id=#####](https://www.beanstream.com/scripts/cart/view_cart.asp?merchant_id=#####) (where ##### is your merchant Id) .

Once again, customers can be returned to your products page by clicking on a *Continue Shopping* button.

## 4 Configuring your Shopping Basket Page

The shopping basket page is the second step in the customer purchase process. Customers who have decided to purchase items from your product page will be sent to the shopping basket to see a complete record of everything they have chosen. The main sections of the basket page show: a list of chosen products, the quantity of each item chosen, a list of product prices and a sub-total for the order.

Customers can click on a Continue Shopping button to return to the product page. They can also empty their cart, update the cart or click on a Purchase button to move on to the next stage.

Product	Quantity	Price	Total
Your shopping cart is empty			
Subtotal:			0.00 CAD
<input type="button" value="Continue Shopping"/> <input type="button" value="Update Cart"/> <input type="button" value="Empty Cart"/> <input type="button" value="Purchase"/>			

**Default Shopping Basket Page (before configuration)**

To customize your basket page go to Configuration → Shopping Cart → Basket.

The following screen will appear:

### Basket Settings

Border Size:	<input type="text" value="1"/>	Update Button Text:	<input type="text" value="Update Cart"/>
Border Color:	<input type="text" value="00AAAA"/>	Clear Button Text:	<input type="text" value="Empty Cart"/>
Basket Width:	<input type="text" value="500"/>	Checkout Button Text:	<input type="text" value="Purchase"/>
Button Width:	<input type="text" value="100"/>	Return Button Text:	<input type="text" value="Continue Shopping"/>
Title Font: Type	<input type="text" value="Arial"/>	Product Font: Type	<input type="text" value="Arial"/>
Size	<input type="text" value="Two"/>	Size	<input type="text" value="Two"/>
Style	<input type="text" value="Bold"/>	Style	<input type="text" value="Normal"/>
Color	<input type="text" value="000000"/>	Color	<input type="text" value="000044"/>
Back	<input type="text" value="CCCCCC"/>	Back	<input type="text" value="EEEEEE"/>

Use the fields on this page to change Beanstream’s default settings for your *Shopping Cart* basket page.

**Border Size/ Color**

Enter a number (in pixels) to determine the width of the border for your basket. Choose an HTML hex code to change the default color for the text or background of basket borders.

**Basket/Button Width**

In these fields, enter a number (in pixels) to change the width of the table on your *Shopping Basket* screen or to change the size of the *Continue Shopping*, *Update Cart* and *Empty Card Purchase* buttons.

**Button Texts**

Use these fields to rename the buttons that appear on the *Shopping Basket* page. If left blank, no button will appear on your *Shopping Basket* page. Note that the *Update* button is used by the customer when they have changed their order and wish to see a new purchase total. The *Clear* button is used to empty a basket if the customer changes their mind or wishes to restart their order. The *Checkout* button is used by the customer to proceed to payment after they have selected their products. The *Return* button is used by the

**Basket Restriction**

Select to limit purchases to only items included in your inventory.

**Return Page URL**

Enter your product page URL if your inventory is not managed on the

You may also choose to modify the size, style, color and type of font to be used on the various areas of your page by using the dropdown menus.

Use the *Header* and *Footer* text boxes to add text above or below the main body of the product page. You can link to custom CSS files here if desired.

Select *View Preview* to see a copy of your newly customized page and click *Update Live* to finalize your changes.

#### 4.1.1 Basket Requirements for Merchant Managed Carts

If you have chosen not to store your inventory on our server, you must go to *Configuration* → *Shopping Cart* → *Basket Settings* in the left menu of your membership area and select the following button:

**Basket Restriction**

Only allow items that exist in your account inventory to be added to the shopping basket. This option should only be selected if inventory is managed through the system and not on your web server.

Any item may be added to the shopping basket. If the item does not exist in the account inventory the system will automatically add the item to your account inventory. Select this option only if inventory is being managed on your web server.

**Return Button URL**

If product inventory is being managed on your web server, you can specify the location of your main products page. The URL defined here will be the location that users will be directed to once they press the 'Return' button on your basket page.

Return Button URL:

You may also specify the URL for a "Return" button on your basket page. This will allow customers to be redirected back to a specific page after visiting the shopping basket. It is not necessary for this URL to reside on a server that has a Secure Socket Layer (SSL) certificate installed

## 5 Configuring your Checkout Settings

This is the third stage in the customer purchase process. Customers who are satisfied with the items in their basket will click on the *Continue Purchase* button to be sent to the checkout page. Using the form provided they will fill out all of the information you need to complete billing and shipping.

**To customize your checkout page** go to *Configuration* → *Shopping Cart* → *Checkout*. The following screen will appear:

### Checkout Settings

Billing Title:	<input type="text" value="Bill To:"/>	Border Color:	<input type="text" value="00AAAA"/>
Shipping Title:	<input type="text" value="Ship To:"/>	Border Size:	<input type="text" value="1"/>
Purchase Button Text:	<input type="text" value="Continue"/>		
Title Font:	Type <input type="text" value="Arial"/> <input type="text" value="Arial"/>	Label Font: Type	<input type="text" value="Arial"/> <input type="text" value="Arial"/>
	Size <input type="text" value="Three"/>		Size <input type="text" value="Two"/>
	Style <input type="text" value="Bold"/>		Style <input type="text" value="Normal"/>
	Color <input type="text" value="000066"/>		Color <input type="text" value="000000"/>
	Back <input type="text" value="DDDDDD"/>		Back <input type="text" value="F2F2F2"/>
Include Shipping:	<input checked="" type="radio"/> Yes <input type="radio"/> No		
Page Layout:	<input checked="" type="radio"/> Horizontal <input type="radio"/> Vertical		

Use the fields on this page to change Beanstream’s default settings for your Shopping Cart checkout page.

**Billing Title/Shipping Title** Enter new text in these fields to rename headings on your checkout page.

**Purchase Button** Enter text to rename the *Continue* button (used by a customer to proceed to the final steps of purchase). If no text is entered, the button will not appear.

**Include Shipping** Check *No* to eliminate the shipping information column. Please see sections 8.11/8.12 for information on configuring custom shipping calculations.

**Page Layout** Choose between a horizontal or a vertical layout.

Use the dropdown menus to select the size, style, color and type of font to be used on the various areas of your page. You may also use HTML text to add header and footer texts to the main content. Use the *Header* and *Footer* text boxes to add text above or below the main body of the Products page.

Select *View Preview* to see a copy of your newly customized page and click *Update Live* to finalize your changes.

## 6 Configuring your Payment Page

Once customers have finished filling in their billing and shipping information, they will click on a *Continue* button. A payment page will appear where the customer can record their credit card information and verify their final order total.

**To customize your payment page** go to Configuration → Shopping Cart → Payment Page.

The following screen will appear:

### Payment Settings

Summary Title: <input type="text" value="Purchase Summary"/>	Label Font: Type <input type="text" value="Arial"/> <input type="text" value="Arial"/>
Card Title: <input type="text" value="Credit Card Information"/>	Size <input type="text" value="Two"/>
Purchase Button: <input type="text" value="Complete Purchase"/>	Style <input type="text" value="Normal"/>
Border Color: <input type="text" value="00AAAA"/>	Color <input type="text" value="000000"/>
Border Size: <input type="text" value="1"/>	Back <input type="text" value="EEEEEE"/>
Transaction Type: <input checked="" type="radio"/> Purchase <input type="radio"/> Pre-Auth	
Title Font: Type <input type="text" value="Arial"/> <input type="text" value="Arial"/>	Cost Font: Type <input type="text" value="Arial"/> <input type="text" value="Arial"/>
Size <input type="text" value="Three"/>	Size <input type="text" value="Two"/>
Style <input type="text" value="Bold"/>	Style <input type="text" value="Normal"/>
Style <input type="text" value="000000"/>	Color <input type="text" value="000000"/>
Back <input type="text" value="DDDDDD"/>	Back <input type="text" value="FFFFFF"/>

Use the fields on this page to change Beanstream’s default settings for your *Shopping Cart* payment page.

- Summary Title/Card Title** Enter text in these fields to rename heading on your checkout page.
- Purchase Button** Enter text to rename the purchase button. If no text is entered, the button will not appear on your page.
- Border Size/Color** Choose a pixel number to change the size of your borders and a hex code to select a new color.

**Transaction Type**      Decide if you will be processing purchases or pre-authorizations.

Use the dropdown menus to select the size, style, color and type of font to be used on the various areas of your page. You may also use HTML text to add header and footer texts to the main content.

Click *Update Live* to finalize your changes and select *View Preview* to see a copy of your newly customized page.

## 7 Listing Inventory items on your Site

By default, the products listed in your inventory will be linked to your *Shopping Cart* if you have chosen a fully managed product page. At any time you can modify these settings to temporarily take a product off of your product page without removing the item from your inventory records. You can also configure your pages so that a listed product can be seen by customers, but not bought.

To link a product to your Shopping Cart product page:

- ✓ Go to *Configuration* → *Inventory*. The inventory mainpage will appear.
- ✓ Click on the name of the item you wish to link to the *Shopping Cart*. An inventory product profile page will appear.
- ✓ At the bottom of the screen, click the checkbox beside the heading *Include this product in the Shopping Cart product listing*.
- ✓ Check the checkbox beside the heading *Allow customers to add this product to their Shopping Cart*.
- ✓ Click *Update*.

To take an inventory item off of your Shopping Cart product page:

- ✓ Go to *Configuration* → *Inventory*. The inventory mainpage will appear.
- ✓ Click on the name of the item you wish to remove from the *Shopping Cart*. An inventory product profile page will appear.
- ✓ At the bottom of the screen, click to clear the checkbox beside *Include this product in the Shopping Cart product listing*.
- ✓ Click to clear the checkbox beside the heading *Allow customers to add this product to their Shopping Cart*. There should be **no** checkmark in this checkbox.
- ✓ Click *Update*.

## 8 Inventory Tracking – Reconciling Sales

As a security feature, it is possible to compare the quantity and price of each item a customer has chosen from your product page against the data you have listed in your online inventory module. If the values do not match, the transaction amount will be flagged *Invalid* and the transaction will be declined. Setting Inventory tracking is a two step process.



### Step 1: Set Basket Restrictions

- ✓ Go to *Configuration* → *Shopping Cart* → *Basket* using the left menu.
- ✓ Under the heading *Basket Restrictions*, select the first bullet. This will allow only items that are listed in your account inventory to be added to a customer shopping cart.

### Step 2: Enable/disable inventory tracking:

- ✓ Go to *Administration* → *Account Settings* → *Order Settings*
- ✓ Select or deselect the *Validate orders against inventory* button at the bottom of the screen.
- ✓ The inventory management module will keep track of all purchases. Once you have sold more than the amount recorded in the *Quantity* field for a product, you will not be able to sell any more of that item until you have updated your inventory.

## 9 Restrictions – Disabling SafeScan / SafeScan ID

If you have signed up for a Canadian Address Verification service, please note that the Beanstream Shopping Cart will only work with CAV Quickmatch option. If your account has SafeScan or SafeScanID, these services will need to be disabled for transactions to be completed.

For additional security you may use Beanstream's other risk management tools such as the *Transaction Filtering* module under *Account Settings*. This tool allows merchants to restrict specific credit cards or limit access to your account from specific IP addresses.

## 10 Setting Shipping Rates

As a shopping cart customer you will have access to a custom shipping module. This tool will allow you to set very general parameters for your shipping fees. Specifically, you may use this module to allow customers to choose from a variety of different shipping methods with pre-set surcharges. When you enable shipping options, a dropdown menu will be added to your checkout page to allow customers to select their preferred shipping method. Alternately, you may wish to have shipping costs totaled based on the value specified in each individual product file.

You may add a maximum of 100 custom shipping options.

To configure custom shipping rates:

- ✓ Go to *Configuration* → *Shipping Options* in the left menu.
- ✓ At default settings, the *No Shipping Options* button will be selected.
- ✓ Select the *Custom shipping option* bullet.
- ✓ The following screen will appear.

## Shipping Options

### Shipping Method

No Shipping Options

Custom Shipping

Custom Calculations

Add per item inventory shipping costs

### Custom Shipping

Courier  
 Freight

Cost:

apply:  GST/HST  PST

### To add a new shipping method to your Checkout page:

- ✓ Click on the *Add* button. A new window will appear.
- ✓ Enter a name for the new shipping method you require. ***This name must be less than 15 characters*** otherwise a shipping cost will not appear beside the heading.
- ✓ Click *OK*. You will be returned to the Shipping Methods mainpage.
- ✓ Highlight the name of the new method you have added.
- ✓ In the cost field, enter the amount you wish to charge your customers if they select this option. Apply Tax 1 and/or Tax 2 if required. (Default settings will appear as GST/PST. You can change tax names and values by going to Account Settings in the left menu.)
- ✓ Click *Update Shipping* to save your changes.

**To view a copy** of your *Shopping Cart* checkout page go to *Configuration* → *Shopping Cart* → *Checkout*. Scroll to the bottom of the page and click *View Preview*.

## 10.1 Charging Shipping by Inventory Item

Use this tool in conjunction with the Beanstream Inventory Module to calculate product specific shipping fees. You may, for example, wish to charge extra for items which are very large or very heavy. You will not wish to charge a customer the same amount if they are ordering pens from your online store as if they order an easy-chair. In this case, a blanket shipping fee will not be enough to cover all of your costs.

### To customize shipping costs for an individual item:

- ✓ Go to *Configuration* → *Inventory* and click *Refresh* or use the search function to locate a specific item.
- ✓ Click on the name of an item in your inventory product list.

- ✓ In the *Shipping* field in the left hand column of your screen, enter the amount you wish to charge for this product.
- ✓ Click *Update*.

Do this for all of the items that require individual shipping surcharges. If you have an extensive list of products all of which require different surcharges you may wish to set more detailed shipping parameters according to the method described in section 13.

### To charge product specific shipping fees:

- ✓ Go to *Configuration* → *Shipping Options* and click on the *Custom Shipping* bullet.
- ✓ Select *Add per item inventory shipping costs*. The individual shipping charge specified in each product file will be applied to purchases.

## 10.2 Custom Calculations

Go to *Configuration* → *Shipping Options* in the left menu of your membership page. Select *Custom Calculations*. The following screen will appear:

**Use the "Shipping Options" text box to insert your custom shipping code.**

Custom shipping calculations are called after a customer has finished filling in their *Ship To* and *Bill To* information on the Beanstream *Shopping Cart* checkout page. When they click on the *Continue* button, the Beanstream system will transfer to a page containing the custom shipping calculations code. Once the code has been processed, the customer will move to the final stage of the purchase process, the *payment.asp* page.

### 10.2.1 Custom Shipping Reference Variables

There are numerous variables that can be used within the custom shipping calculations. Be sure to check all custom calculations carefully. Beanstream does not develop or debug the code for merchants. You are responsible for developing and testing any custom calculations. Beanstream will not cover any losses due to faulty programming in the client's custom shipping calculations.

The following values may be accessed by querying the *rstCart* recordset. To access individual items in the recordset you must either loop through the recordset or reference recordset items directly.

Parameters	Data Type	Description
prod_id	A	The product ID number as it appears in the <i>Inventory Module</i> .
prod_name	A	The product name.
prod_qty	N	The quantity purchased.
prod_cost	N	The product cost. (No \$ sign needed)
prod_shipping	N	The shipping cost of the product as determined in the <i>Inventory Module</i> .
prod_weight_value	N	The product weight.
prod_weight_id	N	The method of calculating weight. 1 = pounds 2 = kilograms
prod_size_height	N	The height of the product.
prod_size_width	N	The width of the product.
prod_size_depth	N	The depth of the product.
prod_size_id	N	The method of calculating size. 1 = inches 2 = centimetres
prod_tax1	N	Set to 1 (meaning 'yes') or 0 (meaning 'no') to determine whether tax1 should be applied to the product.
prod_tax2	N	Set to 1 (meaning 'yes') or 0 (meaning 'no') to determine whether tax2 should be applied to the product.
prod_date	A	The date and time that the item was added to the cart.

The following values may be accessed by querying the request string. They will contain values set in the checkout portion of the shopping cart process.

shipName	A	Customer's Shipping Name
shipEmailAddress	A	Customer's Shipping Email Address
shipPhoneNumber	A	Customer's Shipping Phone Number
shipAddress1	A	Customer's Shipping Address 1
shipAddress2	A	Customer's Shipping Address 2
shipCity	A	Customer's Shipping City
shipProvince	A	Customer's Shipping Province (2 Character code)
shipCountry	A	Customer's Shipping Country (2 Character code)
shipPostalCode	A	Customer's Shipping Postal/Zip Code
billingSameAddress	A	Available values are 'on' or 'off'. If 'on' then the values for billing variables are same as for above shipping variables. If this value is not available it is 'off'
ordName	A	Customer's Billing Name
ordEmailAddress	A	Customer's Billing Email Address
ordPhoneNumber	A	Customer's Billing Phone Number
ordAddress1	A	Customer's Billing Address 1
ordAddress2	A	Customer's Billing Address 2
ordCity	A	Customer's Billing City
ordProvince	A	Customer's Billing Province (2 Character Code)

ordCountry	A	Customer's Billing Country (2 Character Code)
ordPostalCode	A	Customer's Billing Postal/Zip Code
Refn * n = 1 to 5	A	Up to 5 reference fields that may contain site-specific information that you may need to maintain during the shopping process.

The following variables may be set in the custom shipping module. These will affect the shipping calculations and process.

shippingCost	N	Cost of Shipping calculated by Beanstream
shippingMethod	A	When custom calculations used, this value is set to 'CUSTOM'.
applyShippingTax1	N	Set to 1 if you want to apply tax1 to shipping.
applyShippingTax2	N	Set to 1 if you want to apply tax2 to shipping.

**Working Example**

The following script provides a working example of custom calculated shipping code. This script is set so that:

- ✓ If the total order amount is between \$0.00 & \$5.00 the shipping charge will be \$6.00
- ✓ If the total order amount is between \$5.01 & \$15.00 the shipping charge will be \$9.50
- ✓ If the total order amount is between \$15.01 & \$50.00 the shipping charge will be \$14.75
- ✓ If the total order amount is over \$50.01 the shipping charge will be \$19.99

```
<%
dim orderCost 'Total cost of all items in Cart
dim i 'Loop control variable

'Get the total order amount of all products in the Cart
for i = 0 to rstCart.count - 1
orderCost = orderCost + (rstCart(i).prod_qty * (rstCart(i).prod_cost))
next

'Set the shipping cost based on the cost of all products
if orderCost > 0 and orderCost <= 5.00 then
    shippingCost = 6.00
elseif orderCost > 5.01 and orderCost <= 15.00 then
    shippingCost = 9.50
elseif orderCost > 15.01 and orderCost <= 50.00 then
    shippingCost = 14.75
else
    shippingCost = 19.99
end if
%>
```

## 11 Tax Settings

The default settings for the tax module will apply Canadian GST, PST or HST to all purchases as applicable (you have the option to flag taxes on or off when you create a product file in the Beanstream inventory).

### **To change the default tax settings:**

- ✓ Go to *Administration* → *Account Settings* → *Tax Settings*.
- ✓ Click on the bullet marked *Custom Tax Calculations*.
- ✓ A new screen will appear. In the fields provided select a new name and rate for the taxes you wish to charge your customers. You can completely remove a tax by de-selecting the "enable tax" checkbox.
- ✓ Use the checkboxes choose if you will apply these taxes out of province and/or out of country.

## 12 The Inventory Upload Tool

To avoid entering inventory items one at a time using your inventory product page, you can upload already formatted files to the Beanstream web server.

Go to *Configuration* → *Inventory Upload* in your left menu. If you don't have *Inventory Upload* listed in your menu contact your Beanstream representative. This module contains three pages which will allow you to upload lengthy lists of inventory categories, manufacturers and products. These three tables will also be used to store and track all inventory related information on all products available for purchase to your customers.

Inventory upload files must be formatted as comma separated ASCII text files using a double quote(") text delimiter. Note that all text fields must be contained within double quotes. If a double quote is included in the text of the field then it must be entered twice so that it is imported correctly.

For example: The field description of **17" Displays** must be entered as **"17"" Displays"**

### 12.1 Creating Formatted Category Files

Enter numerous inventory categories at one time by creating a formatted file and then uploading it to the Beanstream server using the Inventory Upload module.

```

1,0,0,0,"Hardware"
2,0,0,0,"Software"
3,1,0,0,"Monitors"
4,1,3,0,"Standard"
5,1,3,0,"Flat Screen"
6,1,3,4,"15"" Displays"
7,1,3,4,"17"" Displays"
8,1,3,4,"19"" Displays"
9,1,3,4,"21"" Displays"
10,1,3,5,"14"" Displays"
11,1,3,5,"15"" Displays"
12,1,3,5,"17"" Displays"
13,2,0,0,"Entertainment"
14,2,0,0,"Business"
15,2,0,0,"development"
16,1,0,0,"Storage"
17,1,16,0,"Hard Drives"
18,1,16,0,"Tape Drives"
19,1,16,0,"External Storage"
    
```

**Sample Formatted Category File.**

Refer to the description below for information on file formatting.

	category_id	category_sub1	category_sub2	category_sub3	category_name
Hardware	1	0	0	0	Hardware
Monitors	2	0	0	0	Software
Standard	3	1	0	0	Monitors
15" Displays	4	1	3	0	Standard
17" Displays	5	1	3	0	Flat Screen
19" Displays	6	1	3	4	15" Displays
21" Displays	7	1	3	4	17" Displays
Flat Screen	8	1	3	4	19" Displays
14" Displays	9	1	3	4	21" Displays
15" Displays	10	1	3	5	14" Displays
17" Displays	11	1	3	5	15" Displays
Storage	12	1	3	5	17" Displays
Hard Drives	13	2	0	0	Entertainment
Tape Drives	14	2	0	0	Business
External Storage	15	2	0	0	Development
Software	16	1	0	0	Storage
Entertainment	17	1	16	0	Hard Drives
Business	18	1	16	0	Tape Drives
Development	19	1	16	0	External Storage

The list on the left displays items as they would appear on your *Category* dropdown menu (on your inventory product page) if you were to upload the above file. *Hardware* and *Software* are main inventory categories. *Monitors* is a Level 2 category listed under *Hardware*. *Standard* is a Level 3 category listed under *Monitors*.

In the *category\_id* field, each item is assigned a unique identification number. *Hardware* has been assigned the ID number 1. *External Storage* has been assigned the ID number 19.

Numbers in the second column of the table indicate if an item is a *Level 2* category (ie: a sub-category of either *Hardware* or *Software*). *Monitors* is a sub-category of *Hardware* (item number 1) therefore the number 1 is entered in this field. *Entertainment* is a sub-category of *Software* (item number 2) therefore the number 2 is entered in this field. *Hardware* is not a sub-category therefore the number 0 is entered.

Numbers in the third column indicate if an item is a *Level 3* category (ie: a sub-category of something listed in column two). *Standard* is a sub-category of *Monitors* (item number 3) therefore the number 3 is entered in this column. *Hard drives* is a sub-category of *Storage* (item number 16) therefore the number 16 is entered in this column. The fourth column is completed in a similar manner.

Under `category_name` there is a list of the title used for each item on the Category dropdown menu. These names will always be enclosed in quotes when you are setting up your file. The field description of **17" Displays** must be entered as **"17" Displays"**. Category names cannot be longer than 32 characters

## 12.2 Creating Formatted Manufacturers Files

If you've chosen to file by manufacturer, you can create a formatted manufacturer file offline and upload it to our system. The items you add will be included in a list of manufacturers on your inventory product page.

### ***Sample Inventory Manufacturers File***

```
1,"ViewSonic"  
2,"Hewlett Packard"  
3,"Mitsubishi"  
4,"Lexmark"  
5,"Epson"  
6,"Acer"  
7,"Compaq"  
8,"IBM"  
9,"Symantec"
```

This file lists nine different manufacturers. The numbers listed in front of each manufacturer name give each item a unique ID that you will need to use as a reference when creating formatted product files. You cannot repeat any number twice. Each manufacturer name must be enclosed in quotes and cannot be longer than 32 characters. You may add as many manufacturer names as you require.



### 12.3 Creating Formatted Product Files

Enter more than one product to your inventory at a time by creating a formatted product file and then uploading it to your inventory.

```
"STR-WRITER","12/4/32x CD Rocket Mach 12 ReWriter","Burns audio CDs at 12x speed!",6,"MAC-1290","738495873",19,"writer.gif",1,1,12,312,10,1,20,389.95,0,449.95,0,0,1

"SYS-ACER","ACER AcerPower SE Minitower","466MHz processor, network adapter, 13GB hard drive",6,"",19,"acer.gif",75,1,12,600,123,1,5,799.95,0,899.95,1,1,1

"STR-CMS","CMS Automatic Backup System","Protect your data automatically every time you start your notebook",8,"ETB-CMS8700","924834892",19,"CMS.gif",0.5,1,4,228,3,1,10,289.95,0,349.95,1,1,1

"SYS-COMPAQ","Compaq EN Pentium III 600 MHz","Network-ready, Matrox Millennium graphics, 13.5GB HD, 128MB",1,"",13,"compaq.gif",0,1,9,1745,100,1,15,2299.95,0,2699.95,0,0,1

"SYS-PROLIANT","Compaq ProLiant 800 Server","500MHz Pentium III, 64MB of 100MHz ECC SDRAM, SCSI-3 controller, 9.1GB HD",1,"",13,"proliant.gif",0,1,7,1500,123,1,15,1799.85,0,1999.85,1,1,1

"STR-HP8200e","HP 4/4/6x CD-Writer Plus 8200e","Records on CD-R media, rewrites CD-RWs, and plays CDs",2,"HP8200e","827463463",19,"hp8200.gif",0,1,18,230,2,1,35,299.95,0,329.95,0,0,1

"HP-DESKJET","HP Deskjet 880C -DISCOUNTED","Spectacular color photos, or elegant type, your projects have to look their best.",2,"HPDJ880C","673759833",1,"hp800c.bmp",0,1,3,180,2,1,8,349.99,0,399.99,1,1,1

"SYS-IBM","IBM PC 300GL/Celeron 433 MHz","Windows NT, 64MB of RAM & 8.4GB hard drive",8,"",1,"ibm.gif",0,1,5,900,12,1,12,1299.95,0,1599.95,1,1,1
```

**A Sample Inventory Products File**

This file would upload 8 products to your inventory.

The table shown below provides a complete breakdown of the first product listed in this file. The product is a 12/4/32x CD Rocket Mach 12 ReWriter. It burns audio CDs at 12times the speed of other products in its class. It is listed with the ID code STR-WRITER and its model number is MAC 1290. Its purchase price is \$389.95 and the merchant resells it at \$449.95.

The complete file text for this item is:

```
"STR-WRITER","12/4/32x CD Rocket Mach 12 ReWriter","Burns audio CDs at 12x speed!",6,"MAC-1290","738495873",19,"writer.gif",1,1,12,312,10,1,20,389.95,0,449.95,0,0,1
```

Field Name	Max Length	STR Writer sample	Description
prod_id	32	STR WRITER	Unique ID or SKU number of the product. This is the only <i>required</i> field.
prod_name	64	12/4/32x CD Rocket Mach 12 ReWriter	The name or short description of the product.

Field Name	Max Length	STR Writer sample	Description
prod_desc	1024	Burns audio CDs at 12x speed!	Detailed or long description of the product.
prod_manufacturer_id	2 numeric	6	The ID of the manufacturer as assigned in the Manufacturer list
prod_model_no	32	MAC-1290	The model number of the product.
prod_upc	12	738495873	The product UPC code.
prod_category_id	2 numeric	19	The category ID of the product, as assigned in the Category list (see section 6.1).
prod_image	64	Writer.gif	The file name for the product image.
prod_weight	\$	1	A numeric value indicating product weight.
prod_weight_id	1	1	Enter 1 to calculate weight in pounds. Enter 2 to calculate in kilograms.
prod_size_height	1	12	Enter a numeric value indicating the product height.
prod_size_width	numeric	312	Enter a numeric value indicating the product width.
prod_size_depth	numeric	10	Enter a numeric value indicating the product depth.
prod_size_id	numeric	1	Enter 1 to calculate size in inches. Enter 2 to calculate size in cm.
prod_quantity	numeric	20	The quantity available for purchasing.
prod_cost	\$	389.95	The cost of the product. This field is compared to prod_list_price to calculate revenue.
prod_shipping_cost	\$	0	The shipping cost of the product. This is automatically added to customer totals if you have the <i>Add inventory shopping costs</i> option set to <i>On</i> .
prod_list_price	\$	449.95	The amount you will charge your customers.
prod_apply_tax1	numeric	0	Set to 1 if tax1 should be applied to the Product. Set to 0 if tax1 should not be applied.
prod_apply_tax2	numeric	0	Set to 1 if tax2 should be applied to the Product. Set to 0 if tax2 should not be applied.
prod_cart_include	n	1	Set to 1 if the product should be included in the <i>Shopping Cart</i>

Field Name	Max Length	STR Writer sample	Description
			product page. Set to 0 if you do not want this product to be available for purchase.

## 12.4 Uploading Formatted Files

Go to *Configuration* → *Inventory Upload*. Choose to upload your Category, Manufacturer or Product File as desired.