WP-Client Documentation

Version 2.7.1

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Clients Menu

The Clients menu allows you to manage your clients at a high level. You can Add, Import, Edit and Delete your clients from this menu section. You can also create and assign Staff accounts if you're dealing with a large client and have multiple persons within the client organization that you will be working with.

Client List

Menu: Clients > Clients tab

The first tab in the Clients menu displays all of your existing clients *(See Figure 1).* From this tab you will be able to manage client files, private messages, edit client details, or delete a client. Each client is listed in their own row with a selection of menu options under the Action section *(See Figure 2)* at the end of each row.

Figure 1: The Client List

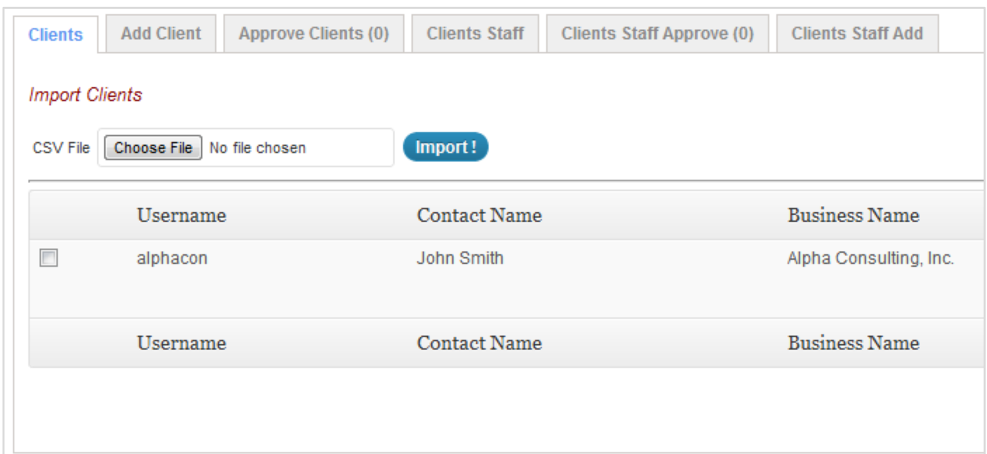
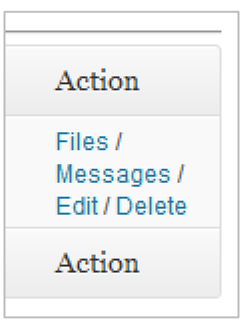


Figure 2: The Action Menu



Import Clients

Menu: Clients > Clients tab

If you already have a list of clients, WP-Client makes it fast and easy to import them. You can do this from the *Clients* tab under the Clients menu.

To import, you must first have a list of clients in a CSV format file. You can create this format from any spreadsheet application such as Microsoft Excel or OpenOffice Calc. Your CSV file should be formatted to look like the following:

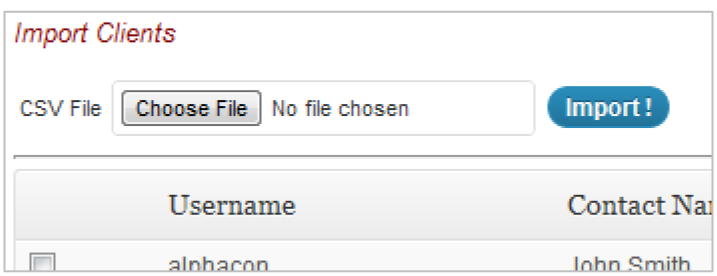
Username	Password	Contact Name	Business Name	Email	Phone	SendEmail?
alpha	pass123	Andy	Alpha, Inc.	email@alpha.com	800-867-5309	1
bravo	pass123	Billy	Bravo, Inc.	email@bravo.com	800-867-5309	0
charlie	pass123	Chuck	Charlie, Inc.	email@charlie.com	800-867-5309	1
delta	pass123	Dean	Delta, Inc.	email@delta.com	800-867-5309	0

Important Note: *Just before importing, delete the top row with the row titles. For the 'SendEmail?' column: 1 = Send New Client email, 0 = Don't send New Client email.*

If you need a template to help you with your client import, you can download one here: http://wp-client.com/v45vy4h45y/wpclient-import-demo.csv

From the *Clients* tab under the Clients menu, select the 'Choose File' button *(See Figure 3)* and navigate to your CSV file and select it. Click the button labeled "Import!" to import you file into WP-Client. Once the import completes, you will see each of your clients in the client list. Respective Hub and Client pages have also been created for each as well and can be found under the Hub Pages and Client Pages menu items.

Figure 3: The Import Form



Add Clients

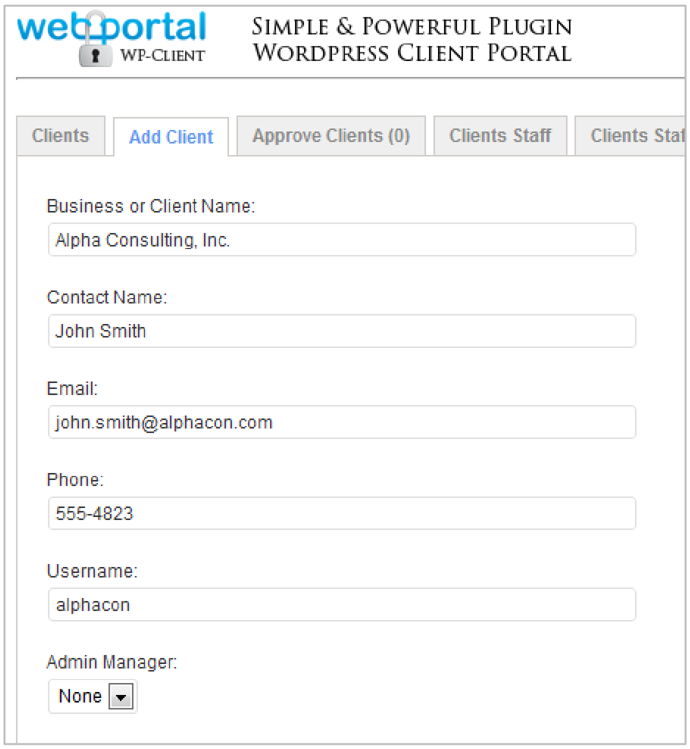
Menu: Clients > Add Clients tab

Adding clients is very simple but there are a few key things to keep in mind:

- All fields are required.
- Clients are created in the User table of the WordPress database, which means that Client usernames and email addresses must be unique. No duplicates.
- The Business Name field will be used to generate the title of the client Hub Page.
- If you check the "Send this password to the new user by email" option it will use the email template as defined in the Templates>*Email Templates* section. It's a good idea to customize and test these templates before sending emails to your clients.

Once you've filled out all of the required fields *(See Figure 4)*, click the 'Add Client' button at the bottom. The new client will be created along with their Hub and Client pages. You will also be able to see the new client under the *Clients* tab of the Clients menu.

Figure 4: The Add Client Form



Private Messaging

Menu: Messages

Think of the Private Messaging feature as a secure email system built right into WP-Client. This feature allows you to read and reply to messages sent from your clients from their secure Hub and Client pages. Messages are sorted by date/time stamp and can be kept for later reference or manually deleted if no longer needed.

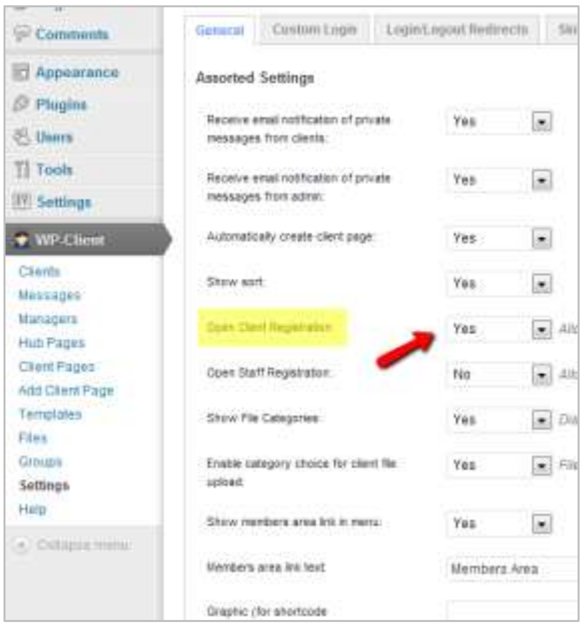
Figure 5: The Messages Menu Screen

Allowing Clients to Register Themselves

Menu: Settings > General tab

If you'd like to be able to allow you're the ability clients to create their own login, you can enable Open Client Registration in the WP-Client settings. *(See Figure 6)* Go to the *General* tab of the Settings menu and switch the 'Open Client Registration' option from Off to On. All client created logins will require Administrator approval before the account becomes active.

Figure 6: Enabling Open Client Registration



Approving Clients

Menu: Clients > Approve Clients tab

If you have enabled Open Client Registration, you must first approve a client created account before it becomes active. To do this, navigate to the *Approve Clients* tab of the Clients menu. A number value in the tab will tell you how many requests are pending in addition to receiving a notification email of any pending requests that are submitted.

Clients Staff

Menu: Clients > Clients Staff tab

If you're working with a large client and have multiple employees or persons within the client organization that you will be working with, you can create Staff accounts that can then be assigned to your existing clients. You can manage Staff entries in the same way you manage Client entries, but they exist solely under the client level. With Staff employees, you now have the ability to send messages to the entire group or to a specific employee only.

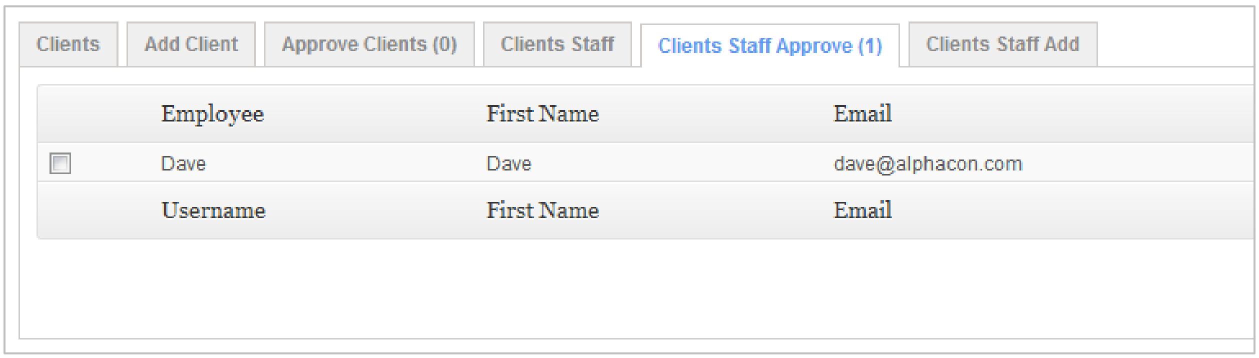
To add a new Clients Staff, navigate to the *Clients Staff Add* tab of the Clients menu. You must assign the new employee to an existing client under the 'Assign to Client' section of the *Clients Staff Add* tab.

Approve Clients Staff

Menu: Clients > Clients Staff Approve tab

If you have enabled Open Client Registration, you must first approve a Clients Staff created login before it becomes active. *(See Figure 7)* To do this, navigate to the *Approve Clients Staff* tab of the Clients menu. A number value in the tab will tell you how many requests are pending in addition to receiving a notification email of any pending requests that are submitted.

Figure 7: Client Staff Approval Screen



Manager Menu

The Managers menu allows you to create and manage Admin Managers for your WP-Client installation.

What is an Admin Manager?

Admin Managers allow multiple administrators to manage your clients. This is useful if you are working in a team environment, such a design firm, and have multiple people interacting with the client or specific people working on different client projects. You can create managers and assign existing clients to them to provide a more personal experience and greater organization.

Managers

Menu: Managers > Managers tab

The first tab in the Managers menu displays all of your existing managers. From this tab you will be able to edit or delete your managers. Each manager is listed in their own row with a selection of menu options under the Action section at the end of each row.

Add Manager

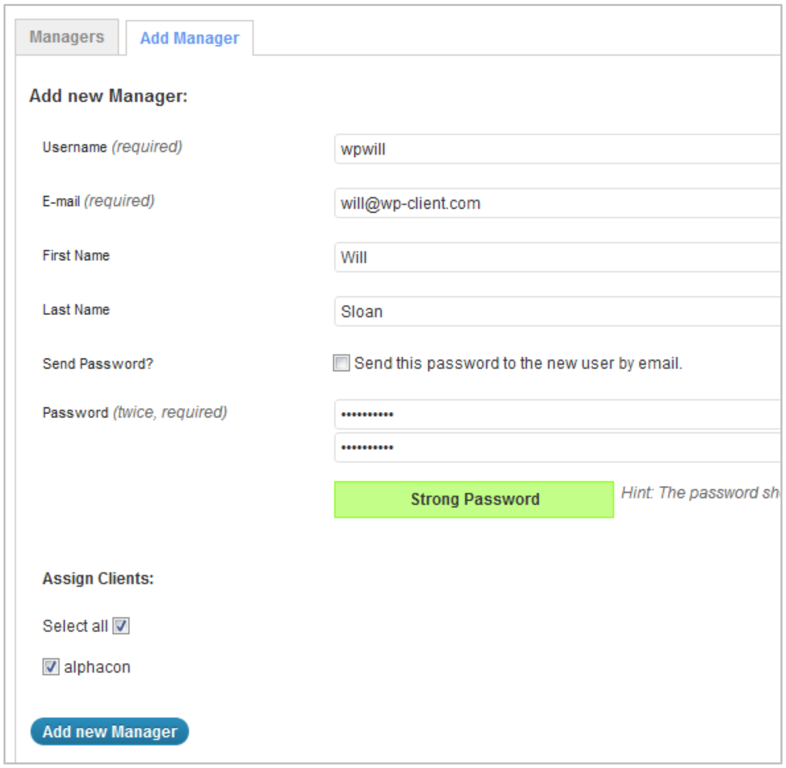
Menu: Managers > Managers tab

Adding managers is very simple but there are a few key things to keep in mind:

- All fields are required.
- Managers are created in the User table of the WordPress database, which means that Manager usernames and email addresses must be unique. No duplicates.
- If you check the “Send this password to the new user by email” option it will use the email template as defined in the Templates>*Email Templates* section. It’s a good idea to customize and test these templates before sending emails.

You can assign clients by checking the box next to the client name or by checking ‘Select all’. Client names in red indicate a client that is already assigned to the manager. Once you’ve filled out all of the required fields, click the ‘Add new Manager’ button at the bottom. *(See Figure 8)*

Figure 8: The Add Manager Form



Hub Pages Menu

What is a Hub Page?

A Hub Page is used to display links to all the content that a client has permissions to view, whether it be several Client Pages or a set of files.

Editing a Hub Page

Menu: Hub Pages > Client Title > Edit

Hub Pages are automatically created when you create a new Client. To manage Hub Pages, hover your cursor over the Client Title. You will see a menu appear that allows you to Edit, Quick Edit, Trash, or View the Hub Page for that client. To edit existing Hub Pages, click on Edit and you be directed to the Edit Hub Page Item page that looks very similar to the post editor built into WordPress.

From the editor, you can fully customize how your Hub Pages appears to your clients. WP-Client comes with an extensive set of shortcodes to help you do this.

Using Shortcodes

Shortcodes can be used to quickly add snippets of code without having any coding experience. Below is a table of available shortcodes used in the WP-Client plugin. ***Important Note:*** *Replace the {curly} brackets with the standard [square] brackets for the shortcodes to work.*

Shortcode	Description
{wpc_client_theme}{/wpc_client_theme}/your_pages.png	Produces the graphics skin that you have selected in the Settings Menu | "Pages you have access to"
{wpc_client_pagel}{/wpc_client_pagel}	Outputs the pages that the logged in user has permissions to view
{wpc_client_theme}{/wpc_client_theme}/upload_files.png	Produces the graphics skin that you have selected in the Settings Menu | "Upload files here"
{wpc_client_uploadf}{/wpc_client_uploadf}	Outputs a file upload form that the user can use to upload files
{wpc_client_theme}{/wpc_client_theme}/uploaded_files.png	Produces the graphics skin that you have selected in the Settings Menu | "Files you have uploaded"
{wpc_client_fileslu}{/wpc_client_fileslu}	Outputs a hyperlinked list of the files that the user has uploaded
{wpc_client_theme}{/wpc_client_theme}/your_files.png	Produces the graphics skin that you have selected in the Settings Menu | "Files you have access to"
{wpc_client_filesla}{/wpc_client_filesla}	Outputs a hyperlinked list of files that the user has access to
{wpc_client}{/wpc_client}	For 'Client Pages', anything between these

	two shortcodes is only viewable by a logged in user with the proper permissions. 'Client Pages' can be permissioned to multiple users.
{wpc_client_private for="username"}{/wpc_client_private}	Can be used anywhere in the site. Allows you to publish private information that is client specific anywhere on the site. Just place the private content between these two shortcodes, and replace username with the username of the appropriate client
{wpc_client_com}{/wpc_client_com}	Can be used on Hub Pages and/or Client Pages. Displays Private Messaging interface and any messages to client.
{wpc_client_graphic}{/wpc_client_graphic}	Displays a logo or graphic (ex. your business logo) wherever this shortcode is placed

Client Pages Menu

What is a Client Page?

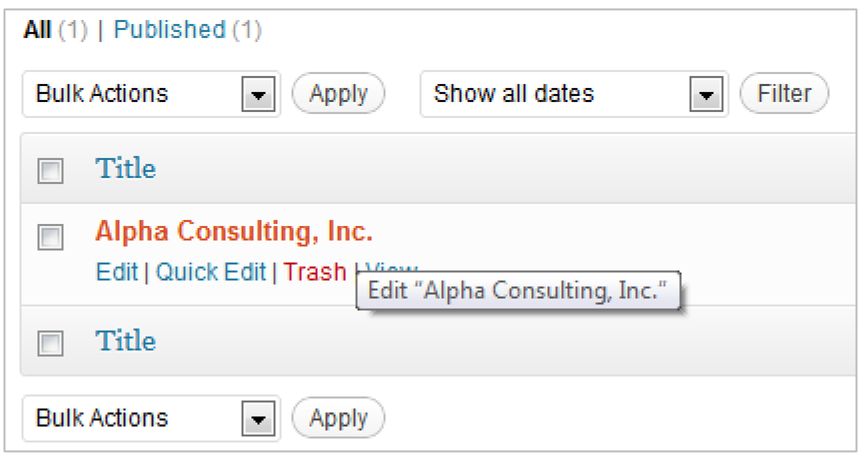
A Client Page is a page that can be given permissions to one, several, or all of your clients. One client can have permissions to many Client Pages and many clients can have permissions to a single Client Page. This versatility means that no matter how you intend to use WP-Client, you will be able to customize it to fit your needs.

Editing Client Pages

Menu: Client Pages > Client Title > Edit

A Client Page is automatically created when you create a new Client, but you can add as many as you need to for each client or for a group of clients. To manage Client Pages, hover your cursor over the Client Title. *(See Figure 9)* You will see a menu appear that allows you to Edit, Quick Edit, Trash, or View the Hub Page for that client. To edit existing Hub Pages, click on Edit and you be directed to the Edit Hub Page Item page that looks very similar to the post editor built in to WordPress.

Figure 9: Menu for the Client Page



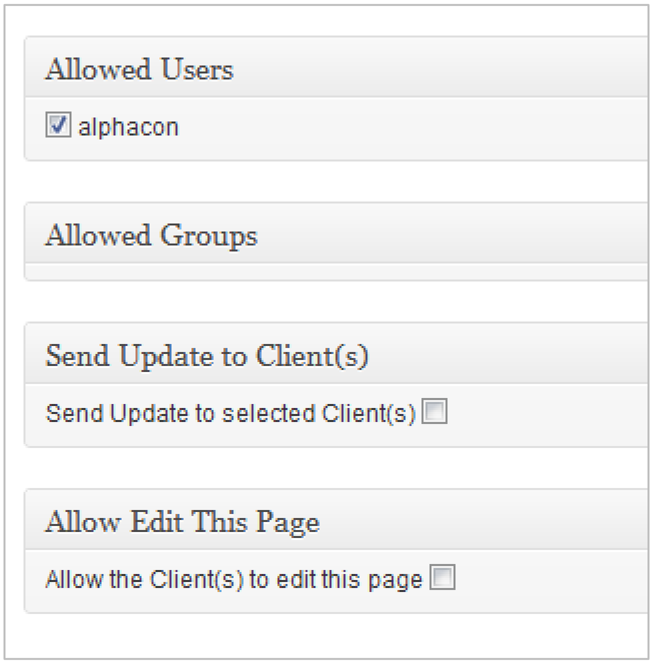
From the editor, you can fully customize how Hub Pages appears to your clients. WP-Client comes with an extensive set of shortcodes to help you do this. *(See Pages 10-11 for a List of Available Shortcodes)*

Setting Permissions for Client Pages

Menu: Hub Pages > Client Title > Edit

As mentioned before, Client Pages can be used across multiple clients or groups. If you need to set or edit the permissions on a Client Page, click on Edit from the menu beneath the Client Title. At the bottom of the Client Page editor you will find a set of controls that that will allow you to allow existing clients to view a particular Client Page. *(See Figure 10)* If you do not see the Client listed, you will first need to create the client in the Add Client section.

Figure 10: Setting the Permissions for Client Pages



Sending Email Updates to Client Pages

Menu: Hub Pages > Client Title > Edit

To send an email update to the clients who have permission to view a page that has been changed, check the box under the 'Send Update to Client(s)' control. *(See Figure 10)*

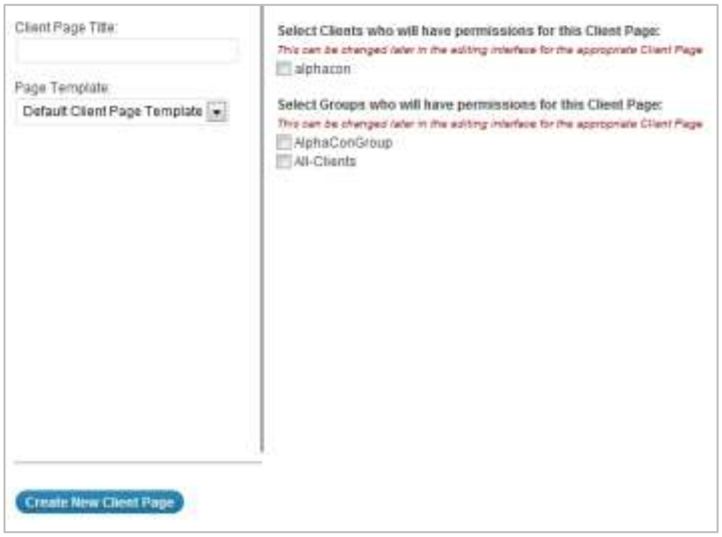
Add Client Page Menu

How to Create a New Client Page

Menu: Add Client Page

To create a new Client Page, go to the Add Client Page menu and enter a title for your page in the Client Page Title field. *(See Figure 11)*

Figure 11: The Add Client Page form



Selecting Client/Group Permissions

From the available list of Clients and Groups, you can select which ones you want to have access to a new page by checking the box beside them. *(See Figure 11, above)* If you don't see a Client or Group listed, you'll need to first create one. Any permission settings made here can later be changed using the editing interface for the appropriate Client Page.

Selecting Page Template

Beneath the Client Page Title field is a drop-down field for selecting a Page Template. *(See Figure 11, above)* You create highly customized Client Pages using templates, which will be discussed in the next chapter. It's important to note that once a template is assigned to a Client Page, making changes to the master template will not affect the Client Page's template.

Templates Menu

How Templates Work

Templates allow you to modify the look of your pages using predefined layouts. These layouts can be customized using HTML and shortcodes and give you the option to make your WP-Client pages match the design of your website. *(See Pages 10-11 for a List of Available Shortcodes)*

Do template changes affect Hub/Client Pages that are already created?

No. Once a Hub or Client page has been assigned a template, that template can only be modified with the Hub or Client Page editor.

Using Placeholders in Email Templates

Menu: Templates > Email Templates tab

A list of Placeholders has been defined by WP-Client to make setting up Email Templates consistent and easy. Placeholders function similarly to shortcodes and can be used to create very customized email messages to one or more recipients.

Placeholder	Description
{contact_name }	Refers to the client name as defined in the Client List.
{user_name}	The username the client used to login to WP-Client.
{user_password}	The assigned password their account.
{page_id}	The URL (web address) to a Hub or Client page.
{admin_url}	The URL (web address) to the Client Portal

An example email template using Placeholders will look like this:

```
<p>Hello {contact_name},<br /> <br /> Your Username is :
<strong>{user_name}</strong> and Password is :
<strong>{user_password}</strong></p>

<p>Your private and secure Client Portal has been created. You can login by
clicking <strong><a href="{admin_url}">HERE</a></strong></p>

<p>Thanks, and please contact us if you experience any difficulties,</p>

<p>YOUR COMPANY NAME HERE/p>
```

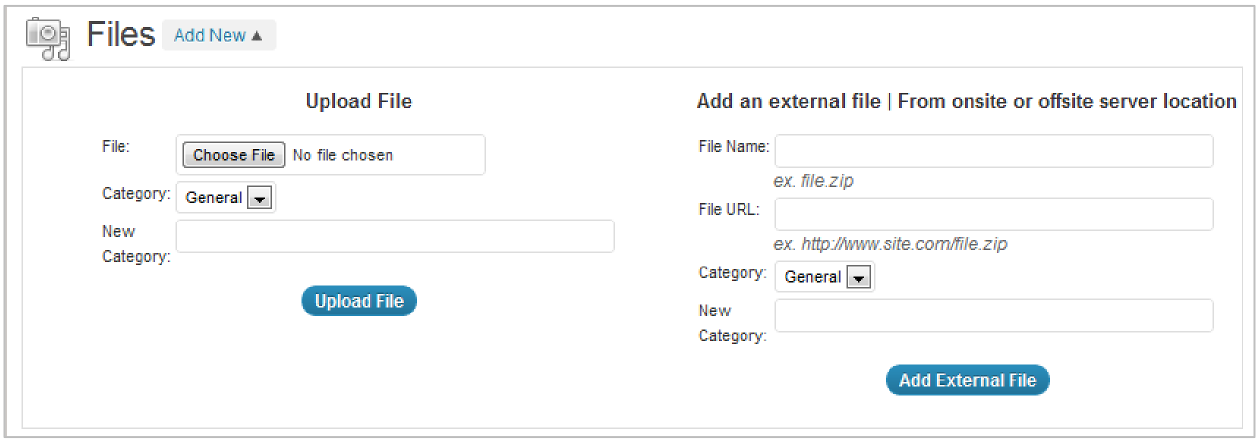
Files Menu

Adding Files

Menu: Files > Files tab

WP-Client makes it easy to add files no matter where they are located. You can upload them from your computer or add them from an external location, such as a web server. *(See Figure 12)*

Figure 12: Adding New Files

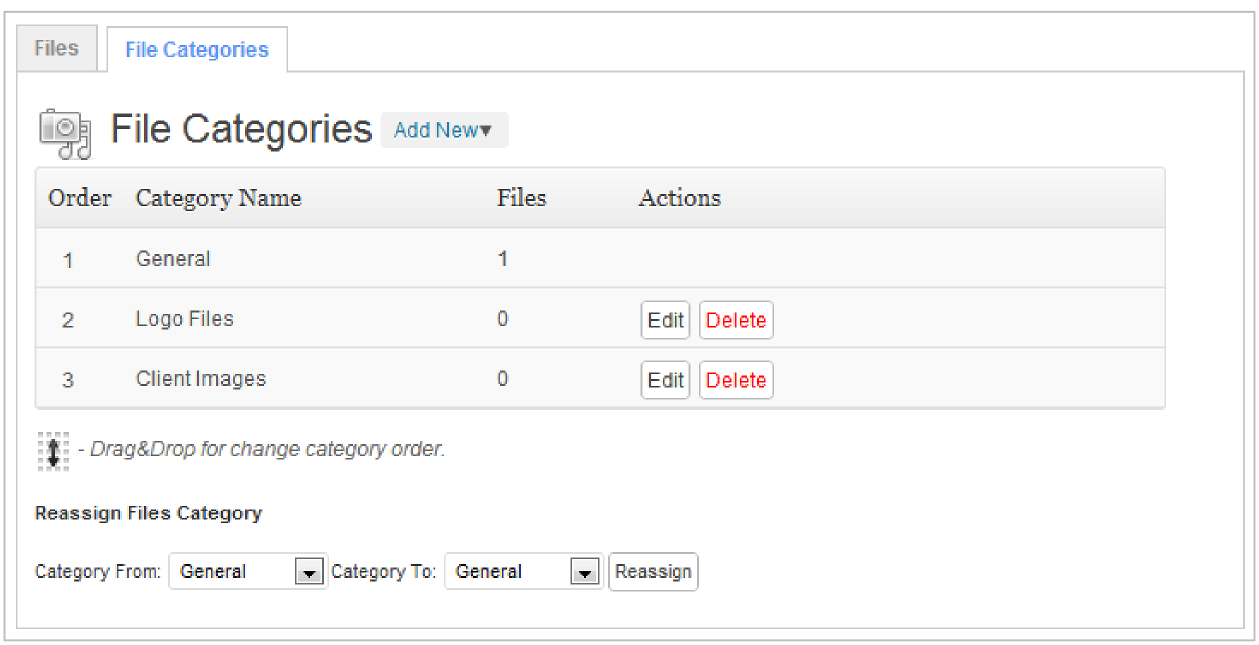


Adding Categories

Menu: Files > File Categories tab

You can add a new category at the time you add or upload a file, *(See Figure 12, above)* but you can also create categories from the Files > *Files Categories* tab. *(See Figure 13)*

Figure 13: Creating and Managing File Categories



Editing Categories

Menu: Files > File Categories tab

Next to each category is an Actions Menu *(See Figure 13)*. This allows you to either edit or delete a category. In edit mode, you can change the name of a category. Press Save after making changes to commit them or press Close to cancel any changes.

Assigning Categories

Menu: Files > File Categories tab

If you ever need to reassign all of the items from one category to another category, use the 'Reassign Files Category' form at the bottom of the Files > *Files Categories* tab window. *(See Figure 13)* In the first field, select the category you want to reassign the files from and in the second field select the category you want to reassign the files to. Use caution when performing this task.

Re-arranging Categories

Menu: Files > File Categories tab

To change the order in which categories appear, hover the cursor over the order number of the item you want to reposition. You will see an image appear indicating you can Drag & Drop this item into a new position. To do so, simply left-click your mouse button and hold, dragging the item up or down to reposition it, then release the mouse button to change the position.

Groups Menu

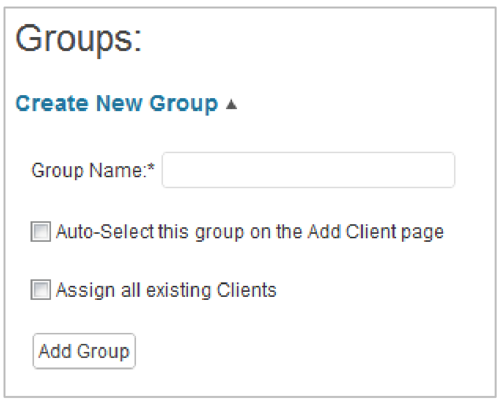
Groups allow you to bring together several Clients into one Group for greater manageability.

Add Groups

Menu: Groups

To add a new group, click on 'Create New Group' from the Groups menu. This will toggle a form into view for creating the group. *(See Figure 14)* Enter a name to assign to the group in the Group Name field. Choosing to "Auto-Select this group…" will make it so any new clients created will, by default, be selected to be assigned to this group. You can also assign all existing clients by checking the respective box. If you're not ready to assign clients yet or want a more specific selection, click the Add Group button.

Figure 14: Creating a New Group



Edit Group

Next to each group item in the Group List is an Actions Menu *(See Figure 15)*. This allows you to either edit or delete a group. In edit mode, you can change the name of the group. Press Save after making changes to commit them or press Close to cancel any changes.

Assigning Clients

Click on 'Assign Clients' from the Action Menu (*See Figure 15)* lets you assign one, several, or all existing clients to a group.

Figure 15: The Group List

List of Groups:

Group Name	Auto-Select	Clients	Actions
AlphaConGroup	No	View	Edit Assign Clients Delete
All-Clients	Yes	View	Edit Assign Clients Delete

Settings Menu

General Settings

Menu: Settings > General tab

In the General tab window, you will find various settings that control the functionality of WP-Client. Below is a table that describes each setting and options available.

Setting	Description
Receive email notification of private messages from clients	Enables or disables the feature that sends an email to you when a client sends you a private message.
Receive email notification of private messages from admin	Enables or disables the feature that sends an email message to you when the admin sends a message to a client.
Automatically create client page	By default, WP-Client creates a Client Page when you create a client. You can disable that here.
Show sort	Adds or removes the option to sort from the various menu lists.
Open Client Registration	Allows Clients to register themselves. Will not become active until receiving admin approval.
Open Staff Registration	Allows Clients to register their own Staff Clients. Accounts are not active until receiving admin approval.
Show File Categories	Adds or removes the File Categories feature.
Enable category choice for client file upload	Show or hide the ability for clients to assign a category to their file uploads.
Show members area link in menu	Show or hide a dynamic link to the Members Area. Logged out users will be redirected to the Login Form. Logged in users will be redirected to their Hub Page.
Members area link text	Defines how the Members Area link is worded in the menu on your site.
Graphic (for shortcode [wpc_client_graphic])	Defines the graphics that is displayed when the [wpc_client_graphic] shortcode is used.

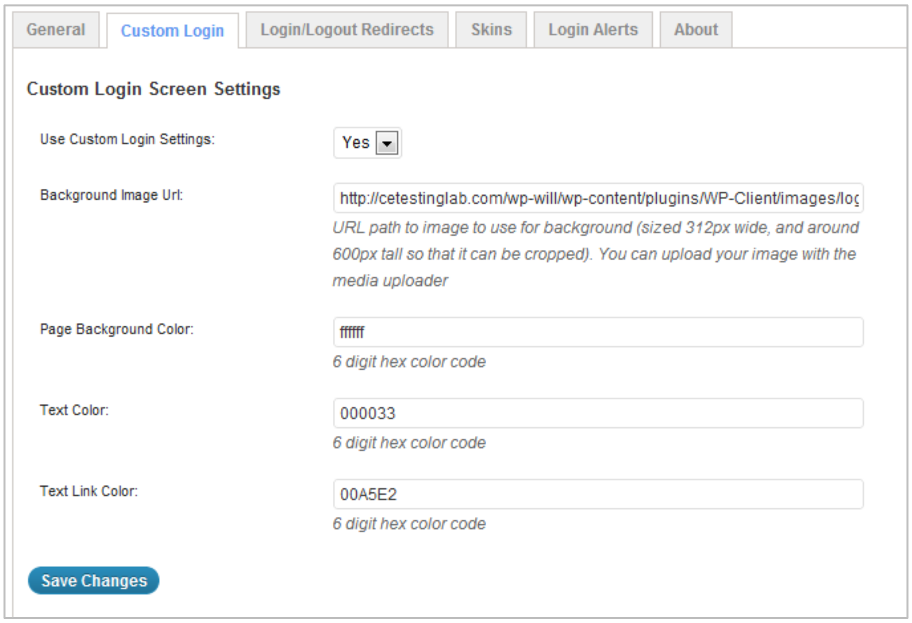
Custom Login

Menu: Settings > Custom Login tab

WP-Client furthers it's highly customizable platform by allowing you to modify the Login Screen your clients will see when they login to their Hub and Client pages. This gives your site a more professional appearance. You can choose whether or not you want to use this feature, but WP-Client has it enabled by default.

The first and most important of modifying the appearance of the Login Screen is a custom image. This can be your logo or a specific image related to the client experience. We recommend the image be 312px wide and around 600px tall in order to extend the frame of the login box past the fieldset. You can create your image using Photoshop, Gimp, or whatever image editor you are familiar with. Save it in either PNG or GIF format to preserve transparency. Once you have an image, upload the file using the Media Uploader in WordPress *(Media Menu > Add New).* After uploading the image, copy the URL path that it saves the file to and paste it into the Background Image URL field of the Custom Login tab window *(See Figure 16)*.

Figure 16: The Custom Login screen



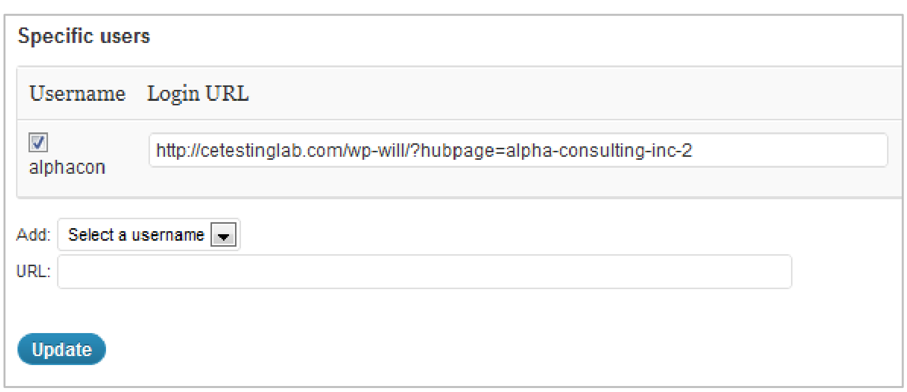
The next three fields define the colors used in the login screen, namely the background color, text color, and link color. Use the 6-digit hexadecimal color code (without the #) to set the colors for each.

Login/Logout Redirection

Menu: Settings > Login/Logout Redirects tab

This setting allows you to define custom URLs to which different users will be redirected upon successful login and logout. By default, a client is setup with a definition to redirect them to their Hub Page upon successful login. You can change that redirect here *(See Figure 17).*

Figure 17: Defining the Login/Logout Redirection



Skins

Menu: Settings > Skins tab

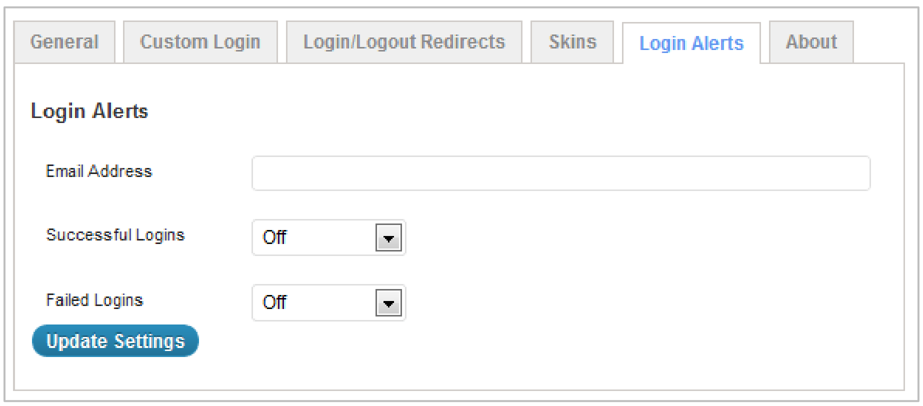
WP-Client comes with two skins, Light and Dark, to integrate the product cleanly into your website. Select the option you prefer from the drop-down box and save.

Login Alerts

Menu: Settings > Login Alerts tab

If you're in need of login auditing for your website, you can setup email alerts in this section. Enter your email address and turn Successful or Failed logins on or off to begin receiving these alerts.

Figure 18: Setting up Login Alerts



About

Menu: Settings > About tabs

The About tab will show you what version of WP-Client you have installed, as well as all of the legal policies, terms, and disclaimers of the product.