



CX

Documentation

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This is commercial software, only users who have purchased a valid license and accept to the terms of the License Agreement can install and use this program.

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Installing Chat X

CX Installation, setup and configuration

There are two steps to install CX:

1. Installing the plugin
2. Configuring Firebase

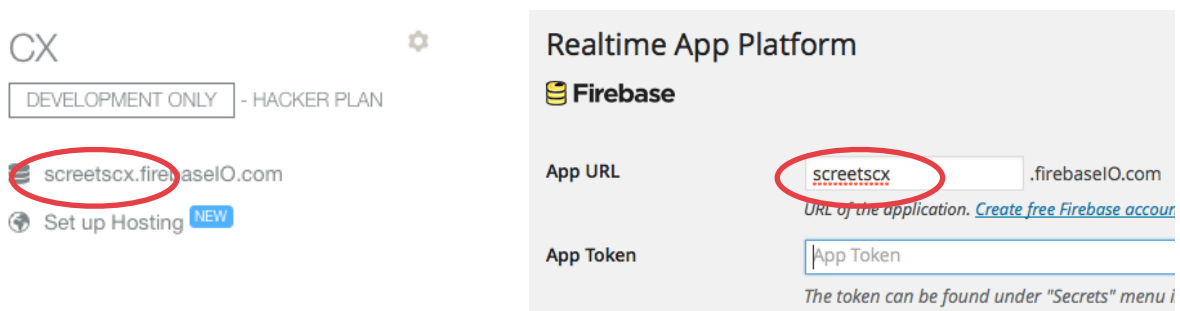
Installing the plugin into your WordPress

First step of installing CX is easy and almost the same with other WordPress plugins in the market:

- * Go to Plugins > Add New menu in WordPress administration panel
- * Click **Upload** link
- * Find **screets-cx.zip** and upload it here by following instructions

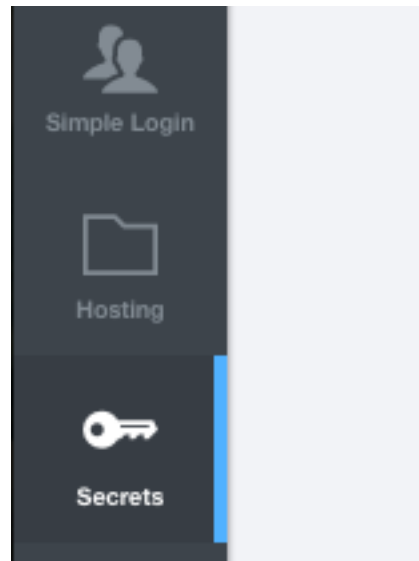
Configuring Firebase

- First of all, you will want to create new **free** Firebase account here:
www.firebase.com/signup

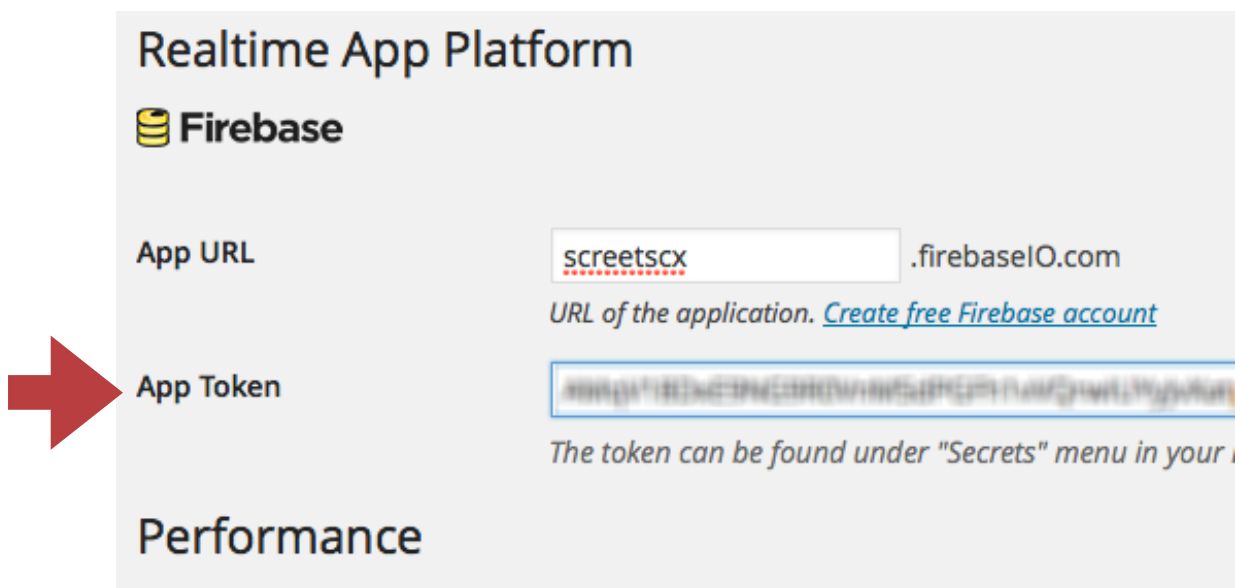


- After sign up Firebase, just **“Create New App”** on Firebase Dashboard.
- Enter your “App Name” into App URL in Chat Settings > Advanced tab like this:

- Final step is finding your “Secret” key in Firebase dashboard (found in “**Secret**” menu):



- Click “Show” button and copy your key. Then you will want to paste it into “**App Token**” found in Chat Setting > Advanced tab.



- After clicking “Save Changes”, then Firebase is ready for CX.

Appearance

Show up chat box in specific pages

The first step is you should **hide chat box** by default.

- Uncheck “Display chat box” under General tab in chat settings
- Now chat box is hidden in all pages!
- Go to any type of *post* or *page* and select “**Show**” radio button in Chat Settings meta box

So, chat box will appear only those page you select “Show” option.

Operators

Manage Operators

Although users with “Administrator” role can chat with your visitors, sometimes you need users with “**CX Operator**” to limit their capabilities. So creating operator is good practice.

Creating new operator

It is the same process with creating new WordPress user. Only difference is that you will want to change *User Role* with “CX Operator”.

- Go to *Users > Add new* page in WordPress admin panel
- Enter user details
- Choose “CX Operator” in **Role** field

How to make existing user an Operator?

You will only need to change User role. But this user will **lose their capabilities** and he can only chat with users! In this case, you will want to extend operators capabilities in chat settings (described below in “*Default and Additional Roles of Operators*”).

- Find the user in *Users* menu in your WordPress admin panel
- Update the users’ **Role** field as “CX Operator”

Now you need to extend operator capabilities:

Default and Additional Roles of Operators

Some people misunderstood of *default and additional roles of operators*. Let us explain:

If you set default role of operator as “Author”:

- Operators have the same capabilities with author users
- BUT users with *Author* role will NOT affected!

What about additional roles?

For instance, you have “Store Manager” role and you chose this role as “Additional Role” in chat settings. It means that YOUR OPERATORS will have the same capabilities with “Store Manager” (included operator capabilities). It does NOT mean that “Store Manager” users will act like operator.

In this case, you will want to:

- Change your some users’ role with “**CX Operator**” (*you can change user roles in their user profiles. All user profiles found in Users menu in WordPress admin panel*)
- Update operators additional role with “Store Manager” in chat settings

So now users with CX Operator role can chat with your visitors and act like “Store manager”.

How to change Operator Avatar?

CX supports gravatars. So you will want to register your **operator’s email address** to www.gravatar.com. Your avatar image will be appeared in 12 hours.

How to change Operator Name?

All operator names found in their profiles. Don’t forget to **refresh chat console page** if you update your operator name.

- Find the user in *Users* menu in your WordPress admin panel
- Update **Operator Name** field
- If chat console page is open, refresh console page to see your new operator name

Translating

Single and multi-lingual translating

CX supports both single-language translations and multi-lingual translations.

It is good practice to **translate messages from Chat Settings**, if you only need to translate chat popup messages. If you need more, continue reading..

Translating into your language

If default language of your WordPress is different than English and current CX isn't translated yet for your language, then those introductions below will help you.

- First download Poedit here: <http://www.poedit.net>
- Find “languages/default.po” file in plugin folder.
- Rename default.po file with cx- prefix and your language code. For instance, for French your filename should be cx-fr_FR.po, or for Portuguese Brazilian cx-pt_BR.po
- Open this file with Poedit.
- Add your translations to “Translations” text box for each string without changing “Source text”.
- Go to Poedit preferences and ensure “Automatically compile .mo file on save” is checked under Editor tab.
- Save file and upload both .po and .mo files to your server in the same place (wp-content/plugins/screets-cx/languages)

Multi-lingual translations

CX supports **WPML Plugin** for multi-lingual translations.

If you use WPML already, you will want to translate CX with **String Translation** in WPML menu. Here is details: <http://wpml.org/documentation/getting-started-guide/string-translation/>

Something wrong?

Normally CX notifies you about issues or some fields you need to review. Once you find something about the issue, you will want to **report** it to us. Then we will help you to solve it.

I can't access chat settings?

Sometimes there would be connecting problem while you updating or installing CX. You will want to:

- Reactivate the plugin one more time
- Try to access chat settings page again
- Enter your **purchase code** and click *Save Settings* button

If problem still exists, please report us.

Chat box doesn't appear

There would be two reasons:

- `wp_footer()` function is NOT located in your theme. It functions usually found in *footer.php* file in current theme folder. You can also ask your theme author to ensure that `wp_footer()` is located! If not, just you will want to add the code below before `</body>` tag in *footer.php*:

```
<?php wp_footer(); ?>
```

- You might have Javascript issue. If there is Javascript error, then CX won't work properly even though there is no issue with CX. In this case, you will want to find the error by following article: "*Chat popup doesn't open when user click chat button*"...

Chat popup doesn't open when user click chat button

Probably, you have Javascript error in your browser console. This issue might caused by either CX or other plugin. So first you will want to find **Javascript error** in your browser console:

- Refresh your website page (front-end)
- Click chat button again (*if you see chat button*)
- Open browser console by following the article “*Checking your browser console*” in *Troubleshooting* section
- Now try to find Javascript error in “Console”

If Javascript error(s) caused by other plugins, then you need to:

- Update your plugins with latests versions
- Deactivate plugin(s) if it has any Javascript error

Before reporting us this issue, please validate your W3 code here to see errors detailed: <http://validator.w3.org> (Just enter your website url)

Contact form doesn't send email

If you face with “**Something went wrong...**” error after sending contact form, it means that WordPress can't send email, not CX. So simply **wp_mail()** function doesn't work. You will want to be sure your email is valid and email settings are correct for WordPress.

If you use SMTP (or 3rd party service like Gmail), then you will want to install **WP SMTP** plugin: <http://wordpress.org/plugins/wp-smtp/>

You can also get more information from your hosting provider to setup your email.

Troubleshooting

Checking your browser console

Check if browser console has any JavaScript error by pressing **Ctrl+Shift+J** (for Mac CMD +OPT+J) in Chrome/Safari or Cttl+Shift+C for Firefox.

Checking PHP errors

Open wp-config.php file and set WP_DEBUG constant line like that below. Than you can see whether any PHP warning or errors occured. Optionally, you can install Debug Bar plugin to catch all PHP errors.

```
define('WP_DEBUG', true);
```

Still don't know what the problem is?

Please ensure again your server and WordPress are compatible with the plugin. You can see it in limitations and requirements parts in the plugin page. And create a topic in support forums with detailed description.

Licensing and Updating

*The information below is about Envato sales policy.
We're just making this clear...*

Regular License

This license allows you to use CX plugin on single-domain only (i.e. yourdomain.com). If you want to use the plugin more than one domains (i.e. youranotherdomain.com, oneotherdomain.com, etc.), you will want to purchase Regular License for each domain. Simply, if you have 3 domains, for instance, then you will need 3 Regular Licenses.

Extended License

This license allows you to re-sell CX into ONLY ENVATO MARKETPLACE (themeforest, codecanyon etc.). You do not resell CX on other markets like MojoThemes. Extended Licenses isn't working like Developer License. So if you want to use CX on multi-domains, then you still need to purchase *Regular License* for each domain you want to use CX.

CX updates are free?

All CX updates are free, of course! You can update your CX from *Dashboard > Updates* menu in your WordPress automatically.