



Reseller WordPress Portal

Version 66 – 10/24/2022



Table of Contents

FEATURES.....	3
Buy or Build Your Own?	4
Let's get started	6
Products Used	6
Steps to CLONE Site	11
PURCHASE Add-Ons	14
Personalize Site	16
Site Edits.....	17
FAQ & Troubleshooting	32
Portal Instructions.....	38
<i>How to Add a Page in WordPress within the Portal</i>	<i>38</i>
<i>How to Setup A New Reseller</i>	<i>39</i>
<i>Create a Newsletter Post</i>	<i>40</i>
<i>Add a Reseller to your Reseller Locator.....</i>	<i>40</i>
Portal Integrations	43
Security	49
EULA - Overview.....	50
End User License Agreement (EULA)	50
Release Notes (what's new):.....	53

The Chanimal / SaaSMAX Portal with WordPress – Rev66

Chanimal and SaaSMAX are proud to present The Reseller Partner Portal (licensed jointly via Chanimal or SaaSMAX). It was a project that started in 2004 after trying to help several vendors to launch their reseller partner portals, but the programs were seriously delayed by either IT (who were supposed to create it internally—but couldn't get it done (or did a terrible job)), or they didn't have the interest or budget to purchase an expensive and complicated PRM (ranging from \$6,000 (now \$13,000) to over \$50,000 *each* year) before they even proved out their partner program (could they even make money with partners?).

It was originally created as an HTML template but soon switched to WordPress, as the world's largest content management system. There are over eight years and 250 hours of selection, refinement, and integration that has converted an open-source platform, into a full-fledged partner portal that has been used and tested by thousands of partners.

The strength of WordPress is in the 40,000 plus plug-ins. However, some are very good and well-supported, but others are weak and quickly lose support, have security of stability issues, etc. Each of the integrated products used in this portal was selected after researching (over numerous months (often running up to ten of each type simultaneous to see which worked best and could be integrated and supported), scouring multiple review sites for the best plug-ins, but also the one with the best license (some were free/open source). One of the parameters was to reduce or eliminate the ongoing cost of the portal and keep the cost to a minimum. If the open-source version wouldn't meet the primary needs, then a paid version was found—including a developer license when possible.

The portal includes the following features:

FEATURES

- Best Practice template and content. Over 50 pre-defined template pages with a format that has been tested and refined (for ease of use--with constant accolades) for over a decade, and content (lead policy, deal registration, NFR policy, MDF policy, etc.) that follows industry best-practice workflows and processes.
- Samples & Instructional Videos. It also includes industry best-practice sample content (policies, agreements, templates, documents and processes) used to help grow over 400 world-class channel programs (Apple, Adobe, Intel, Citrix, Novell, Disney, Autodesk, Sony, Lotus, IBM, Netscape, 3M, Microsoft, Corel, Goldmine, HP, Red Storm, GE, Motorola, and hundreds more). It also includes numerous videos that also show how to set up the entire program, setup alliances, position your product and more.
- Newsletter distribution. Partners can automatically receive emails of news every time you post a new blog. The latest three newsletters automatically display on your portal home page with the remaining archived under Newsletters found under the support menu.

- Reseller locator. There is an easy-to-use zip-code-based reseller locator that allows prospects to find your resellers. It is the bait used to get resellers to put the product on their website.
- Auto-Notify forms. Every form that is completed (application, MDF request, NFR quiz, Deal Registration, Place Order) is saved, but also sends you an email notification. They Include NoCaptia to reduce spam.
- Reseller forum. A simple-to-use reseller forum to address FAQs and allow resellers to collaborate. It is pre-populated with jump-start sample content.
- Learning Management. Built-in Learning Management System (LMS) that can be used to train your partners online. It also includes a sample course on Basic Sales (approach, presentation, closing, overcoming objections) that is applicable to all products or services.
- Affiliate Application. Includes one of the most powerful affiliate systems to track affiliate/referral partners. Includes stats, banners, entire affiliate interface.
- Program Levels. A robust and automatic membership plug-in allows you to control levels and manage which users see which content. It is already pre-set for Affiliate, Authorized, Gold, Platinum, Alliance and Admin levels. It also allows conditional menus.
- WordPress tools. Several plug-ins are pre-selected and pre-installed to allow you to do a global search and replace, backup your site, set up passwords, and swap menus (the public and protected sections have different menus (not a WordPress feature)). Performance is also enhanced with a popular caching plug-in.
- FAST setup--no developers. The site does not require IT to set up or manage. Plus, the average user with basic WordPress understanding can setup, expand and manage the content without development cost.

Hundreds of sites and companies (start-ups to several billion) have used the Chanimal / SaaSMAX portal model with great success. Some later migrated into a Partnership Relationship Management (PRM) system (there are some very good ones available) later as their partner program grew *much* bigger and they could justify the cost—but others (including several multi-billion companies) have extended the portal (with CRM plug-ins, etc.) to meet all their needs.

This Chanimal / SaaSMAX WordPress portal solves the need for a fast, affordable (almost no ongoing cost) and functional reseller content portal and allows you to prove out the reseller model and produce revenue before having to get into expensive systems or custom development and integration—it has been used with start-up partner program to programs with thousands of partners. Plus, it follows the industry best practices (in structure and content) and helps create a uniform portal structure that can be used by the entire industry--making it much easier for resellers to recognize and use. Resellers have to enter so many different portals for their content (and many systems have terrible UI designs) that they appreciate a structure they've used before.

BUY OR BUILD YOUR OWN?

Can you purchase one of the popular Partner Relationship Management applications? Sure, but most will cost between \$13,000 to \$50,000 per YEAR (or more—especially when you include add-ons for deal registration, reseller locators, a forum, LMS, etc. (that are already included in this portal)) and usually

take a month or longer to set up (versus 40 minutes (10 min to clone and 30 min to personalize with logo, phone, contact, info, etc.). Many of these PRMs are very good (Chanimal has reviewed and even consulted with many of the PRM vendors)—but you may never use most of the features for years (although some are modular and ala-cart—which helps), or until your program becomes difficult to run (with thousands of partners) and you need all the analytics, integration and polish you can get.

Many PRMs contain advanced system management and analytics—critical when working with tens of thousands of partners. But this portal can extend very easily (some integrations can occur with a single add-on that takes 10 minutes to setup) and leverage the analytics and processes from your existing CRM and marketing automation, since you already use these systems (so the PRM is replicating—and most folks prefer to manage from a single CRM since it is the integration hub, not your PRM).

The usual justification for a PRM is the cost of scaling without it. If a new employee costs a modest \$50k/year (the industry average for a channel sales manager is \$137k), but the *existing* team (without having to hire another person) can run your program just fine with the *existing* staff (*if they just had a more effective PRM (at \$25k per year avg)*)—then your PRM is justified (allows you to continue to manage your program without throwing another body at it), then you have your cost justification for a PRM. If a PRM only helps a single reseller (and you may have hundreds to thousands) to get what they need, run more smoothly and sell more—the extra revenue will more than pay for the cost. Of course, the Chanimal / SaaS MAX portal is drastically less expensive and is often paid off with 1 or 2 sales (with little to *zero ongoing expense*).

You can also develop your *own* site from scratch (IT loves projects), but one of the companies we helped that decided to make their own portal and their system got completely bogged down—a YEAR later their internal portal was *still* not done. Plus, the interface was terrible, it had never been usability tested with actual partners, and it didn't have nearly as many features as this portal.

Just because you can, does not mean you should! Besides, if it takes less than an hour to set this site up (versus possibly hundreds to thousands of hours (if hand coding) to create your own), you only have to edit all the policies to get everything assembled MUCH quicker, and you can use this *while* an internal replacement is being created. It can be also used as a model for any future system you decide to create.

Besides, this reseller portal is built around WordPress, so with over 40,000 plug-ins and counting, you can usually add a new capability (integrate with Salesforce, create a round-robin lead system, track your MDF funds, deal registration, manage promotions, etc.) in MINUTES with well-refined existing WordPress plug-ins that are often open-source and free or very affordable (\$10 - \$99)—so it is hard to justify scratch development. I recommend you start with this portal, extend it as needed (although you'll find it has a *LOT* of powerful features to start with), and then you can decide if you want to replace it with a dedicated PRM later—after you have *proven* out your partner program.

LET'S GET STARTED

I recommend you PRINT this entire document and then move from TOP to BOTTOM and check off EACH item as you make all the changes. The process to *clone and personalize* the site typically takes 40 minutes.

PRODUCTS USED

All of these products can be downloadable within WordPress by clicking on the Plugins menu and selecting "Add New" from the top. However, when we CLONE this portal, each of these will be automatically installed and configured (otherwise you will have to set up everything manually)—but this lists what the products are and how they are used. Most are open-source or pre-paid, but some do not have dev license and require an annual upgrade if you want them to stay current (some last for years but need an update when WordPress goes through any major changes). You will then want to purchase those that have a cost so you can swap out the original license with your own (or a few of the paid plugins may be disabled).

- WordPress. Everything works and has been tested with version 5.0. It should work with future releases (existing plug-ins were also selected based on their ability to stay updated).
- Menu Swapper. This is a handy utility that allows you to have one set of menus on the home page and then another set of menus on the "inside" pages (not a WordPress feature without using this plug-in). You must have this installed or all the pages inside and outside of the portal will have the same menus.
- Enfold Theme. This is one of the most popular and powerful themes and is consistently on the top of the reviews for *best themes*, I know it well and can also support it if needed. It allows you to use the built-in editing, but also includes a fully graphical advanced layout builder (Avia Layout). Most pages do not use or need the advanced layouts (which are mainly used for the home page and a few others that benefit from a fancy layout)—but it is a nice option if needed.
- Gravity Forms. The seven main forms used in the portal were created using Gravity Forms—a WordPress plug-in. If you wish, you can also use the form creator within your CRM (Salesforce, Goldmine, etc.) or your affiliate software, email marketing software, etc. to bring the form data directly into an existing database. However, Gravity forms will automatically integrate with most of the popular CRMs (Salesforce), email apps (like Mail Chimp), affiliate apps (like Post Affiliate Pro), automatic marketing (like HubSpot) and more. The portal includes a snapshot of all the forms.

However, you *will need to purchase a license* (and replace the license key within the settings) if you decide to continue using Gravity Forms (the latest versions requires an upgrade to update) and need one of the add-ons, if you need support. Also, some of the plug-ins (not needed to start) require you purchase a pro version. Fortunately, Gravity Forms sells for \$39.95 (but *Google for a coupon*—it is usually 30% off) so it is only **\$27.00** (more if you later want a plug-in that requires the pro version). Or you can strip it out and use the forms within your CRM (but I do NOT recommend you do this until later). The form data can easily export if you switch later-

or you can use one of numerous pre-developed add-ons for bi-directional import. It usually takes about 15 minutes to set these up.

- WP Store Locator. This will allow you to have a reseller store locator (a high percentage of resellers won't even come on board without one—since it shows that you are channel-friendly). It can also be used as “bait” to reward your reseller when they put your product on their website (we would never send them a lead without the product on their website). It allows you to input your reseller locations once they add your product to their website—which is when you should add them. It has an extra add-on you can get that allows you to import existing resellers as a CSV file if needed. This is worth it if you have a lot of existing partners—but is not set up by default (since most portal users are setting up a new partner program).
- Better Search and Replace. A plug-in that does a simple and safe search and replace. You will use this to search for Acme and replace it with your company name throughout the site. It can be viewed at Tools/Better Search and Replace. You need to read the instructions carefully (it has taken the entire site down when used incorrectly since it can replace your URL if it has “acme” or other “replaced” words in it). Backup first.
- bbPress. This is one of the industry's most popular forums and was developed by the creators of WordPress. It is configured already with a few sample posts. It is only accessible within the portal and is a great way for partners to collaborate among themselves or for you to address FAQs. There are a LOT of online videos and documentation that show how to modify it—great for when you want to get your partners talking and collaborating.
- bbPress Tweaks. This is an add-on forum widget that allows you to create sidebar menus for your bbPress forum.
- Menu Swapper. It allows the site to have a different menu *outside* of the portal than the one seen *within* the portal (not a normal feature of WordPress). By default, the pages use the “internal” menu—use this for anything seen outside of the password-protected portal. The “Membership” plug-in also has an add-on module that can do this (and more), but it requires you to purchase the development “Plus” package—not needed if you use this one.
- Wordfence Security. This is an optional plugin that can be activated (it is activated in two stages – first, during the learning stage for a few weeks (it maps common “non-hacking” patterns, then the final stage where it blocks behavior outside of the norm) *once your site has gone live*. This will increase your site security in the event any hackers try to by-pass the built-in WordPress security. The site usually contains information intended for the public (PowerPoints, matrix, SRP price List, etc.), so it is *not* a high-risk site, but there is an option to activate it if you wish. BTW – this site should NOT contain highly confidential information—it is for salespeople and they are paid to talk. The built-in agreement has an NDA, but you should write “confidential” on anything they should *not* share (but there shouldn't be much if anything), so the need for extra security is rare (but this will help any concerned IT folks). BTW – some ISPs won't allow Wordfence because it can be server intensive during a scan (works on Bluehost, Go Daddy but not on WP Engine (they will send you a notification if it is found). Other options are listed further in the documentation.

- UpdraftPlus. One of the highest-rated (with over 1 million installs) backup plugins so you can backup your own portal site. By default it is NOT activated (some WordPress sites are already covered with a general backup so you won't always need it), but you can activate it within seconds after you have personalized your site to keep a snapshot—great for when you are testing new add-ons or doing major configuration changes and you need to quickly re-set if you messed up (happens).
- LoginPress. Gives you a customizable login screen (not WordPress) with your logo (configure details below). It also redirects the admin and the partner (user) to the inside of the site and has a custom login/logout. It also sets the maximum login attempts to 5 with a 5 minute delay (so you won't need a similar plug-in (installed by default if you use WP Engine as your ISP).
- If Menu. Allows conditional menus so you can turn menus on and off by user type (Admin, Subscriber, etc.). Example: If you log in as an Admin, you will see an Admin Login menu that contains detailed instructions and files (demo scripts, recruiting phone dialogues, new channel orientation, how to determine margins—and more). Subscribers (any level) will never see these menus. **Note:** If Menu also contains custom code that allows you to view menus according to the users' level or any other custom criteria (Authorized, Gold, Platinum, USA, Distributors, Reseller, Affiliate, etc.). This way your USA and UK resellers can see different price lists, or distributors only see their policies vs resellers, etc.
- Remove Dashboard Access. Allows your partners to login to the internal portal to change their name and password and select preferences—without allowing them to view *your* dashboard or any WordPress *admin-only* features.
- Paid Membership Pro. You need to set up a password to keep non-partners out. You can either find a password plugin or use this award-winning "membership" plugin. This plug-in will allow you to determine who sees which content within your portal by levels (i.e., Affiliate, Alliance, Authorized, Gold, Platinum, OEM, etc.). It also allows them to change their password and manage their profiles. Several membership plug-ins are expensive (many have monthly fees), but after pouring through numerous reviews, the free plug-in that comes out on top (often beating or rivaling the #1 paid plug-in) is "Paid Membership Pro." It can also set up paid membership (and access by levels, passwords, etc.), if you ever wish to charge for access to your program (not typical with a new program since it creates a barrier to entry—but may work later when you are thinning your program) and it works great. It is called "Paid..." because it will accept payments. It does not cost anything to use, but they will charge \$250 plus for one year of support if needed (it also has options for "paid" add-ons to manage menus, etc. that are not part of the open-source product).
- Yoast SEO. Installed, but *not* activated to start. It will be used for creating an SEO optimized product landing page for partners to put on their own site (then de-activated since it is not used after the landing page is created (we don't SEO optimize the portal site (only a sample landing page) since it is password protected and private—Google won't be crawling it).
- Tawk Chat. One of the most popular chat applications. It will require you to create an account (you will want to use your partner@yourcompany.com email so your channel manager will get the offline messages), but it is free to register and use. They have a paid version that has the

same features, but removes their branding. It works great to ensure you can respond to partners when they have a quick question. It also sends you an email if offline (when you are not logged in) and will often be your primary communication with investigating partners.

- LearnPress. A highly rated Learning Management System (LMS) that allows you to create online training courses to get your partners up to speed on your product, support and how to sell. It includes a free Basics Sales Training lesson to level set the resellers, but also as an example of how to set up your own courses. It has no cost, but you can purchase additional advanced features later if preferred (auto certificate issuance, etc.)—helpful when you eventually set up your reseller certification program.
- AffiliateWP. One of the most powerful and popular affiliate programs designed to work inside of WordPress. Integrates with Gravity Forms and Paid Membership Pro, and includes full stats, panels, banner management—everything needed to track and pay affiliate partners.
- WPDataTables. Allows you to edit the Program Levels. Access the WPDataTables Forms and edit the document. When saved, the two tables are automatically updated.
- LEADsmart. A plug-in that works with LEADsmart CRM (a white label version of Salesforce that includes an easier-to-use interface, full marketing automation, and partner management (including built-in lead dissemination and deal registration management)—all at a price that is less than Salesforce direct. It follows the exact best-practice partner follow-up processes that are recommended within the portal. It is de-activated to start but can be activated and set up in minutes if you are using their CRM. Click [HERE](#) for a special discount via SaaS MAX. Install details are further in the documentation.

These products all work together well, but they may not all be integrated with YOUR back-end systems, but they provide a lot of the core functionality for an intermediate to advanced reseller portal (and have many highly advanced capabilities with the reseller locator, levels, forum, LMS, affiliate, etc.). Even still, the included best-practice policies and content are totally unique and can make the difference between a successful and failed partner program.

Fortunately, since the portal is built on WordPress, it is almost infinitely extendable. You can add plug-ins for Salesforce, LEADsmart, and other popular CRMs, HubSpot, email apps, affiliate programs, etc. later (either by integrating via Gravity Forms or via WordPress directly) in *minutes* and everything *is* integrated!

This portal can last you for hundreds to thousands of resellers before you will want to add additional capabilities (integrate your CRM so you can manage and disseminate your leads, manage MDF fund requests when you have hundreds to deal with, automate deal registration, track MDF funds, etc.—but again, many of these can still be accomplished with existing WordPress plug-ins (over 40,000 plug-ins exist, but are not included or pre-configured since it depends on which backend systems you prefer to use).

The main difference between this portal and a dedicated PRM is analytics and automation—but many of these may be redundant with your existing CRM or marketing automation. These capabilities are critical when you have tens of thousands of partners and thousands of deals and have to work with your

partners in-mass just to keep them all straight. But at that stage there is enough money flowing through your partners that a PRM is easily justified. Fortunately, almost all the portal data is easy to export, so any future transitions should be easy.

STEPS TO CLONE SITE

Technical Ability: 3 out of 5 for WordPress, 4 out of 5 for the Clone process. 2 out of 5 for the rest of the setup and personalization. Instructions, including a detailed video, are included.

Avg Time: 10-20 minutes if you follow EACH step exactly (I recommend you **print this document and check off** each item).

The portal is cloned using either Duplicator Pro or WP All In One. Detailed instructions are below.

1. Install WordPress. Create a **NEW** install with a separate instance of WordPress. Do NOT use multi-site WordPress install (many plug-ins are not multi-site compatible). Also, do **NOT** use your existing WordPress site when cloning since it will re-write *everything*. Most ISP's can easily allow you to set up multiple instances/copies of WordPress in *different* directories. I HIGHLY recommend **www.YOUR URL.com/partnerportal** as your directory (since all the examples will use this URL) or **partners.YOUR URL.com**. If you use a directory different than your main URL, you may have problems sending emails from the WordPress system if you use an email (partners@acme.com) that is different than your server URL (acmepartners.com)--unless you install an SMTP plugin. Otherwise a receiving email may consider your regular emails spam (since you have a sent from partners@acme.com, but the server says .acmepartners.com, etc.).
2. If you do NOT have a hosting service. If you are *not* planning on hosting this on a new directory on your own existing site, then you will need to find a hosting service. Do *not* use WordPress.com – the domain name and service pricing are not competitive (\$24/month vs about \$6 for better options).

I also do NOT recommend GoDaddy—they are slow, slow, slow no matter what plan I have seen. They also require updating plug-ins one at a time which is tedious (versus others where you can just click update for all and they update quickly).

I recommend **CloudWays**. Their \$10-\$13/month plan (any of their first three networks (Digital Ocean, Linode, or Vultr) works fine—and is faster than a shared server). I recommend Vultr High Frequency for the best speed. The portal is NOT high-traffic (even with 10,000 partners you might only have 500 people on the site on any given day), and is not resource intensive (no eCommerce, etc.), so the simplest \$13/mo plan should work (and is still faster than a shared hosting plan). I set up myself as an affiliate so I can get a [LINK](#) that gives you a \$15 discount.

I used to recommend Bluehost.com—consistently rated one of the top WordPress *optimized* hosting services in the world. You will want to get their “shared pro plan” which cost about \$6.97/month paid annually (it is affordable and they usually send you the login credentials with WordPress already installed). It is simpler to manage than CloudWays—but may or may not be as fast (uses a shared server so it can vary).

WP Engine. This is a popular ISP that is a managed services hosting service, versus a shared hosting. It is as fast as Cloudways, but *considerably* more expensive (3-5x more) and it has some

restrictions (50 mb max file size, can't use Wordfence, can't use popular Cache applications, etc.). It also requires a different cloning process with a different closing application (If you use WPEngine, then please provide the following information to allow cloning:

Destination Site URL:
SFTP Server Address:
SFTP Username:
SFTP Password:

WP Admin URL:
WP Admin Username:
WP Admin Password:

3. Test your Fresh Install – remove unneeded plugins. Log into your fresh WordPress site to ensure it is working fine, to begin with. It is HIGHLY recommended that you remove any “trash” plugins that your ISP may have added (many use MoJo WordPress installer)—similar to the lightweight (and often unwanted) trials and products many vendors add to a new computer. It will be much harder to identify these plugins later (since they will be mixed in with plugins that are part of your clone site). Common files ISPs pre-install are Constant Contact integration, Jetpack, Hello Dolly, MOJO Marketplace, OptinMonster, etc. You pretty much want to start with a fresh version of WordPress.
4. Clone your site. Chanimal/SaaS MAX will do this for you (only takes about 10 minutes).
 - Once cloned, your site uses the following login:
 - **User name: master**
 - **Password: !ReselPort123!**
 - Additional Login. There is another username already pre-configured that you can use to TEST and to do portal demos and show what the Gold level reseller might see (and see how the login process works). You can remove this later—but it is not recommended since you will have to create another “end-user” name again anytime you wish to view the site from the reseller’s perspective.
 - **Username: Gold**
 - **Password: password123**
 - Actual name is John Doe. Nickname and display name is Gold – but you would log in as “Gold” then enter the password.
 - Update your Permalinks – IMMEDIATELY. Once logged in you MUST update your Permalinks. This is what locks in your new clone site to use your NEW location (mycompany.com/partnerportal, etc.). Don't make any changes—just Go to Settings (on the left menu within WordPress), select Permalinks, and click **Save Changes (TWICE – common WordPress issue)**. This will update all your links so everything should point to your *new* cloned site instead of the cloned site's older site. It will NOT update any hard links that might be within the forms, etc. Instructions to change these will be covered in

the *Personalize Site* section below. Confirm that your portal is using YOUR site URL--*not* the original at Chanimal.com and please **do not** log into the original and make any modifications (it has been done before and I had to re-do and fix everything!).

- Turn off auto-updates. Next, as a matter of best practice, while you are working with WordPress, email your ISP (if you use one) and have them turn OFF the automatic updates (many services automatically update Wordpress, PHP and other items and only send you an email *after* the fact—do NOT allow them to run auto-updates (you want to TEST your site after you run the updates manually). This will allow you to manually update as you wish and *test* it is working ok (or it could be updated by your service overnight and everyone will call you complaining if it breaks something) 😊
- You must Remove WP-All-In-One. It is only used once for the clone and never again (also, it frees up the license so it can be used to clone another site). You are cloned. Your site is now cloned and you are ready to personalize it (next section).
- Optional activations. Later, when you are all *through* with the personalization of the site (the rest of the document below) and we have made ALL the site edits to your policies (usually takes two hours and two meetings) and you are ready to PUBLISH and link to your site, then you may chose to *activate* and configure two popular plug-ins that are pre-installed, but *optional*:
 - WP Super Cache. It may make your WordPress site faster—but your site may be fine already or may have cache pre-installed by your ISP (BlueHost ads their own cache to fresh WordPress installs (but they don't tell you)). WP Super Cache should always be *deactivated* during the setup and while adding a lot of content so you don't have to refresh as much to see the updates.
 - Wordfence Security. It is one of the highest-rated apps and will add an extra layer of WordPress security to prevent anyone from hacking your portal site—however, this portal site is a low volume site (even with 1,000 partners you may not have more than 50-100 access it in a day), does not contain sensitive data (it includes info you WANT resellers to present and customers to see), so it may not be worth the effort. Follow the Wordfence instructions carefully—it first asks for a “warm-up” period of about a week where it detects normal traffic patterns, then you can turn it on fully to block anything odd—like mass attacks (if not, you may find it blocks you and your partners from the site). Regardless, it is *optional*.

Some sites like WPEngine do not allow WordFence (since it can use a lot of resources when doing a manual scan), but most are fine (Wordfence typically reports over 100 attempts to crack into my main website every week—so it is definitely helping). WPEngine pre-installs a simple password retry plugin to prevent any more than 3-5 login attempts—it is not a

security plugin, but it does the most basic job (although LoginPress that is included with the portal has a similar feature).

PURCHASE ADD-ONS

You will seldom need to purchase any add-ons (most have pre-paid developer license). However, you may need additional add-ons if you have special integration requests (i.e., Salesforce, etc.), but most of these are incredibly cheap (\$39-\$100)—much less than the cost for custom development.

1. One of the site objectives was to create the portal as affordable as possible, and that it would not require ongoing expenses—but still have excellent functionality. Most of the included plugins are free or I own a developer's license so there is no cost (and are best-of-breed (requiring countless hours selecting and testing for function and compatibility). Following are a few that are NOT free. However, these are *OPTIONAL*, since you can use your own theme or forms/CRM. One thing to note, if you do not use these then you will need to re-configure your menus, your permissions and all your forms which could take you 2 to 10 hours or more... so I recommend you *try these first* so you can set up your site quicker. You can always make changes later—which is the main reason for using an extensible platform like WordPress.

Remember: You can try the site and see how it works—but before you make it public, you must either replace the items below with your own license or purchase them. They currently use the Chanimal license, and the license codes **MUST** be replaced (or you will get a "license key" error—so please get these (fortunately they are really inexpensive).

- o Theme. A *snapshot* of the theme is included with the portal, but it may require you to re-license it over time for updates (they make them frequently keep up with WordPress improvements) and support. Like most themes, it is not pricey (about \$59) if you need to (don't bother unless you see an error if it tries to update and the update seems to have value—the latest updates included major performance increases (faster load times, complete compatibility with WordPress 5.0), etc.—so take note).

NOTE: I do NOT recommend that you swap out this theme, to begin with. There are a LOT of theme-related shortcodes, unique and swappable menus (so the public-facing and password-protected sections show different menus) and other refinements built-in (this portal gone through over 41 revisions so far with refinements). The last time I tried to manually update the theme from a prior version—it took over 4 ½ hours with the custom menus, custom widgets, unique customization that had to be re-configured (and I created the portal).

I have seen some IT-savvy folks swap the theme out and have made so many changes that I can't even help them configure all the pages until they swap it back (or they end up creating incompatibilities that break features between the carefully selected plugins). Once we have something to work with quickly (which is the intent of the portal site), and you've read all the instructions (some are for the admin only within the portal

pages (listed as “private”)) you can change the theme within a staging site and see what may be affected and make changes before making it live. But please—do *not* change the theme to start with (we can easily make it look like your existing site in minutes—not hours).

- GravityForms.com. The six main forms (Registration, Deal Reg, NFR Quiz, Submit Lead, MDF request, and Place Order) all use this plug-in. This is consistently the #1 rated forms plug-in with over 1 million installs. There are a few competitors that are free, but they are either harder to use (I had repeated problems with forms and didn't want to fuss with it) or don't integrate with other popular applications that you may want to use later (which was one of the *main* considerations).

There are numerous popular plug-ins that integrate Gravity Forms with Salesforce, MailChimp, Affiliate Pro, etc. Popular CRM, email and marketing automation apps can also create their own forms that you may wish to use them (so the data goes directly into your own system—but the data will transfer similarly with the add-ons (so I don't recommend re-doing all the forms).

If you decide to create the forms with one of your existing applications, then you can use the form content and layout as an example, but you do not need to keep GravityForms. If you want to continue to use the GravityForms plug-in (*highly* recommended when you start so you don't have any delays), then you **MUST** replace the existing license key (that you get when you pay for it) with your own (or it will *not* allow your forms to save after the software eventually “calls home” to confirm a valid license). Cost: \$49, but it is only \$27 with discount coupons (search for coupons)

Note: Purchasing the plug-ins is only necessary if you get the clone portal included as part of Micro Consulting (since you will get a free *snapshot* of the most current site), or if you purchase a Snapshot (it will work—but eventually you won't be able to upgrade). If you are not part of Micro Consulting and have the site hosted for you (i.e., via SaaS MAX), then the cost of any of these plug-ins is included. This plug-in is valuable, but optional and there was no reason to continually pay a multi-site developers license for these specific plug-ins if they would just be tossed out and replaced later (but it's your choice).

PERSONALIZE SITE

Technical Ability: 2 out of 5. Some WordPress experience helps. The *channel worksheet* has a tab for portal changes that contains most of these steps.

Time: 40 minutes. Recommend that you PRINT this document and checkoff EACH step (lots of small areas to make changes).

You now have a CLONE of the portal site along with *all* the associated plug-ins (everything gets duplicated). Now you need to personalize the entire site (to change from Acme to YOUR COMPANY, add your own graphics, phone numbers, content, emails, etc.). Please follow these steps and sequence **exactly** to ensure you cover *everything* and complete the process quickly. The process will also *teach you the features of the portal* and where to go later if you need to make edits--so it is worth the time to go through it.

I recommend that *whoever will be updating this site (usually your current or future Channel Marketing Mgr/Intern) complete these steps (not your IT person)* since they are relatively easy, but more important since the instructions will show you HOW to make updates so you will not be dependent on IT (which is one of the objectives) and you can easily use and modify this site as a marketing tool to help your partners.

Info You Need In Advance

2. Name of your channel manager
3. Phone (it should be a direct line)
4. Setup `partners@yourwebsite.com` as an email address (it will be used by partners and should redirect to your personal company email)
5. Address
6. A company credit card number. Google will require it to use their maps but it should NEVER charge it anything (only bills like 50 cents for every 10,000 searches past 10,000 free per month—you won't have that much traffic should it should never be hit—but they require it.

Items to note (especially to seasoned WordPress users (the ones that seem to have the MOST problems)):

- Please **do NOT change the theme immediately**. As mentioned above, several vendors changed the theme before we even got started and it messed up all the shortcuts throughout the site. We can change it later if you wish, but we want to be able to make all our edits first (backup so we have a completed snapshot)--then you can play all you want. :-). BTW, it uses one of the top five best-selling themes in the industry, has a LOT of powerful features built-in, and is constantly optimized and updated and well supported.
- Remember to follow ALL the steps (there are a lot, but it still only takes about 40 minutes to personalize and swap all the contacts, logos, etc.). Pay special attention to the FORMS - some of the edits are in the email text, etc.

- You will typically want to use "partners@YOURURL.com" for the reseller email. I do NOT recommend you use a normal personal email (i.e., John@...) since your role may change in your company over time, but resellers will be slow to switch (sometimes for years).
- Please *do NOT* remove any plug-ins to start and do not change any forms. One vendor took out the membership plug-in because they didn't know what it did. Another modified and stripped down the reseller application form removing the profiling questions (including % hardware ("We don't do hardware") - not realizing that it helps us qualify and determine how much *software* a reseller sells vs service and hardware).
- Do NOT remove **any** of the existing users (definitely not master). WordPress ties content to users. Pages act like Post—so if you remove the Master (used to create the site) and Ted Finch (used to test the “Gold” level, but also some of the pages were created)) then it removes their “posts/pages” and puts all of it in the trash—and you will be shocked when you log back in. However, you can move each page out of the trash and make public again—but it is a major hassle. I recommend you just change the passwords later and associated emails, but keep the two users so you don't risk losing any of the content.

SITE EDITS

7. Decide a Primary Contact NOW. You MUST decide a primary channel contact, their direct phone and should set up an email, “partners@yourcompany.com” to re-direct to their regular email. Do not use a generic main number or rely on the switchboard to transfer a call to whoever can help them—channel partners need a DIRECT contact and a direct line.
8. Edit the Site Name & Primary Email. Go to Settings/General. Add your company name in front of “Partner Portal,” add a tagline if you wish. Change the email to partners@YourCompany.com (again, I do NOT recommend you use your actual email, instead use the general email address for the partner program (BTW – immediately set this up (and you can have it re-directed to your normal email). Confirm or change the Timezone to your own. Press “Save Changes”. If you do not, it may be sending emails from the original staging site account (typically tedfinch@yahoo.com) and will confuse your partners. Plus, your emails may go to spam since it looks like you are sending from partners@acme.com but the server sees a different location—thinks it is a phishing email.
9. Change the Theme Settings. Go to Enfold (the theme name). Do NOT change anything other than the items below (do not add social icons, change the colors (you can do later)—nothing (this is not a normal site—it is a password-protected portal, so it won't need all the same elements that are seen in a normal public email (no links to your social media, no SEO (it is locked from Google)—except a single page that your partners can mimic as their landing page.
 - Theme Options. Change the logo to your own logo (you may wish to use the Acme sample for size if it doesn't adjust automatically). You may have to add about 10-20 pixels of white space to the top of your logo if it doesn't center horizontally properly.
 - Header. Click the “Extra Elements” tab. Change the phone number xxx-xxx-xxxx to the actual phone that partners would call (not the main number—makes it easier for them to get straight through).

- Footer. Under copyright, change Acme to your company name. Do NOT remove the [no link] after the copyright or it will advertise and link to your theme's URL - Enfold.
 - SAVE ALL CHANGES – when completed.
10. Replace Site Name & Variables. Go to Tools/Best Search and Replace. Type *Acme* in the Search Pattern and then YOUR COMPANY in the Replace Pattern. Select ALL of the files and deselect the "test" checkbox.
- Also, change "(xxx)xxx-xxxx" AND "XXX-XXX-XXXX" to your channel person's phone number.
 - Change "John Doe" to your channel person's name (decide now—it will be in about 20 places).
 - Change "partners@acme.com" to partners@YOURCOMPANY.com. Do NOT use a personal email (versus an email "type"). You will then want to check with IT to make sure partners@... will redirect to the actual channel manager's personal email address.
 - All instances of these changes should have been replaced throughout the entire site.
 - **NOTE:** If this plug-in is not found, then go to the PlugIns page. Deactivate and then Activate it again. It should now show up in the Tools section. Sometimes a cloned site doesn't set this up correctly--this fixes it.
 - **Options:** There is a more advanced search and replace plug-in that is pre-installed called "Better Search Replace." It will change everything in the database at a much deeper level and may save as much as 10 minutes of time—however, it can mess up EVERYTHING if you make a mistake. You can use this instead, but at *your own risk*—Regex is safer but changes fewer things. If it does mess up everything—quickly replace your search with the prior search term and it should come back up (don't ask me why I know this ;-). If you use this option, many of the contact info changes below may already be made—but you will want to confirm.
11. Change Home Page. The home page is under Pages and called, "Home." It is one of a few pages (the portal and contact page) that use advanced formatting (The Avia Layout Builder). You can use this for any page, but most don't need it since they have simple text with links, etc. and the advanced layout will just slow down your edits. "If" the search and replace did not change these elements, you will need to do so manually. BTW, if your program has a reseller *and* an affiliate (referral) program, we may use an alternative home page (Home – Affiliate). It is pre-configured to explain both programs (don't worry to start, since it takes minutes to switch later if it applies).
- Click the first section, "Acme Partner Program" and change Acme to your company name in the main heading and the subheading. Save.
 - Click the next "Thank you..." section and change Acme with your company name. Save.
 - Click the body copy, "Click HERE" section. Change the photo to your own (Yes—use a photo, this site MUST be personal (not cold and corporate—it is about relationships) and change all the names and contact information (if it did not get changed automatically). Save.
 - UPDATE this WordPress page (click blue Update button toward the top right of the page).

12. Change Footer Contact Info. The site footer contains primary contact information. It may or may not be changed in the search/replace process—regardless, some areas are not covered in the search/replace process. To edit, go to Appearance/Widgets. Click on Footer – column1 through 4. Click on the “Text:” areas and edit each area (phone, email, address, business hours).
13. Go to Forms. This is part of the *Gravity Forms* plug-in. There are five forms, 1) Deal Registration, 2) MDF Request, 3) NFR Quiz, 4) Reseller Application and 5) Place Order. You will need to review *each* form and edit the name and email contact information.

NOTE: If you use the “Better Search and Replace” (riskier if you make a mistake—but more automatic), it will change the phone numbers and @Acme.com for you—so you may not need to make any of the Forms changes below (but check one form to verify. If it is fine, you can skip this section).

The changes for each form is listed below:

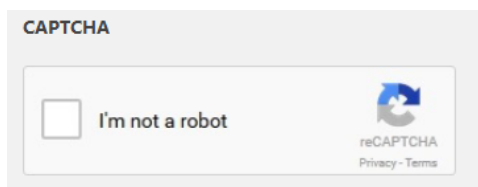
- Deal Registration.
 1. Click on the Deal Registration form. Go to Form Settings/Confirmations. Edit the Default Confirmation. Change the Phone Number from (xxx)xxx-xxxx to your own phone. Save Confirmation.
 2. Go to Notifications. Edit Settings. Change Send to Email from @Acme.com to YOUR COMPANY.com. Also, change From Email from @Acme.com to @YOURCOMPANY.com. Save by clicking Update Notification.
- MDF Request Form. Click on "Forms" to return to the main forms list.
 1. Go to Notifications. Edit Settings. Change Send to Email from @Acme.com to YOUR COMPANY.com. Also, change From Email from @Acme.com to @YOURCOMPANY.com. Save by clicking Update Notification.
- Place Order Form. Click on "Forms" to return to the main forms list.
 1. Go to Notifications. Edit Settings. Change Send to Email from @Acme.com to YOUR COMPANY.com. Also, change From Email from @Acme.com to @YOURCOMPANY.com. Save by clicking Update Notification.
- NFR Quiz.
 1. Go to Notifications. Edit Settings. Change Send to Email from @Acme.com to YOUR COMPANY.com. Also, change From Email from @Acme.com to @YOURCOMPANY.com. Save by clicking Update Notification.
- Reseller Application.
 1. Go to Confirmation. Edit the Default Confirmation. Change the Phone Number from (xxx)xxx-xxxx to your own phone. Save Confirmation.
 2. Go to Notifications. Edit Settings. Change Send to Email from @Acme.com to YOUR COMPANY.com. Also, change From Email from @Acme.com to @YOURCOMPANY.com. Save by clicking Update Notification.
 3. On the bottom of the Reseller Application form, there is a field called, "HTML CONTENT." *Inside* the content you will need to change the location of the reseller agreement—it is HARD coded. Replace the URL with your own website

location. For example,

"http://chanimal.com/websites/cloneportal//agreement/" might be switched to "http://varportal.yoursite.com/varportal//agreement/" etc. You will also want to replace the phone number in the same section.

- Go to Forms/Settings
 1. Enter your support key. The current key is licensed to Chanimal but it MUST be replaced with your own or Chanimal will be violating the license—and your forms will not save. Just paste your own license in the space and you will be fine.
 2. Enter your NO reCaptcha Settings. You may be able to keep the settings as they are. But if they don't work, you will need to sign up for your own free account to get the key (takes a minute). Make sure you select Recaptia 2 and chose, "I'm not a Robot." <https://www.google.com/recaptcha/intro/index.html> . Enter your site name and it will assign you a site and secret "key". Go to Settings, NO Captcha and copy the site and secret key. Done.
 3. Save Settings.
- 14. Go to Settings/No Captia. The forms and the site, in general, require these settings. Click on the LINK "Enter Google No Captcha...". It will show that there is a KEY already—but this was for the clone site—you'll need your own. Click the link, "Google No CAPTCHA reCAPTCHA" and follow the instructions to register a FREE site key. Select reCaptcha V2 and the "I'm not a robot" checkbox. Capture the Site Key and paste it back to your portal field, along with the Secret Key. Save and all your Captia (to eliminate spam) is set. Note: You will re-use this SAME information when you get to the Membership plug-in section (Membership/Settings/Advanced). NOTE: If for some reason your noCaptia does not work—then check any of the forms. If there is not a checkbox "noRecaptia" on the bottom, then you will need to replace the reCaptia for ALL the forms (takes about 30 seconds each).

You must see this image. If not, delete the Captcha and re-add it. Your problem will be fixed. 😊



- 15. Go to Forums (instructions only - you do NOT need to make any changes, just get familiar with it)
 - You can view the Forum from the Forum menu. You can also add a new forum (actually, a section) if you wish.
 - View the Topics. There is a menu item below the Forum called Topics. There is a FAQ section with the question, "How Resellers Get Paid." You may want to answer this within the forum. This is where you can also add new topics.
 - You can view the forum configuration at Settings/Forums

- This forum uses bbPress as the plug-in. It is made by the makers of WordPress and is a very popular forum plug-in that your resellers can use to communicate with you and each other. You will want to go to the bbPress website for a basic tutorial that explains how you can manage it.

16. Go to Menus.

- Go to “Select a menu to edit” and click the drop-down menu. Select *Reseller Locator* then press Select. Click on the “Back to Home” menu item and swap “acme.com” with your own company main URL (i.e. “yourcompany.com” (your company, not your portal if it is different—want people to return to your company website). This creates a mini menu for your Reseller Locator page.
- The rest of this section contains *instructions only*--**you don't need to make any changes**, but this explains how you would add menus--and make sure it only shows up in the "private" portal, instead of the external public menus. *Instructions only (below)*:
- Click Appearance/Menus and you will see the menu structures. There are several menu sets within this portal. Most Word press sites do not allow dual menu structures, but the portal site uses a plug-in called *Menu-Swapper* that allows different menus for different pages. You can set up which locations swap at Settings/Menu Swapper. Following are the four menus:
 1. The Main menu controls the top menu that is seen by the public *without* logging in.
 2. The Portal Menu (called the Chanimal Portal Menu) is the top menu seen within the portal *after* you or the reseller login. This is the menu used by most of the content. Each page has a "Swap" menu.
 3. The Footer Menu shows on the bottom of the page.
 4. The Header Menu shows in small text above the main page. It contains a "login-link."
 5. Example:
 - If you want to add a new page INSIDE the portal you will go to Pages / Add New. Complete your page like normal.
 - Before you save, you will go to the RIGHT-hand menu and find the section called "Menu Swapper". Select the "Replace this Theme Location" and pick "Primary Menu"
 - Next, go below to the "With this Theme Location" and chose, "Chanimal Portal Menu"
 - This will swap your main menu (which is OUTSIDE of the portal and only contains a few items) with the INTERNAL menu (so it will show up INSIDE the portal). Press SAVE (Publish).
 - If you want to create a page OUTSIDE the portal (which I don't recommend)--then do nothing and your new menu will show up outside and you will probably wonder why (repeat the steps above to fix). :-)

- Remember to also go to Menus and ADD your page to the menu in the location you prefer.
- Go to Users
 - This is where your resellers will show up once they have been signed up to your partner program using the Membership plug-in (if you keep it activated)
 - This is also where you should set up a new master ADMIN user (versus the temporary "master"). You may wish to remove the "master" user LATER to ensure others that have cloned their site don't have access to your content if they happen to find your portal. Do NOT remove the original *until* your site is about to go live—so we can easily get in and out during all the content additions.
- Go to Memberships. It allows you to control who sees what content dependent on their level (like a custom portal). The problem is that it is not integrated into your forms. So if a user signs up, you have to enter this information (just basic, not advanced) manually. It will still allow access to a page, but won't show the content if they don't have sufficient rights (by level). On EACH page of the portal, you select the level that is allowed to see that content. You will need to edit the following sections:
 - Email Templates
 - Edit *Checkout - Check*. Change all the contact information (John Doe, acme, phone, website, etc.) to your own.
 - Edit *Checkout - Free*. Change all the contact information.
 - Make sure you change the Subject so it says YOUR company—not Acme or whatever it may be.
 - Go to Memberships/Email. Change the "From Email: to *your* email address and the "From Name" to *your* company name.
 - Go to Memberships/Advanced Settings. Change the URL for the Message for Logged-in users to "http://yourcompany.com..." (use the location for your own website). Make the same change for Logged-Out users. (Sometimes this area is already correct--make the changes above if it is not).
 - If you add a NEW page and are using the Membership plug-in, you will have to set up the levels for that page (or your intended users can't access it). Instructions:
 - Create a new page like normal and add your content.
 - Find the "Require Membership" area on the right menu while you are on the new page and select the level (this uses industry-standard names) that you want to be able to view this page. If you only want Gold and Platinum to see it--then only select those options. You should ALWAYS select Admin for EVERY new page or you will not see it when logged in as the admin.
 - Setup Captcha/ReCaptcha for your levels. For Gravity Forms, you had to update your spam Captcha/ReCaptcha keys. You will also have to copy the same keys for the membership form (uses its own--not the other form). Go to Settings/noCaptcha reCaptcha. Copy ALL of the (Public) site key (make sure you get ALL of it). Go to Memberships/Advanced Settings. Paste the Public site key code to the "public key"

field. Go back to the Settings/noCaptcha form and copy the Secret (Private) key. Return to Memberships/Advanced Settings. Paste the Private Key. Press SAVE settings on the bottom.

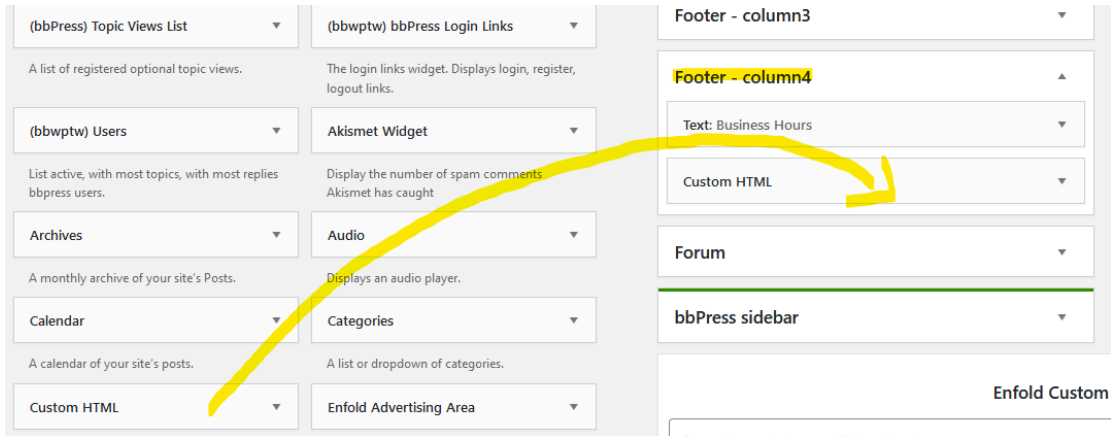
- Turn off Pages. First, WAIT for us to go through your program definition before you turn off any pages—since that’s when you’ll know what features your program will or will not have. You can then turn off pages that are non-applicable and may never be used for your product type (config tools, Evals (if you don't have hardware)). Do not remove, instead just Turn off those pages that have no content (you may add it later (i.e., you may not have white papers, videos, etc. but you may add later to those pages).
 - Select the page.
 - Change Visibility (top right) to private. Remember to also go to Menus and delete the top menu (and add back when you decide to add content back to the site).
 - The Eval (refers to hardware) and Distributor pages are turned off by default.
- Change Address. Go to the Page called Contact Us and change the address.
- Edit Address Map. Your Contact Us page includes a map. Click the map and add your address (make sure to click the button to set the coordinates). Then save and exit—your location now shows up on the map.
- Store Locator. View the store locator at /My Account/Reseller Locator. Put in the sample zip code and press Search to see how it will look with resellers. This sample data is there only so you can see how it looks. Now, select "Store Locator/Manage Stores." Leave these names for a sample—later you can remove them when you have resellers in “Austin, TX.” You will add your own resellers along the way so they can be found. By default, the 500 mile radius is selected since you may not have a lot of partners. You can change that later. Also, you will want to select Settings and change your start point (current is Austin, TX) and put your own city, state, and country. Most of the other settings are already configured and should be fine. Again, you may wish to leave the names if you don't have any resellers yet so you can test that it is working--then delete later. See below, “How to add your store locator to your company website.” It shows how to put it in a frame—if you don’t know how already.
- Maps Require a Google API Keys. After June 22, 2016, for any site that uses a Google Map (like the address map above and the store locator below—or any other app that displays a Google Map). Here are instructions (since they may change):
<https://wpstorelocator.co/document/create-google-api-keys/>
 - Create a Project. Your map is tied to a Google project, so create that first.
<https://cloud.google.com/resource-manager/docs/creating-managing-projects>
 - Setup a Billing Account. You get \$300 credit initially and \$200 per month and they only bill you more if you are over apx. 100,000 visits in a month—plus, you won’t be using the paid features (just the static features)—so it shouldn’t cost you anything. Right click on your project and select Billing/Create a Billing Account. Enter your credit card information.
 - Setup Your Google Map API Keys.

- **MAIN Instructional Video.** Here is a video tutorial showing how to setup if you have any troubles. <https://youtu.be/kuAZ5IYbNK4>
- **Create the Browser Key.** Click the button, agree to the Google terms. Give it a Name (Store Locator) – don't worry about the second line and press "Create." It will give you an API key. Put this in the Browser Key section in WP Store Locator. Save Changes. Without this step, you may not be able to set your start point in the Store Locator (it will have an error image and you won't be able to use it).
- **Create the Server Key.** Click the button (below Browser Key). Click Continue. Just accept the default name (Server key 1) and press Create. Copy the API key to the Server Key field within the Store Locator. Often you can use the same key for both fields—you can try if there are any problems. Save Changes.
- **Test.** When through, go to the Store Locator and test it. It is found within the portal at My Account / Reseller Locator.
- **More Details if needed:**
 - **Google Setup Instructions.** Here is a link from the plug-in author on how to setup Google Maps: <https://wpstorelocator.co/document/configure-wp-store-locator/> Plus, you have to setup your Google API Keys: <https://wpstorelocator.co/document/create-google-api-keys/> (make sure you have also setup the Google Maps API (Java, Geocoding, directions, distance, elevation and places))
 - **Video Resources:**
 - Resources: Create, Modify, or Close Your Billing Account → <https://goo.gl/31Z4YSz> Creating and Managing Projects → <https://goo.gl/33b610D> Enable Google Maps Platform APIs and SDKs → <https://goo.gl/30WczQu> Generate and restrict API keys for Google Maps Platform → <https://goo.gl/31XOHNM> Optimize your Google Maps Platform usage with budget alerts → <https://goo.gl/2OwHSim> Control your Google Maps Platform usage with quotas → <https://goo.gl/325KZ4N>
- **Configure the LMS email.** Your portal includes a Learning Management System. The only change you need to make is to change the name and the default email. Go to the LearnPress menu item on the left menu bar. Select Settings and replace Acme with your company name (unless it is already changed) and change the "From Email" from tedfinch@chanimal.com to partners@YourCompany.com (or whatever you use within the portal site). Click Save Settings on the bottom left.
- **Setup Login logo.** Your system uses a popular WordPress plugin to hand the login and login—called LoginPress. Select LoginPress / Customizer. Select Logo. Click the area to change image. Select your logo from your media library (should be there already when you setup your logo for your website. You should see your logo. You may or may not need to adjust the log width (depending on logo) to fill in the space. Remember to publish when done.

- Update LoginPress Password. “IF” your LoginPress plug-in later updates, but it ever says that you don’t have the rights to update when you try (shouldn’t happen—but it has happened once), then go to LoginPress/License Manager. Click the button, “Deactivate License” and then input the following license key: cdfb7063b0dcde840ba3dfcee2296e4 then click on “activate license.” Now you can go back to your plug-in and select update.
- NEW Instructions – newer installs. Depending on your clone date, Google Maps may now require a credit card (as of Oct 2018). It won’t charge you for the maps unless it is over 10,000 or so views, so you should never be charged, but the clone site cannot come pre-configured or it would use the wrong credit card. You will need to sign up for it once your site is set up and ready to go live. Also, the store locator (until updated) will have a spot for the browser key and server key—**use the key you got from Google and put it in BOTH fields.**
- Hard-coded links. If your site cloned correctly, then all the existing hard-coded links (links to other pages, etc.) will be correct. However, if there was a hick-up, the links may not have re-set. In that case, you will need to change them manually. You can do that as you edit your content page by page (test anyway), or all at once. Test several of the links to see if they go to the Chanimal site or your own are found on the Partner Portal page (the opening page when someone is logged into your portal). Click on the Shortcuts to popular content (with links to “Register a Deal,” “Claim leads,” etc. If they go to your site you should be fine—if not, you will need to change all the links on this page, plus check other “links” found along the way as you proof your site. To edit, click the link and press the edit button and then change the link (only the front end where it is unique to Chanimal – leave the rest there (replace “chanimal.com/websites/cloneportal” with your own portal URL).
- Add content. Once the site structure and standard items are complete, you will want to add your content (PowerPoint, white papers, graphics, etc.). Most of the policy pages will need little change. The main content you must have:
 - PowerPoint. Resellers sell on-site and need a PowerPoint that they can edit and make their own.
 - Competitive matrix. One of the most requested items. Resellers need to know the strengths and weakness of their product and what makes it different and better.
 - Price List. Can't sell without it.
 - Market Info. The section contains the sections. The sample site shows how it is put together.
 - Policies. All policies have to be reviewed. Confirm your name replaces the default. Make modifications to meet your needs (not too many--these are industry best practices already).
 - Reseller Agreement. This has to be changed in TWO places. There is a public copy the reseller sees when they sign up and an internal copy that stays as a reference. They cannot be the same page because one is inside and another outside of the password portal.

- Update Menu. *Instructions only – no edits.* The side menus are labeled “Side – Name” and are specific to each of the main sections inside the portal (My Account, Marketing, Sales, Support). The top menu is called Internal Menu or External Menu (since the main external page and the internal portal have different menus). To add your new page to the top menu: Go to Appearance / Menus in WordPress.
 - Select a menu to edit: Internal Menu or External Menu (controls the TOP menu in or outside of the portal—you chose)
 - Under Pages on the left, select your newly created page and Add to Menu.
 - Your new page will be added on the bottom of the Menu Structure. Drag it where you would like it to go.
 - Select Save Menu. Your new page is setup. Now view that page to ensure it is set up correctly.
 - Now do the same for the SIDE menu (if you added the menu to “My Account” then you would select the “Side – My Account” menu (add your page and save).
- Tawk Chat setup. Go to Plugins. Find Tawk.to Live Chat and select “Settings.” Under About Settings, click here to reselect property. Select Sign Up. Use “Partner Manager” as your name and “partners@youcompany.com” as the email so any offline messages will go to your partner email. When you’ve created your account, return to this same settings screen and login. All the settings, colors, etc. you set up in Tawk will apply. Save changes and it will be live. You can return to the Tawk site to login and make color changes, turn off the message, decide where you want your chat pop-up to show, etc.
- Tawk mobile setup. Make sure to search for Tawk on either Android or IOS to install their mobile app. Use the same login and you can manage most of the chat messages from your phone.
- OLDER Portals (bypass this section if you use Tawk): Update the Zendesk Chat email. Zendesk Chat is configured with tedfinch@yahoo.com. However, that means all offline chat messages will be sent to that email address. You’ll want to change it to your partners email (typically partners@yourcompany.com). Click on Zendesk Chat menu item on the bottom left of Wordpress. Click the orange “Launch Dashboard” button. It will require you to log in. Instead, click the “Sign up free” link on the top right. Once you sign up for a free account it will give you instructions to change the email for your portals chat (**typically, you’ll deactivate the existing account** (says “Deactivate”) and then re-activate with your new Zendesk account and will send you the emails from then on. You may need to login with the tedfinch account first.
- Location. Admin/Channels/Web Widget/Setup/Go to Message page. Select your Style (pick your colors), then go to Installation for the actual web code.
- Chat not showing. Occasionally, depending on your system, the chat doesn’t show up. In this case you will need to login to your Zendesk account (that you just setup). Click on Settings (wheel), then Widget and then the first “Setup” Tab. Copy the embed Web Widget code. Return to the inside of your portal site and go to Appearance/Widgets. Pick the option for “Custom HTML” and drag it into the Footer Column4 area. Open the Custom HTML tab and

paste the Widget code in the content area. Do NOT give it a title. Press SAVE. Check your portal site and your Chat popup will show up. If it still doesn't work, you can replace it with the 3-user free version at TIDIO.com

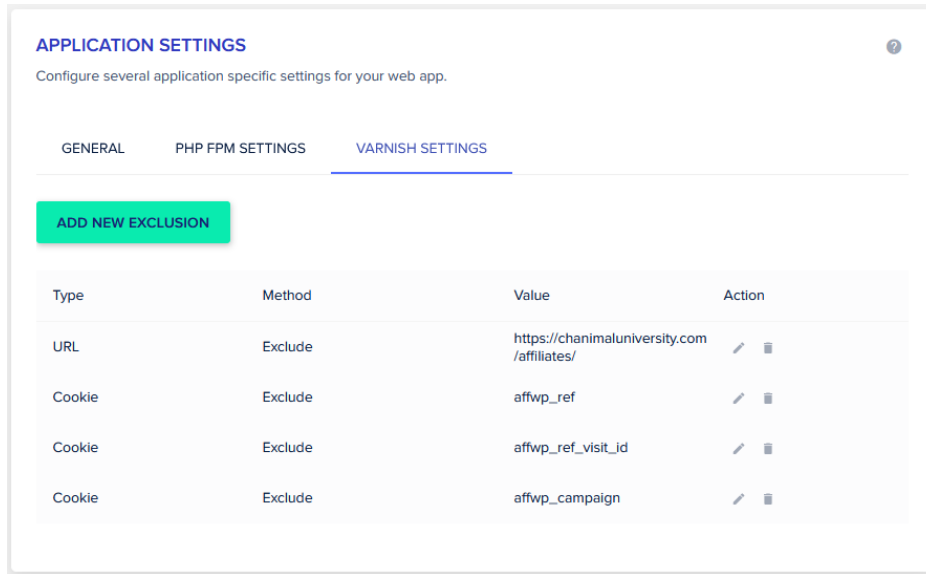


- Turn on non-default pages. Some pages are created but turned off by default. You can see these pages within WordPress with the word, "Private" next to the pages (select Pages to view entire list). If you wish to turn these pages on, highlight the page, select Quick Edit and then un-check the Private button to the right of Password. Then you can edit as you see fit. The private sections include:
 - Eval program (only applies to hardware)
 - Distributors (if you use wholesale distribution for hardware (if applicable))
 - Personal Data
- Referral Program. If your partner program also includes a referral program, then you can select the alternative home page:
 - Go to Enfold (the theme – on the left).
 - For the first menu option on the top, Theme Options – select Frontpage Settings and chose *Home - Affiliate*. Save all changes. This new home page includes information for a referral program also.
 - Change the menu. Go to Appearance/menus. Select External Menu (Intro Menu) and press Select. Select the Referral Form on the left under pages. Click Add to Menu. It will show up on the bottom of the External Menu. Move it above login.
 - Save Menu. Your referral partners can now use this form to submit leads without having to login.
- Activate the LeadSmart Plugin (ONLY if using LeadSmart—bypass this section if not). Note: By default, the LeadSmart Plugin is pre-installed in the Portal. However, if for some reason the plugin is not installed you can [download it here](#).
 - Settings. Go to the plugin Settings and verify that there are two custom fields – LeadSmart Portal and LeadSmart Deal Reg. If either of these two fields is missing you can create them otherwise there is nothing you need to do here.
 - Menu Setup. Go to Appearance → Menus and select the "Internal Menu". Select the LeadSmart category in the Pages column and then add the LeadSmart Custom

links to your internal menu. Generally, you will want to replace the Leads menu under “My Account” with the LeadSmart Portal option and the Register Deal under “Sales Tools” with the LeadSmart Deal Reg option. Repeat the above steps on the appropriate side menus as well.

- Verify Setup. Log in to your portal using the Master login and verify the menu links are working properly. A sample Deal Registration and Portal Page was automatically setup for the Master user ID. You are now ready to use the LeadSmart integration.
- For more information and detailed instructions view the integration [Tutorial Video](#).
- **Test Entire Site including EVERY form (read the reseller agreement, etc.).**
- BACK IT UP. Now that you have your site personalized, make a backup of this complete portal site--so you can re-set if you ever make a mistake. You can go to the Plug-ins and activate the UpdraftPlus Backup plugin (it is pre-installed, but not activated yet). Then select “Backup Now” and it will back up a snapshot of your configured site—in case you mess it up and have to re-set.
- Go to the Support/ADMIN page—also described above. It should show up as a menu item within the portal if you login with admin rights (the default admin of master is already setup). It is typically on page 3 or 4 of the Pages and shows if you log in as the admin—but you can view it on the last pages of the Portal “Pages”). It contains internal instructions on how to set up a new reseller and other portal tips (in case you don’t have this document later).
- AffiliateWP Set Up. This plugin uses separate plugins to activate each applicable module (you will see over 10 AffiliateWP plug-ins pre-installed). Each one includes the name of what it covers. As each is activated, a new tab shows up within the AffiliateWP settings—although a few just add functions to the existing tabs. There are several steps to leverage this feature:
 - Server Setup - AffiliateWP exclusions. The affiliate software uses cookies to track affiliates/referrals. However, some servers use VARNISH or other server-based cache. You need to make sure it does NOT cache your cookies or your affiliate tracking will not work. You will need to exclude the following (graphic below shows how):
 - Exclude the affiliate URL where the affiliate software resides. This is typically: `partners.yourwebsite.com/affiliates`
 - Exclude these three cookies: `affwp_ref` , `affwp_ref_visit_id` , `affwp_campaign`

Here is how it looks on the Cloudways servers (where Chanimal.com is hosted)—yours may look different:



- **STOP.** You have completed the portal setup.

Affiliate Configuration. There are specific settings unique to most affiliate programs. To make the changes, from the inside of WordPress, go to AffiliateWP and then Settings. Most of it should be pre-configured, but you will still want to review and possibly modify the following areas:

General

- **Referral Rate.** It is currently set to 10% – you will want to confirm that is your preferred rate.
- **Cookie Expiration.** This is the number of days a link from their website will get credit from the time their referral goes to your designated landing page. It is set to 30 days–this is the most common.
- **SAVE** Changes if you make any.

Emails

- **Logo.** You can add yours if you want it to show up in your emails.
- **Name.** The name Acme should have already been switched to your company name through the global search and replace. Confirm.
- **Email Review.** Review every email to confirm it contains your preferred response.

Misc – notes

- **Do Not** Automatically register new users as affiliates–not if you have a reseller program since some may not be part of the affiliate program.
- **reCAPTCHA.** You typically won't need to complete these, since the portal uses Gravity Forms and it has the captcha. If you do, then you can use the same reCAPTCHA settings you used in the Gravity Forms setup.

Affiliate Portal

- **Do NOT** click Check this box to enable the Affiliate Portal or you link to the affiliate page will launch a stand-alone affiliate interface. We don't use this. Instead, we have our own custom "tab" area that allows more customization.

Affiliate Setup if NO Shopping Cart

If you have a shopping cart, AffiliateWP can often integrate, so if an affiliate lead purchases, the system automatically credits the sale.

However, if you do not have a shopping cart for self-server orders, and the leads go through your main website, it makes it difficult for the Affiliate WP software to register the link, associate a dollar value with it and pay out the commissions. In this case, you will need to manually enter the dollar value, adjust the % of commissions and mark the lead as paid.

No Shopping Cart Set-up

1. Prospect applies to program
2. Approve them in the system under *Affiliates > Overview > scroll to latest registrations and click review and then approve*
3. Next, go into the affiliate profile and make sure you have the correct commission percentage, it will use the global setting unless you change it here.
4. Make sure to enter the affiliate's website so the system can generate their unique URL
5. In the system, the solution is to manually enter each referral lead that gets filled out via the web form (from the affiliate landing page)
6. When the lead gets closed, you will have to manually enter in the lead and if you are paying out via the Affiliate WP software, then PayPal is set up already, so you can click to pay easily. If your company pays another way, you will have to include an extra step to have the company pay the affiliate separately and you will have to enter in the lead and close manually, and click completed in the system
7. You will also have to go into the referrals section and mark as "paid" manually

If the product has multiple levels in dollar value

1. You will need to install the following Plugins: Affiliate Product Rate Add-On and the Affiliate Tiered Rates Add-On. If you *do* want to set up tiered affiliate rates as described above, you can go to *Affiliates > Settings > Tiered Rates* tab to set those rates.
2. If you want your affiliates to be rewarded only when a sale actually goes through (and not for the initial lead). Make sure to disable the **Ignore Referrals with Zero Amount** option (*Affiliates > Settings > Misc*) so that the \$0.00 amount referrals will show up for affiliates, and you can "assign" those leads to them. Then, you can come back and edit the existing \$0.00 referral that brought in the lead with an amount, or manually credit the affiliates with their referrals as previously mentioned.

Please note that the affiliates cannot see the data submitted on the forms, so you would need to provide that to the affiliates if you'd like them to have it for sales contacts, etc.

3. Next, you can manually add, edit, and delete referrals for completed sales on the *Affiliates > Referrals* screen and manually enter in the dollar amount and mark as paid. **Note:** Once you “mark as paid”, you cannot go back and edit the amount.

If you test it by creating yourself as a user, then send it from the same IP address, it will not show up as a referral and will not register. This prevents someone from creating their own account and getting their own discount. You can turn off this feature (another “allow users to register themselves) plugin—but you should not need it.

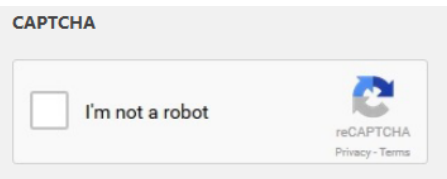
FAQ & TROUBLESHOOTING

- **Why do all my underlined links go to the wrong place (usually a blank page)?**
 - When you cloned the site all the links should have been re-set to your own site. However, some companies have changed their URL to attempt to make the portal site more secure (with SSL)—so instead of using http://, all the pages now use https:// (note the “s”). Have your network administrator fix this, or change it back. https is primarily for e-commerce, and there is no ecommerce within the portal (nor does it help with SEO (since the portal won’t be indexed))—so you should not need it. The portal site includes the Wordfence Security plug-in (anti-virus, firewall, malware scan, etc.) that is turned off to start, but can be enabled later when the site is about to go public—it can add an additional layer of protection (but a STRONG password (you will later change the portal password) works wonders.
- **I can’t log in.**
 - The site uses two plug-ins to control access. The usual problems with login are because of cache (the site has cache and your browser has cache). Refresh your browser multiple times it is solved 90+% of the time. Also, use a different browser. There was an occasion when a users FireFox browser wouldn’t accept cookies. The resolution was to access the browser security settings and delete the prior locations visited—this solved it. Another option is to hide or delete the Logout menu item. There is actually no reason for your typical reseller to logout anyway—unless he is on a shared computer, which is rarely if ever the case. As the vendor, you may logout as Master and Login as Gold when you demo the portal (so the admin menu on top and inside do not come up). Or you can use Firefox for Admin and Google for Demos.
- **I’m not getting the emails.**
 - First, confirm that your partners@YourCompany.com (or whatever email you use for your partner program) is set up correctly. Send yourself an email to that address and confirm receipt. If it arrived, then it is set correctly. Go to the next step below.
 - Go to page 17 - 19 of these instructions to find the FORMS and MEMBERSHIP instructions. Check the FORMs to ensure you changed who the emails would go to under the Notifications (check each form). Also, check the Membership plugin (shows on the left menu and on the top menu of WordPress) and go to Membership/Email and confirm that the *From Email* has been changed to your own email, along with the *From Name* below it if it is incorrect). Now test again to ensure you received the forms.
 - There is an odd occasion that if you had Yoast (SEO tool) active, then turned it off—it won’t send emails. But your email works again if you turn it back on. (Feb 28, 2019)
 - If you are using a personal WordPress site (not a commercial ISP (like BlueHost, etc.)), then it may not have SMTP setup for server emails installed or it may be turned off—in which case you will want to have your IT set it up, or install a WordPress email plug-in. Here is one that may prove helpful: <https://www.socketlabs.com/blog/wordpress-not-sending-email/>
- **How do you update the newsletter?**

- The newsletter and all prior versions are found inside the portal under the main support menu, "Partner Newsletter." The first 3 show up on the home page so your resellers can see it when they log in. You can also have your partners subscribe to your "blog" which will send them the newsletters automatically.
- **How do I remove the login toolbar?**
 - By default, WordPress will show a toolbar (even if you are not the master) when you log in to a WordPress site as a user (not admin). This allows the user to logout if they wish. Most of the time, it's better if they just stay in. If you want to change this so it does not show a toolbar, then go to Users/View Profile and de-select "Toolbar" – "Show Toolbar when viewing site". Then update the profile and it will disappear for each specific users. You will usually set this up when you add a new user (or modify as described afterward).

17. What if my reCaptia is not working?

- Most of the time you should follow the instructions above and it will work. However, sometimes (I haven't identified why or when) the reCaptia for the forms themselves needs to be swapped. If there is *not* a checkbox "noRecaptia" on the bottom, then you will need to replace the reCaptia for ALL the forms (takes about 30 seconds each). Go to each form. Go to the bottom of the form. Select the Advanced Fields on the right and click the CAPTCHA button. Put the captcha box in the area where it was before and delete the old NoCaptcha section.
- This may also happen during the advanced search and replace. There are reports that the reCaptcha is tied to the original WordPress email you used during the install. If you changed this (especially with a global search and replace), then the reCaptcha may not work. Again, just remove the existing one (usually won't have a checkbox) as explained above and the checkbox will show up and it will work. You must see the following image—if not, replace the Captcha and it will work.



- **I can't save my theme changes.**
 - Make a blank php.ini file and put it in the same WordPress wp-admin directory that controls your portal site. I don't know why, but this often fixes weird installs from "automatic" WordPress installs from some of the popular ISPs. Also, some problems have shown up with version 4.8.1 of the WordPress core files. Reverting them back to 4.7.5 fixed the save problems. This should NOT happen with the latest theme update (Enfold).
- **What are the image sizes?**
 - The main banner images are 1920 x 800. The Blog/Newsletter images are 1024 x 423. The channel manager photo is 180x180 (square so it converts to round).

- **The portal won't allow me to upload large files.**
 - Sometimes you may have a problem when you try to upload larger files (5 Mb PowerPoint, etc.) into the Media manager. This is a WordPress setting and has nothing to do with the portal files. Some ISPs (especially GoDaddy) pre-set their WordPress install so it won't allow larger files. Contact your ISP and ask them to set the default to 64 Mb (or larger if you upload (rather than link to) videos—but most videos should reside elsewhere on a video server like YouTube (even if you prefer to make them private—YouTube option)). It usually takes about 30 seconds for your ISP to make the change. BTW, GoDaddy “support” has repeatedly said they cannot change it—wrong, that support person doesn't know how (it is changed easily). They have paid support options and they may try to get you to upgrade for it—this a COMMON configuration issue and should always be changed if discovered (or they gave you a *useless* site (even a PowerPoint can be larger than 5 Mb)).
- **My notification emails (when a reseller registers, sends an MDF or Deal Reg request) are going to Spam.** The system uses Gravity Forms which uses the built-in PHP email send capabilities of WordPress. On some systems (not all), the notification emails show up in Spam (usually within Outlook). You can often white list them, but there might still be the occasional problem. There are several work-arounds, but the one that always works is to use SMTP email instead of the built-in PHP. If you are using gMail, etc. you can often use Easy WP SMTP (<https://wordpress.org/plugins/easy-wp-smtp/>). This article explains how it works: <https://www.egwebdesign.co.nz/2016/03/wordpress-emails-going-into-spam-heres-how-to-improve-wordpress-email-delivery/>

If you need to fix it within MS Office 365, there is another process described here:

<https://peritumstudios.com/wordpress/using-office365-to-send-emails-in-wordpress-via-smtp/>

- **My plugins tab in WordPress shows a red #1, which means a plugin needs to be updated—but I've updated them all. What's wrong?**
 - First, it is correct—but harmless and I usually just ignore it. This portal uses a theme called Enfold. It includes a free bundled version of LayerSlide which allows animated banners. Sometimes this feature has an update—but it doesn't always get updated with the theme updates. While annoying, I haven't seen any issues, but it does go away at times when the theme has a major update, or if you purchase a license for a more advanced version of LayerSlider (cool—but not used by the default portal). More details are found here: <https://wordpress.org/support/topic/wordpress-shows-update-when-none-available/>
- **Icon color bug.** This is intermittent—it shows up on some systems but not on others (depends on your server, ISP, etc.). it may also only show up if you edit the original—if not, it is fine. If you change the icon colors for a series (program features), only the first set changes—the rest move to the default. It is a known bug that should be fixed with an update to the theme. Here are the details: <https://kriesi.at/support/topic/icon-list-custom-color-bug/>
- **Social Media Icons missing.** First, social icons are not used in the portal site—it is not a promotional site, but instead is a utility site for your partners. However, if you do have a problem with the icons missing (you set them up, but they still don't show), it is unique to *WordPress 5.3.1* and version *4.6.3.1* of your Enfold theme (apx. Dec 2019 – Feb 2020). It is fixed on any newer version of Enfold.

To fix, add the following to the Enfold theme “quick css” located on the bottom of the General Styling tab:

```
/* enfold social media icons fix */
.social_bookmarks_twitter a::before, .av-social-link-twitter a::before {
    font-family: 'entypo-fontello';
    content: '□';
}
.social_bookmarks_facebook a::before, .av-social-link-facebook a::before {
    font-family: 'entypo-fontello';
    content: '□';
}
.social_bookmarks_linkedin a::before, .av-social-link-linkedin a::before {
    font-family: 'entypo-fontello';
    content: '□';
}
.social_bookmarks_pinterest a::before, .av-social-link-pinterest a::before {
    font-family: 'entypo-fontello';
    content: '□';
}
.social_bookmarks_tumblr a::before, .av-social-link-tumblr a::before {
    font-family: 'entypo-fontello';
    content: '□';
}
.social_bookmarks_reddit a::before, .av-social-link-reddit a::before {
    font-family: 'entypo-fontello';
    content: '□';
}
.social_bookmarks_vk a::before, .av-social-link-vk a::before {
    font-family: 'entypo-fontello';
    content: '□';
}
.social_bookmarks_gplus a::before, .av-social-link-gplus a::before {
    font-family: 'entypo-fontello';
    content: '□';
}
.social_bookmarks_mail a::before {
    font-family: 'entypo-fontello';
    content: '□';
}
.social_bookmarks_dribbble a::before {
    font-family: 'entypo-fontello';
    content: '□';
}
.social_bookmarks_youtube a::before {
    font-family: 'entypo-fontello';
    content: '□';
}
.social_bookmarks_instagram a::before {
    font-family: 'entypo-fontello';
    content: '□';
}
.social_bookmarks_vimeo a::before {
    font-family: 'entypo-fontello';
    content: '□';
}
```

- **My icons (for the program description and elsewhere) are showing as rectangular boxes.**
 - It is typically a CORS-related issue (Cross-Origin Resource Sharing). If using an Apache server (common), then do the following:
 - Look for the **.htaccess** file at the root of your WordPress installation and add the following to it:
 - `<FilesMatch ".(ttf|otf|woff)$">`
 - `<IfModule mod_headers.c>`
 - `Header set Access-Control-Allow-Origin "*"`
 - `</IfModule>`
 - `</FilesMatch>`

Fixes this problem. See this document for more information:

<https://kriesi.at/documentation/enfold/icon/#icons-are-showing-as-rectangular-boxes->

EO 3C	EO 3D	EO 3E	EO 3F	EO 40	EO 41	EO 42	EO 43
----------	----------	----------	----------	----------	----------	----------	----------

How do I add other content (videos, content from other applications, that are on my main site, etc.) in my portal?

You can create a frame to insert other content into the site. Create a “code block” and insert the following:

```
<iframe src="https://www.yoursite.com" width="900" height="700" allow="fullscreen"></iframe>
```

I am getting a “Parts of the page are insecure (mixed media). How do I fix this?

You may have linked to sites or content that is insecure. If so, you should be able to fix them by replacing the “http://” link with a “https://” link. The Better Search and Replace can allow you to do this—but you MUST backup your files first in case you change a file that affects your entire site.

PORTAL INSTRUCTIONS

These instructions are listed here for documentation only—they are *not* part of the required *setup*. They are for a full working portal site. These instructions are also found on the “Admin Page” within the portal (usually about page 3 of the page listings, toward the bottom and marked “Private.”). The Admin menu now shows up next to Logout (as of version 41 and above) so you can access it—but the menu only shows up if you login as master or some other name with master admin right (be careful not to set up too many user names with admin rights—each one is its own security risk—but **NEVER delete “master”** users or you may find your portal content disappears (discussed earlier in the documentation—if you remove the users, it removes all the pages they created—which is ALL!).

HOW TO ADD A PAGE IN WORDPRESS WITHIN THE PORTAL

Adding a page to the Chanimal portal is different than just adding a regular WordPress page since you also have to set permissions (who can view what), use the correct page template to match the look of rest of the pages, and make sure your new page shows up on the “inside menu,” etc. These *unique* steps are shown in blue text.

1. Go to Pages
2. Add New
3. Give it a name
4. Parent: Select which page would be your parent page
5. **Template:** Use the default for this Enfield theme (“feature tour” if using the older Construct theme)
6. **Require Membership:** Select which group can see this page. Do not check any items if you want *everyone* to see the page, or select one or more of the user types (Authorized, Gold, Admin, etc.) to limit who can see the page content. Usually, you would select them all inside the portal, or select NONE if it is an external page.
7. **Menu Swapper:** If your new page is inside the “portal” section, then it is already set up by default. However, if your new page should be on the outside of the site, then select “Enfold Main Menu” and replace with “Intro Menu” (since the outside of the portal uses its own menu structure). Note: an external page that can be seen by the general public.
8. Add content to your new page. Press UPDATE before you leave the page.
9. **Show the page on the menus.** The side and top menu items are created manually (since the external page and the internal portal have different menus). To add your new page to the top menu: Go to Appearance / Menus in WordPress.
10. Select a menu to edit: Internal Portal Menu (the menu used INSIDE the portal)
11. Under Pages (on the left), select your newly created page
12. Your new page will be listed on the bottom of the Menu Structure. Drag it above to where you would like it to go.
13. Select Save Menu. Your new page is setup. Now view that page to ensure it is set up correctly.

14. Select the Side Menu that corresponds to the top menu (i.e., if your new page is Support, then you'll use the Side Menu – Support menu). Add you new page to this menu and save menu.
 15. Your new page is setup. Now view that page to ensure it is set up correctly.
-

HOW TO SETUP A NEW RESELLER

Review the application and website. If they are legitimate reseller that meets your criteria, then do the following (your steps may vary slightly, depending on your internal processes):

1. Sign them up for the NFR account. Add the NFR access login details (usually their email and password) to the Reseller Acceptance Email Template.
2. Add them to the portal site.
 - Go to USERS, ADD NEW
 - Create a user name (usually the firstlast combined)
 - Create a password use "password123" (makes it easy to tell it to them again if they don't remember (until they change it)) and confirm weak password (they can change this later).
 - Unclick the send user notification
 - Keep the role as "Subscriber"
 - SAVE (update)
3. Create the partner level
 - Return to the USERS and it will now show new options that allow you to set up their reseller level (called Membership), enable them to comment within the forum, etc.
 - Go to USERS and edit the reseller (the one you just created)
 - Turn off the Toolbar (a checkbox). If you do not click this, a black menu item appears above the portal content (default by WordPress). It often causes confusion if left on.
 - If you are using the LeadSmart integration you will need to add the unique LeadSmart links for this user to the Deal Registration and Portal fields (under the LeadSmart Integration section). See below (next page) for instructions on how to access these links.
 - Change Membership to GOLD (de-select the option to automatically send an email—you will send the approval email manually (with their NFR access, etc. manually afterward)
 - Change Forums to "Participant"
 - SAVE (update)
4. Add them to your affiliate program (*if you have one*). Note their name and password.

5. Modify the Reseller Approval Email Template (include their NFR name and password, their login name and password (same for portal). Send them the Reseller Approval E-mail.
 6. Follow up after the email with a phone call to get them to the Orientation Meeting
-

CREATE A NEWSLETTER POST

You can create your newsletters within this portal site so it will automatically show up on the home page and be archived under Support. You will use the Blog Post feature of WordPress. Use the following steps:

- **Add a Post.** Click on POST, Add NEW and then create your newsletter subject and copy.
- **Select Categories.** You can categorize your newsletter which will allow you to create filters and post the respective content in different sections of your site later if preferred.
- **Do NOT Swap Menus.** Unlike adding a new page, you will NOT swap out the top menu when you add a POST. The menu swapper plug-in apparently will use the menu of the most recent "post" AS the menu for the home page--not good since your public home page will then have the internal menus.
- **Levels.** Do not select any of the levels under Require Membership--so everyone sees the newsletter.
- **Add a graphic.** You can add a graphic for the post under Featured Image on the bottom right.

Update your page and proof. Your latest newsletter is now posted within the site.

Following are options to email the newsletter. You can copy the content from your portal post into your email or CRM package and send, or you can use the Newsletter plug-in. One is included within the portal, but it is turned off. This is a BETA feature and all the details aren't worked out yet—but you can experiment. This plug-in can connect to your users so every time you make a post it will go out to the resellers. More details yet to come.

Another option that integrates with your newsletter (blog post) and Gravity Forms is Mail Poet.

ADD A RESELLER TO YOUR RESELLER LOCATOR

You will typically want to add your resellers to your reseller locator AFTER they list the product on their website. 1) First, your prospects will be able to find your resellers when they are

looking for local support and to answer pre-sales questions (critical if your office is closed or you are in a different region or time zone--better the prospect gets someone who can answer questions and potentially close the deal than nobody (and your risk them finding another product instead)). 2) Second, it shows that you support your resellers (think of them as regional offices that also need leads). 3) And third, it is an incentive (BAIT) for resellers to get your product on their website (no product info--no leads (through locator or manually)).

The Store Locator shows up in TWO places: 1) [Inside](#) the portal (Reseller Locator) so the resellers can read the policies to get listed (and then it shows what it looks like below). 2) There is also another page that is [outside](#) the password-protected portal (Find A Reseller--the "first" page that shows up inside this portal)--this can be linked from your pricing page (usually called "Find a Reseller").

1. To add a reseller, select "Store Locator" on the left side menu. Add the reseller name within the section. Note: you do NOT want to automatically link this to your User database since the reseller MUST put the product on their website BEFORE they show up in the Locator.
2. Send the reseller an email that they are now in the locator.

HOW TO ADD THE RESELLER LOCATOR TO YOUR PUBLIC WEBSITE

1. This will only show the map "if" you have setup your reseller locator properly within your portal—otherwise it will show an area where the map should be, but a Google maps error. Instructions are above to first make your Google map is correct.
2. Create a blank page on your website—usually links from your pricing page. If using WordPress, you might call it "Find a Reseller." Here is a sample: <https://seynd.com/web-push-notification/about-us/find-a-reseller/>
3. Create a frame on this new blank page that will display your reseller locator page.
 - You want this frame to contain the reseller locator page from your portal site. It is typically called, www.yourcompany.com/partners/find-a-reseller (that is the default location). You can also find this page when you log into your portal site under Pages / Find A Reseller. It is about the 3rd page down.
 - On the blank page you would add the following code (change the "yourcompany.com" path to reflect your own URL)—you may have to create a code block content section (or not, depending on how you created your main website):

```
<div style="text-align:center">
```

```
<iframe src="https://yourcompany.com/partners/find-a-reseller" style="width: 100%; height: 1000px" border="0" frameborder="0"
```

```
marginheight="0" marginwidth="0" name="iframe21"
scrolling="no"></iframe>
```

```
</div>
```

- Now, when you go to this new page from a menu or link on your main website it will contain the reseller locator from your portal site within a frame. Note: if you are currently logged into your portal as the admin, it will show a black WordPress top menu. This will NOT show up for your visitors—only the content below. It will also disappear for you if you log out of your portal site.
4. Test that your link or menu from your website goes to this page and it loads. Done.
-

How do I show or remove the login toolbar?

- By default, WordPress will show a toolbar (even if you are not the master) when you log in to a WordPress site as a user (not admin). This allows the user to logout if they wish. Most of the time, it's better if they just stay in and the bar is confusing (there is also a new logout menu item).

By default, the instructions to set up a new user say to de-select the toolbar. If you want to show a toolbar (with the logout), then go to Users/View Profile and de-select "Toolbar" – "Show Toolbar when viewing site". Then update the profile and it will appear for the select user.

The partner can also modify this themselves when inside the portal by going to My Account/Personal Data. They would then click on Edit Profile (under the My Account section). They will gain access to a limited part of the WordPress interface where they can select, "Show Toolbar when viewing site." They can also change their login information, email, etc. You can see what they have access to by logging in with your test account (name: Gold, password: !ReselPort123! (assuming you didn't delete this sample Gold member account)).

How do I add the LeadSmart links for a new user?

- Only applies if you use the LeadSmart CRM. Login to your LeadSmart account and locate the partner Contact in LeadSmart that you are adding to the Portal. In the Contact record, you will

see a section called LeadSmart Partner Links and within that section, you will see two links – one for Deal Registration and the other for the LeadSmart Portal. Simply copy each unique link and add to the custom field in that User’s profile record in the portal. Now when this user clicks on the LeadSmart Portal or Deal Registration menu items they will see their personalized Portal and Deal Reg pages. For more information and detailed instructions view the integration [Tutorial Video](#).

PORTAL INTEGRATIONS

Many companies want to integrate their portal with existing systems. Fortunately, the portal is built in WordPress which has tens of thousands of plug-ins—many for popular applications. In addition, the portal uses *Gravity Forms* which can integrate every form into most of the popular applications. Between WordPress and Gravity Forms integrations, you can pretty much cover most of your integration needs—without programming. Following are several popular integrations, along with a few options.

Salesforce. Many companies want to integrate their CRM with the forms, so the applications, deal registrations, etc. can automatically show up in Salesforce. Following are a few plug-ins to consider (I recommend a Gravity Forms to Salesforce option whenever possible since you do not have to reconstruct all the forms).

- [Gravity Forms Salesforce \(by CRM Perks\)](#). 5.0 stars. Plug in, but also contains details on how to setup Gravity Forms with Salesforce. They have a free and a pro version (not too pricy). Near perfect 5 star reviews. Click [HERE](#) for their Website Salesforce product.
- [Gravity Forms – to other CRMS](#). Same site as above, but it also supports Infusionsoft, Zoho, Zendesk, Netsuite, Insightly, Dynamics, etc. (wouldn’t bother about their Hubspot plug-in, Gravity includes one for FREE).
- [Gravity Forms – own add-ons](#). There is automatic integration with Gravity forms and numerous other applications as part of Gravity’s own add-ons. Many are included with the basic plan, others require the pro or elite—always check for online coupons for Gravity (can cut cost 33-50%). They include popular integrations with ActiveCampaign, Constant Contact, HubSpot, Mailchimp, SendGrid, Dropbox, Freshbooks, PayPal, Slack, Zoho, Zapier, and others. These are not included within this portal package (and the portal uses a special version, not the basic, so you may have to pick up the basic first (about \$30 with coupons)—since some folks never use any of these. But the cost is very low—much cheaper than an hour of custom development!
- [Gravity Forms Salesforce Add-On](#). 4.0 stars. Caution—this may be unsupported in the latest versions. This free Salesforce Add-On adds contacts from Gravity Forms into Salesforce automatically. Add on setting, check a box when configuring your forms and all your form entries will be added to Salesforce from that time on.
- [Zapier](#). Makes it easy to quickly integrate Gravity Forms with Salesforce. Most of your integrations are free—some more advanced capabilities are paid. Many of this portal users prefer using Zapier, then they can integrate with even more applications.
- [WordPress-to-lead for Salesforce](#). 4.5 stars. If you want to bypass Gravity Forms, you can connect a form from WordPress directly to Salesforce. Includes easy to add forms for WordPress pages.
- [Object Sync for Salesforce](#). Easily map content types to Salesforce objects.

- [WordPress WooCommerce Salesforce Connector](#). Works great for bi-directional syncing if you use WooCommerce.
- [LEADsmart](#). 5.0 stars. One of the rare Salesforce OEMs (when they allowed it years ago). It has an improved Salesforce interface (don't have to convert an opportunity to an account) that is more usable, plus full marketing automation, and pre-configured partner follow-up—all built-in (at a lower price—check it out!!). This version includes a free plug-in that is already pre-installed in your portal. Just “activate” and it can tie directly to your own copy of LeadSmart and act as a full PRM and transfer leads and registered deals in and out of the portal—without the high fees associated with many PRMs that require a license for every partner. Check it out at <https://LEADsmarttech.com/LEADsmart-saasmax-package>

Following are several articles that discuss Salesforce integration:

- [Integrating WordPress with Salesforce](#). Includes five approaches with pros and cons, 1) web to lead form (from Salesforce), 2) Content Management System Form Builders, 3) Advanced Form Builders, 4) 3rd party services, and 5) Custom integration.
- [How to Integrate Wordpress with Salesforce](#). Highlights web-to-lead forms, MailChimp to Salesforce and WooCommerce.

Some companies will link Gravity Forms to Hubspot (etc.), and then let the built-in Hubspot to Salesforce link complete the loop—then you data gets synched is in BOTH systems with the least effort.

Integrate with Google Sheets

Manually. An easy way to manage deal registration, regardless of your CRM, is to create a Google sheet. Then export your registered deals to a CVS file through Gravity Forms. You can set filter dates so you only download the most recent deals. You would then paste the file in your Goolg sheets.

Automatically. You can also use a plug-in to import registered deals automatically as they are submitted by your partners. Two to consider are:

- [Gravity Form with Google Spreadsheet](#). Only \$19 and connect each form to a different Google sheet.
- [Connector for Gravity Forms and Google Sheets](#) (by CRM Perks). This company also makes a lot of integration plug ins for Gravity Forms and different CRMS and most are about \$59 for a single site. The free version (this link) has limited import (won't import a phone number)—but you can still check it out and upgrade later.

Importing Users (resellers). Some companies already have hundreds and even thousands of resellers—and will need to import the users. Rather than doing this manually, you can use a plugin. One that has worked well is “Import and Export Users and Customer,” by Codecton (codecton.com). It works for WordPress and WooCommerce. You can assign passwords and roles (subscriber) while importing—including custom fields (i.e., Distributor, Affiliate, Reseller USA, etc.). It also works with Paid Membership Pro to import memberships (levels).

If Menu updates (Ver 0.16.2). Note: if your version is not this version or higher—it may not be working properly and the custom code will have to be re-added. It is fairly straightforward and so it does not need to be updated frequently, but if it does (and your portal uses it (most do not)), then it should

updated as per the instructions below.

The program uses Paid Membership Pro to control who sees which content—but it does not control the menus. So you can have a menu that brings them to a page that says, “You don’t have permission to view this content”

Instead, it is best if they don’t even see the menu link if they don’t have access to the pages content. We use another plugin call IF Menu to control who sees the menu—but it does not automatically recognize the permissions setup with Paid Membership Pro. This custom code makes them work together seamlessly.

Below is a graphic showing where the if menu was modified. Sometimes, if the IF Menu is updated, it may replace the custom files. If it does, we will need to add them back. It only takes about 30 seconds. Below is the code and the screen showing where to make the changes.

Instructions

Go to Plugins/Plugin Editor/. Find the Select Plugin to Edit on the top right (“Select plugin to edit:”). Then select the If Menu Visibility Control (click SELECT to view this area). Under the right menu call Plugin Files, select src, then select conditions-basic.php. You will then insert the code below in the area shown within the graphic. After inserting the exact code below, then select the “Update File” button on the bottom which will save your changes and it will work as previously.

Code:

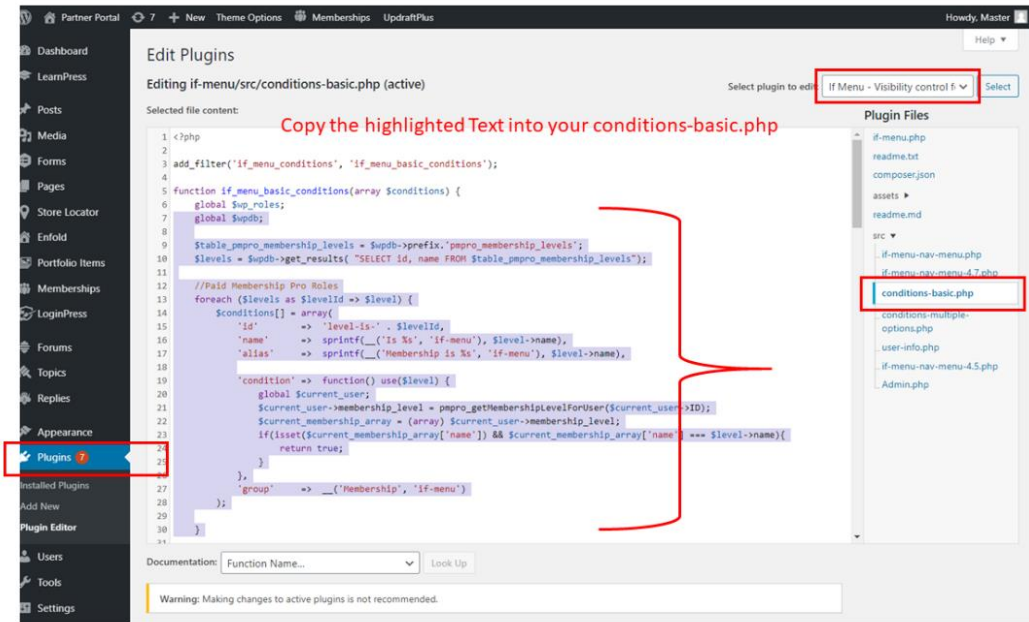
```
global $wpdb;

$table_pmpo_membership_levels = $wpdb->prefix.'pmpo_membership_levels';
$levels = $wpdb->get_results( "SELECT id, name FROM $table_pmpo_membership_levels");

//Paid Membership Pro Roles
foreach ($levels as $levelId => $level) {
    $conditions[] = array(
        'id' => 'level-is-' . $levelId,
        'name' => sprintf(__('%s', 'if-menu'), $level->name),
        'alias' => sprintf(__('%s', 'if-menu'), $level->name),
        'condition' => function() use($level) {
            global $current_user;
            $current_user->membership_level =
            pmpo_getMembershipLevelForUser($current_user->ID);
            $current_membership_array = (array) $current_user->membership_level;
            if(isset($current_membership_array['name']) &&
            $current_membership_array['name'] === $level->name){
                return true;
            }
        },
        'group' => __('%s', 'if-menu')
```

```
);  
}
```

Here is a graphic that shows where to add the code above:



ftp location. If you need to restore the file, it is found: /applications/cloneportal (replace with your own portal directory)/public_html/wp-content/plugins/if-menu/src/conditions-basic.php

Note: There has been the rare occasion, where the “if menu” plugin was updated and the site gave a critical error—but it was only if the user had used the visibility rule and selected a partner level (if it was never used, then there was no error). In the case of an error, then the new version had overridden the custom code. If possible—STOP. Use your browser to return to the prior page, which will be within the admin section. Now, go to the plugin editor, find the file above and make the edit. Everything will show up again.

If you have closed your browser and can't return back to the inside of Wordpress, then you will have to go to the ftp location, save the file to your desktop. Make the change above to this downloaded file, and then copy it back into the same directory on top of the existing file. Test and it will return to normal.

Contact Me

Email tedfinch@saasmax.com or chanimal@chanimal.com or call 512-263-9618 if you have any questions or need help re-setting this If Menu code.

Multi-Language. If you are doing a lot of international recruiting, you may need to create a duplicate site in another language. Rather than cloning the site and translating it, you can create separate pages within the same site that display according to the preferred language. You would typically use a Wordpress plug-such as WPML.

Adding Reseller Locator. The reseller locator has a sample internal page where we post the policy. It also has a page that is public and uses the same locator file and database. It remains off of your reseller page, but is typically added below the price (Find a Reseller) on your main website. When prospects click the link it goes to a page on your website that displays the reseller locator in an iFrame. Here is code for that page:

```
<iframe height="500" width="500" src="https://yourpartnerportal.com/reseller-locator"></iframe
```

Or to auto resize...

```
<script>  
function resizeIframe(obj) {  
obj.style.height = obj.contentWindow.document.body.scrollHeight + 'px';  
}  
</script><iframe src=" https://yourpartnerportal.com/reseller-locator frameborder="0" scrolling="no"  
onload="resizeIframe(this)" />
```

Initial Announcement for LeadSmart

Howdy,

Portal Update: New Plug-in for managing leads, deal registration, and partner follow-up

Your portal currently has a lead policy, but also a tab that says “Leads.” You can either manually send leads (which is what it says currently), or you can attach it to your CRM with a plugin.

One of the companies I’ve been working with is LeadSmart. They created a new Wordpress plugin that integrates with your WordPress partner portal to send leads and automatically capture registered deals (so resellers can see leads and any accounts they’ve already registered on one place).

It also includes an enablement follow-up process that is mapped directly to the spreadsheet we reviewed (application signs up, NFR and approval info is set, Orientation is scheduled, Product on their Website, Added to the locator, promotions recorded, etc.).

It takes minutes to set up and works great.

About LeadSmart

LeadSmart is one of the few white-label versions of Salesforce (rare and is no longer available to others as OEM), but it sports a much better interface (built for SMBs—not enterprise), plus it includes full-featured marketing automation built-in (like Marketo), plus it has full channel partner management (many of the features of a Partner Relationship Manager (PRM)—but it does not charge per reseller (like Salesforce does)).

And... it is cheaper than Salesforce! They also have another version that snaps on top of an existing Salesforce account.

This link includes a few discounts and extras, plus a short demo and instructional video:

<https://leadsmarttech.com/leadsmart-saasmax-package>

It's pretty good and worthwhile to take a quick look.

Ted

SECURITY

Some companies are concerned about using WordPress because of security concerns. WordPress dominates the market and powers over 30% of the web (as of March 2018). As such, it is a target of hackers just like Windows—because so much of the world runs on it. The general rule is to keep your WordPress and all plug-ins updated (they tell you whenever there are updates), just like keeping Windows updated. Plus, make periodic updates. The portal comes with a popular WordPress backup plug-in, but you have to click the button to start the backup (the paid version does it for you, but a simple snapshot after you make big changes will help).

Your portal site should not contain highly sensitive information (resellers and all salespeople are paid to TALK). You may not want competitors in, and it is fine to make them work for the information, but it should not be too sensitive—period.

The greater risk is someone taking over your site, or accessing it and feeding malware ads from an unknown directory (I've had this happen—not with the portal, but a client's website). There are a few easy tools that can help prevent it and sometimes fix the problems if they do arise (depending on the type of hack). The free version of Wordfence is included if you wish to use it. I have the paid version and don't really use many of the additional features.

If your site is hacked, you can try Wordfence or Sucuri (although I find Sucuri harder to figure out), but if you need a service I recommend OneHourSiteFix from SharkGate. The last time I needed help I tried Wordfence (offers a service) but they never responded to my 3 emails, had no address, and kept raising the prices with “multipliers” (worst pricing model I've ever seen—I call it “Tick off the Prospect” pricing). Others had mixed reviews, but OneHourSiteFix.com had perfect 5-star reviews (including my own) and live chat support that was REALLY helpful. Plus, they were FAST and they put the site behind a CDN (increases the speed and helps with ongoing security). It cost \$179 for the year (fix and re-fix if a problem, plus security)—versus \$286 (with the multipliers) for Wordfence (and it didn't speed up the site). A lot cheaper than the 20 plus hours I spent trying to fix the blasted hacked site (it kept getting re-infected from a hard-to-find backdoor). The hacked site was not the portal site, but it was a company WordPress website that I helped with—but the same concept.

EULA - OVERVIEW

This portal site was created by Chanimal, Inc. and has been licensed for use by SaaSMAX and others. If you participate in the Micro Consulting program or purchase a snapshot of the portal site, then you have a license to use a one-time snapshot of the portal site for your own company's use.

You do not have the right to re-distribute a copy of this content outside of your own company or re-sell this portal site to others. You do not own the copyright for the original content and policies, nor do you have the right to use any of the plug-ins that require a developers license. In addition, each plug-in is covered by its own EULA from the respective owner--which is not replaced by this one.

If you use this portal site as part of a SaaS agreement (not Micro Consulting), then you can continue to use the site and the portal content during the length of your program—and receive all associated updates and support. If you later decide to move it to your own server, then you must either change your plan to be part of the Micro Consulting program (where a snapshot of the site is included), or you must *purchase* a one-time snapshot of the site. You cannot just clone the site used during a SaaS program—it is not yours to clone.

Fortunately, there are usually buy out discount options that take into account the transition. Please contact Chanimal or SaaSMAX to discuss.

Following is a more formal version:

END USER LICENSE AGREEMENT (EULA)

READ CAREFULLY: This End User License Agreement ("EULA") is a legal agreement between you (either an individual or an entity) and Chanimal Inc. (Company). By purchasing, and/or downloading, and/or using any of our SOFTWARE or PARTNER PORTAL (both included in SOFTWARE) you agree to be bound by the terms of this EULA. This agreement only refers to the content, structure and complete portal application—it does not cover any EULA from WordPress itself or any associated plug-in that was not developed by Chanimal Inc (which is covered under its own license).

1. GRANT OF LICENSE

Commercial Version

After you have purchased the Commercial License for SOFTWARE, and have received the file of Commercial Version, you are licensed to install the SOFTWARE only into the number of website(s) corresponding to the license you purchased. You may not duplicate the SOFTWARE in whole or in part, except that you may make one copy of the SOFTWARE for backup or archival purposes. You may terminate this license at any time by destroying the original and all copies of the SOFTWARE in whatever form. You may permanently transfer all of your rights under this EULA provided you transfer all copies of the SOFTWARE (including copies of all prior versions if the SOFTWARE is an upgrade) and retain none, and the recipient agrees to the terms of this EULA. You may not redistribute, modify or resold the SOFTWARE in any way without the written permission of Chanimal Inc. You may not rent, lease, or lend the SOFTWARE. You may

not use the SOFTWARE in any software or application that competes with products and services of Chanimal Inc.

We provide three kinds of Commercial Versions:

Micro Consulting: You may install the SOFTWARE on one website for your personal, company, educational, or commercial use. You may not redistribute the SOFTWARE in any forms, including but not limited to templates, themes, software, and applications. This version is included as a SNAPSHOT for free, as part of the Micro Consulting program. Support is provided up to the time the site is properly cloned and you have a working and functioning copy of the site. It may extend after it is “live,” and you are still participating in Micro Consulting, but it may not include fixing any breaks that you have created once it was working (i.e., you changed the theme, modified and misconfigured the forms, uninstalled a required plug-in, etc.).

Snapshot: You may install the SOFTWARE on one website for testing, and then another URL for personal, company, educational, or commercial use. You may not redistribute the SOFTWARE in any forms, including but not limited to templates, themes, software, and applications. It is supported during the install and initial testing, but it does not include fixing any breaks that you have created once it was working (i.e., you changed the theme, modified and misconfigured the forms, uninstalled a required plug-in, etc.).

SaaS Usage. You may use the SOFTWARE on the Chanimal Inc or SaaSMAX hosted websites for personal, company, educational, or commercial use. You may not redistribute the SOFTWARE in any forms, including but not limited to templates, themes, software, and applications. You may not make a clone or similar replicate version of the software during the time of SaaS usage or for use after your SaaS usage expires (you will need to enroll in Micro Consulting or purchase a Snapshot that can be cloned to continue using). This version includes support during the time of usage—but limited support if you changed the theme, modified and misconfigured the forms, uninstalled a required plug-in, etc. Please contact the company to assist with these items.

2. YOUR SAAS SUBSCRIPTION

After you have purchased the subscription, we will create an account for you in our membership area. You must keep your master login credentials secret (but can assign users for portal access). You may not distribute, give away, lend or re-sell it. We reserve the right to monitor levels of your membership activity and take any necessary action in the event of abnormal usage being detected.

3. RESTRICTIONS

Prohibition on Reverse Engineering, Decompilation, and Disassembly. You may not reverse engineer, decompile, or disassemble the SOFTWARE in any way without the written permission of Chanimal Inc.

4. TERMINATION

Without prejudice to any other rights, Chanimal Inc may terminate this EULA if you fail to comply with the terms and conditions of this EULA. In such event, you must destroy all copies of the SOFTWARE.

5. COPYRIGHT

The SOFTWARE that is owned by Chanimal Inc is protected by copyright laws and international copyright treaties, as well as other intellectual property laws and treaties. The SOFTWARE is licensed, not sold, to You for use solely subject to the terms and conditions of this Agreement.

6. LIMITED WARRANTY

THE SOFTWARE IS PROVIDED "AS IS" WITHOUT WARRANTY OF ANY KIND, EITHER EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. IN NO EVENT WILL THE AUTHOR or AUTHORS BE LIABLE TO YOU FOR ANY DAMAGES, INCLUDING INCIDENTAL OR CONSEQUENTIAL DAMAGES, ARISING OUT OF THE USE OF THE SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. YOU ACKNOWLEDGE THAT YOU HAVE READ THIS LICENSE, UNDERSTAND IT AND AGREE TO BE BOUND BY ITS TERMS AS THE COMPLETE AND EXCLUSIVE STATEMENT OF THE AGREEMENT BETWEEN US, SUPERSEDING ANY PROPOSAL OR PRIOR AGREEMENT, ORAL OR WRITTEN, AND ANY OTHER COMMUNICATIONS BETWEEN US RELATING TO THE SUBJECT MATTER OF THIS LICENSE.

7. LIMITATION OF LIABILITY

IN NO EVENT SHALL CHANIMAL INC OR ITS SUPPLIERS OR DISTRIBUTORS BE LIABLE TO YOU FOR ANY CONSEQUENTIAL, SPECIAL, INCIDENTAL, OR INDIRECT DAMAGES OF ANY KIND ARISING OUT OF THE DELIVERY, PERFORMANCE, OR USE OF THE SOFTWARE, EVEN IF CHANIMAL INC HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. ALL LEGAL ISSUE SHOULD BE JUDGED BY THE COURT INDICATED BY CHANIMAL INC.

8. CHANGES TO THIS AGREEMENT

WE RESERVE THE RIGHTS TO MAKE CHANGES TO THIS AGREEMENT WITHOUT ANY PRIOR NOTICE AT OUR SOLE DISCRETION.

RELEASE NOTES (WHAT'S NEW):

Rev 66

- AffiliateWP documented. Added section in this document, and the admin section of the portal documenting the installation, setup, server configuration (do not cache the cookie), how to add a partner, enter an order if you don't have e-commerce, and how to pay. Same as Rev 65, *but* put the documentation in this document, in addition to it being within the portal Admin section.

Rev 64

- Changed Chat. Used to use Zendesk, but it was too hard to configure and was undependable. Switched to Tawk.io. This is FREE chat software for life—so long as you're ok with their "powered by Tawk.io," which is fine—Zendesk and others have the same branded message. Tawk will charge you if you want the branding removed, and it's not worth it. They seem make their money through their live chat service for \$1/hour—so don't select that option and you'll be fine.

Rev 63

- Added WPDataTables. The program levels previously used a spreadsheet and graphic and had to be edited, then re-imported. Now, the table can be updated within the portal by editing the respective form. There are three pre-designed forms for Reseller only, Reseller and Referral, and Reseller, Referral and White Label.

Rev 62

- Added additional instructions for AffiliateWP showing how to exclude the URL and the associated cookies (so it tracks properly).

Rev 61

- Gravity Forms changed their terms and now REQUIRES a new license. Previously, everything worked, including updates, and you only had to get an advanced version (they have three depending on which apps you want it to work with) if you were going to integrate. Now, it works—but won't update without a new license.
- General interface refinements.

Rev 60

- Admin section updated. Now has accordion sections to make content more condensed.
- Defaults to reseller and affiliate partners.
- Plugins updated. Removed Wordfence (would send all reports to SaaS MAX/Chanimal – regardless of email. Should re-install from scratch to add back in for security).

Rev 59

- Changed the MDF form from user_email to admin_email. It was not being received by some systems.
- General refinements in the menus, some of the formatting—plus fixed a lot of grammatical and spelling errors.

Rev 58

- Added custom code to the *If-Menu* that allows you to set additional menu visibility that ties to Paid Membership Pro. You could always setup menus so they only showed up for the admin, etc.—but not using the same levels setup within the membership plugin. This new code enables this integration and Rev 58 provides better instructions.
- AffiliateWP. Major update includes a stand-alone affiliate control panel. It is “activated” by default but the checkbox to use it is de-activated since the portal has an advanced tab-based interface with more options built-in.
- Portal Documentation. This documentation is now available within the Admin section of the portal. Your version should be the latest release and will indicate which version you are using.

Rev55

- Confirmed WP 5.6 compatibility. Updated all plugins.
- Removed Gutenberg compatibility plug-in (Theme can use “Classic” pages)
- Fixed menu redirect (needed https)
- Added more instructions (including a WordPress video tutorial) in the Admin section

Rev 54

- Added the complete Affiliate program into the portal. Uses Affiliate WP.
- Created sample landing page template for Affiliate referral page.
- Created “Contact Me Please” form that works with the Affiliate referral page.

Rev 53

- Changed forms so they were easier to complete (website does not require http://), changed affiliate form fields, plus added email notification to the form submitter (instead of just a web-based notification). Sent from “admin_email” so must change if different from portal URL. Updated to all the latest plug-ins.

Rev 52

- Added instructions to clone a site if using WP Engine as the ISP.
- Added additional support files within the Admin section

Rev 51

- Changed the log in plug-in to LoginPress. Removed Peter’s Login and Theme my Login.

Rev 50

- Documented new plug-ins for Salesforce integration.
- Documented how to add the reseller locator to the outside of your website and included code to put it in a frame (or you can use a plug-in).

Rev 48

- Updated EULA. Also, documented how to fix icons (in some systems the icons show as squares).
- Created a new sample site that shows how the content is put together.
- Updated the look and feel in several areas. Cleaned up the login and logout verbiage.
- Updated the format for the blog/newsletter

Rev 45

- Updated plug-ins. Plus contains additional instructions, a partner SEO video, and SEO kit built-in. Added an intro to the top of the page, plus new topics and initial content to the forum to get it jump-started. Changed the menus with sub-directories so the top menu (without content) was not clickable. Removed all references to the older clone approach—the new one works better. Fixed a bug in the login menu link on the bottom. Added levels to the partner locator—so a reseller’s level will show up in their description (Authorized, Gold or Platinum). Added table of contents to the documentation and fixed grammar.

Rev 44

- Rev 43 and 44 contain simplified install instructions, further clarification for the setup, additional tweaks to the LMS and clarifications to the documentation. It also removed instructions for using Duplicator Pro (no longer used—uses WP-All-In-One Migration instead).

Rev 42

- Added additional documentation for LeadSmart, along with a special promotional link.

Rev 41

- Added the *LearnPress* LMS, the supporting documentation, and the sample course on Basic Sales.
- Documented the *LeadSmart* plugin.
- Further documented the *WP-All-In-One* plug-in cloning process.
- Tightened the default portal password for better security (was password123—too easy to guess).
- Fixed the login issues by using *Peter’s Login* plug-in.
- Added the *Disable Gutenberg* plug-in since the Enfold theme is far superior to the new Wordpress “block” feature.
- Added the *If Menu* plug-in to add visibility control to the menus. This way we can show the admin menu when an administrator (you) logs in—but it never shows for a normal user.

- Note: the Paid Membership Pro – Email Templates Add On cannot be updated since they made the previous free plug-in part of their paid support (can only be updated if you subscribe to their annual maintenance support program (approx. \$200). Not really worth it since this add-on is so basic (allows you to edit the default emails that are sent within the program). It still works perfectly, but it is rather irritating.
- All the pages have been re-numbered. As new features were added (with their associated automatic pages), they were pushing the main user-managed pages down. So, every page of the portal was manually re-numbered and sequenced similar to how the pages appear on the default menus inside the portal—making it much easier to find pages (and see which pages were “auto” created). Critical since the portal now has over 70 pages of content.

Rev 40

- Added a 2nd home page (Home2) that now ads a referral program description and ties in with the referral form. This can be selected in the THEME as the home page (instead of Home).
- Added a new “Referral” form. This is used to send referrals to the company. It is modeled after the Place Order form but also includes prospect lead information. It would be added to the External menu in the event that the referral option is included.
- Replaced the “theme my login” *redirect* option, with Peters Redirect plugin. It is pre-configured but is much easier to use and more reliable.
- Updated all the plugins and the theme.
- Turned off Wordfence site security plug-in initially. This way it won’t carry over all the history (which is not applicable to a new site). Ensure you have a strong password and *activate* before making the site public.
- Added the ability for conditional menus. The first use turns an Admin Login menu on ONLY if you log into the portal as an Admin.
- New Admin Login content. More detailed instructions, plus over 10 files for setting up your team, how to conduct orientations, reseller approval emails, how to determine margins, recruiting dialogues and much more.

Rev 39

- More details about All-in-one-migration. I can supply the latest update if needed.
- Add the Security section.
- Uses the same Rev 35 files (retained the coveted Rev 6.4 (vs 7.x) of the Theme my Login (the newer version charges too much))—just make sure you update all your plug-ins and uninstall Duplicator PRO once installed.

Rev38

- Changed the default password to make it more secure upon install.
- Included a link to the clone site via All-in-one Migration as an alternative to cloning.

- Explains the new Google Maps requirements (As of Oct 2018) which require a credit card (although it should still be free if you have less than 10,000 or so views/month).

Rev37

- Removed RegEx, a long-time safe search and replace. It just stopped working (doesn't seem to support the newer versions of WordPress and hasn't been updated in years. Re-documented Better Search and Replace (more powerful, but it can take your site down if not used correctly).
- Using WP All-in-one migration much more recently. The prior popular Duplicator Pro seems to be failing more frequently—especially on GoDaddy and other ISPs that time out. “All in one” can't be run on its own though (like Duplicator) since I have to install the paid component for it to install—but it works 100% of the time.

Rev36

- Introduced new clone application. Documented the missing pages when you delete one of the original users (it moves ALL the pages to the trash (have to pull out of the trash)).

Rev35

- Updates to the plugins. Also, a newer version of Duplicator Pro that should resolve a few of the install problems without a workaround.

Rev34

- Major update. Now includes the new Enfold Theme. It includes the Avia Layout Builder so it is much easier to create graphical pages. All shortcodes associated with the previous theme have been re-worked for the new theme. Major updates to the documentation associated with the new theme.

Rev33

- Updated instructions within the “Admin” section—including the workaround for adding a post (for the newsletter) where it may change your public-facing menus.

Rev32

- Completed additional FAQ sections (what if you don't get your emails, etc.), plus documented the email settings for one of the new forms, “Place Order” (which can be used for partner referrals).

Rev 31

- Clarified the documentation throughout. Removed instructions related to the prior cloning application (WP Clone), only leaving the instructions for Duplicator. Added EULA to these instructions.

Rev 29

- Several bug fixes.
- Updated documentation
- Updated the Theme from Construct from 1.7 to 2.8.4 (supported under a different name). This should solve the PHP 7.0 problem (PHP 7.0 was in Beta and created some odd formatting problems).

Rev 28

- Added several new plugins.
 - *Theme My Login* to give you better login control
 - *Remove Dashboard Access* to hide the admin panel and allow resellers to change their own settings.
 - UpdraftPlus so you can backup your own site (even offline)
 - Added the LOGIN menu to the top
 - Updated the plugins and made some other general refinements.
- Updated the link to download
- Added portal instructions already found within the portal to this document

Rev 27

- Documented the workaround if you use PHP7.
- Updated the link to download

Rev26

- Documented a fix for a newer version of PHP (have to change it to 5.4)
- Updated the link to download

Rev24

- Changed Clone Software. Changed the cloning software from WP Clone (kept having problems) to Duplicator Pro. Adds extra steps, more technical, but it is MUCH more reliable and flexible with different host providers.

Rev 22

- Updated plugins. Fixed a banner problem that occurred occasionally where it wouldn't show up. Created two identical banners and it seemed to work. Also, remember that the custom banner size is 900 x 400 if you wish to replace it.

Rev 20

- Updated plugins. Added a better search and replace (does more of the work). Plus, added additional clarification.

Rev 18

- Updated all the plugins, added more details to the Landing Page (sample page that is optimized for local SEO and provided to partners so they can put your product on their own website to get their own leads). provided new backup link.

Rev 17

- Added instructions on how to add the reCaptcha/Captcha to the Membership forms. Clarified some of the instructions.

Rev 16

- New link, the new version of WP Clone (prior was not working properly).

Rev 15

- Added instructions to BACK up your new site when completed, plus used the latest cloning link.

Rev 13

- Added additional instructions (with screenshots) in case you can't get the site to point to your URL. Also, updated all plug-ins and re-cloned.

Rev 12

- Fixed some phone numbers (the search and replace is CASE sensitive and some of the samples were all CAPS and some were small case). Improved the instructions in a few areas that were causing problems. Updated plug-ins to the latest as of Sept 2015.

Rev 10a

- Rev 9 used the WRONG URL!! Use this one. 10a - updated plugins.

Rev 9

- Fixed typos in the portal content.

Rev 8

- Updated Construct theme from 1.2 to version 1.7. Fixed visual text bug for the home page. Fixed security hole (never had problems--but fixed anyway). Removed link and content for all prior Rev updates (not needed--only most recent).

Rev7

- Updated plug-ins. Fixed missing graphics.

Rev6

- Rev 5 fixed some typos. Rev6 changed to "NOCaptcha" instead of "reCaptcha" since it works better with Gravity forms and is easier for users (requires a simple check, versus writing a

complete word). It also added to the FAQ section, ads that you must change the URL for the reseller agreement that is seen when completing the application, and clarified several other sections.

Rev 4

- Added the instructions to change the reseller agreement in TWO places.
- Included instructions to use the Membership Plug-in Optionally if it is too many hassles.

Rev 3

- Fixed the Deal Registration Form. The Deal Reg form was missing the field to put the opportunity Company Name. It is now there.
- Removed older Store Locator plug-in that was tested and considered, but never used. I kept the one that is being used.
- Updated plug-ins. Did a general plug-in update for anything that was out of date so the new clone continues to use the latest versions.

Rev2

- The Membership plugin. Changes above to the two email templates to make sure they are personalized.

- Extra Plugins
- Modern Event Calendar Lite
- PDF Embedder
- Photonic Gallery & Lightbox for Flickr
- Popup Maker
- Smash Balloon Instagram Feed