

Sitelok™

Cartloom Plugin



V1.3

Sitelok Cartloom Plugin Manual

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It is the users responsibility to ensure the suitability of Sitelok Cartloom Plugin before using it. In no circumstances will Vibralogix be responsible for any loss or damage of data or programs as a result of using Sitelok. Your use of Sitelok implies acceptance of these terms.

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Chapter 1 Introduction

What is the SiteLok Cartloom Plugin?

The SiteLok Cartloom Plugin can create or update users in SiteLok when products are sold via Cartloom (<http://www.cartloom.com>). This is useful if you wish to create support accounts for your products or even just to sell memberships.

New accounts created can use either the buyers email address as a username or a unique username based on their name. A random password is used. The user can change this from their profile page if you allow it.

Users can update their existing account by using the same email address when they purchase again via Cartloom.

Cartloom doesn't support recurring payment subscriptions.

Chapter 2 Installation

Installing the Sitelok Cartloom Plugin

Before installing the Sitelok Cartloom Plugin make sure that you have installed Sitelok and that it is working correctly. Ideally you should use the latest version but at the very least V3.0 should be installed.

Installing for the first time or upgrading

- 1) Extract the contents of the zip file to your PC.
- 2) Upload the [pay_cartloom](#) folder to your existing Sitelok slpw folder using FTP. There are no special permissions required on most servers. If you have a previous version then overwrite the files.
- 3) Login to the Sitelok control panel.
- 4) Open the following URL in the browser

http://www.yoursite.com/slpw/pay_cartloom/install.php

which will start the installation process. If all is well you will be taken to the plugin preferences page where you will see the plugin listed.

If you have any problems with installation please let us know so that we can help you.

Initial configuration

If you just upgraded you can ignore this section which is only required the first time you install the Cartloom Plugin.

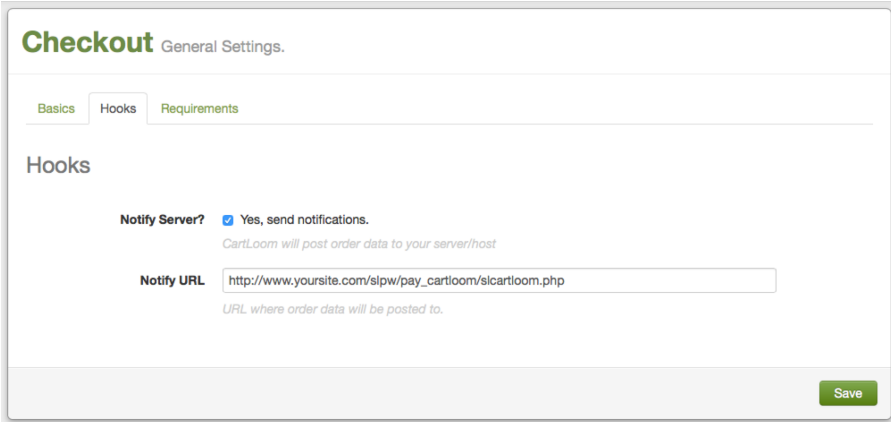
Before using the Sitelok Cartloom Plugin for the first time we need to setup your Cartloom account.

Setup you Cartloom account

Sitelok makes use of Cartloom's feature to notify of payments. Login to your Cartloom account and goto [Checkout - General](#) in the main menu. Click the [Hooks](#) tab and set the [Notify URL](#) to be

http://www.yoursite.com/slpw/pay_cartloom/slcartloom.php

replacing yoursite.com with your domain of course.



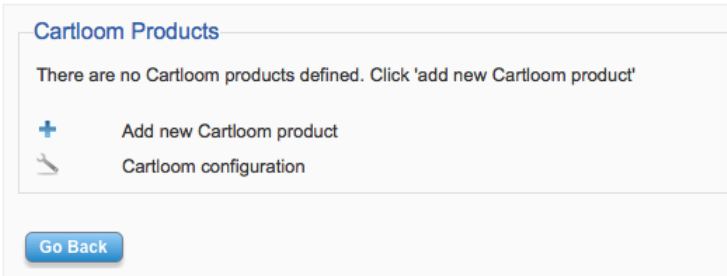
The screenshot shows the 'Checkout' configuration page with the 'Hooks' tab selected. Under the 'Hooks' section, there is a 'Notify Server?' checkbox which is checked, with the text 'Yes, send notifications.' and a sub-note 'CartLoom will post order data to your server/host'. Below this is a 'Notify URL' text input field containing the URL 'http://www.yoursite.com/slpw/pay_cartloom/slcartloom.php', with a sub-note 'URL where order data will be posted to.' A green 'Save' button is located at the bottom right of the form.

Check the **Notify Server** checkbox to enable the hook.

Configuring the Sitelok Cartloom Plugin

Login to the Sitelok control panel and click the **Cartloom** option in the Plugins menu at the top of the screen. You will see the following.

Cartloom Plugin

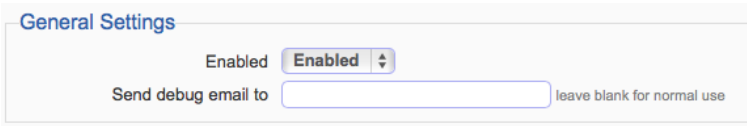


The screenshot shows the 'Cartloom Products' configuration page. It features a heading 'Cartloom Products' and a message: 'There are no Cartloom products defined. Click 'add new Cartloom product''. Below the message are two options: 'Add new Cartloom product' (indicated by a plus sign icon) and 'Cartloom configuration' (indicated by a wrench icon). A blue 'Go Back' button is located at the bottom left of the page.

Click **Cartloom Configuration** to display the main configuration settings.

Enter the following settings and then click save to store the configuration.

General Settings



General Settings

Enabled **Enabled** ▾

Send debug email to leave blank for normal use

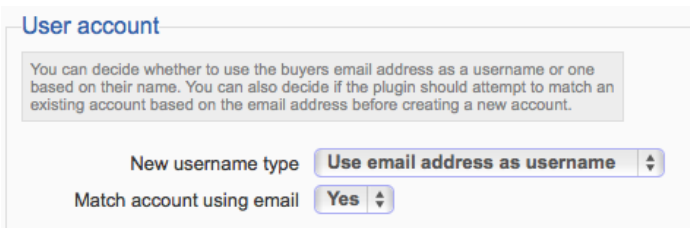
Enabled

This setting allows you to disable the Cartloom webhook handler so that it will ignore orders.

Send debug email to

If you set an email address then the webhook handler will send debug information each time its called. Normally its best to leave this blank.

User Account



User account

You can decide whether to use the buyers email address as a username or one based on their name. You can also decide if the plugin should attempt to match an existing account based on the email address before creating a new account.

New username type **Use email address as username** ▾

Match account using email **Yes** ▾

New username type

This sets the username type the plugin will use when creating a new Sitelok account. This can be either the buyers email address or a unique username based on the buyers name (plus number to make it unique).

Match account using email

If enabled the plugin will check first if a Sitelok account exists with the buyers email set in the username or email field before creating a new account. If you enable this option it is probably wise to also enable the following two options in Sitelok which are available from V3.1.

[Email change verification](#)
[Email field must be unique](#)

Default Usergroups

Default Usergroups

Optionally choose the default usergroup(s) you wish the user to join for all orders and enter the number of days membership (0 for no expiry). If you want to remove a user from a usergroup you can set -1 days as the expiry time.

| | | | | |
|------------|----------------------|---|------|----------------------|
| Group name | <input type="text"/> | ▼ | Days | <input type="text"/> |
| Group name | <input type="text"/> | ▼ | Days | <input type="text"/> |
| Group name | <input type="text"/> | ▼ | Days | <input type="text"/> |
| Group name | <input type="text"/> | ▼ | Days | <input type="text"/> |
| Group name | <input type="text"/> | ▼ | Days | <input type="text"/> |

The plugin can add users to product specific usergroups. However in many cases you may just want to add all buyers to the same groups in which case you can set them here. Select the usergroup name and enter the expiry days. You can change how the days affect the expiry date as follows.

If the user doesn't already belong to the usergroup

- 0 No expiry date set
- 365 Sets the expiry date to 365 days from the order date
- +365 Sets the expiry date to 365 days from the order date

If the user already belongs to the usergroup and not expired

- 0 No expiry date set
- 365 Sets the expiry date to 365 days from the order date
- +365 Sets the expiry date to 365 days from the existing expiry date extending the membership by a further 365 days

If the user already belongs to the usergroup but expired

- 0 No expiry date set
- 365 Sets the expiry date to 365 days from the order date
- +365 Sets the expiry date to 365 days from the order date

You can also set the expiry days to -1 to remove a user from a usergroup.

Default Email notifications

Default Email notifications

These settings allow you to choose which email templates to send to the client and to the site admin for all orders. You can define separate templates depending on whether the user is new (created during the order) or existed before.

| | | |
|-------------------------|------------------|---|
| Client email (new) | Don't send email | ⬇ |
| Admin email (new) | Don't send email | ⬇ |
| Client email (existing) | Don't send email | ⬇ |
| Admin email(existing) | Don't send email | ⬇ |

The plugin can send product specific emails to the user and site admin but in many cases you may just need the emails to be sent out for all orders. You can select the email templates to be sent to the user and admin depending on whether the user is new (the account has just been created with this order) or an existing user.

Custom Fields

When an order is received you can have SiteLok store values from Cartloom in custom fields. For example you could choose to store the buyers address details. You can define the data to store and how to update it when further orders are made.

Custom fields

If you wish to store any data provided by Cartloom in custom fields you can set that up here. You can choose whether to store the data only once, update old data or append to old stored data.

| | | | | |
|---------|------------|---|-----------|---|
| Custom1 | do nothing | ⬇ | Choose... | ⬇ |
| Custom2 | do nothing | ⬇ | Choose... | ⬇ |
| Custom3 | do nothing | ⬇ | Choose... | ⬇ |

Chapter 3 Adding Products

Once you have configured the Sitelok Cartloom Plugin to work with your Cartloom account it is actively listening for orders. If you have setup default usegroups or emails then these will be processed for all orders. When products are purchased that have a Cartloom SKU matching that set in the product definition in Sitelok it is actioned as well as the default settings.

Setting up a product in the plugin

Enter the Sitelok control panel and click the **Cartloom** menu option. Click the **Add Product** icon.

Product Details

Product Details

Item ID (SKU) to match the 'SKU Number' entered in Cartloom

Enabled ▾

Product Name

Product Type ▾

Item ID (SKU)

Enter the SKU you entered for the product you created in the Cartloom. In this example its 001.

Product Basics

Active Available for Sale

Featured Yes
*Include this product in Featured Products of your **Storefront**.*

Name

SKU Number

Enabled

You can disable product if required so that it won't be processed.

Product name

Enter a description for the product.

Product Type

Select the correct product type. Either **Single payment membership** or **Other single payment**. Other single payment products are used to sell non membership products but where you would still like Sitelok to send out an email. They can also be used with the Credits plugin.

Email notifications

Emails notifications

These settings allow you to choose which email templates to send to the client and to the site admin when this item is purchased. You can define separate templates depending on whether the user is new (created during the order) or existed before.

| | |
|-------------------------|---|
| Client email (new) | <input type="text" value="Don't send email"/> |
| Admin email (new) | <input type="text" value="Don't send email"/> |
| Client email (existing) | <input type="text" value="Don't send email"/> |
| Admin email (existing) | <input type="text" value="Don't send email"/> |

When a product is ordered the plugin can send an email to the user and / or the site admin. You can select the email templates to be sent to the user and admin depending on whether the user is new (the account has just been created with this order) or an existing user.

Usergroups

Usergroups

Choose the usergroup(s) you wish the user to join upon payment for this product and enter the number of days membership (0 for no expiry). If you want to remove a user from a usergroup when this product is purchased you can set -1 days as the expiry time.

| | | | | |
|------------|----------------------|---|------|----------------------|
| Group name | <input type="text"/> | ▼ | Days | <input type="text"/> |
| Group name | <input type="text"/> | ▼ | Days | <input type="text"/> |
| Group name | <input type="text"/> | ▼ | Days | <input type="text"/> |
| Group name | <input type="text"/> | ▼ | Days | <input type="text"/> |
| Group name | <input type="text"/> | ▼ | Days | <input type="text"/> |

Select the usergroup name and enter the expiry days. You can change how the days affect the expiry date as follows.

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If the user already belongs to the usergroup but expired

- 0 No expiry date set
- 365 Sets the expiry date to 365 days from the order date
- +365 Sets the expiry date to 365 days from the order date

You can also set the expiry days to -1 to remove a user from a usergroup.

Chapter 4 Support

Hopefully if you have followed this manual carefully everything will be working fine. However sometimes things don't go quite so smoothly so if you have any questions or problems then please check the FAQ on the support page or email us.

Support area: <http://www.vibralogix.com/support/>

Email: support@vibralogix.com