Popup Item Manager for WordPress

Installation and Usage Guide

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Installation

WordPress Installation

The wpPopWizard WordPress plugin is extremely easy to install and setup. The plugin is installed like any other standard WordPress plugin.*

1. Unzip contents of the download file to your local hard drive.
2. Install the wpPopWizard plugin
   - Use the Add New WordPress feature (Plugins | Add new) to upload the plugin file: `kswp_pop_wizard.zip`.
3. Activate the plugin

* - wpPopWizard is a licensed product and works with the Ken Sar Access Control System plugin to provide access for the purchaser. Please refer to the Licensing Installation and Setup guide for details.

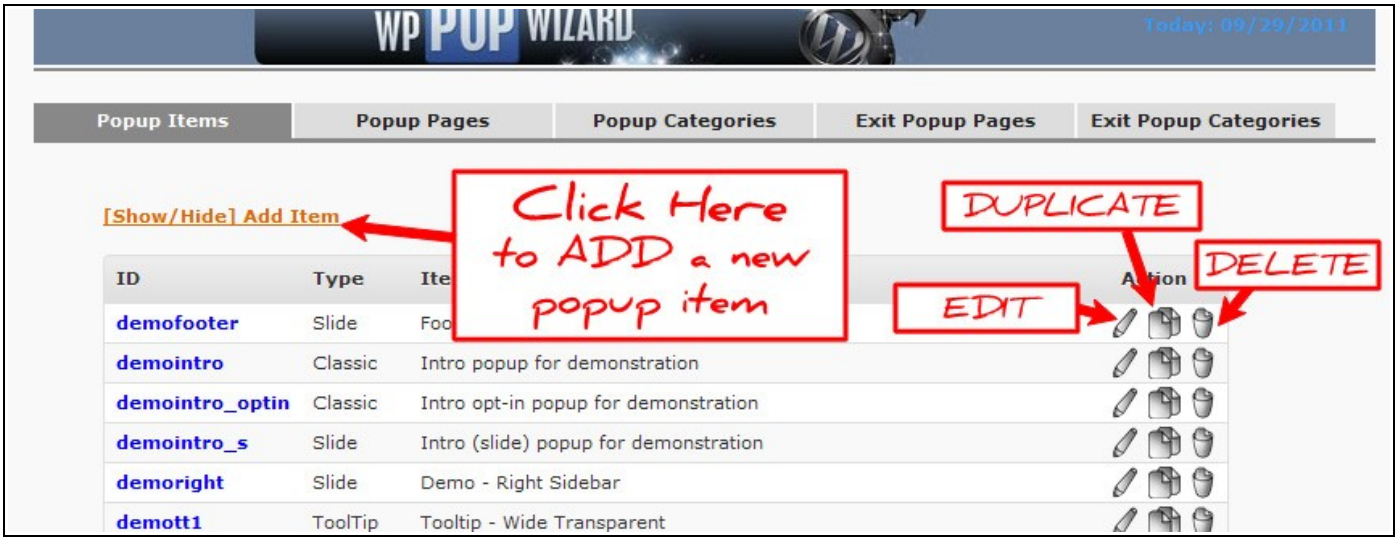
*Permalinks Settings - ** IMPORTANT **

Please make sure that your Permalinks setting (Settings | Permalinks) has been changed to something **other than the default.** WordPress writes additional system settings when "non-default" permalinks are active and wpPopWizard needs those additional settings when retrieving ToolTip data.

Usage

wpPopWizard Popup Items

Each popup item's settings can be defined and maintained in the wpPopWizard Popup Items area. The initial screen will look much like:



and will display tabs for specific wpPopWizard functions and a list of existing popup items.

New items can be added to the form that is displayed when the "[Show/Hide] Add Item" link is checked.

Existing items can be edited, duplicated (used as the basis for a new item), or deleted by clicking the appropriate image link to the far right of the item row.

Popup Specifications

The Specifications tab allows you to specify the basic popup identifyers, the timing, and the screen (HTML) layout of the popup item.

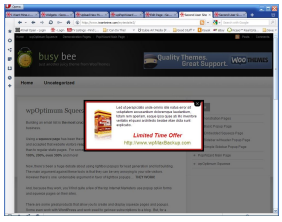
- **Item ID: –** This is the identifier that wpPopWizard uses to keep track of a popup item. This entry is required and the Item ID must be comprised of numbers, letters, and underscores *only*.
- **Item Name:** – The item name is a short description of the popup item to help you distinguish one page from another. Any text is accepted up to 255 characters.
- **Enable Popup** – must be checked for popups to display. This allows you to activate and deactivate popups easily.
- **Start Date/End Date** – allows you to specify a date for your popup to become active (Start Date) or inactive (End Date). The check the box to the left of the start/end date must first be checked to activate the feature. If checked, the popup will not display prior to (Start Date) or after (End Date) the date specified.
  NOTE: The WordPress site's time and timezone on the General Settings page (Settings | General – Timezone) are used when determining whether or not to display the popup.
- **Popup Type** – The type of popup being defined. The available popup types and associated options are discussed below in the "Popup Types" section.
- **Top margin** – *Used for Slide popups only* – This specifies the distance from the top of

the browser window that a slide popup will use when s*liding in* ***to*** the left, right, or center of the window.

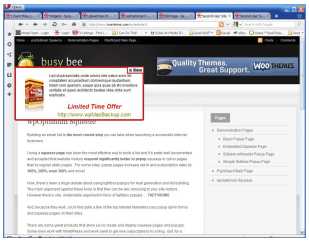
- **Width** – Popup width.
- **Height** – *Used for Slide popups only* – The height of the popup. For all popup types other than "Slide" the hight of the popup is calculated based on the content of the popup.
- **Background Color** – The background color for the popup. Notice that the color can be set to "Transparent" which will result in "floating" content since the window content behind the popup will show through.
- **Border Color** – The color of the border to be displayed around the outside of the popup.
- **Border Width** – The width of the border to be displayed around the outside of the popup. A width of 0 displays no border regardless of the "Border Color" or "Border Radius" settings.
- **Border Radius** – Creates rounded corners for the borders (except on Internet Explorer). The greater the radius, the more rounded the corner.
- **Delay for X seconds…** – *Classic and Slide popups only* – Once your website page has loaded, this number specifies the time (in seconds) before your popup displays. A longer delay (10+ seconds) will cause your popup to be noticed more. However, the attention factor increases because longer delays cause the popup to become more intrusive, so set your delay accordingly.
- **Or Show on Exit** – *Classic and Slide popups only* – When checked, the popup becomes an exit popup and the "Delay for X seconds" entry is ignored.
- **Popup Action Takes X seconds…** – *Classic and Slide popups only* – Controls the length of time the popup display action takes. It is most useful for "Slide" popups to specify the time length of the "slide" action.
- **Wait X days…** – allows you to specify an interval between displays of a popup for any given user. This is most useful where you have a popup set to display on every page (see Popup Pages below) but don't want your visitors to be interrupted each time the navigate to different page
  NOTE: The number of days allows fractional days to the thousanths. Fractional value equivalents:
  - .001 = approximately 1 ½ minutes
  - .01 = approximately 15 minutes
  - .04 = approximately 1 hour
  - .1 = approximately 2 ½ hours

Popup Types

wpPopWizard provides four popup types that can be pre-defined in the admin area. Three of the types, "Classic", "Slide", and "Tooltip" are very distinct in appearance and behavior. The "Quick Tip" popup type is a version of "Tooltip" with a different implementation.



- **Classic** – this is the standard, lightbox popup where the content is displayed in the center of the browser window with the surrounding content "greyed" out.



- **Slide** – Slide popups are "animated" popups that slide into position on the veiwer's screen. Popups slide in from the *left, right, top, or bottom* of the screen. The popups can then slide into position at the *left, right, top, bottom, or center* of the viewing window.

WpPopWizard's slide popups offer a **unique capability for displaying content.** Often, you'll want to display dynamic content at the top of the window ("header" popup), at the bottom of the window ("footer" popup), or at either the left or right sides of the window ("sidebar" popup). wpPopWizard doesn't treat these as special popups. They are simply created as normal slide popups where the starting and ending positions are the same:

- Header – Slide in From: *"Top"*; Slide To: *"Top"*;
- Footer – Slide in From: *"Bottom"*; Slide To: *"Bottom"*;
- Sidebar Left – Slide in From: *"Left"*; Slide To: *"Left"*;
- Sidebar Right – Slide in From: *"Right"*; Slide To: *"Right"*;

- **Tooltip & Quick Tip** – Tooltips and QuickTips are "hover" popups – a type of popup that is used often on top-notch websites but unique to wpPopWizard as a WordPress plugin. This type of popup is displayed when a user hovers over (or optionally clicks on) a text link or image link. Tooltips are generated dynamically and passed to the web page when activated. This can cause a lag (generation time) on the first activation on a page. QuickTips, by contrast, are included as hidden content in the page HTML and made visible when activated. As a result, QuickTips will always display immediately when their associated link is hovered over or clicked.

** IMPORTANT ** - Please make sure that your Permalinks setting (Settings | Permalinks) has been changed to something **other than the default.** WordPress writes additional system settings when "non-default" permalinks are active and wpPopWizard needs those additional settings when retrieving ToolTip data.

Content

The content area is where you'll place your popup item content. wpPopWizard uses the well respected ckEditor HTML editor to allow you to easily style the content area.

Not only can you layout your page with the WYSIWYG (what you see is what you get) editor, but you can copy and paste HTML from external sources (sales pages, opt-in forms, etc.) into the ckEditor content area using the "Source" button.

You can view the ckEditor user manual here: ckEditor User's Guide

Preview

The "Preview" tab allows you to view your layout changes before saving your document. All layout changes will be displayed.

When a layout change is made, simply return to this Preview tab and press the *"Click Here to View (or Refresh) Your Popup"* button.

Popup Pages / Exit Popup Pages

The “Popup Pages” and “Exit Popup Pages” tabs are where you assign your popup items to pages as entry or exit popups.

This function has been separated from the popup item definition for one main reason – to prevent the assigning of multiple popups to the same page – a scenario that would be difficult for wpPopWizard to satisfy without resulting in arbitrary and unpredictable popup behavior.

The Popup Pages and Exit Popup Pages tabs are simple to use. Just select the popup in the drop down and it will be assigned to the corresponding page.

There are two definitions with unique behavior:

- **Front Page** – This is the page assigned as the “Static Front Page” on the WordPress “Reading Settings” page (Settings | Reading). A post on the home page received preference over all other settings that that page may satisfy.
- **Every Page/Post** – A popup assigned to “Every Page/Post” will show on any and all pages or posts (including WordPress “category” pages) if no other popup has been assigned to the webpage the visitor lands on.
  NOTE: As mentioned above, the popup item assigned to every page should have a wait period (at a minimum 15 minutes or .01 days, but a delay in days is not unreasonable) before it is displayed again to the same user. Without the wait period, users will see the popup every time they navigate to another page.

Popup Categories / Exit Popup Categories

The “Popup Categories” and “Exit Popup Categories” tabs serve much the same purpose as the “Popup Pages” and “Exit Popup Pages” above, except they control the display for posts in WordPress “categories”.

Because of the dynamic nature of posts in the WordPress environment, wpPopWizard uses WordPress “categories” to control the display of popup instead of assigning the popups to individual posts.

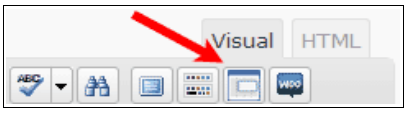
Simply select the popup to be assigned to the category and wpPopWizard will do the rest.

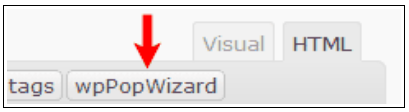
NOTE: *If a post is assigned to multiple categories, wpPopWizard will use the first category it finds that has a popup associated with it.*

Tooltip / QuickTip Implementation

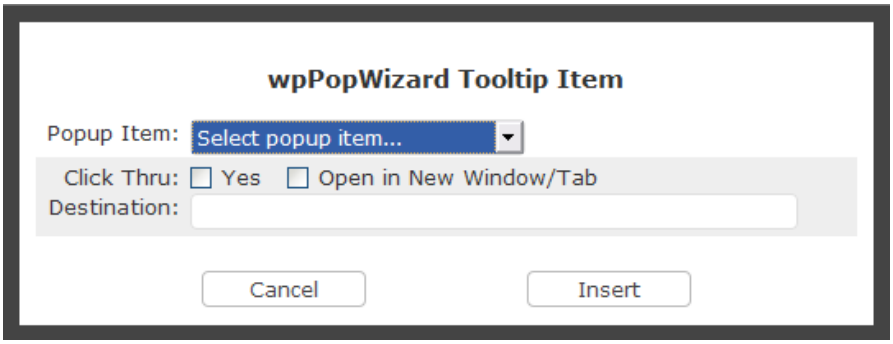
Tooltips and QuickTips are popup types that are unique to wpPopWizard as a WordPress plugin. These popups appear when the user hovers over (or clicks on) a text or image link. As a result, Tooltips and QuickTips are closely linked to content on a web page and not just to the page itself.

This means that you'll need to establish the content link when creating the WordPress page or post. This is done using the WordPress editor and can be accomplished using either the:

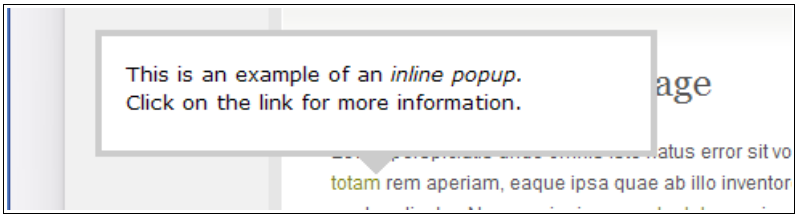
- Visual Tab – 

- HTML Tab – 

Clicking on either of these buttons will display the wpPopWizard Tooltip Item dialog box:



- **Popup Item** – Select the popup item that you want to use for the "hover" popup. The list of available popup items only includes Tooltip and QuickTip items. You can also select "* Inline " as a popup item. Inline items can be used to create short, tooltips like:

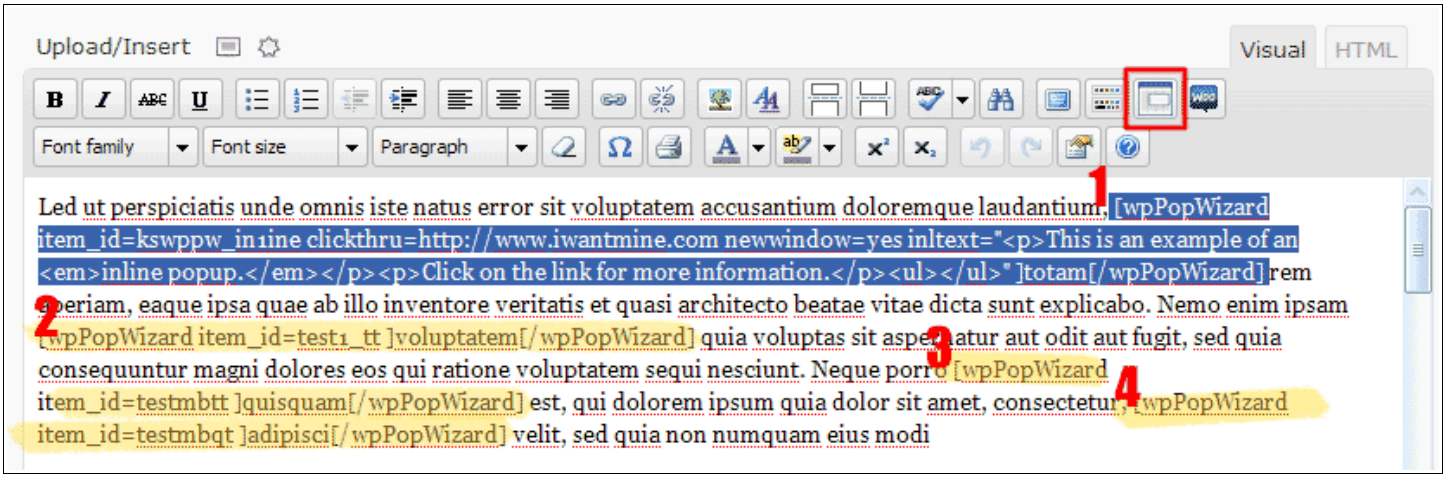


  If "* Inline *" is selected, a basic editor window is displayed where the tooltip text can be entered. This text (or other HTML) is stored right inline with the page content when web page is actually displayed.
- **Click Thru** – Normally, the tooltip link is use to initiate the popup – when the user hovers over or clicks on the link. When "Click Thru" is selected ("Yes" is checked), the link also behaves the same as a normal link and, when clicked, transfers the user to a new web URL.
  - Yes – use the link as a normal, click-thru link
  - Open in New Window/Tab – When clicked, the link will display in a new browser window.
  - Destination – The "Click Thru" destination URL

Once you've entered your information and clicked the “Insert” button, wpPopWizard will place the “shortcode” into your page or post text that will control the tooltip display and behavior. That shorcode syntax will look something like this:

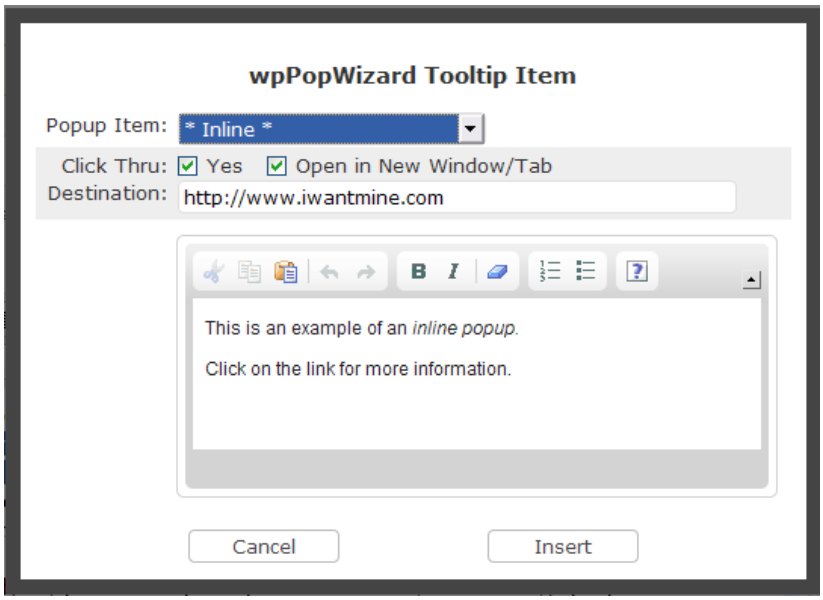
```
[wpPopWizard attribute=value ...attribute="attribute value"]link text/image[/wpPopWizard]
```

IMPORTANT - wpPopWizard supports editing of existing shortcode. To edit, make sure to highlight all text between and including the “[wpPopWizard]” and “[/wpPopWizard]” delimiters before clicking the editor button. For example, you might highlight text like:



**NOTE: There are actually four (4) tooltips in this example. They are labeled 1-4 and 2-4 highlighted in yellow.*

before clicking the editor button. When the button is clicked, you will see a wpPopWizard Tooltip Item dialog box that looks like this:



Notice that the highlighted example #1 is an “* Inline *” tooltip with “Click Thru” behavior defined.

Appendix I: Content Editor (ckEditor) Concerns

Opt-In forms: "name="

Some mailing list providers create HTML forms that do not have a "name" parameter. Unfortunately, ckEditor considers this to be invalid syntax and deletes the <form> tag.

Of course, once that is done, the opt-in form will not work as expected although it will look fine in the editor window and when the popup is displayed.

To correct this:

1. Paste the form HTML into the "Source" window of the wpPopWizard content editor
2. Locate the <form ... > HTML tag
3. If there is no "name=..." parameter, enter:
   `name="whatever-you-want"`
   before the ending ">"

Notice that the actual name you give the form is irrelevant.

For example, here's a <form> tag from an AWeber opt-in form:

```
<form action="http://www.aweber.com/scripts/addlead.pl" class="af-form-wrapper" method="post">
```

Notice that there is no "name" parameter. Consequently, this form needs to be changed to:

```
<form action="http://www.[...]addlead.pl" class="af-form-wrapper" method="post" name="myform">
```

Opt-In forms: "target="

Opt-In form HTML from most mailing list providers will send the contents of the form (name, email address, etc.) directly to the mailing list. If the user enters in faulty information, the target mailing list site may display an error and send the user "back" to your website to re-enter the information.

Unfortunately, your popup may be setup with a "Wait" period so that the user can't display it again.

The solution to this is to edit the HTML <form> tag and add the "target" parameter so that the form contents are sent to the mailing list in a new browser window (target="_blank").

As an example, the AWeber example used in the previous section would be modified to:

```
<form action="http://www.[...]addlead.pl" [...] method="post" name="myform" target="_blank">
```

Extra Space after HTML Tables

ckEditor doesn't seem to like to have a table as the last item in the content window so when it encounters that scenario, it adds a new paragraph. This displays as extra space at the bottom of your popup window.

Unfortunately, the only solution to this is to use the Source window to delete the ... that you'll find after the table ends (</table>).

Once deleted, save the content **WITHOUT** switching back to the normal, WYSYWIG view.