

Software Manual

# DRUPAL 7

**UBERCART 3  
ECOMMERCE  
MANUAL**

David Ipswich

Technology Now

Drupal 7 Ubercart 3 Ecommerce Manual

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## INTRODUCTION

This book takes you step-by-step through the process of installing and configuring Drupal 7 and Ubercart 3 to create a fully functional e-commerce site capable of selling both physical goods, and intangible goods such as files and downloads. Ubercart is the free ecommerce software that was designed especially for Drupal, and they are completely compatible with one another and fit together seamlessly.

Whether you are new to e-commerce and wanting to create your first ever online store, or if your company already has an online store that you are considering upgrading, this book will take you through the whole process from start to finish.

Ubercart does many things out of the box that other e-commerce programs have to have expensive add-ons for. Want to add two products together as a package? Want to give customers a choice of sizes, colors, shapes or format? Want to ship anywhere in the world? All this and more comes as standard with Ubercart.

It is possible to follow this book from start to finish with no previous knowledge of either program, but you will certainly find it easier to follow if you have already read my 'Drupal 7 Manual' (which can be purchased from where you got this). If you have already read that book, or if you are already familiar with Drupal you could skip the first few chapters and start at STEP 4 (Preparing for Ubercart).

### Requirements

In order to create a website using Ubercart with Drupal 7, I would recommend that you find a hosting company with a Linux server with the following recommended minimum requirements:

PHP 5.2.5 or higher (5.3 recommended)

MySQL 5.0.15 or higher, with PDO database extension for PHP

Apache 1.3 or higher

cPanel

## CREATING A DATABASE

Ubercart and Drupal both require a database in order to work, but they both work using the same database so you only need to create one.

If you are completely new to cPanel, when you purchase hosting, you will be given a link to your cPanel account, a username and a password. If you go to that link and enter your **username** and **password**, you are taken to the **main cPanel page**, part of which is shown in the below Figure 001.

Drupal needs a database in order to work, and you create a new database by clicking on the '**MySQL Databases**' icon. (Figure 001)



Figure 001

Type in whatever name you want for your database in the white box then click on the '**Create Database**' button (**IMPORTANT** - make a note of the name) - Figure 002

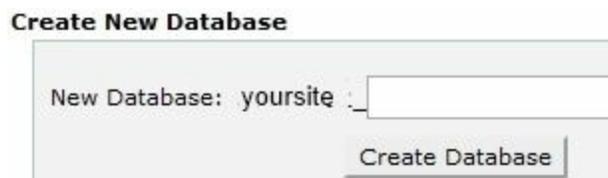


Figure 002

You then need to create a database '**user**' by typing in a '**username**' in the next top white box, followed by a '**user password**'. Once you've done that, click on the '**Create User**' button. (**IMPORTANT** - make a note of both the username and password)

Next, you need to add the user to the database by choosing them from the drop down list (Figure 003). Then click on the '**Add**' button.

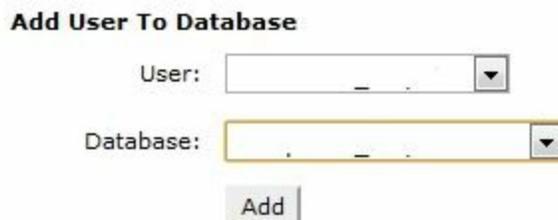


Figure 003

You will now be asked what privileges to give your user. Click on '**All Privileges**' at the top. This will fill in all the squares. Then click on the '**Make Changes**' button.

**What we have done so far:** We've created our database and user.

**What we are doing next:** You are now ready to download the Drupal files.

## INSTALING DRUPAL

From the Drupal page at <http://drupal.org/project/drupal> download the latest edition of Drupal 7. Use the '**recommended releases**' not the Development releases. The recommended releases are highlighted in **green**, and you need the line that starts with a 7 (for Drupal 7). Click on the '**tar.gz**' file, and download it to your desktop.

Next, return to your **cPanel home page** (If you are still in cPanel, you may need to click the '**home**' icon in the top left hand corner to get to the home page). About half way down the page you will find the '**File Manager**' icon (Figure 004) Click on that icon to open the file manager.



Figure 004

The screen you are on now works similar to the way Windows Explorer works, so you should be familiar with it. There is a list of folders on the **left hand side**, and when you click on a folder, the contents are listed on the **right hand side**. Depending on your hosting company, you may not have access to all these folders.

You need to click on the **public\_html** folder (Depending on your hosting company this may just be named '**public**'). If you have doubts, ask your hosting company to tell you where your public folder is) (Figure 005).



Figure 005

In my folder (figure 006) I've only got a **cgi-bin** folder and nothing else. Again, depending on your hosting company, you may have no folders at all or you may have other folders

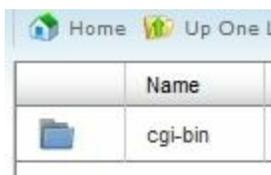


Figure 006

The Drupal file needs to be uploaded from your desktop and into your **public\_html** or **public folder**, the above figure 006 shows the current content before the upload (yours may differ). To upload Drupal, click on the '**Upload**' button at the top of the page. Then click on the '**Choose**' button and find the Drupal file that is on your desktop. Select this

file, and then click on the '**Open**' button.

Wait whilst it uploads, and then click on the link that takes you back to your file manager. You should now see the zipped Drupal File (Figure 007)

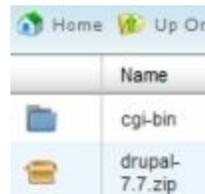


Figure 007

The Drupal file is a compressed **Zip** file, so it needs to be unzipped. To do this, select the Drupal file by clicking on it, then click on the '**Extract**' button at the top right of your page. You will then be asked for confirmation. (Figure 008). The defaults will be correct, so click on the '**Extract Files**' button.

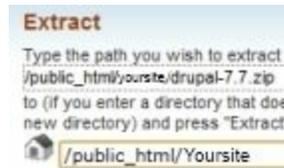


Figure 008

Once the files are extracted, you will see a list of the extracted files on the screen. Click on the '**Close**' button. You will now find that you have an uncompressed drupal-7 folder as well as still having the compressed drupal-7.zip file (Figure 009).

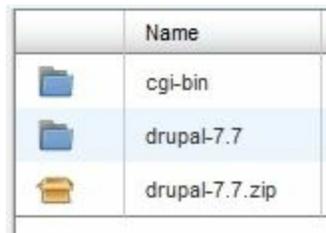


Figure 009

We now need to copy the uncompressed files up a level, and we begin by double clicking on the **drupal-7 folder** (NOT the zip file) to open it. Then select **ALL** the files and folders that are in it (Figure 010).

	Name	Size	Last Modified (GMT)
	includes	4 KB	Jul 28, 2011 1:02 A
	misc	4 KB	Jul 28, 2011 1:02 A
	modules	4 KB	Jul 28, 2011 1:02 A
	profiles	4 KB	Jul 28, 2011 1:02 A
	scripts	4 KB	Jul 28, 2011 1:02 A
	sites	4 KB	Jul 28, 2011 1:02 A
	themes	4 KB	Jul 28, 2011 1:02 A
	.gitignore	174 Bytes	Jul 28, 2011 1:02 A
	htaccess	5.28 KB	Jul 28, 2011 1:02 A
	authorize.php	6.45 KB	Jul 28, 2011 1:02 A
	CHANGELOG.txt	58.21 KB	Jul 28, 2011 1:02 A

Figure 010

Once you have selected everything click on the '**Copy**' button near the top left of the page. (Figure 011)

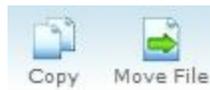


Figure 011

You should now see a list of files (Figure 012).

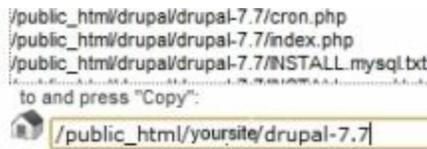


Figure 012

The bottom box currently shows their present position '**/public\_html/yoursite/drupal-7.7**' (or whatever version it is when you are doing it). You are going to copy the files into the '**yoursite**' folder, so you need to change the bottom box by **removing** the words **drupal-7.7** (or whatever version it is)

So change the bottom box.

**FROM:** /yoursite/drupal-7.7

**TO:** /yoursite/

Then click on the '**Copy Files**' button, and the files from the Drupal folder should be copied to the new location (Figure 013)



Figure 013

That's it! Once everything has been copied we can tidy things up by deleting the un-needed Drupal-7.7 folder and the Drupal-7.7.zip file, and then you should be able to go to your site. If you are unsure which files and folders to delete you can just leave them, they won't cause any harm.

## CONFUGURING DRUPAL

If you have followed the previous sections correctly, you should now be able to go to your own website, and it should look like Figure 014



Figure 014

The '**Standard**' profile should be selected by default and this is the one you want, so click on the '**Save and Continue**' button. You are then asked you to select your language. As this guide is written in English, I'm assuming the default '**English**' is correct. If not you need to change it, then again click on the '**Save and continue**' button. A few pages back, I told you to make a note of your **database name, database user name, and database user password**. That's because you now need them! They need to be entered correctly (Figure 015) then click on the '**Save and Continue**' button.

The image shows a form for database configuration. It has three input fields: "Database name" with the value "database\_name", "Database username" with the value "database\_username", and "Database password" with the value "Password". Below the fields is a link for "ADVANCED OPTIONS" and a button for "Save and continue".

Figure 015

The next page asks for some basic information:

**Site name:** Drupal will have guessed a site name, but you can change it to whatever you want and the name will be displayed at the top of your site. I'm going to name my site 'Ubercart Store Test Site'.

The next entry asks for a **site email address**. Again, you can insert any email address you own.

The 'Site Maintenance Account' will be the first person to register on the site. As 'user1' that person automatically has additional admin rights, so for security reasons it needs to be you, and you need to **choose a secure username and a secure password** (and you need to remember them!) Give yourself a username, email address (can be the same as the above one) and password.

You should **choose your country** from the drop down list, changing the time zone if required.

Leave the '**Update Notification**' boxes ticked, and you will receive an email notification if there is a future security update you need to deal with.

Click on '**Save and Continue**' and it should display the following message (Figure 016). Click on the '**Visit your new site**' link.

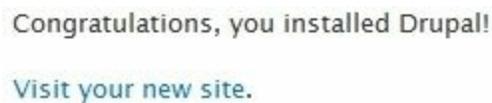


Figure 16

The front of my site looks like Figure 017. Yours should look the same, except the name of your site will be different.

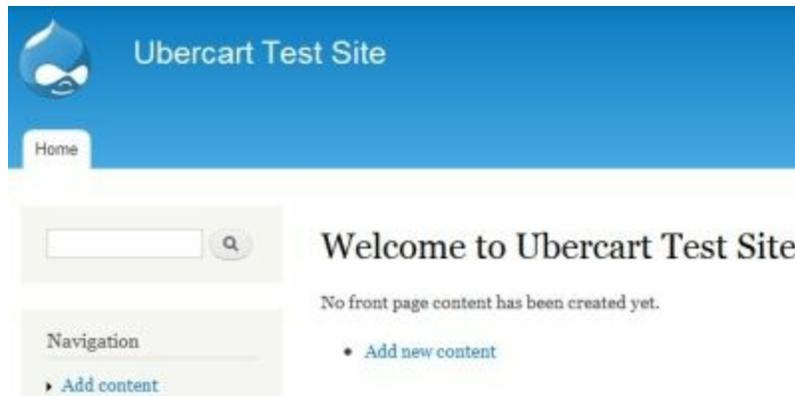


Figure 017

On the top of the page there is a black menu. It's only visible to you, the site administrator, not to other site visitors. (Whenever I refer to this black menu in future I will call it the '**Admin menu**').

On the front page, it says '**No front page content has been created yet**', and under that there is an '**Add new content**' link. Click on that link.

Two different content types are already available by default, '**Articles**' and '**Basic Page**' (Figure 018). By default '**Articles**' are published on the front page, and '**Basic Pages**' are not. We want to create front page content, so click on the '**Article**' link.



Figure 018

I'm going to add an article to the front page of my site. Your content will be different of course, but the method will be the same.

Firstly, I need to add a '**Title**'. The best title is one that Google users may be searching for, so I'm going to call my article 'Ubercart Manual Test Site'

The next block down is the '**Tags**' block, which can sometimes be confusing on an ecommerce site, so I'm going to leave that blank.

The next section down is for the text that will actually be shown to site visitors. At the bottom of the text box, there is a drop down '**Text Format**' list. By default, the site administrator can use any text format, and for now I'm going to leave it at the default of '**Filtered HTML**'. This means I can use any of the allowed HTML tags listed under the '**Filtered HTML**' heading.

The text I'm going to type is as follows:

*The **Ubercart Manual Test Site** site is a demonstration site created to demonstrate the website created by using *Ubercart and Drupal 7*.*

If you don't already understand how HTML tags work, in most cases it's self-explanatory.

Everything between the **<strong>** and **</strong>** tags will be in bold and everything between the *<em>* and *</em>* tags will be emphasized in italics.

Once you have typed in the words you want on your front page, scroll down to the bottom and click on the '**Save**' Button.

Once it's finished saving, click on the '**Home**' link to take a look.

What we've created so far is merely a holding page. Something for the front page whilst we do some more back-end work.

We've installed Drupal and very soon we'll be installing Ubercart and creating our e-commerce site. Before we do that there is a little bit of configuration we need to do, so we'll get that out of the way straight away.

**Admin Menu>Configuration:** This is the main configuration page for your sit, and I'll take you through some of the settings.

**Admin Menu>Configuration>People>Account settings:** The first lot of default settings are fine, but on an ecommerce site you want to do everything you can do to

encourage visitors to register on your site. In the **‘Who can register accounts’** setting, click in the **‘Visitors’** circle to select it. This will disable the **‘Visitors, but administrator approval is required’** setting. Similarly, remove the tick from the **‘Require e-mail verification’** setting. Once you’ve made those changes scroll down to the bottom of the page and click on the **‘Save configuration’** settings.

**Admin Menu>Configuration>Search and Metadata>Clean URLs:** Place a tick in the **‘Enable clean URL’s’** box, then click on the **‘Save configuration’** button.

**Admin Menu>Configuration>Development>Performance:** Click in the three boxes at the bottom of the page so that there are ticks in the **‘Compress cached pages’** box, the **‘Aggregate and compress CSS files’** box, and the **‘Aggregate JavaScript files’** box. Then click on the **‘Save configuration’** button.

Having completed the minimum basic configuration we can now turn our attention to some of the core modules.

**Admin Menu>Modules>List:** Many of the essential modules will have been activated already, but you should add a tick in the small box to the left of the name of the following modules to activate these also

**Statistics**

**Tracker**

**Trigger**

**Update manager.**

Once all of these have a tick beside them, scroll down to the bottom of the page and click on the **‘Save configuration’** button.

**Admin>Configuration>System>Statistics:** Click to **‘Enable access log’** and **‘Count content views’**, then click on the **‘Save configuration’** button.#

**Admin>People>Permissions:** You should check that every box in the **‘Administrator’** column has a tick in it, and that the **‘Administrator’** has permission to see and do everything. As you load future modules the **‘Administrator’** (you) should automatically get all permissions, but it’s always worth checking.

The **‘Anonymous User’** column should only have a tick in the **‘View comments’** and **‘View published content’** boxes.

The **‘Authenticated User’** column can generally be left on the defaults apart from one exception. As it is currently set up, **‘Authenticated Users’** (that’s users who have an account and are logged in) are able to post comments that are immediately published on your site. Some of you may want to make sure that you have the opportunity of reading the comments before they are published, and if this applies in your case you need to **un-tick** the **‘Skip comment approval’** box.

Once you have made your choices, scroll down to the bottom of the page and click on the '**Save permissions**' button.

**What we have done so far:** We've created our database, installed Drupal and given Drupal a basic configuration.

**What we are doing next:** You are now going to take some steps to prepare Drupal for Ubercart before installing the Ubercart module itself.

## PREPARING FOR UBERCART

We are now almost ready to install and configure Ubercart itself, but before we do that there is a word of warning! What we have done above is the absolute minimum to install and configure your Drupal site so that it is ready to take Ubercart. This book is about **Ubercart**, so we're going to move straight into installing the Ubercart module without considering any other modules. You should bear in mind that we have installed no anti-spam modules and no search engine optimization modules, both of which may be considered an essential requirement to any site. Experienced Drupal users will not find this to be a problem as they will already have their own preferred modules for those purposes, and possibly other modules that they also want to use. For those of you who are unsure, some additional modules are included in the first book of the series '**Drupal 7 Manual**', and there is a far deeper examination of modules in the second book in the series '**Drupal 7 Modules**', either of which can be purchased quite cheaply from the same location that you purchased this book.

Over and above the basic install of Drupal that we have done above, Ubercart itself is dependent upon other modules also having been installed, and there are some additional modules that are not essential but are recommended.

So a basic install of Ubercart has the following three components:

Installing dependent modules.

Installing recommended modules.

Installing Ubercart itself.

It may sound complicated, but taken step-by-step it's quite easy.

**Firstly the dependent modules.** These are the **Rules** module, the **Views** module, the **Ctools** module, and the **Entity API**.

The '**Rules**' module can be found at <http://drupal.org/project/rules> and you should open that page in **another** tab or another browser. Scroll down the page to the green '**Recommended releases**' section, find the line that starts with a **7** (for Drupal 7) **right click** on the '**tar.gz**' link and then on the '**Copy link address**' line. Return to your own site.

**Admin>Modules>List:** Towards the top of the page click on the '**Install new module**' link. **Left click** in the '**Install from a URL**' box, then **right click** and **paste**. The box should now contain the link address that you previously copied (figure 019). Once it does, click on the '**Install**' button.

**Install from a URL**

<http://ftp.drupal.org/files/projects/rules-7.x-2.1.tar.gz>

For example: <http://ftp.drupal.org/files/projects/name.tar.gz>

Figure 019

Once installed, click on the ‘**Enable newly added modules**’ link. This takes you back to your list of modules.

The next essential module is the ‘**Views**’ module, and this is installed in exactly the same way as the previous module. The module can be found at <http://drupal.org/project/views> and again scroll down to the ‘**Recommended releases**’ section and the **Drupal 7** line, **right click** on the ‘**tar.gz**’ file then ‘**Copy link address**’. Return to your own site at **Admin>Modules>List** click on the ‘**Install new module**’ link, then **right click** and **paste**, then click on the ‘**Install**’ button. Once installed, click on the ‘**Enable newly added modules**’ link to return to your list of modules.

Having installed two modules, the others are installed in exactly the same way so you now need to install the following modules.

**Ctools** from <http://drupal.org/project/ctools>

**Entity API** from <http://drupal.org/project/entity>

Having installed all four of these essential modules we now need to activate them.

**Admin Menu>Modules>List**: you need to click on the boxes to add a tick to the left hand side of the following module names.

**Chaos tools** (the other sections of the Chaos Tool Suite do not need to be activated)

**Entity API**

**Entity tokens**

**Rules**

**Rules UI**

**Views**

**Views UI**

Once all the above modules have been ticked, scroll down to the bottom of the page and click on the ‘**Save configuration**’ button.

Having installed the modules that Ubercart depends upon, we’ll continue by installing other modules which, although not essential, are highly recommended. These are the ‘**Colorbox**’ module and the ‘**Token**’ module. Both these modules are installed in exactly the same way.

**Colorbox** is installed from <http://drupal.org/project/colorbox>

**Token** from <http://drupal.org/project/token>

Once they have been installed go to **Admin Menu>Modules>List**: You need to add a tick to the following:

**Colorbox**

**Token**

Then scroll down and click on the '**Save configuration**' button.

**What we've done so far:** We've installed and configured Drupal and also installed the additional modules that Ubercart needs to work.

**What we are doing next:** We're going to download and install the Ubercart module itself.

## INSTALLING UBERCART

It's at this stage I feel an anti-climax coming on! Having done all the above preparation, installing Ubercart is as simple as installing any one of the above modules. That's the beauty of Ubercart. It's easy to install and just as easy to update when the time comes.

The **Ubercart module** is at <http://drupal.org/project/Ubercart> and you already know how to install modules. Scroll down to the '**Recommended releases**' section, the **Drupal 7** line, **right click** on the '**tar.gz**' file then '**Copy link address**'. Return to your own site at **Admin>Modules>List** click on the '**Install new module**' link, then **right click** and **paste**, then click on the '**Install**' button. Once installed, click on the '**Enable newly added modules**' link to return to your list of modules. Simple!

**Admin Menu>Modules>List**: Scary isn't it? Ubercart has installed, but there are **thirty different modules** contained within it! It's at this stage many people make their biggest mistake. They go through all thirty items, activate them all and get completely confused! You definitely won't need all the items, and to start with you only need to activate the four Ubercart Core modules. Others we'll activate one at a time as we need them (less scary!).

## CONFUGURING UBERCART

### Core Modules

The four Ubercart Core Modules that need to be activated and configured are:

**Cart**

**Order**

**Product**

**Store.**

Activate them by adding a tick to the box in front of their names, then scroll down to the bottom of the page and click on the ‘**Save configuration**’ button.

Wait whilst the modules are activated, and you will find a new ‘**Store**’ item has been added to the **Admin Menu**.

### Store

**Admin Menu>Store:** Any error messages are usually caused by the store not having been configured yet, and as that’s what we are about to do they can safely be ignored! We’re going to look at the store configuration menu from top to bottom.

**Admin Menu>Store>Configuration>Store:** The ‘**Store**’ setting has six tabs (figure 020) so I’ll go through each of them in turn from top to bottom.



Figure 020

**Basic Information:** In this setting you should already have the name of your store and your store email address, but you have the option to also add the name of the ‘**Store owner**’, a ‘**phone number**’ and a ‘**Fax number**’. If you have a **contact page or a faq page**, then the page address of one of those pages should be added to the ‘**Store help**

**page**' box. Once you've made any changes you want, click on the '**Save configuration**' button to save them.

**Store Address:** It never ceases to amaze me how many ecommerce sites do not display a **physical address** anywhere on their site. If I can't find an address, then I don't buy from them. I just move to another site. If someone wants to know all about me, including my full name, full address, and bank or credit card details, and yet doesn't have the courtesy to give me any of their own contact details, then I'd rather trade elsewhere! I'm sure I'm not alone in this, so add your **real address** and post code. It will be used on your site, on your invoices and on your delivery notes.

**Currency format:** The default is USD \$ and that's fine if you are in the USA. If you are not then click on the '**ISO 4217**' link to open it in another tab. Scroll down the list to the country of the currency you will be using and make a note of the three letter code in the left hand column. **CAD** for Canadian dollars or **GBP** for UK pounds for example. Back on your own site add the three letter code into the '**Default currency**' box. Figure 021 shows this for Canada (If you added GBP for the UK you would also need to change the '**Currency Sign**' from \$ to £). Make your own choice and then click on the '**Save configuration**' button.



Figure 021

**Weight format:** The default is pounds, but in the drop down box this can be changed to Ounces, Kilograms, or Grams. You need to think ahead here. If you are only selling intangible goods such as files then weight will not be an issue. However, if you are going to be selling physical goods then the best weight to use here will be the weight your carrier will be using. If the price your carrier will charge is by the pound, then use pounds. If your carrier charges are based upon another unit, then use that unit.

**Length format:** Similar to the above. Choose the unit of measurement that your carrier uses.

**Display settings:** The default is probably correct for you.

## Cart

## Admin Menu>Store>Configuration>Cart:

There are four tabs in the cart section (figure 022) and again I'll go through them from top to bottom.



Figure 022

## Admin Menu>Store>Configuration>Cart:

**Basic settings:** The only one of the basic settings that you need to consider is the '**Minimum order subtotal**'. If you are not going to be supplying anything for free, such as samples of ebooks for example, then you could reset this to whatever your lowest priced item is going to be.

**Cart lifetime:** The defaults can usually be left as they are.

**Continued shopping element:** Change from '**Text link**' to '**Button**'. That's my personal choice as I think a button looks more professional than a simple link.

**Cart breadcrumb:** The defaults can be left as they are.

**Admin Menu>Structure>Blocks:** The '**Cart**' module will have created a '**Shopping cart**' block and you'll find this towards the bottom of the page in the '**Disabled**' section. Click on the '**configure**' link to add it to a region of your website. The most common region would be in a right hand margin, but it's a matter of personal choice. As for the other settings, you can choose to hide the cart if it's empty (again this is a personal choice but I like to leave it displayed). Once you've made your choices don't forget to scroll to the bottom and click on the '**Save block**' button.

## Checkout

### Admin Menu>Store>Configuration>Checkout:

**Basic settings:** Make sure that '**Enable checkout**' is ticked. PayPal is one of the most popular checkout services so I'm going to assume that is what you will be using. Whilst this box does not need to be ticked if you are using **PayPal Express**, it does need to be ticked if you use **PayPal Website Payments Standard**. Whilst in theory you can use PayPal Express, in practice it has sometimes caused problems in the past. I would **recommend that you use PayPal Website Payments Standard**, and for that you need

to make sure the ‘**Enable checkout**’ box is ticked. The remaining settings can all be left on their default.

**Anonymous checkout:** Whilst you can allow anonymous users to purchase your goods, this can cause all sorts of difficulties if there are delivery problems or future queries. For that reason my recommendation would be to make sure there is no tick in this box. Without a tick, details will be collected from your customers, and an account created during the buying process.

The next four tabs can all be left at their defaults.

## **Countries and addresses**

By default the United States and Canada are installed by default, and if you are only going to sell within those countries there is nothing further you need to do. If your customers are going to come from other countries, or if you yourself come from another country, then you can click on the ‘**Import Countries**’ link and select the countries from the drop down list. For example, if your store is based in the **UK** you would select ‘**United Kingdom**’

On the ‘**Address Fields**’ tab you can choose to make more or fewer of the address fields a ‘**Required**’ field.

## **Orders**

All the defaults can be left unchanged.

**Admin Menu>People>Permissions>Order:** Make sure ‘**Authenticated User**’ can ‘**View own orders**’ and ‘**Create orders**’

## **Products**

All the defaults can be left unchanged

**Admin Menu>Structure>Content types>Product>edit:** We are not going to actually going to create any products yet, but we are going to look at the form we will be using to create them, and making some changes. Making changes to this template will save us a lot of time later on. Towards the bottom left you will see several tabs (figure 023) and I’ll go through some of them.

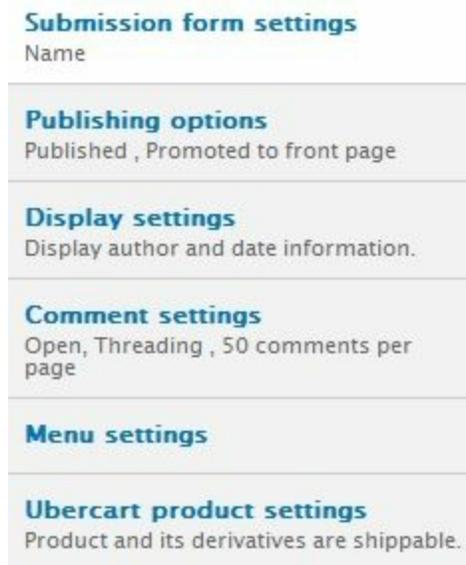


Figure 023

**Display settings:** Whilst it's nice to have your name on the top of a page if you are writing a blog type site, it can be a bit off putting on an ecommerce site. Click on this link and remove the tick from the '**Display author**' box.

**Comment settings:** It's great to have feed-back on your products that will encourage others to buy the same, but the default displays an empty comment box immediately under your product description. It's a personal choice, but I think it's better just to have a '**comment**' link rather than the full comment box. If you feel the same, remove the tick from the '**Show reply form on the same page as comment**' box.

**Ubercart product settings:** By default the '**Product and its derivatives are shippable**' box is ticked. If you are always, or sometimes, selling physical products then the default setting is fine. However, if you are always, or mainly, selling downloadable files for which there is no shipping, then it will save time later if you remove the tick.

Once you have made the above choices, click on the '**Save content type**' button.

**Admin Menu>Structure>Content types>Product>edit:** This time we're going to look at the '**Manage Display**' tab at the top of the page (figure 024)



Figure 024

This page lists all the fields that will be displayed when you create a product. One of the things that Ubercart does is display the '**List price**' and '**Cost**' as well as listing the '**Sell price**'. My own experience is that these tend to confuse buyers, so unless you have some over-riding need to display all three prices my recommendation would be to just display the '**Sell price**'. To hide the others, in the drop down box in the format column, on the '**List price**' and '**Cost**' line, change '**Visible**' to '**Hidden**'.

If you are only selling downloadable files, the weight and dimension of the goods may not be an issue for you. In that event you may want to also hide the **‘Weight’** and **‘Dimensions’** setting.

Once you have made your choices click on the **‘Save’** button.

**What we have done so far:** We’ve installed Drupal, installed Ubercart, and configured the core Ubercart modules.

**What we are doing next:** We’re going to add and configure a payment module and add and configure a catalog. Then we’re all set to add our products and start making our first million!

## Payments

Whichever method of payment we use we need to activate the **payment module**. Then we are going to tell the payment module what type of payment we are going to receive. I’m going to show you how to configure payments through **PayPal** because that is the most popular, and because that also enables you to accept **credit and debit card** payments.

**Admin Menu>Modules>Ubercart - Core (Optional)>Payment:** Add a tick in front of the **payment module**.

**Admin Menu>Modules>Ubercart - Payment>PayPal:** Add a tick in front of the **PayPal module**.

Scroll down to the bottom of the page and click on the **‘Save configuration’** button.

**Admin Menu>Store>Configuration>Payment methods:** Make sure there is **NO tick** beside **‘PayPal Express Checkout’** (if there is, delete it). Make sure there is a **tick** beside **‘PayPal Website Payments Standard’** and then click on the **‘Save configuration’** button.

To the right of **‘PayPal Website Payments Standard’** click on the **‘Settings’** link. Add the **email** you use to access your PayPal account, change the **currency** and **language** to that used in your own country, change **‘PayPal’** server from **‘Sandbox’** to **‘Live’**, and then click on the **‘Save configuration’** button.

Once you have saved those settings the only other setting you need to worry about are the **‘Shipping address’** settings towards the bottom of the page. If you are only going to be selling **intangible files** that do not need a shipping address, then you should make sure the **‘Do not show shipping address’** line is selected. If you are only going to be selling **physical goods** then you should make sure the **‘Require customer to provide a shipping address’** line is selected. If you are going to be selling a mixture of **tangible and intangible goods**, then the **‘Prompt customer’** line should be selected. If you need

to change the current selection don't forget to click on the '**Save configuration**' button again.

I've chosen to only explain the PayPal module as that is by far the most widely used option, but if you do use one of the other modules they are usually all configured in a similar easy way.

## Catalog

**Admin Menu>Modules>Ubercart - Core (Optional)>Catalog:** Activate the Catalog module, then scroll down to the bottom of the page and click on the '**Save configuration**' button.

**Admin Menu>Store>Configuration>Catalog:** The default '**Catalog vocabulary**' is called '**Catalog**'. Unless you have some overriding need to change it I would recommend leaving everything at their defaults.

Don't let the word '**Taxonomy**' put you off if you have never come across it before. The word '**Taxonomy**' is a scientific term for a classification system, so it's really just a way of classifying the items you are going to sell. You can ignore this section altogether if you are only going to be selling one category of goods, but most online stores sell more than one category, and **the taxonomy is simply a list of those categories**.

You will have your own categories, but for the sake of illustration I'm going to assume I am a book seller (which I am) and I'm going to assume that I sell software manuals and self-help manuals (which I do). Those would be my two categories or taxonomies. To add them to the Catalog, on the Catalog line click on the '**add terms**' link, and in the '**Name**' box I'm going to type the name '**Software Manuals**' and then scroll down and click on the '**Save**' button. Then I'm going to do the same again, but this time I'll type the name as '**Self-Help Manuals**'. Before clicking on the '**Save**' button it's worth mentioning the '**Relations**' link. At the moment this is set to **<root>** which in our case is '**catalog**' because we started on the catalog line. It is possible to create a hierarchy if your store is going to be more complex, and to have sub-categories. Simply add new categories to the catalog until all your categories are listed, not forgetting to click on the '**Save**' button each time.

**Admin Menu>Structure>Taxonomy:** Click on '**list terms**' and you will see a list of the various parts of your catalog. By default they are listed in alphabetical order, but you can change the order by holding your mouse down on the **cross to the left** of each title and then moving items in the list. You can also create **sub-categories** by **moving items to the right**, below their parent item.

**Admin Menu>Structure>Blocks:** The catalog module will have created a ‘**Catalog**’ block. Click on the ‘**configure**’ link to the right of the block name. Make sure the ‘**Display product counts**’ is selected, then in the ‘**Region Settings**’ select the area of your site where you want the catalog to be displayed. The most usual position would be in the right hand margin immediately above the ‘**Shopping cart**’ block.

**Admin Menu>People>Permissions>Catalog:** Make sure ‘**Anonymous User**’ and ‘**Authenticated User**’ both have permission to ‘**View catalog**’.

**What we have done so far:** We’ve installed Drupal, installed Ubercart, and configured the core Ubercart modules, the payment module and the catalog.

**What we are doing next:** We’re ready to add our products.

## DOWNLOADABLE PRODUCTS

### Single Product Type

I've started with downloadable products first because we don't need to worry about shipping. In order to add downloadable files we only need to activate the '**File downloads**' module as described below.

**Admin Menu>Modules>Ubercart - Core (Optional)>File downloads:** Activate the File downloads module then scroll down to the bottom of the page and click on the '**Save configuration**' button.

**Admin Menu>People>Permissions>File downloads:** Make sure '**Authenticated User**' can '**Download file**'.

**Admin Menu>Store>Configuration>Products>File download settings:** The most important setting here is the '**Files path**'. If you add a file on your site that contains downloads, once someone has bought something they will know where those downloads are and they can send an email to all their friends to tell them. That's why the instructions below the box say that files should be located **outside the web root**. Easy to say, but what does that mean? The Ubercart forums are regularly filled with people asking exactly the same question so I'll spend some time explaining.

In another tab, or in another browser, log into **cPanel**. In the **left hand column** of cPanel, under your domain name, you will see your '**Home Directory**' (figure 025)



Figure 025

The name of your home directory is usually your **log-on name**.

On your **cPanel** page click on the '**File Manager**' icon (figure 026)



Figure 026

Just as you would with Windows explorer, in the **left hand column** double click on the **picture of a house** followed by your home directory (Figure 027)



Figure 027

The list of files in the **center** of your screen should now include all the files that are in your **home/logoname** folder. This is where you need to add a secure file to contain downloads.

At the very top of the page, towards the left, you will see a **'New Folder'** button. Click on this button to create a new folder, give it the name of **'downloads'** and then click on the **'Create New Folder'** button. **WARNING:** Do not add anything in the **'New Folder will be created in'** box as you are already where you want the folder to be.

A new **'downloads'** folder will be created and the path to that new folder will be **/home/logoname/downloads**. It's in that folder that you need to add your downloadable files. You can now return to your own site.

**Admin Menu>Store>Configuration>Products>File download settings:** The **'Files path'** will be **/home/logoname/downloads**.

Having mastered that, the rest of the settings are a lot easier. In the **'Downloads'** box enter **2** (to allow for an error). Everyone who is buying downloadable files is already online when they make the purchase and most will want to download the file straight away. For that reason I usually change the **'Time'** setting so that it expires after **2 days**. Make your own choice and then click on the **'Save configuration'** button.

For the sake of illustration I'm going to be selling a **pdf file** and it is currently on my desktop with the name of **product1.pdf**. I've also prepared a 100x133 image that illustrates the product.

I'm going to open another tab or a new browser, go to my **cPanel** again, and click on **'File Manager'**. At the top of the columns there is an **'Up One Level'** link. I'm going to click on that link until the newly created **'downloads'** folder shows itself, then I'm going to **click on that folder to open it**. Once in that folder I'm going to click on the **'Upload'** icon in the top margin, **find the file** on my desktop and **upload it** into the folder. After that we need to return to our site to create the actual product.

**Admin Menu>Content>Add content>Product:** The first things you need to do are pretty obvious. You need to give your product a **Name** (title) and a **Description**. The most important part of the description should be in the first couple of sentences, so once you have finished the whole description **copy the first two sentences**, click on the **'Edit summary'** link, and past them into the **'Summary'** section.

Further down the page there is an **'Image'** section. Click on the **'Choose File'** button, find the image of your product that is on your desktop. Click on the **'Open'** button, then click on the **'Upload'** button.

The next section down is '**Catalog**' with a list of all the different categories you added earlier. I'm going to select '**Self-Help Manuals**'

Next you have a '**Product information**' section. You have to give it a **SKU**. This can be anything you want but it has to be **unique**. The easiest way is to create a SKU that will remind you what the product is so I'm going to name mine **201201firstproduct**. Next we have to add the **price**. Remember, earlier we changed the display settings so that the 'List price' and 'Cost' were going to be invisible to the buyer, so we only need to add the price in the '**Sell price**' box. Also, just below the '**Sell price**' box there is a '**Product is shippable**' box. As there is no shipping for a downloadable product this should be **un-ticked**.

At the bottom of the page click on the '**Save and continue**' button.

At the top of the page you now need to make sure you are on the '**Edit**' tab, and then click on the '**Features**' button (figure 028)



Figure 028

In the '**Add a new feature**' section, make sure '**File download**' is selected then click on the '**Add**' button.

In the drop down **SKU box** select the SKU for your product (which is why you need descriptive SKU names), and then in the '**File download**' box start typing the name of your download (if you are lucky it will self-complete once you start typing). Make sure that the '**Shippable product**' box does not have a tick in it and then click on the '**Save feature**' button.

Go to your **home page**.

Congratulations! You are ready to sell your first product. The product is described, the price is displayed, it has an image, and there is an 'Add to cart' button (figure 029) If you have moved the 'Catalog' block into your site, that block should also show one item in the appropriate category.



Figure 029

## Multiple Product Types

You know how to add one downloadable product, so you also know how to add one hundred downloadable products (just repeat the above one hundred times).

That's fine as far as it goes, but what if I want to supply a product in different formats, and allow customers to choose the format. What if, for instance, I want to create a second book in PDF format, but also allow buyers to purchase the book in mobi format (for Kindles) or in epub format (for almost all other makes of ereader). Can I do that? No need to ask, this is Ubercart, of course you can.

Firstly I need to create my three files, and using **cPanel** I need to add them to the downloads folder, you know the one, it's at **/home/logonname/downloads** I also need to create an image for it and leave the image on my desktop.

Back to your own site

**Admin Menu>Modules>Ubercart - Core (Optional)>Product attributes:** Activate the Product attributes module and then scroll down and click on the 'Save configuration' button.

**Admin Menu>Content>Add content>Product:** You already know how to create your product by giving the product a **Title**, and a **Description**. Choose and **upload an Image**. Add the product to whichever category of the **Catalog** you want to add it to, give it a **SKU** and add a **Sell price**, and then click on the 'Save and continue' button.

At the top of the page there is now an extra 'Attributes' tab (figure 030).



Figure 030

Click on the **Attributes** tab and then on the **Add an attribute** link.

Click on the **here** link in the sentence **You may add more attributes here**. Give the **Attribute** a name and **Label**, in my case I'm going to give my buyers a choice of three file formats, so the Name and Label is going to be **Format**. I need customers to choose one of the file formats so I'm going to **add a tick** in the **Make this attribute required** box, and I'm going to leave the **Display type** on the default of **Select box** and then click on the **Submit** button.

On the next page click on the **Add an option** link. I'm going to give my customers the option of choosing a **PDF file**, a **Mobi file**, or an **ePub file**, so the first option will be named **PDF** then scroll down and click on the **Submit** button.

I'm then going to name the next option **Mobi** before clicking on the **Submit** button, and then I'm going to name my final option **ePub** and click the **Submit** button for the last time.

You will probably have noticed that there was also an option to increase or decrease the cost of each option if I had wanted to, so I could have made one of the formats dearer or cheaper than the others.

We now need to return to the product we created, and add those options to it.

**Admin Menu>Content>YourNewProduct>Edit>Attributes**: Click on the **Add an attribute** link. There is a list of available attributes but we've only created the **Format** attribute so far. Add a tick in the **Format** box and then click on the **Add attributes** button.

At the top of your product edit page there will now be additional tabs (figure 031)

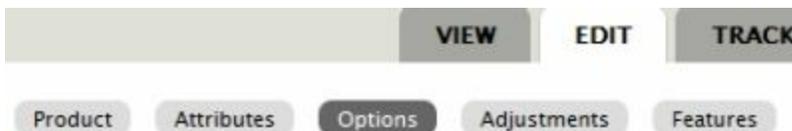


Figure 031

If you click on the **Attributes tab** it shows that there is an attribute named **Format**.

If you click on the **Options tab** it shows the options available, in my case **ePub, Mobi, and PDF**, and I can select one of these to be the default (figure 032).



Figure 032

The **Adjustments tab** shows you the SKU for the product (figure 033) and gives you the opportunity of changing the SKU for each of the different formats. I usually keep the original SKU, but **add a suffix** to it to indicate the different formats ‘E’ for ePub, ‘M’ for Mobi and ‘P’ for PDF for example (figure 034). If you do make changes don’t forget to click on the ‘**Submit**’ button.

**Default product SKU: 201202**

FORMAT	ALTERNATE SKU
ePub	201202
Mobi	201202
PDF	201202

Figure 033

**Default product SKU: 201202**

FORMAT	ALTERNATE SKU
ePub	201202E
Mobi	201202M
PDF	201202P

Figure 034

The **Features tab** is where you actually attach the files themselves. Click on the tab, then on the ‘**Add**’ button. Select the **SKU** of the file (201202E for the epub file for example) and then start typing the name of the file into the ‘**File download**’ box. It should auto display a list of appropriate files, so I need to make sure I select the correct one, in my case the epub one figure 035).

**SKU**  
   
 This is the SKU that

**File download**  
  
 product1.pdf  
 product2.epub  
 product2.mobi  
 product2.pdf

Figure 035

Once I click on the ‘**Save feature**’ button, I can repeat the process and add the other

two files (figure 036)

TYPE	DESCRIPTION
File download	<b>SKU:</b> 201202E <b>File:</b> product2.epub <b>Shippable:</b> No
File download	<b>SKU:</b> 201202M <b>File:</b> product2.mobi <b>Shippable:</b> No
File download	<b>SKU:</b> 201202P <b>File:</b> product2.pdf <b>Shippable:</b> No

Figure 036

If you return to your front page you'll see your new product has been added (figure 037). Whilst the first product can simply be added to the cart, the buyer of the second product has to choose a format from the drop down box first, and they have to choose whether they want to buy the product in ePub, Mobi, or PDF format.

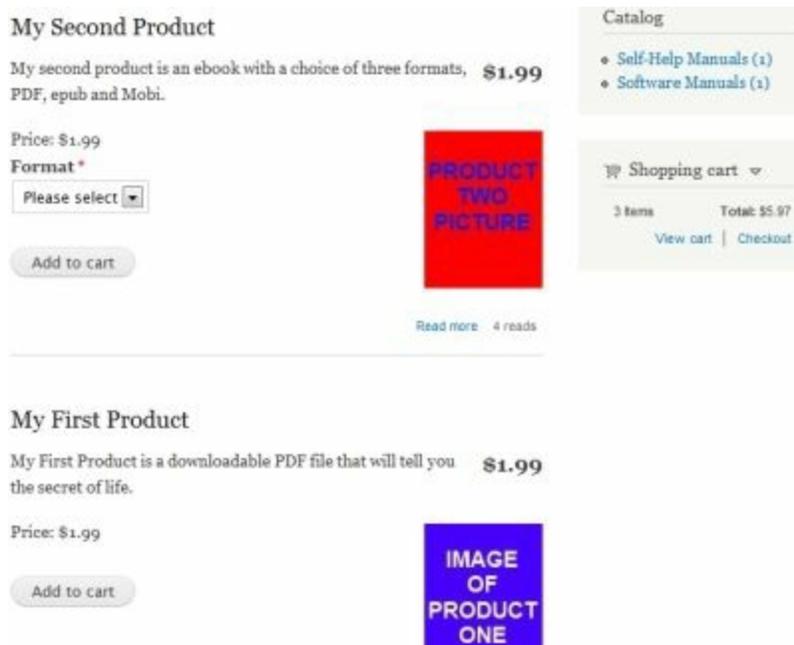


Figure 037

That's it. Finished. If you are only going to use your store to sell downloadable files then all you have to do now is repeat the above process and start creating your product pages.

## The Download Buying Process

The experience for the buyer is quite straight forward. A visitor comes to your site,

chooses a product and clicks on the ‘**Add to cart**’ link. They are taken to their cart, and have the option to continue shopping, to update the cart, or to ‘**Checkout**’ (figure 038)

## Shopping cart

Remove	Products	Qty	Total
Remove	 My First Product	1	\$1.99
<b>Subtotal: \$1.99</b>			

Continue shopping
Update cart
Checkout

Figure 038

If they click on the ‘**Checkout**’ tab they are taken to a page where they either have to log-in by typing their username and password (if they already have an account) **or create a new account** by supplying a username, email and password. Once they have logged in (or created a new account) they have to **provide their billing information** (name and address) and click on a ‘**Review order**’ page. This confirms what they are buying, their email and address, the cost, and that they will be paying by PayPal (if that’s what you are using). Once they have checked everything is correct they click on a ‘**Submit order**’ button.

They are then taken to the secure **PayPal login page**, where they have a choice of **logging into PayPal** to pay from their PayPal account, **or supplying their card details** to pay by card. Once they have made their choice they click on a ‘**Pay Now**’ button, and they also get a **confirmation email from PayPal** to say they have paid. PayPal also sends you (the site administrator) an email to say you have been paid.

From your own store, an email is sent to the buyer. A separate email is also sent to tell them their log in details and how to access their purchases. If they return to your site directly from PayPal they return to an empty shopping cart.

Once they log into your site, by clicking on the ‘**My account**’ link they can see a list of all their orders, and a link to download the file(s) they’ve bought. They just click on the link to download the file to their desktop.

## PHYSICAL PRODUCTS

### Shipping

The extra ingredients for physical products are of course the shipping modules. There are two modules that have to be activated whatever type of shipping we are using, and they are the ‘**Shipping**’ and ‘**Shipping quotes**’ modules.

**Admin Menu>Modules>List>Uberscart - Core (Optional):** Select the ‘**Shipping**’ and ‘**Shipping quotes**’ modules by adding a tick to their boxes, and then scroll down to the bottom of the page and click on the ‘**Save configuration**’ button.

The next thing you have to do is decide what shipping method you are going to choose. There are **four shipping modules already included** and these are **Flat Rate Shipping**, the **U.S. Postal Service**, **UPS**, and **Weight Based Shipping**. Wherever you live in the world one of these shipping methods will be suitable for you. Which one you use will depend very much on the type of goods you are selling, the carrier you use, and whether you are prepared to deliver worldwide or just within your own area. I’ll go through the setup for all four so that you can choose the most appropriate one for yourself, but if I had to recommend one **I’d recommend the Flat Rate Shipping module**. It is by far the most versatile as it really can be adapted for all different types of shipping, whatever your product and wherever in the world you need to ship to. It can also manage free shipping or conditional free shipping.

### Flat Rate Shipping

Although the ‘**Flat Rate Shipping**’ method can be used to provide a single flat rate, it is not necessarily confined to a single rate. Depending upon your needs you could have a single rate for all your shipping, but you could just as easily have flat rates for different areas of your catalog, or for goods of different weights, or even speed of delivery. For example you could have a flat rate for all your **music** DVD’s, and a different flat rate for all your **film** DVD’s.

**Admin Menu>Modules>List>Uberscart - Fulfillment>Flat rate:** Activate the ‘**Flat rate**’ module and then scroll down the page and click on the ‘**Save configuration**’ button.

**Admin Menu>Store>Configuration>Shipping quotes>Settings>Default Pickup Address:** Complete the address where the goods will be dispatched from.

Now, let’s create three different flat rates, as an example I’ll name mine **regular**,

quicker and quickest.

**Admin Menu>Store>Configuration>Shipping quotes>Methods:** Click on the ‘**Add flat rate quote**’ link. For illustration purposes in the ‘**Shipping method title**’ box and in the ‘**Line item label**’ I’m going to give my first method the name of ‘**Regular Shipping**’. In the ‘**Base price**’ I’m going to add \$3.00.

You have got a choice now. Some sites will want to have a single shipping price irrespective of the amount of goods. In that case you will need to ensure that the price you add to the ‘**Base price**’ is sufficient to cover all your costs, and in the ‘**Default product shipping rate**’ you would add \$0.00. Other sites may prefer to have a lower ‘**Base price**’ that is applied per order, **plus** an amount per item purchased. In the latter case you would add a further amount in the ‘**Default product shipping rate**’ box. By way of example I’m going to charge \$3.00 per order, plus an extra \$0.50 per item (figure 039). Once you have made your choice, click on the ‘**Submit**’ button.

**Shipping method title \***  
  
 The name shown to administrators di

**Line item label \***  
  
 The name shown to the customer whe

**Base price \***  
 \$   
 The starting price for shipping costs.

**Default product shipping rate**  
 \$

Figure 039

If you are only having one flat rate, then you’ve finished. If you are having several rates, just repeat the above process for the other rates (figure 040). It’s worth remembering that, in the event that a particular product is extra heavy or extra light, or an odd shape, the ‘**Default product shipping rate**’ can be over-ridden when you create individual products,

SHIPPING METHOD	DETAILS	OPERATIONS
+ <input checked="" type="checkbox"/> Regular Shipping	\$3.00 + \$0.50 per item	<a href="#">edit</a> <a href="#">conditions</a>
+ <input checked="" type="checkbox"/> Quicker Shipping	\$5.00 + \$0.75 per item	<a href="#">edit</a> <a href="#">conditions</a>
+ <input checked="" type="checkbox"/> Quickest Shipping	\$7.00 + \$1.00 per item	<a href="#">edit</a> <a href="#">conditions</a>

Figure 040

As things stand at present, if a shippable product is created, and a buyer adds it to their cart and goes to the checkout, they get to choose whether they want to pay more for

faster delivery (figure 041)

- Regular Shipping: \$3.50
- Quicker Shipping: \$5.75
- Quickest Shipping: \$8.00

Figure 041

This may be the only configuration you need, but how powerful this shipping module is can best be illustrated by using the simple illustration of a carrier who charges by weight, for example:

Under 1 pound costs \$2.00

1 pound and over, but less than 5 pound cost \$4.00

5 pound and over, but less than 10 pound cost \$9.00

This is a very simplified example, but in this case I would create three shipping quotes named '**Weight Under a Pound**' and '**Weight Under 5 Pound**' and '**Weight Under 10 Pound**' with the shipping base prices as \$2.00, \$4.00 and \$9.00.

SHIPPING METHOD	DETAILS	OPERATIONS
<input checked="" type="checkbox"/> Weight Under a Pound	\$2.00 + \$0.00 per item	<a href="#">edit</a> <a href="#">conditions</a>
<input checked="" type="checkbox"/> Weight Under 5 Pound	\$4.00 + \$0.00 per item	<a href="#">edit</a> <a href="#">conditions</a>
<input checked="" type="checkbox"/> Weight Under 10 Pound	\$9.00 + \$0.00 per item	<a href="#">edit</a> <a href="#">conditions</a>

Figure 042

To add the different weights, in the '**Weight under a pound**' line, click on the '**conditions**' link (figure 042) and then click on the '**Add condition**' link. In the drop down '**condition**' box, scroll down to the '**Order: Product**' section and select '**Check an order's total weight**'.

In the '**Products**' section: select '**All products**'

In the '**Unit of Measurement**' section: the value would be '**Pounds**'.

In the '**Product Weight Value**' section: the value would be **.001**

In the '**Operator**' section: the value would be '**Total is greater than or equal to the specified value**'

At the bottom of the page click on the '**Save**' button.

That is our first condition.

Click on the '**Add condition**' link again. In the drop down '**condition**' box, scroll down to the '**Order: Product**' section and select '**Check an order's total weight**'.

In the '**Products**' section select '**All products**'

In the '**Unit of Measurement**' section, the value would be '**Pounds**'.

In the '**Product Weight Value**' section, the value would be **1**

In the '**Operator**' section, the value would be '**Total is less than specified value**'  
At the bottom of the page click on the '**Save**' button.

That is our second condition.

That takes care of '**Weight Under a Pound**' shipping. This is the shipping that will be charged if the product **weighs more than .001 Pound** (first condition) **but less than 1 Pound** (second condition).

The process for adding conditions to the other two are similar, and you just need to follow the above instructions with the following changes.

For '**Weight Under 5 Pounds**' the '**Product Weight Value**' would be **1** (first condition), and **5** (second condition)

For '**Weight Under 10 Pounds**' the '**Product Weight Value**' would be **5** (first condition) and **10**.(second condition).

As things stand at present the shipping only applies to items with a weight **under 10 pounds**, so if the order comes to more than this no shipping would be added. This would obviously not be what you want, so you need to ensure your highest weight using this method is a lot higher than anything you are likely to ever have in a cart at any one time. In the present example we would be shipping goods weighing only one or two pounds, and items that customers would only want one or two of, so this would be OK. To be on the safe side we could always add a final top weight with a condition of 10 pound and above.

**REMEMBER:** The above is just an example. On your site **you need to make sure the weight settings go up at least as far as the maximum weight anyone is ever likely to have in their cart**, and then add a top rate to be on the safe side.

We're going to look at how these three shipping rates work in practice in a moment, but before we do it's worth considering how powerful this module is, as it really is the shipping module you need.

We've looked at **shipping by weight**, but we could just as easily chosen **other conditions** such as the **number of products**, the **order balance**, and even by **country** (described briefly below) or address.

## **Flat Rate Shipping to Different Countries**

**Store>Configuration>Countries and addresses>Import Countries:** Select all the countries you will ever ship to.

**Store>Configuration>Shipping quotes:** Create a shipping method named after the country ('**Shipping to France**' for example)

In the '**Conditions**' select '**Data comparison**', then the '**Continue**' button.

Click on the '**Data Selectors**' link.

Scroll down to '**order:delivery-address:country**' (or any other criteria)

Copy and paste '**order:delivery-address:country**' into the '**Data selector**' box at top of page.

Click on '**Continue**' button at bottom of page.

In the '**Operator**' Value box select '**equals**'

In the '**Data Value**' drop down box select '**France**'

Click on the '**Save**' button.

Just repeat the process for every country you want to ship to. You can of course combine the two methods above (weight and country) and have 3 or more weight conditions for each country.

## Free Shipping

One of the things that is not always grasped by new users of Ubercart is that the **Flat rate shipping module is also ideal for Free shipping**. This can be achieved in several ways, two of which are described below.

### Method One: For products without a specified weight

Following the procedure already described simply create a flat rate shipping named '**Free Shipping**' and mark the '**Base price**' and the '**Default product shipping rate**' as **\$0.00**.

Click on the '**Add condition**' link. In the drop down '**condition**' box, scroll down to the '**Order: Product**' section and select '**Check an order's total weight**'.

In the '**Products**' section select '**All products**'

In the '**Unit of Measurement**' section, the value would be '**Pounds**'.

In the '**Product Weight Value**' section, the value would be **0**

In the '**Operator**' section, the value would be '**Total is equal to the specified value**'

At the bottom of the page click on the '**Save**' button.

**IMPORTANT:** This provides free shipping **where a product has no weight**. Any shippable products you create will have free shipping if they have a weight of 0, but this means, if you forget to add a weight to a product you do want to charge shipping for, it will be sent free shipping instead! Make sure you don't forget.

### Method Two: For products over 10 pounds in weight

Following the procedure already described simply create a flat rate shipping named '**Free Shipping**' and mark the '**Base price**' and the '**Default product shipping rate**' as **\$0.00**.

Click on the ‘**Add condition**’ link. In the drop down ‘**condition**’ box, scroll down to the ‘**Order: Product**’ section and select ‘**Check an order’s total weight**’.

In the ‘**Products**’ section select ‘**All products**’

In the ‘**Unit of Measurement**’ section, the value would be ‘**Pounds**’.

In the ‘**Product Weight Value**’ section, the value would be **10**

In the ‘**Operator**’ section, the value would be ‘**Total is greater than the specified value**’

At the bottom of the page click on the ‘**Save**’ button.

## **Flat Rate Shipping Product**

We’ve spent some time looking at the Flat rate shipping module as it really is the only one you need. I’ll create a new product so that you can see how the module works in practice, and I’ll use the weight based shipping that I created earlier:

Under 1 pound costs \$2.00

1 pound and over, but less than 5 pound cost \$4.00

5 pound and over, but less than 10 pound cost \$9.00

I’ve also created a free shipping option. If a customer purchases so many items that they add up to over 10 pounds in weight then I’ll reward them with free shipping.

**Admin Menu>Content>Add content>Product:** Add a ‘**Name**’ and ‘**Description**’ to your product. If you have a picture of your product on your desktop click on the ‘**Choose File**’ button in the ‘**Image**’ section, and then on the ‘**Upload**’ button. In the ‘**Catalog**’ area, click on the area of the catalog you want the product to appear in.

In the tabs on the bottom left of the page click on the ‘**Product information**’ tab:

Give your product a short but meaningful **SKU**.

Add a ‘**Sell price**’.

Tick the ‘**Product is shippable**’ box.

Add the **Weight** of the product.

Add the **Unit of weight**.

Add the maximum number of items you will send per package.

Click on the ‘**Save**’ button.

On my test product I made the price \$15.99, and the weight 3 pounds, so **one of them should ship for \$4.00** (under 5 pounds) and **two of them should ship for \$9.00** (under 10 pounds).

If I now go to my product, add it to my cart and then click on the ‘**Checkout**’ button, I’m told that the price is £15.99 and the shipping is \$4.00 (figure 043).

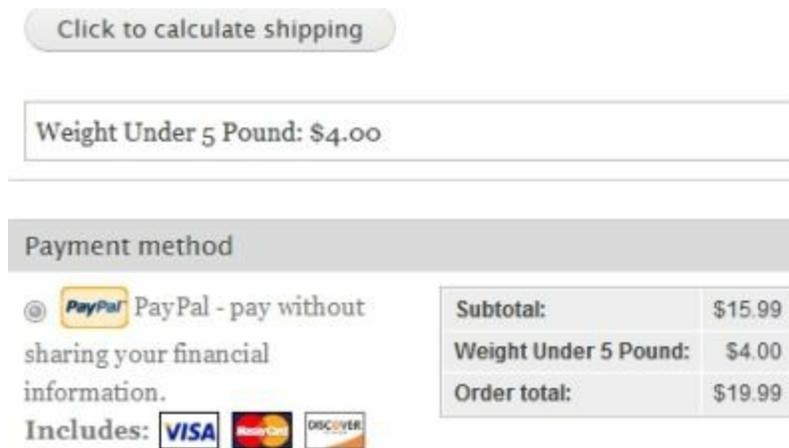


Figure 043

If I change my order so that there are two items in my cart, update the cart, and then return to the checkout, the cost becomes \$31.98 and the shipping cost becomes \$9.00 (figure 044)

Subtotal:	\$31.98
Weight Under 10 Pound:	\$9.00
Order total:	\$40.98

Figure 044

The shipping would remain the same if someone ordered three items (because the weight is still less than 10 pounds) but if they ordered four items, they are rewarded with free shipping (figure 045).

Subtotal:	\$63.96
Free Shipping:	\$0.00
Order total:	\$63.96

Figure 045

## U.S. Postal Service

In order to use the U.S. Postal Service module you need to have a **USPS account** as a **‘Web Tools User’**. If you do not already have an account you can register free at <https://secure.shippingapis.com/registration>. You do not need to be resident in the US to register, but after registering you need to email them ([icustomer@usps.com](mailto:icustomer@usps.com)) or phone them (**1-800-344-7779**), tell them you are using Ubercart and ask them for access to their production server. The following instructions assume that you have already done all the above.

**Admin Menu>Modules>List>Ubercart - Fulfillment>U.S. Postal Service:** Add a tick in the box to the left of the module name to activate it, then scroll down to the bottom of the page and click on the **‘Save configuration’** button.

**Admin Menu>Store>Configuration>Shipping quotes>Settings>USPS>Credentials:**  
Add your '**Web Tools User ID**' to the box, and click the '**Save configuration**' button.

**Admin Menu>Store>Configuration>Shipping quotes>Settings>USPS>USPS Domestic:** Select the domestic postal services that are available to you. By default they are all selected. If you make any changes don't forget to scroll down and click the '**Save configuration**' button.

**Admin Menu>Store>Configuration>Shipping quotes>Settings>USPS>USPS International:** Select the domestic postal services that are available to you. By default they are all selected. If you make any changes don't forget to scroll down and click the '**Save configuration**' button.

**Admin Menu>Store>Configuration>Shipping quotes>Settings>USPS>Quote options:** You can select to send each item in its own package, or send all the items together (default). You can also select to add insurance, confirmation of delivery, and signature confirmation, but none of these are selected by default. If you make any changes don't forget to scroll down and click the '**Save configuration**' button.

**Admin Menu>Store>Configuration>Shipping quotes>Settings>USPS>Markups:**  
The shipping costs are based upon the weight of the final package not just the weight of the goods themselves. This is where you add an additional amount to cover the weight of your packaging, the cost of the wrapping paper, tape, cardboard box and so on. These packing costs will differ from site to site depending upon what you are selling, how fragile it is, whether it needs specialist materials etc. This '**Markups**' setting is where you add the amount for the packaging itself and also to allow for the extra weight of the packaging, and you can do this in several ways. You can add a percentage, a multiplier, or a fixed amount to the shipping costs. If you make any changes don't forget to scroll down and click the '**Save configuration**' button.

**Admin Menu>Store>Configuration>Shipping quotes>Methods:** This is where you set the shipping methods that you are actually going to use, and you **must** select at least one domestic and one international method. Simply add a tick to all the ones that you want to make available, make sure the configuration settings are correct and then scroll down and click the '**Save configuration**' button.

**Admin Menu>Store>Configuration>Shipping quotes>Settings>Basic settings:**  
Click on the '**Default Pickup Address**' link and make sure your full address is entered including ZIP Code (Postal code).

### **How it Works:**

The module links up with the USPS server which works out the shipping costs. The server needs to know where you are (which is why you just checked the above setting) the address the item is being shipped to, the total weight of the package, and the

dimensions of the package.

## U.S. Postal Service Product

**Admin Menu>Content>Add content>Product:** Add a **'Name'** and **'Description'** to your product. If you have a picture of your product on your desktop click on the **'Choose File'** button in the **'Image'** section, and then on the **'Upload'** button. In the **'Catalog'** area, click on the area of the catalog you want the product to appear in.

In the tabs on the bottom left of the page click on the **'Product information'** tab:

Give your product a short but meaningful **SKU**.

Add a **'Sell price'**.

Tick the **'Product is shippable'** box.

Add the **Weight, unit of weight** and **dimensions** of the product.

Add the maximum number of items you will send per package.

Click on the next tab down, the **'Shipping settings'** tab.

In the drop down boxes, depending on the size of package and shipping address, select the correct **'Default product shipping type'** and the **'USPS Product Description'**.

Click on the **'Save'** button.

## UPS

**UPS Shipping is designed for businesses that have daily shipping needs** and it is ideal for that purpose, so the UPS Module is of most benefit if you need regular and frequent shipping. If your needs are weekly, or every couple of days, then you may well be better off using one of the other methods.

In order to use the module you need to **register with UPS as a shipper** at **<http://www.ups.com>**, and they will supply you with your **'UPS Shipper Number'** and **'UPS Online Tools XML Access Key'**. The following instructions assume that you have already created a UPS account.

**Admin Menu>Modules>Uberscart - Fulfillment>UPS:** Add a tick in the box to the left of the module name to activate it, then scroll down to the bottom of the page and click on the **'Save configuration'** button.

**Admin Menu>Store>Configuration>Shipping quotes>Settings>UPS>Credentials:** Add your **'UPS Online Tools XML Access Key'** and **'UPS Shipper Number'** in the appropriate boxes, and then add your **'UPS user ID'** and **'Password'**.

**IMPORTANT:** The default **'Server mode'** is **'Testing'** and it is recommended that you use the test server whilst you configure all the UPS settings and through the creation

of your first products. This will enable you to test everything and make sure it is all working correctly. **DO NOT FORGET** to change this to ‘**Production**’ server mode once you are ready to go live.

**Admin Menu>Store>Configuration>Shipping quotes>Settings>UPS>Service options:** Select the service options that you will be making available to your customers.

**Admin Menu>Store>Configuration>Shipping quotes>Settings>UPS>Quote options:** These options will differ depending upon your own site and what you are selling. Make the selections appropriate to your site.

**Admin Menu>Store>Configuration>Shipping quotes>Settings>UPS>Markup:** The shipping costs are based upon the weight of the final package not just the weight of the goods themselves. This is where you add an additional amount to cover the weight of your packaging, the cost of the wrapping paper, tape, cardboard box and so on. These packing costs will differ from site to site depending upon what you are selling, how fragile it is, whether it needs specialist materials etc. This ‘**Markups**’ setting is where you add the amount for the packaging itself and also to allow for the extra weight of the packaging, and you can do this in several ways. You can add a percentage, a multiplier, or a fixed amount to the shipping costs.

**Admin Menu>Store>Configuration>Shipping quotes>Settings>UPS>Label Printing:** Provided you have permission from UPS to use this feature, your Shipping label printing preferences can be changed here.

Once you have made any changes to any of the above settings, don’t forget to scroll down and click on the ‘**Save configuration**’ button.

**Admin Menu>Store>Configuration>Shipping quotes>Settings>Basic Settings:** Click on the ‘**Default Pickup Address**’ link and make sure your full address is entered including ZIP Code (Postal code).

### **How it Works:**

The module links up with the UPS server which works out the shipping costs. The server needs to know where you are (which is why you just checked the above setting) the address the item is being shipped to, the total weight of the package, and the dimensions of the package.

## **UPS Product**

**Admin Menu>Content>Add content>Product:** Add a ‘**Name**’ and ‘**Description**’ to your product. If you have a picture of your product on your desktop click on the ‘**Choose File**’ button in the ‘**Image**’ section, and then on the ‘**Upload**’ button. In the ‘**Catalog**’ area, click on the area of the catalog you want the product to appear in.

In the tabs on the bottom left of the page click on the '**Product information**' tab:

Give your product a short but meaningful **SKU**.

Add a '**Sell price**'.

Tick the '**Product is shippable**' box.

Add the **Weight, unit of weight** and **dimensions** of the product.

Add the maximum number of items you will send per package.

Click on the next tab down, the '**Shipping settings**' tab

In the drop down boxes, depending on the size of package and shipping address, select the correct '**Default product shipping type**' and the '**UPS Product Description**'.

Click on the '**Save**' button.

## **Weight Based Shipping**

The weight based shipping module is very similar to the new '**Flat Rate**' module described above, and in many ways has been superseded by it. If you follow the instructions for the '**Flat Rate**' module you should be able to also use them with this module.

**Admin Menu>Store>Configuration>Store>Weight format:** Make sure your '**Default unit of measurement**' is correct. If your shipping spans from grams to kilograms, you should set your default as **Kilograms**. If your shipping spans from ounces to pounds, you should set your default as **Pounds**

**Admin Menu>Modules>List>Ubercart - Fulfillment>Weight quote:** Add a tick in the box to the left of the module name to activate it, then scroll down to the bottom of the page and click on the '**Save configuration**' button.

**Admin Menu>Store>Configuration>Shipping quotes>Settings:** Click on the '**Default Pickup Address**' link and make sure your full address is entered including ZIP Code (Postal code).

**Admin Menu>Store>Configuration>Shipping quotes>Methods:** Click on the '**Add weight quote**' link.

From here on, the configuration is basically the same as for the above '**Flat Rate**' module.

## ATTRIBUTES

We've already looked at **'attributes'** under the downloadable products section when we discussed multiple product types, but **'attributes'** can be added to all types of product not just intangible ones. I'll take as an example an item of **clothing available in black and white**, with **each color available in small, medium and large sizes**. That's a total of six different product combinations, but we only need to add one.

If you did not activate the **'Attributes'** module when we looked at it above, or if you have since deactivated it, you will need to activate it as follows.

**Admin Menu>Modules>Ubercart - Core (Optional)>Product attributes:** Activate the Product attributes module and then scroll down and click on the **'Save configuration'** button.

Next, we create our attributes.

**Site Admin>Store>Products>Attributes>Add an attribute:** Give the attribute the **'Name'** and **'Label'** of **'Color'**, place a tick in the **'Make this attribute required'** box, and make sure the **'Display type'** is **'Select box'**. Then click on the **'Submit'** button.

On the next page, click on the **'Add an option'** link.

Give the option the name **'Black'**, then click on the **'Submit'** button. Name the next option **'White'** and then click the **'Submit'** button again (it's worth noticing that you can increase or decrease the **'Price'** if you want to, to make either of the options dearer or cheaper than the other).

When you have finished, clicking on the **'cancel'** link will take you back to the **'Color'** attributes, where you will see the two options (figure 046)



Figure 046

We've created a product with an attribute of **'Color'** and we've given that attribute the choices of **'Black'** and **'White'**. Now we need to create the attribute of **'Size'** in the same way and give that attribute the choices of **'Small'**, **'Medium, and 'Large'**.

**Site Admin>Store>Products>Attributes>Add an attribute:** Type **'Size'** into the **'Name'** and **'Label'** boxes, add a tick to the **'Make this attribute required'** box, then click on the **'Submit'** button.

Click on the **'Add an option'** link, create an option named **'Small'**, then click on the

‘**Submit**’ button (the options will be displayed in alphabetical order, so will display as Large, Medium, and Small. To reverse this order you would need to change the ‘**List position**’ and give ‘**Small**’ a list position of **0**, ‘**Medium**’ a list position of **2**, and ‘**Large**’ a list position of **4**. The **lower numbers are placed above the higher numbers**. Leaving a gap between the numbers allows you to add options into the 1 and 3 positions should you need to do so later). Repeat the procedure for the ‘**Medium**’ and ‘**Large**’ options, clicking on the ‘**Submit**’ button each time.

When you have added all your options, clicking on the ‘**Cancel**’ link will take you back to the ‘**Size**’ attribute page where you will see the three options (figure 047). I’ve reversed the alphabetical order using the method described above.



Figure 047

So we’ve created two attributes, one named ‘**Color**’ with options of ‘**Black**’ and ‘**White**’, and one named ‘**Size**’ with options of ‘**Small**’, ‘**Medium**’ and ‘**Large**’. We can add these options to any of our products, but we’ll create a new one as an example.

**Admin Menu>Content>Add content>Product:** Create your product in the usual way. Add a ‘**Name**’ and ‘**Description**’. If you have images of the items you will of course want to **add an image of both** colors. Add a **SKU** and a ‘**Sell price**’, mark the product as ‘**Shippable**’, choose your shipping and then click on the ‘**Save**’ button.

Click on the ‘**Attributes**’ tab at the top of the page (figure 048).



Figure 048

Click on the ‘**Add an attribute**’ link, add a tick in the ‘**Color**’ box, and then click on the ‘**Add attributes**’ button.

Click on the ‘**Add an attribute**’ link again, this time adding a tick to the ‘**Size**’ box then clicking ‘**Add attributes**’.

If you now go to view your product you will see that there are two compulsory choices that have to be made by the buyer before they can add the product to their cart, ‘**Color**’ and ‘**Size**’ (figure 049). The illustration also shows that drawing clothing is not one of

my talents!



Figure 049

## PRODUCT KIT

We've looked at downloadable products and physical products, how they are shipped and how we can add attributes or choices to them, but there is something else we may want to do. It may be that we want to sell two different products at \$1.99 each, but sell them at a combined price of \$3.00 if the buyer purchases both. To put it another way, we may want to **sell individual items as a set** and adjust the price of the set compared to the original individual items.

We can do this with any two (or more) products that we have already created so I'll demonstrate this by going back to my first two products (figure 050). As well as selling them as they are, individually, I'll create a combined product using the '**Product Kit**'.

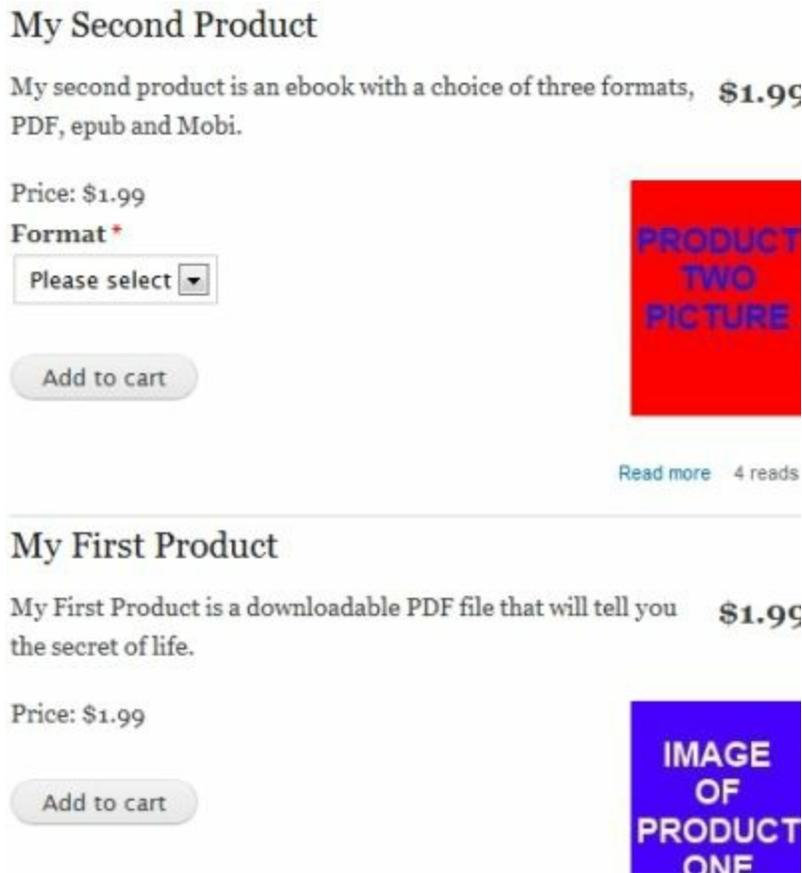


Figure 050

To begin, I need to activate the ‘**Product Kit**’ module.

**Admin Menu>Modules>List>Uberscart -Extra>Product kit:** Activate the module by adding a tick into its box, then scroll down and click on the ‘**Save configuration**’ button.

Then we need to create a ‘**Kit**’.

**Admin Menu>Content>Add content>Product kit:** We name and describe the product in the usual way. When it comes to the ‘**Image**’ you can upload two pictures, one for each product, but probably a better way would be to create a new single image that shows both products.

When you get to the bottom left of the page you will find a ‘**Product kit information**’ tab with a drop down ‘**Products**’ box listing all your current products. Select whichever two (or more) you want to sell together, and then click on the ‘**Save and continue**’ button.

On the same page, add your new combined ‘**Total Price**’. It will tell you underneath how much the original combined price was (Figure 051). Then click on the ‘**Save**’ button.



Figure 051

If you remember back to when I created the original two products, the first product was a downloadable PDF file, but the second product was a downloadable product where the buyer could choose whether to have a PDF file, a Mobi file, or an ePub file. The buyer has the same choice when they buy the combined products (figure 052).

## Two Product Set

Submitted by [admin](#) on Thu, 04/05/2012 - 15:08

This combined set of Product One and Product Two make the **\$3.00** ideal gift for someone you love.

Show your love and save money by buying both products at the same time.

Price: \$3.00

1 × [My First Product](#)

1 × [My Second Product](#)

My Second Product

**Format \***

Please select



Figure 052

**What we have done so far:** We've installed Drupal, installed Ubercart, and configured the core Ubercart modules, the payment module and the catalog. We've created intangible products (downloads), tangible products (physical) and we've looked at how they are both delivered. We've also examined how products can have attributes that give choices to the buyer, and at how we can use the product kit to sell products in groups.

**What we are doing next:** We're going to look at 'Taxes'. Sorry to mention them, but I don't want you to end up being arrested like Al Capone! After that we'll look at a special type of product that sells membership, then we'll conclude by looking at all the other odds and ends under the catch-all heading of 'Admin'.

## TAXES

Death and Taxes are said to be the only two certainties in life, and much as I hate paying them, taxes seem the most preferable option of the two. Unfortunately, unless you are extremely fortunate enough not to have to pay them for some reason (like being dead!) you have to install the 'Taxes' Module.

**Admin Menu>Modules>List>Ubercart - Core (Optional)>Taxes:** Click on the box to activate the module, then scroll down and click on the 'Save configuration' button.

Depending upon where you are and what you are selling all of your needs will be different so I'm going to go through several scenarios, starting with the assumption that all your sales are taxable at the same rate, to all of your goods being taxed at differing rates.

For the first illustration I'm going to assume that you have to add a single tax rate of 5% to all your products (I kept the rate low so that you don't become too depressed!). You will need to follow the same method for whatever the tax requirements and rates are in your own country.

**Admin Menu>Store>Configuration>Taxes:** Click on the 'Add a tax rate' link. Give your first rate the name of the tax applicable to your own country, and add the percentage in the 'Rate' box. Add a tick beside 'Product' in the 'Taxed product types' section. In the 'Taxed line items' section add a tick in the 'Shipping' box if the tax has to be paid on the shipping as well as on the product itself (if it is only paid on the product and not on the shipping, you do not have to tick this) Towards the bottom I'm going to add a tick in the 'Include this tax' box, and I'm going to add a space then 'Includes 5% Tax' in the 'Tax inclusion text' box. Then I'm going to click on the 'Submit' button.

If you look at any of your products, you will now find that all the prices have increased by 5%. For example my first product was created at a cost of \$1.99 but is now \$2.09 including tax (figure 053).



Figure 053

For my second example I'm going to assume that some of your products have a tax rate of 5%, some of your products have a tax rate of 10% (boo!) but some of your products are tax free (hoorah!).

For the sake of illustration let's assume that you are selling books (tax free), children's clothes (5% tax) and adult clothes (10%). The simplest way of dealing with this is by creating your products into three different classes. We're going to create a **'Books'** class of product, a **'Children's clothes'** class and an **'Adult clothes'** class.

**Admin Menu>Store>Products>Manage classes:** I'm going to type in my first **'Class ID'** as **'books'** (no capitals are allowed) and the **'Class name'** as **'Books'**. I don't need a description as the word **'Books'** is pretty self-descriptive, so I just need to click on the **'Save'** button.

I'm then going to create the other two classes using **'childrens\_clothes'** and **'adult\_clothes'** for the **'Class ID's'**, and **'Children's Clothes'** and **'Adult Clothes'** as the **'Class names'**. Don't forget to click on the **'Save'** button each time (figure 054).

CLASS ID	NAME
adult_clothes	Adult Clothes
books	Books
childrens_clothes	Children's Clothes

Figure 054

Having created the three product classes, we now need to create the three tax rates that go with each class.

**Admin Menu>Store>Configuration>Taxes:** I've already got the 5% tax rate that I created earlier, so I'm going to click on the **'Add a tax rate'** link and follow similar instructions to also create a 10% rate (figure 055).

NAME	RATE	TAXED PRODUCTS
My Countries 5% Tax	5%	Any product
My Countries 10% Tax	10%	Any product

Figure 055

Not shown in the above image, but on the right hand side of each tax rate, there is an **'edit'** link. Click on the **'edit'** link for the **'5%'** tax rate, and in the **'Taxed product types'** box make sure only **'Children's Clothes'** is selected. Then click on the **'Save'** button.

Repeat the procedure for the **'10%'** tax rate, making sure this time that **'Adult Clothes'** is the only product type ticked.

**What we've just done:** We've created three new categories of goods, **Books, Children's Clothes and Adult Clothes**, and we've created two categories of tax, the **5% rate and the 10% rate**. The 5% tax rate will only apply to Children's Clothes, and the 10% tax rate will only apply to Adult Clothes, so by default **any other goods will be**

tax free (figure 056)

NAME	RATE	TAXED PRODUCTS	TAXED PRODUCT TYPES
My Countries 5% Tax	5%	Any product	childrens_clothes
My Countries 10% Tax	10%	Any product	adult_clothes

Figure 056

**Admin Menu>Content>Add content:** As well as the default ‘**Product**’ type, you will now find that new product types have been created, one for each of the new classes of **Books, Children’s Clothes and Adult Clothes**. If you create one of each at the same sale price of \$2, you will find that the prices of two of them become different because the different tax rates are automatically added (figure 057).

<b>First Adult Clothes Product</b>	
SKU: FAC	<b>\$2.20 Includes tax at 10%</b>
Price: \$2.00	
<hr/>	
<b>First Children's Clothes Product</b>	
SKU: FCCP	<b>\$2.10 Includes 5% tax</b>
Price: \$2.00	
<hr/>	
<b>First Book Product</b>	
SKU: FBP	<b>\$2.00</b>
Price: \$2.00	

Figure 057

**What we have done so far:** We’ve installed Drupal, installed Ubercart, and configured the core Ubercart modules, the payment module and the catalog. We’ve created intangible products (downloads), tangible products (physical) and their shipping. We’ve also examined how products can have attributes and choices, how they can be sold in sets, how they can have different categories, how they can be taxed, how different tax rates can be added to different categories.

**What we are doing next:** We’re going to look at how to create a special type of membership product, then we’ll cover all the other odds and ends under the catch-all heading of ‘Admin’, and this will include the creation of orders, controlling stock and reporting.

## SELLING MEMBERSHIP

It is possible to use Ubercart to sell access to part of your site, and some entertainment and gaming sites use Ubercart for this purpose. The procedure is to produce content on your site that can only be seen by a particular roll, an online help forum or premium content for example.

First we need to **activate the Roles Module**.

**Admin Menu>Modules>List>Ubercart - Core (Optional)>Roles:** Activate the module with a tick and then scroll down and click on the **'Save configuration'** button.

As things stand at the moment, anyone who purchases anything from your site automatically becomes an **'Authenticated User'**. In the event that we wanted to allow someone paid access to a forum we would need to create a new **'Role'** of **'Member'**. This is done at **Admin Menu>People>Permissions>Roles:** Add **'Member'** into the **'Add role'** box then click on the **'Add role'** button. You then need to edit the **'Permissions'** so that **'Members'** have all the permissions that **Authenticated Users** have **PLUS** permission to access the forum. Only Members (and administrators) should have access to the Forum if that is what you are going to be selling.

**Admin Menu>Store>Configuration>Products:** At the bottom left, you will now see an additional **'Role assignment settings'** tab (figure 058)

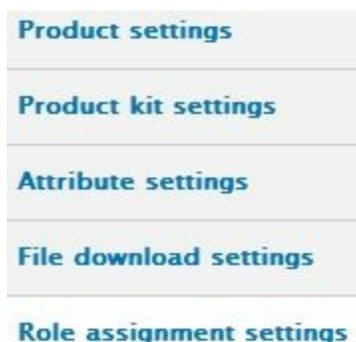


Figure 058

Click on the **'Role assignment settings'** tab, and in the **'Default role'** box select **'Member'**. In **'Product roles'** also select **'Member'**. In the **'Default Role Expiration'** section the usual selection would be **'Relative to purchase date'**, but there are also options for membership to expire on a fixed date (end of a year perhaps). In the drop down **'never'** box, select how long it will be before the membership is going to expire. This can be days, weeks, months or years. As an example, you could create an expiry date of 1 year, and send the person a reminder after 11 months (figure 059)

**DEFAULT ROLE EXPIRATION**

**Expiration type**  
 Relative to purchase date ▾

1 year(s) ▾

From the time the role was purcha:

Multiply by quantity  
 Check if the role duration should be multiplied by the quantity of items purchased.

---

**Time before reminder**  
 11 month(s) ▾

Figure 059

Once you have made your choices click on the ‘**Save configuration**’ button. Having created the roll, and done the above configuration, all we need to do now is create a new product.

**Admin Menu>Content>Add content>Product:** I’ve named my product ‘**Membership**’, given it a **SKU**, added a ‘**Sell price**’, and marked the product as **not shippable**. I’ve then clicked on the ‘**Save and continue**’ button.

At the top of the page you will see a ‘**Features**’ tab, and if you click on that tab you will see an ‘**Add a new feature**’ drop down box. In that box select ‘**Role assignment**’ and then click on the ‘**Add**’ button (figure 060).

**Add a new feature** Role assignment ▾

Figure 060

On the next page, select that product **SKU**, then click on the ‘**Save feature**’ button and you will see a summary of the features you have created for this product (figure 061).

TYPE	DESCRIPTION
Role assignment	<b>SKU:</b> Memb <b>Role:</b> Member <b>Expiration:</b> Global expiration <b>Shippable:</b> No <b>Multiply by quantity:</b> No

Figure 061

That’s it. Anyone purchasing this product will automatically be given the roll of ‘**Member**’ for 12 months, and will receive the default registration confirmation email as well as the purchase invoice. As a ‘**Member**’ they will be able to access any area of the site that I mark out as having access for members only.

**Admin Menu>People>Role Expiration:** Gives you a list of all Members, together with their expiry dates.

**What we have done so far:** We've installed Drupal, installed Ubercart, and configured the core Ubercart modules, the payment module and the catalog. We've created intangible products (downloads), tangible products (physical) and their shipping. We've also examined how products can have attributes and choices, how they can be sold in sets, how they can have different categories, how they can be taxed, how different tax rates can be added to different categories, and we've looked at creating a special type of membership product.

**What we are doing next:** We're going to look at some other odds and ends under the catch-all heading of 'Admin', and this will include the creation of orders, controlling stock and reporting.

## ADMIN

### Creating Orders and COD

In all the cases we have looked at so far, the products have been ordered and purchased online in advance of delivery. Depending upon your circumstances, you may have a business where goods are shipped up-front, with the buyers paying their account up to a month later. Ubercart allows you do this, and the process is to produce an invoice and print it out and send it with the goods, or send it by email to the buyer and ship the goods separately. Either method allows you to create an order and to ship the goods before payment, only receiving payment at some date after the goods have been delivered. The process is as follows:

**Admin Menu>Create order:** You can ‘**Search for an existing customer**’ or ‘**Create a new customer account**’. You can also send an order without creating an account first. If you click on ‘**Create a new customer account**’ you are asked to add an email address and there is an optional choice of emailing the customer the account details once it has been created. Make your choice and click on the ‘**Create order**’ button.

On the next page you have to complete the **customers shipping address** and **billing address**. If they are identical you only need to complete one of them, and then click on the documents icon above the top line and the other section will be completed automatically. Hover your mouse over the option to choose the correct one.

Further down the page there is a ‘**Products**’ section. If you click on the ‘**Add product**’ button you get a drop-down list of all your products. You have to choose them one at a time and then click on the ‘**Select**’ button.

Once you have added all the products there is a ‘**Shipping quote**’ section. Click on the ‘**Get shipping quotes**’ button, and once it has got the quote click on the ‘**Apply to order**’ button.

When you have finished, click on the ‘**Submit changes**’ button. At the top of the screen there are several tabs (figure 062)



Figure 062

If you click on the ‘**Invoice**’ tab, you get a choice of printing out the invoice (to enclose with the goods as a delivery note as well as invoice) and of emailing the invoice. The other tabs let you record when you pack the goods, when you ship the goods, and when you have received payment for all the goods.

## Stock

If you are only selling downloads, then tracking stock will not be an issue for you as you will never run out. However, if you are selling physical goods, then stock levels will be something that you will need to keep track of. That is done by the ‘**Stock**’ Module.

**Admin Menu>Modules>List>Ubercart - Extra>Stock:** Activate the module by placing a tick in the box, then scroll down to the bottom and click on the ‘**Save configuration**’ button.

**Admin Menu>Store>Configuration>Stock notifications:** Add a tick in the ‘**Send email notification ...**’ box at the top of the page, and then click on the ‘**Save configuration**’ button.

If you go to any of your products, or create new products, there will now be an extra ‘**Stock**’ tab on the top of the ‘**Edit**’ page. If the product is a physical product, or if the product is a membership product and you want to limit the number of members, then you need to **add a tick** to the ‘**Active**’ column to activate the tracking of stock for that product. In the ‘**Stock**’ column you add the number of stock that you currently have. An email will be sent to you when stocks fall to the number that you enter in the ‘**Threshold**’ column, to warn you that stocks are running low (figure 063).

<input checked="" type="checkbox"/> ACTIVE	SKU	STOCK	THRESHOLD
<input checked="" type="checkbox"/>	Memb	100	15

Figure 063

## Reports

A lot of reporting features have been activated by default as we’ve activated various modules, and these can be found on the **Admin Menu>Store** page. These include a list of all orders ‘**View orders**’ in the ‘**Orders**’ section; a list of all customers ‘**View customers**’ in the ‘**Customers**’ section; and lists of all **products, attributes, classes and file downloads** in the ‘**Products**’ section.

Over and above these basic reports there is a specific ‘**Reports**’ module, and a separate ‘**Tax report**’ module if you are adding taxes.

**Admin Menu>Modules>List>Ubercart - Core (Optional)>Reports.**

**Admin Menu>Modules>List>Ubercart - Core (Optional)>Tax report.**

**Activate both modules** with a tick and then scroll down and click on the ‘**Save configuration**’ button.

When you return to **Admin Menu>Store** you will find a whole new additional ‘**Reports**’ section (figure 064)



Figure 064

From this menu you have all the additional reports you could ever need.

## WHERE NEXT

Where next? You simply start making your millions!

Ubercart straight out of the box contains all the parts we've looked at throughout this book, and for the vast majority of users that is all you will need. However, nothing is ever perfect and the ingenuity of mankind knows no bounds, so there is always someone that wants that little bit extra. There is always someone who wants Ubercart to do something nobody ever thought of when it was first designed. That's where additional modules come in. If you want to do something extra the chances are that someone else has got there before you, and has created a module that will provide what you are looking for. You simply need to ensure that the Modules are **Drupal 7** ones, and that they are **Ubercart v3** Modules.

Additional modules can always be searched for on the Drupal site itself at <http://drupal.org> and there is a dedicated Ubercart site and forum at <http://www.ubercart.org>. Ubercart has had three versions, but **only version 3 is suitable for Drupal 7**. One of the things you need to be aware of, is that at the time of writing, the vast majority of questions and answers on the Ubercart forum relate to versions 1 and 2, so you need to make sure that any answers or advice are still valid for version 3 of Ubercart.

I've tried to make this book both readable and informative, as well as trying to write it

for those who are familiar with Drupal without putting off those who have never used Drupal before. I won't always have got that right, but I've tried to price the book at what I think is a reasonable price, and I hope that you agree that it was well worth the price you paid for it. If you do agree, please take the time to return to the website where you bought this, and give me a favorable rating and feedback or click on a Facebook like button.

Thanks for having purchased my book and good luck with your own selling. I hope your ecommerce site will be successful for you.

## WHAT NEXT

**This book is the third book in a four book Drupal 7 series by David Ipswich**

The final book in the series shows you how to create your own fully reactive Drupal 7 theme.

Drupal 7 Manual (Book One)

Drupal 7 Modules (Book Two)

Drupal 7 Ubercart 3 Ecommerce Manual (Book Three)

Drupal 7 Theme Creation (Book Four)

## **ABOUT THE AUTHOR**

David Ipswich first became a lecturer in computer usage whilst working for the Technology Section of a Government Office in 1994, and by 1996 had designed his first website and was working for a Regional Technology Network liaising between universities and technology based businesses.

Over the years he has designed hundreds of websites, and has been consulted on the creation and design of many ecommerce sites.

His publications include:

### **DRUPAL SERIES**

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