

HSA-Products Plugin

Development Notes

Platform: WordPress

Version Required: 4.0+

Plugin Location: ../wp-content/plugins/hsa-products/ (will be referred to as PLUGIN_ROOT for the rest of this document)

Author: Red Orange Studio (created originally by staff member Ryan Stimmler, then maintained by Developer consultant Quentin Bolton, who wrote this documentation along with Susie Fife)

Theme Location: ../wp-content/themes/healthsavings/ (will be referred to as THEME_ROOT for the rest of this document)

The HSA-Products plugin was built to support a special/custom post type. The HSA-Product post type consists of 6 content areas: Forms, Fees, Funds, FAQ, Resources and Contact Us.

Administrator Notes

The admin interface for the plugin is labeled as 'HSA-Products' and can be seen upon logging in to the hsaxchange/healthsavings websites with a user that has admin privileges.

The 'settings' feature is minimal as it only allows you to set global content for the HSA-Product post type's content areas. For example, content saved in the 'Forms' tab in the 'settings' area will be shown for every HSA-Product post's 'Forms' subsection when those HSA-Products don't have any content in their local 'Forms' content subsection.

Aside from that, you can edit the HSA-Product posts just like you would built-in pages and posts. The HSA-Products have content subsections that can be edited.

HSA-Product Content Sub Menus

Each HSA-Product currently has 7 submenu items located in a left justified sidebar. The labels for these menu items can be edited for each individual HSA-Product. The number of menu items, however, are shared across all HSA-Products. In other words, they all have 7. If you want to remove one (or add another), you'll be doing that for every single HSA-Product.

NOTE: *I'm not actually sure what happens if you leave one of the submenu items labels blank. I don't know if that prevents that item from showing up on the actual post or not. That's worth a test. If it doesn't work that way, it should.*

Modifying HSA-Product Content Subsections and/or Sub Menus

If you want to add, remove or modify the content subsections or submenus for the HSA-Product post type, you'll need to change some PHP code in the plugin. You'll need to edit the following files:

PLUGIN_ROOT/includes/class-hsa-products.php

PLUGIN_ROOT/includes/class-hsa-products-settings.php

PLUGIN_ROOT/includes/lib/class-hsa-products-admin-api.php

Ideally, those are the only files you'd have to worry about but you'll also need to edit a few of the theme files to support any HSA-Product subsection or submenu changes:

THEME_ROOT/single-hsa-products.php

THEME_ROOT/content-singlehsaproduct.php

THEME_ROOT/page-hsa-products.php (*You may not need to edit this one. I included it because it sets the hover text for the link that actually takes you to the particular HSA-Product page. It currently will say "FUNDS, FEES and More...." but if you, for example, remove the Funds and Fees menu items for HSA-Products then you'll probably want to change that text. You can do that in this file*)

HSA-Product Simple Product Fields

Also present in the HSA-Product are 4 fields that are editable. They are: Logo Link, Enroll Now Code, Menu Name and Navigation Header Menu. These fields are managed by the 'Custom Fields' plugin. Go into the Custom Fields plugin admin, click on 'products' and you'll see the list of fields mentioned above. You can make minor text or field type changes and/or additions here.

Logo Link

The logo link output is in the "Products New" widget in the PHP Code section.

Menu Name

The Menu Name is output in the "Products New" widget in one of the two 'text' sections.

Enroll Now Code

The Enroll Now Code is just a link. The link that is entered into that field is placed onto the HSA-Product page via shortcode. The shortcode can be seen at work in the "HSA Products" and "Products New" widgets. Look in the 'text' sections. You'll find them there.

The Navigation Header Menu

The image that is selected for this field is ultimately output in the following file:

THEME_ROOT/content-subheaderhsa.php

If you have problems with the image displaying properly there may be an issue with the CSS and you can adjust that in this file.

HSA-Product Permalinks, Routing and htaccess

An HSA-Product can be viewed via its permalink. To that end, none of the permalinks will work properly if the WordPress site's .htaccess file does not look like this:

(yes, this is the entire .htaccess file)

```
# HTTPS forced by SG-Optimizer
<IfModule mod_rewrite.c>
RewriteEngine On
RewriteCond %{HTTPS} off
RewriteRule ^(.*)$ https://%{SERVER_NAME}%{REQUEST_URI} [R=301,L]
</IfModule>
# END HTTPS
RewriteRule (\.?\.+?)/(funds|fees|forms|faqs|resources|contact-us)/?$
/index.php?hsa-products=$1&product_page=$2
# BEGIN WordPress
<IfModule mod_rewrite.c>
RewriteEngine On
RewriteBase /
RewriteRule ^index\.php$ - [L]
RewriteCond %{REQUEST_FILENAME} !-f
RewriteCond %{REQUEST_FILENAME} !-d
RewriteRule . /index.php [L]
</IfModule>

# END WordPress
```

This .htaccess file is extremely important. The routing that is necessary to show content within the HSA-Product post type content areas depends on it. As you can see, the post type subsections are explicitly named in the rewrite rules. So, if you need to update the post type with new subsections (or rename and/or remove one), you'll have to remember to make changes to the .htaccess file.

NOTE: *if the HSA-Product urls are not working properly or the HSA-Product submenus are not behaving as they should, the .htaccess file is the absolute first thing that you should check.*

Miscellaneous Notes

- There are virtually no comments in the hsa-products plugin or in the theme files. I've made some assumptions as to how things work.
- The following plugins are critical and without them, hsa-products WILL NOT work.

Advanced Custom Fields

Advanced Custom Fields: Widget

AMR Shortcode any Widget

Menu Shortcode

PHP Code Widget

Be careful when upgrading.

- I decided not to change the way that the HSA-Product post type did it's url routing but even without a full plugin rewrite, that needs to change. There has got to be a better way than having the HSA-Product subsections (ie Funds, Fees, etc) hardcoded into the .htaccess file. That is a recipe for things to not work, since you'll forget those items are in there.
- The plugin needs a rewrite. There are too many files to change when you want to modify very simple things. The plugin and post type are too heavily coupled to the theme.
- The HSA-Products settings area in the WordPress admin should be expanded to allow more specific configuration options.

Usage and differences on HealthSavings.com and HSA-xchange.com

This documentation for the HSA-Products plugin is valid for both hsa-xchange.com AND healthsavings.com. The HSA-Product plugin itself works the same for both sites. The customization differences are minor.

The healthsavings.com site has fewer fields to work with than the version on hsa-xchange. For example, hsa-xchange HSA-Product has logo_link, Menu_name, Header Image fields. The healthsavings site does not. Still, the plugin functions the same, the urls are routed the same and if you want to modify certain features, the developer will have to edit all of the same files mentioned in this document.