

2013

SpotOption platform plug-in



Version 1.0

SpotOption

2/11/2013

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Introduction

The Spotoption WordPress plugin comes to enable full functionality of our trading platform on every WordPress website. The plugin creates and adds all the needed functionality, with the ability to override and change the layout as you need.

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Initial Setup

These tasks must be completed in order for the system to work.

1. Domain – Since your WordPress installation and the platform sits on different server they will need different sub domains. You can install the WordPress on **www.DOMAIN** and the platform on **platform.DOMAIN** or any other configuration that you like. After this was decided, please update your Project Manager on Spotoption about the chosen sub domains and ask him to configure the platform.
2. WordPress setup – Please arrange a WordPress setup and make sure it is on its latest version. The plugin won't work on wordpress.com – it must be a standalone installation.
3. SSL – In order for secured pages, SSL certificate must be perched and installed on the WordPress server. This is important for pages such as deposit, withdrawal and actually all the personal account pages.
4. Plugin install – extract the 'spotoption-platform' into your /wp-content/plugins/ folder and activate it through the plugin manager.

Platform Setup

Spotoption Platform settings

Use this section to setup the platform as you see fit.

platform Url

Use Bootstrap CSS ☒

Use Spotoption custom CSS ☒

Options, Etc.

Save Changes

In the WordPress admin panel, a menu called Platform settings is available to every user with administrator privileges.

Fields settings:

1. Platform url – the full path to your platform without http prefix or any slashes.
2. Use Bootstrap CSS – in order to style the elements we've used twitter bootstrap package. This can be turned on or off.
3. Use Spotoption custom css – some of our elements got their custom CSS. It is recommended to copy these settings to your template CSS, and not to use our, but it is up to you to decide if to use it or not.
4. Options, Etc. – this function is not relevant at this phase.

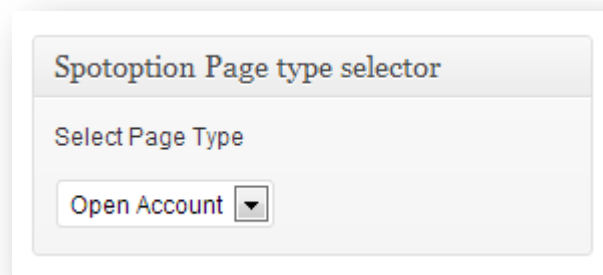
--- 5 ---

Custom pages configuration

These pages must be created in order to provide all the needed areas. It is recommended to work with [permalinks](#) and sub-pages in order to create a nice URL structure. This is not a must have, and the plugin will work with any permalink structure or the default parameter functionality.

1. Open Account
2. Deposit
3. History
4. Portfolio
5. Withdrawal
6. Personal info
7. Platform Page
8. Expiry rate page

In order to create the pages, login to your WordPress admin panel and create new page. Give it the required name and set up the permalink. A custom meta box with dropdown should be added to your page manager. Select the required page type with this box. If this is just a regular page (such as terms and condition, or any other information page) select "Regular". Otherwise, select the correspondent page type.



You can add content in the Page content area, the required elements will be added just below the content you've added.

Also, you need to create thank you page for these pages:

- Open Account thank you
- Deposit thank you
- Withdrawal thank you

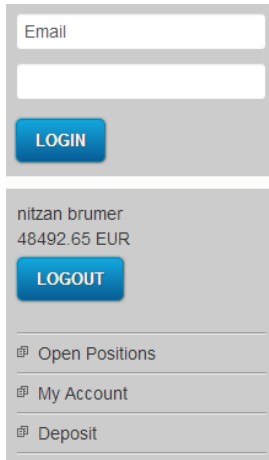
These should be regular pages with any content that you see fit.

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Widgets

The plugin provide two widgets for usage with the WordPress widget system.

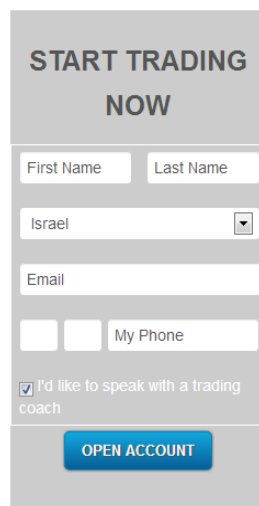
Login Box



The login widget has two versions – for not logged in users and for logged in users. The not logged in state shows email and password fields, while the logged in version show the customer name, balance and some useful links to his account.

The lead box can be added to any widget sidebar. It is recommended to create space for him in the header or at the top of a sidebar.

Lead box



The lead box allow the visitor to open a lead on the CRM, once the lead form is submitted, the user is transferred to the open account page to complete his registration.

The lead box registers the visitor name, country, email and phone number, and also campaign parameters – if any (if the user comes from a campaign)

The lead box can be placed on any widget sidebar and will need styling adjustments in your template Style.css file.

When adding the widget on WordPress, you should supply the link to the open account page on the widget settings

Forms

All the forms are created in `\spotoption-platform\functions\forms.php`.

In case you need to override the forms design – such as for changing the layouts, adding text and so on, please don't change anything on these functions since on the automatic update, when a new version will be available, all your changes will be overwritten.

Instead, on your theme folder, add to your functions.php file the required methods (these methods are case sensitive, please stick to the names):

- `customTradingPlatform` – This function adds the trading zone page.
- `customWithdrawalForm` – This function adds a withdrawal form.
- `custompersonalInfoForm` – Draws the customer personal information form
- `customPositionPage` – Draws the user portfolio page, allowing him to see his positions
- `customHistoryPage` – Draws the user banking history page
- `customDepositForm` – Draw the deposit form
- `customOpenAccountForm` – Draws the open account form.

There are two ways for overriding this feature – you can either create an HTML variable on the function or return it with the return command, or you can build the function as custom page templates, encoding it into the template HTML. If you select the second method, just make sure your function returns a null value.

Fields names

Each form has its own field's names, while you can override the design and the layout, the fields name and some of the classes / Ids are mandatory and case sensitive.

All the platform functionality, relays on these fields names and forms id's and changing them might cause errors in the functionality.

Notes

Jquery Version

The plugin uses WordPress custom jQuery file, this has an addition that called “No-conflict” and prevent the usage of \$ instead of jQuery. In order to use a short call, you can use \$j. In order to use that, you should add in the top of your JS files this line:

```
var $j = jQuery.noConflict();
```

Please note, that replacing the WordPress jQuery version and replacing it with the not patched version will cause the plugin scripts to stop working.