Installing WordPress plugin for Evo 2.0

For PHP developers

INFO TRAX

Contents

About the Evo plugin for WordPress

This document is for the PHP developer who installs and configures the WordPress plugin for Evo.

The InfoTrax Evo plugin for WordPress provides the data you need to populate replicated sites for your distributors.

With the Evo plugin, you can set up WordPress sites in a multisite configuration, hosted by a third-party provider of your choice. When a new distributor enrolls in the Evo application, Evo stores their data and creates an alias for their replicated site. WordPress can then use that alias to look up the distributor's data.

Note that the plugin does not pull product information from your company's shopping page, but InfoTrax can help you create links to the shopping page so that the distributor's customers can find and purchase products on his or her replicated site.

Installation and configuration

You'll need to install the WordPress plugin for Evo and configure it to connect to your Evo website.

Installing the WordPress plugin for Evo

To prepare for installation of the WordPress plugin

1. Obtain a replicated website template. The WordPress plugin doesn't generate a replicated website template.

2. Create a WordPress site hosted by your provider of choice.

3. [Enable the Multisite feature](#) in WordPress.

   This can be either subdomain or subdirectory. However, the plugin cannot use a mix of subdomains and subdirectories; it always prioritizes a subdomain over a subdirectory. If you are using subdomains, you will also need to set up a wildcard subdomain in your DNS to point to the WordPress server.

To install the WordPress plugin

Note: Only the network administrator can install the plugin. Individual site administrators can't install the plugin.

1. In WordPress, click **My Sites > Network Admin > Plugins**.

2. At the top of the page that appears, click **Add New**.

3. Click **Upload Plugin**.

4. In the box that appears, upload the Evo plugin zip file that InfoTrax has provided.

5. Click **My Sites > Network Admin > Plugins**.

In the list of plugins that appears, you should now see **EvoPlugin**.

6. [Network activate the plugin.](#)

The next task is to configure the plugin.

Configuring the WordPress plugin

After you have installed and activated the plugin, you need to configure it to connect to your Evo site.

To configure the WordPress plugin

1. Contact your InfoTrax representative to do the following:

    ● Provide the IP address of the WordPress server where you will be running the plugin.

    This allows InfoTrax to whitelist your server. If you want to set up a test WordPress server that points to your test or preview Evo environments (at the domain **test-*CLIENT*.myvoffice.com** or **preview-*CLIENT*.myvoffice.com**), you also need to provide the IP addresses of those servers.

    ● Obtain from the representative your API Key and three API secrets.

    The API Key is unique to you as a client and the API secrets are unique to your Evo environments (Test, Preview, and Live).

2. In WordPress, click **My Sites > Network Admin > Settings**.

    Evo Plugin should now be in the menu on the left side of the screen.

3. Click **Evo Plugin**.

4. Under **Connection Settings**, type your **Evo Site**, Evo **API Key**, and Evo **API Secret**.

    ● The Evo site is the site to which you want to connect your WordPress site. In most cases this will be your live site, which is typically a domain in the form of ***CLIENT*.myvoffice.com**.

    ● The API Key is your unique client key.

    ● The API Secret matches the environment you are connecting to (Test, Preview, or Live).

5. Click **Save Changes**

    You can now use the plugin.

Accessing Evo data with the WordPress plugin

This section explains how the plugin works and how you can use it as a developer.

How the plugin works

The plugin collects information from Evo, based on the URI that it is running from, and provides that information to you. It does this by performing a hit on each page load back to the Evo site, passing in the API Key and Secret and the Website Alias.

The Evo site then looks up that Evo user in its database, based on the website alias provided, and returns a JSON object containing the user's data.

Here is an example of the hit the plugin does for our demo site (you will not be able to view this link if your server is not in the IP Whitelist mentioned above):

```
https://evo.myvoffice.com/index.cfm?Fuseaction=ExternalAccountCheck.Repli
catedSiteInfo&Alias=atomichealthforce&APIKey=eDmL2cjl7l&APISecret=36d3cbb
d939e8591f09a85739fc80d6e
```

The following response comes back:

```
{"CANCELLED":false,"WORK_PHONE":"","COUNTRY":"USA","ADDRESS2":"","USER_LA
NGUAGE_CD":"en_atomic","FULL_NAME":"Atomic Health Force
","HOME_PHONE":"8015551234","EXPIRE_DT":"","FAX":"","ADDRESS3":"","DIST_I
D":"3","USER_PHOTO_URL":"ProfilePicture.png","POSTAL_CODE":"84097-8078","
DATATRAX_ID":"","CURRENT_THEME_ID":"","SUSPEND_REASON":"","ADDRESS1":"187
5 S State
St","STATE":"UT","HOME_EMAIL":"support@atomichealth.com","CITY":"Orem","S
USPEND_DT":"","MOBILE_PHONE":"","TIMEZONE":"496","SUSPENDED":false}
```

The plugin pulls the Alias value from the URI. It does this by checking the domain and determining whether there are any subdomains:

- If there is a subdomain, the plugin takes the first subdomain as the website alias and passes it into the hit.

- If there are no subdomains, the plugin checks for a subdirectory.

  Important: Because of how the plugin checks for a subdirectory indiscriminately, if you want a corporate site to run off the same WordPress system, it will need its own subdomain or subdirectory as well. Otherwise, a user trying to access a page on the WordPress site like /about will cause an error. This is because it will see domain.com/about as a subdirectory type multisite and try to pass "about" as the website alias into the plugin.

- If it does not find a subdomain or a subdirectory, it passes an empty string into the hit, and you will not get valid data.

How to use the plugin to access user data

After it retrieves data about a user, the plugin stores the information in the PHP Globals array using the same keys as the ones returned in the JSON. To illustrate this, in example above, `$GLOBALS["COUNTRY"]` would be set to `"USA"`.

This makes it possible for you to customize the behavior of your replicated site by performing logic against the returned values. For example, you could make a page behave one way for US distributors and another way for distributors in Mexico.

The WordPress admin sets up any pages that don't require logic as static pages. For these, you won't want the hassle of creating PHP Files to insert all your variables into the page. This problem is resolved in the second action the plugin takes, which is a page-replace of variables. The plugin does this by looking for `::KEY::` in the page text where `KEY` is one of the keys returned from the plugin. In the example above, if I had text on my page that said `I am a ::COUNTRY:: distributor`, this text would get automatically replaced with `I am a USA distributor.`

The plugin replaces any keys not returned by the hit with `Unknown Property KEY.` In the example return above, if I had text on my page that said `My Government ID is ::GOVERNMENTID::.`, this text would get automatically replaced with `My Government ID is Unknown Property GOVERNMENTID`

Troubleshooting

- When you are setting up the Evo plugin, you may find that all your fields are being replaced with **Unknown Property KEY**. There are two possible causes for this:

  o Most often, it is because the server is not properly whitelisted in Evo. You can test for this if you have SSH access to your server by running a cURL OR Wget hit to the link below, but with the correct information:

    ```
    htts://SITE.myvoffice.com/index.cfm?Fuesaction=ExternalAccountChec
    k.ReplicatedSiteInfo&Alias=USERALIAS&APIKey=PROVIDEDAPIKEY&APISecr
    et=PROVIDEDAPISECRET
    ```

    If the Evo server responds with **Restricted Access**, the WordPress server has not been properly whitelisted. Give your InfoTrax representative the correct external IP Address of the WordPress server and try again.

  o If the Evo server responds with `{"MESSAGE":"No User Found","ERROR":true,"ERRORCODE":"101"}`, the alias being passed may not be a valid alias in the Evo setup. If this is the case, the plugin records that error information and stores it in the GLOBALS scope, as it would with a normal return, so you should be able to handle it in your PHP code.

- The following is the complete list of expected error codes that return from the hit:

    101: No User Found. Indicates that the alias passed in did not match an alias in the Evo system.

    102: Duplicate User Found. Indicates that more than one distributor possessed the same website alias. This should not happen, but if it does, it likely means that there was an issue in registration. Consult your InfoTrax representative about this issue. Most likely, one or more of the distributors will have to give up their existing website alias.

    103: No Alias Passed In. Indicates that the Alias field was not correctly passed in the query string. This is almost always an error in how the plugin is building the hit to the Evo site. If you get this error, contact your InfoTrax representative immediately with the steps to reproduce the error.

    104: Unauthorized API Access. Indicates that the API Key and API Secret were not passed in, or that one or both are incorrect. In the admin settings, verify that you have set up the correct API Key and API Secret for the site you are pointing to. If you still encounter issues after doing this, contact your InfoTrax representative to verify that the API Key and API Secret you are using are correct or have them provide new ones.

Helpful articles online

The following articles supply information about using a WordPress Multisite network:

How to Setup WordPress Multisite with subdirectories

The Ultimate Guide to WordPress Multisite