WordPress Plugin Documentation

Support Marketing Agent WordPress Plugin
Version: 1.0.0 | Status: 100% Complete

📋 Table of Contents

Installation

Manual Installation

1. Download the plugin from the releases page
2. Upload to `/wp-content/plugins/support-marketing-agent/`
3. Activate in WordPress Admin > Plugins
4. Navigate to **SMA Settings** to configure

WordPress.org Installation

1. Go to Plugins > Add New
2. Search for "Support Marketing Agent"
3. Click Install Now, then Activate
4. Run the onboarding wizard

Requirements

- WordPress 5.8+
- PHP 7.4+
- WooCommerce 6.0+ (optional, for e-commerce features)

Configuration

Initial Setup (Onboarding Wizard)

The plugin includes a 5-step onboarding wizard:

1. **API Key** - Enter your Support Marketing Agent API key
2. **Widget Settings** - Configure chat widget color and position
3. **WooCommerce** - Enable order/customer sync (if WooCommerce active)
4. **Email Marketing** - Set up email capture forms
5. **Complete** - Review settings and finish setup

Settings Page

Navigate to **SMA > Settings** for:

Setting	Description
API Key	Your platform API key
Widget Position	Bottom-right or bottom-left
Primary Color	Widget accent color
Webhook URL	Auto-generated URL for platform events

API Key Setup

```
// API keys are stored securely in WordPress options
update_option('sma_api_key', 'your-api-key');
```

Shortcodes Reference

Helpdesk Shortcodes

`[sma_ticket_form]`

Displays a ticket submission form.

```
[sma_ticket_form title="Contact Support" show_order="true"]
```

Attribute	Default	Description
`title`	"Submit a Ticket"	Form heading
`show_order`	`true`	Show order ID field
`show_category`	`true`	Show category dropdown
`class`	""	Additional CSS classes

`[sma_ticket_status]`

Ticket status checker for customers.

```
[sma_ticket_status]
```

Email Marketing Shortcodes

`[sma_email_form]`

Email signup form.

```
[sma_email_form style="boxed" button_text="Subscribe" show_name="true"]
```

Attribute	Default	Description
`style`	`inline`	Form style: `inline`, `boxed`, `minimal`
`button_text`	"Subscribe"	Submit button text
`show_name`	`false`	Show name field
`list_id`	""	Target email list ID
`placeholder`	"Enter your email"	Email field placeholder

Knowledge Base Shortcodes

`[sma_knowledge_base]`

Full knowledge base display.

```
[sma_knowledge_base show_search="true" show_categories="true" columns="3"]
```

Attribute	Default	Description
`show_search`	`true`	Show search bar
`show_categories`	`true`	Show category filters
`columns`	`3`	Article grid columns (2-4)
`limit`	`12`	Articles per page

`[sma_kb_search]`

Standalone knowledge base search.

```
[sma_kb_search placeholder="Search articles..." ai_suggestions="true"]
```

`[sma_faq]`

FAQ accordion component.

```
[sma_faq category="shipping" style="minimal"]
```

Attribute	Default	Description
`category`	`""`	Filter by category slug
`style`	`default`	Style: `default`, `minimal`, `boxed`
`limit`	`10`	Number of FAQs to show

Gutenberg Blocks

All shortcodes are available as Gutenberg blocks:

Available Blocks

- **SMA Ticket Form** - Helpdesk ticket submission
- **SMA Email Signup** - Email capture form
- **SMA Knowledge Base** - Full KB display
- **SMA FAQ** - FAQ accordion

Block Settings

Each block includes a settings panel with:
- Visual style options
- Field visibility toggles
- Color customization
- Preview mode

Example Usage

```js
// blocks/email-form/edit.js
import { InspectorControls } from '@wordpress/block-editor';
import { PanelBody, SelectControl, ToggleControl } from '@wordpress/components';

const Edit = ({ attributes, setAttributes }) => {
  return (
    <>
      <InspectorControls>
        <PanelBody title="Form Settings">
          <SelectControl
            label="Style"
            value={attributes.style}
            options={[
              { label: 'Inline', value: 'inline' },
              { label: 'Boxed', value: 'boxed' },
            ]}
            onChange={(style) => setAttributes({ style })}
          />
        </PanelBody>
      </InspectorControls>
      {/* Block preview */}
    </>
  );
};
```

WooCommerce Integration

Auto-Detection

The plugin automatically detects WooCommerce and enables e-commerce features.

Order Sync

Orders are synced to the platform on:
- Order creation
- Status changes
- Order updates

```php
// Sync triggers
add_action('woocommerce_new_order', [$this, 'sync_order']);
add_action('woocommerce_order_status_changed', [$this, 'sync_order_status']);
add_action('woocommerce_update_order', [$this, 'sync_order']);
```

Customer Sync

Customer data synced includes:
- Name, email, phone
- Billing address
- Shipping address
- Order count
- Total spend

Bulk Sync

Sync existing data from **SMA > WooCommerce**:

1. Click "Sync All Orders" for order history
2. Click "Sync All Customers" for customer database
3. Progress is shown in real-time

Order Lookup

Support agents can look up orders directly:

```
// AJAX endpoint
wp_ajax_sma_lookup_order

// Parameters
$order_id = sanitize_text_field($_POST['order_id']);
$email = sanitize_email($_POST['email']);
```

Settings

Option	Description
Enable Order Sync	Auto-sync new orders
Enable Customer Sync	Auto-sync customer data
Include Order Context	Add order details to tickets

Email Marketing

Inline Forms

Basic email capture:

```
[sma_email_form style="inline"]
```

Popup Forms

Configure in **SMA > Email Marketing**:

Setting	Options
Trigger Type	Time delay, Scroll %, Exit intent
Delay	5-60 seconds
Scroll Depth	25%, 50%, 75%
Cookie Duration	1-30 days
Position	Center modal, Slide-in

Slide-in Forms

Less intrusive alternative to popups:

```
// Settings
'slidein_enabled' => true,
'slidein_position' => 'bottom-right', // or 'bottom-left'
'slidein_trigger' => 'scroll',
'slidein_scroll_depth' => 50,
```

Cookie Management

```
// Cookie set on form dismiss/submit
SMA_EmailForms.setCookie('sma_popup_dismissed', '1', 7); // 7 days
```

Knowledge Base

Features

- **Semantic Search** - AI-powered article search
- **Category Filtering** - Browse by topic
- **AI Suggestions** - Smart answer recommendations
- **Modal Viewer** - Read articles without page reload

Search Endpoint

```
// REST endpoint
GET /wp-json/sma/v1/kb/search?q=shipping+issue

// Response
{
  "articles": [
    {
      "id": 123,
      "title": "Shipping Policies",
      "excerpt": "...",
      "relevance": 0.92
    }
  ]
}
```

AI Suggestions

```
// REST endpoint
POST /wp-json/sma/v1/ai/suggest
{
  "query": "Where is my order?"
}

// Response
{
  "suggestion": "Based on your question about order tracking...",
  "articles": [...],
  "confidence": 0.87
}
```

API Reference

REST Endpoints

Endpoint	Method	Description
`/sma/v1/tickets`	POST	Create ticket
`/sma/v1/tickets/{id}/status`	GET	Get ticket status
`/sma/v1/subscribe`	POST	Email subscription
`/sma/v1/unsubscribe`	POST	Email unsubscription
`/sma/v1/kb/search`	GET	Search knowledge base
`/sma/v1/kb/articles`	GET	List articles
`/sma/v1/kb/articles/{id}`	GET	Get article
`/sma/v1/ai/suggest`	POST	AI suggestion
`/sma/v1/webhook`	POST	Platform webhooks

PHP API Client

```php
// Get API instance
$api = SMA_API::get_instance();

// Create ticket
$response = $api->create_ticket([
  'subject' => 'Order Question',
  'message' => 'Where is my order #12345?',
  'email' => 'customer@example.com',
  'order_id' => '12345'
]);

// Check ticket status
$status = $api->get_ticket_status($ticket_id);

// Sync order
$api->sync_order($order_id);
```

JavaScript API

```javascript
// Chat widget
SMA_Widget.open();
SMA_Widget.close();
SMA_Widget.setUser({ email: 'user@example.com', name: 'John' });

// Email forms
SMA_EmailForms.showPopup();
SMA_EmailForms.hidePopup();

// Knowledge base
SMA_KnowledgeBase.search('query');
SMA_KnowledgeBase.openArticle(articleId);
```

Hooks & Filters

```php
// Actions
do_action('sma_ticket_created', $ticket_id, $data);
do_action('sma_order_synced', $order_id);
do_action('sma_subscriber_added', $email);

// Filters
apply_filters('sma_ticket_data', $data);
apply_filters('sma_widget_settings', $settings);
apply_filters('sma_email_form_fields', $fields);
```

Troubleshooting

Common Issues

API Connection Failed

1. Verify API key in **SMA > Settings**
2. Check server can reach `api.supportmarketingagent.com`
3. Review error logs in **SMA > Debug**

WooCommerce Not Detected

1. Ensure WooCommerce is installed and activated
2. Deactivate and reactivate SMA plugin
3. Check for plugin conflicts

Widget Not Showing

1. Check widget is enabled in settings
2. Verify no JavaScript errors in console
3. Check theme compatibility

Forms Not Submitting

1. Verify REST API is accessible
2. Check for caching plugin conflicts
3. Review browser console for errors

Debug Mode

Enable debugging in `wp-config.php` :

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

Logs are saved to `/wp-content/debug.log`

Support

- Documentation: https://docs.supportmarketingagent.com/wordpress
- Support: support@supportmarketingagent.com
- GitHub Issues: https://github.com/supportmarketingagent/wordpress-plugin/issues

---

Changelog

1.0.0 (January 7, 2026)

- Initial release
- Helpdesk widget with ticket submission
- WooCommerce order/customer sync
- Email marketing forms (inline, popup, slide-in)
- Knowledge base with AI search
- FAQ accordion component
- Onboarding wizard
- Gutenberg blocks
- Admin dashboard widget

Plugin Location: `/wordpress-plugin/support-marketing-agent/`
Documentation Last Updated: January 7, 2026