

WHMCS Bridge for Wordpress



Copyright

© 2011-2014, i-Plugins

All rights reserved. No part of this publication may be reproduced, distributed, or transmitted in any form or by any means, or stored in a database or retrieval system, without the prior written permission of the publisher.

Visit our website at i-plugins.com

First e-book edition 2012

Current edition: January 2014

WHMCS Bridge for Wordpress

WHMCS Bridge integrates your WHMCS support and billing software into Wordpress, providing a seamless and consistent user experience to your customers.



Overview

The WHMCS Bridge solution comes in a Standard and Pro version.

The Standard version consists of a Wordpress plugin that can be simply downloaded from the Wordpress.org repository and installed like any other Wordpress plugin.

The Pro version consists of an additional Wordpress plugin as well as a WHMCS addon and a WHMCS patch. These will need to be downloaded from the i-Plugins repository and installed via FTP, at least for the first time.

The Pro version can be purchased here:

<http://i-plugins.com/whmcs-bridge>

Installation

Standard Wordpress plugin

Install the Wordpress plugin either via the Wordpress plugins menu or by uploading the plugin directory whmcs-bridge to your Wordpress plugins directory.

Pro Wordpress plugin

The Pro version is not listed on the wordpress.org repository so will need to be uploaded manually the first time. After that updates can be done automatically.

The Pro plugin comes in the form of a zip file.

To install the plugin, there are 2 ways of doing so:

1) First method: FTP the zip file to your server in the Wordpress wp-content/plugins directory and unzip it there. This can usually be done using modern FTP tools such as Filezilla

or even using the cPanel File Manager if you have a cPanel hosting account.

2) Second method: Unzip the files locally on your PC and then transfer the files in binary mode using FTP. Make sure the transfer mode is set to binary or you will have messages saying the files are corrupt when you try to activate or use the plugin.

PRO VERSION

1. Note that the Pro version adds functionality to the standard version and both need to be active to benefit from all the functions.

Once installed, activate the plugin(s).

Pro IP Fix patch

To ensure your customer's IP address is displayed on your WHMCS pages instead of the Wordpress server IP, do the following:

1. Upload the files bridgeipfix.php and bridge-license.txt to the root directory of WHMCS. These files can be found in the sub-directory 'whmcs' of the plugin folder 'whmcs-bridge-sso'

2. Edit the file configuration.php in WHMCS and add the end of the file, but before the closing `?>` add the following:
`require(dirname(__FILE__).'/bridgeipfix.php');`

Pro WHMCS helper addon

This addon is required to:

- redirect customers who followed links to your WHMCS site to your Wordpress site
- add improved visual integration
- support shortcodes in Wordpress

To install do the following: upload the directory 'whmcs-bridge-sso/whmcs/modules/addons/bridgewp' to the directory 'modules/addons/bridgewp' of your WHMCS installation, just like you would install a WHMCS addon.

WP Configuration

Standard version

Configuration consists of filling a number of settings on the WHMCS Bridge control panel.

The basic version has the following settings:

Integration Settings

This section customizes the way WHMCS Bridge interacts with Wordpress.

WHMCS URL:

The site URL of your WHMCS installation. Make sure this is exactly the same as the settings field 'WHMCS System URL'. If you want to use SSL (https), make sure this URL and the 'WHMCS System URL' are using the https URL. In all cases make sure the setting 'WHMCS SSL System URL' is left blank.

The WHMCS URL is the URL of your normal stand-alone WHMCS installation. Don't confuse it with the WHMCS Bridge Wordpress page.

Make sure this is exactly the same as the settings field 'WHMCS System URL'. If you want to use SSL (https), make sure this URL and the 'WHMCS System URL' are using the

https URL. In all cases make sure the setting 'WHMCS SSL System URL' is left blank.

Styling Settings

This section customizes the look and feel.

jQuery library:

WHMCS

Select the jQuery library you want to load. If you have a theme using jQuery, you may be able to solve conflicts by choosing a different library or no library. Note that WHMCS Bridge uses the jQuery \$ function, hence it needs to be defined if you manage the loading of jQuery in your Wordpress theme.

Custom styles:

Enter your custom CSS styles here

Load WHMCS style:

☒

Select if you want to load the WHMCS style.css style sheet.

Load WHMCS invoice style:

☐

Select if you want to load the WHMCS invoicestyle.css style sheet.

The jQuery library can be selected to be the Wordpress jQuery library, the WHMCS jQuery library or no jQuery library if you choose to manage the loading of jQuery yourself. In most cases the Wordpress jQuery library will work fine but if you encounter some issues, you may try the other options.

In custom styles, you can fill in additional css markup which may be required to fine tune the integration.

You can also control the loading of WHMCS styles. Normally this is not required but you may experiment with it to see the effect it has on your website.

Other Settings

This section customizes miscellaneous settings.

Debug: ☐

If you have problems with the plugin, activate the debug mode to generate a debug log for our support team

Footer: None ▾

Show your support by displaying the Zingiri footer on your site.

If you encounter issues, you can activate the debug mode. This will generate a log that can highlight the reason for the problem you're encountering.

Finally you can decide whether to show support to our development team by including a footer on your WHMCS Bridge page.

When done, click 'Update' to save your settings. If this is the first install, a new Wordpress page called 'WHMCS' will be automatically created.

WHMCS Bridge:A WHMCS front end page has been created on your Wordpress site. This page is the main interaction page between Wordpress and WHMCS. You can view this page [here](#). Do not delete or edit this page.

You can rename this page to anything you like.

The plugin will also create a number of widgets that you can place on your sidebars.

Text Arbitrary text or HTML	WHMCS Account Info WHMCS Account Info	WHMCS Account information WHMCS Account information
WHMCS Account Statistics WHMCS Account Statistics	WHMCS Main WHMCS Main	WHMCS Quick Navigation WHMCS Quick Navigation
WHMCS Top Nav WHMCS Top Nav	WHMCS Welcome Box WHMCS Welcome Box	

The widget contains also two widget areas at the top and the bottom of the page into which you can add other widgets or a top navigation menu for example.

Pro version

The Pro version has a few additional settings.

WHMCS URL:
The site URL of your WHMCS installation. Make sure this is exactly the same as the settings field 'WHMCS System URL'. If you want to use SSL (https), make sure this URL and the 'WHMCS System URL' are using the https URL. In all cases make sure the setting 'WHMCS SSL System URL' is left blank.

License key:
Fill in your WHMCS Bridge Pro license. You can obtain a license key [here](#).

WHMCS admin user:
This is your WHMCS admin user, used for connections, upgrades and synchronisation of new users. Make sure you authorise your IP (127.0.0.1) in your portal (General Settings - Security - API IP Access Restriction).

WHMCS admin password:
The password of the WHMCS admin user.

Secret token: Your secret token is: 76A533D5. You will need to enter in the add-on settings of the Wordpress WHMCS if you're using the add-on.

Language:
You are using the qTranslate plugin, the user language will change automatically with the language selected by the plugin. If none found, the default entered here will be used

Session cookie domain:
If you are running a Wordpress multi-site installation where every sub domain is connecting to the same WHMCS, you can specify the main domain here so that customers can log in once and access their WHMCS client area from any of the sub domains.

Single Sign On: ☐
You can activate single sign on here, users logging in to Wordpress will be automatically logged in to WHMCS

Type of synchronisation: Copy WHMCS users to Wordpress ▾
Choose the type of user synchronisation. The sync process runs every 60 seconds and syncs 10 users at a time. The process only copies users from WP to WHMCS and vice versa if the users don't exist yet. Updates are not synced (yet).

After having ordered the Pro version, you should have received a license key which you can enter here.

If you want to benefit from the automatic syncing between WHMCS and Wordpress, you need to fill in the user name and password of a WHMCS user that has at least access to the API. You also need to whitelist your Wordpress server's IP in

WHMCS via the General Settings > Security > API IP Access Restriction.

General Settings

Help

General

Localisation

Ordering

Domains

Mail

Support

Invoices

Credit

Affiliates

Security

Social

Other

Captcha Form Protection

☒ Always On (code shown to ensure human submission)

☐ Off when logged in

☐ Always Off

Captcha Type

☒ Default (5 Character Verification Code)

☐ reCAPTCHA (Google's reCAPTCHA system)

Required Password Strength

50

Enter the required password strength from 1 to 100 - Enter 0 to Disable

Failed Admin Login Ban Time

15

Enter the time in minutes for the ban after exceeding 3 invalid login attempts

Admin Force SSL Access

☐ Tick this box to force SSL Access for all admin area requests

Disable Admin Password Reset

☐ Tick this box to disable the forgotten password feature on the admin login page

Disable Credit Card Storage

☐ Tick this box to not store customers credit cards in the database for repeat billing

Allow Customers CC Delete

☐ Tick this box to allow customers to delete the credit card details stored on their account

Disable MD5 Clients Password

☐ This is not recommended as passwords can be decrypted (Disabling this resets all clients passwords)

Disable Session IP Check

☐ This is used to protect against cookie/session hijacking but can cause problems for users with dynamic IPs

API IP Access Restriction

Enter the IPs allowed to connect to the API, one per line

You can choose the language you want to have WHMCS displayed in. The plugin is also compatible with the qtranslate multi-lingual and WPML plugins and will automatically switch languages when switching languages in qtranslate or WPML.

The session cookie domain is useful when you are running a Wordpress MU set up and have multiple sites accessing the same WHMCS installation.

Single sign on is an optional feature and can be activated here. When sign on is active you can also choose to keep your WP and WHMCS users in sync and define whether this is a one-way or two-way sync.

Template:

Enter the template you wish to use. Available choices are 'default', 'portal', 'classic' or enter your own if you have customized or purchased one.

Pretty permalinks:

☒

Tick this if you want to use pretty permalinks

In the template field you can enter the WHMCS template you want to use. If nothing is specified then the WHMCS v4 ‘portal’ template will be used. The plugin is fully compatible with the WHMCS v5 ‘default’ template. You can also experiment with other templates including your own.

Finally, pretty permalinks will turn your WHMCS links into pretty permalinks, having a positive effect on SEO.

WHMCS Configuration

The WHMCS redirect addon auto redirects users accessing the WHMCS client portal to your Wordpress WHMCS page.

To set it up, go to WHMCS, click on the menu Setup > Addon Modules and look for ‘WHMCS Bridge Redirect’.

WHMCS page URL: enter the URL exactly as it is displayed in Wordpress, in the WHMCS Bridge settings page

» WHMCS Bridge Redirect

Adds the possibility to redirect customers to your Wordpress WHMCS page.

2.2.3

Zingiri

Activate

Deactivate

Configure

WHMCS page URL

The full page URL to your Wordpress WHMCS bridge page. You can see this in your Wordpress WHMCS Bridge settings page.

Pretty permalinks

☐

Check this if you have activated pretty permalinks in WHMCS bridge settings on Wordpress.

Access Control

Choose the admin role groups to permit access to this module:

☐ Full Administrator ☐ Sales Operator ☐ Support Operator

Save Changes

Pretty permalinks: in case you have activated pretty permalinks in the WHMCS Bridge settings on Wordpress, tick this box

The access control options can be left blank as the addon doesn’t provide an administration interface.

Using the Bridge

The bridge page

By default a bridge page Wordpress is created. In the standard version this is the only way of interfacing with WHMCS (the Pro version also supports shortcodes, see further).

NOTICE

1. Make sure you don't delete the WHMCS Bridge page. You can change the title and permalink but don't change the content nor the custom fields assigned to the page.

Widgets

If you use the WHMCS 'portal' theme, you can use widgets that respectively contain:

- account info
- statistics
- quick navigation
- welcome box
- top navigation

Shortcodes

As of Pro version 3.0.0, you can use WHMCS bridge shortcodes in your Wordpress pages.

Simply use `[whmcsbridge]` in any page.

You can optionally set the WHMCS page to load like this example:

`[whmcsbridge page="supporttickets"]`.

You can also pass additional variables in the general format:

`[whmcsbridge page="..." var1="..." var2="..."]`