CHILI WOO INSTRUCTIONS

Last update April 1, 2021

Thank you for downloading the WordPress CHILI WOO v2.0 Plugin. The following are the instructions needed to install and configure the plugin.

Prerequisites

Before we begin there are a few prerequisites:

1. You must own a license of CHILI Publisher Software. This plugin will not function without it. If you do not already own a license please visit
    https://www.chili-publish.com/contact-sales/

2. This version of the plugin does not support the older SOAP server version. It is designed to work with the Cloud (SaaS) version only. Please contact support to see if there is a plugin for your version of CHILI Publisher.

3. You will need your login and password to your CHILI Publisher account.

4. You will need your login and password to your WordPress Website.

5. You will need to have at least one Document and Workspace created in your CHILI account prior to using the CHILI WOO plugin.   Normally sample documents and workspaces are created during your CHILI Publisher training sessions. Please make sure your instructor is aware that you will be using CHILI WOO so you add a few projects to your account.

6. You will need the CHILI WOO plugin Version 2.0 Zip file. If you do not have this file please visit https://chiliwoo.com/ and click Download to request a copy of the plugin.

7. You should know the subdomain configured for your CHILI account. This is the DNS CNAME you worked out with CHILI Publisher support for your license. If you do not know it, reach out to CHILI Publisher support and they should be able to set one for you or provide you with the one you already have on record. What is a subdomain name? In this example the word STORE is the subdomain https://**STORE**.mydomain.com where mydomain.com is the domain name of your WordPress site.

Getting Started:

The first step is to add the WooCommerce and CHILI WOO plugins to your WordPress site. This is the same process used for all plugins in WordPress, so if you are unfamiliar with adding and removing WordPress plugins we recommend you watch this video first
https://www.youtube.com/watch?v=QXbrdVjWaME
(note we do not endorse this video, just one of many out there that can help)

We shall assume:

1. You have admin access to your WordPress Website (full rights)
2. You downloaded the **CHILI WOO plugin** (chiliwoo.com)
3. You downloaded **WooCommerce plugin** (woocommerce.com)
4. You know the basics of how to install a wordpress plugin.
5. You have installed the WooCommerce Plugin
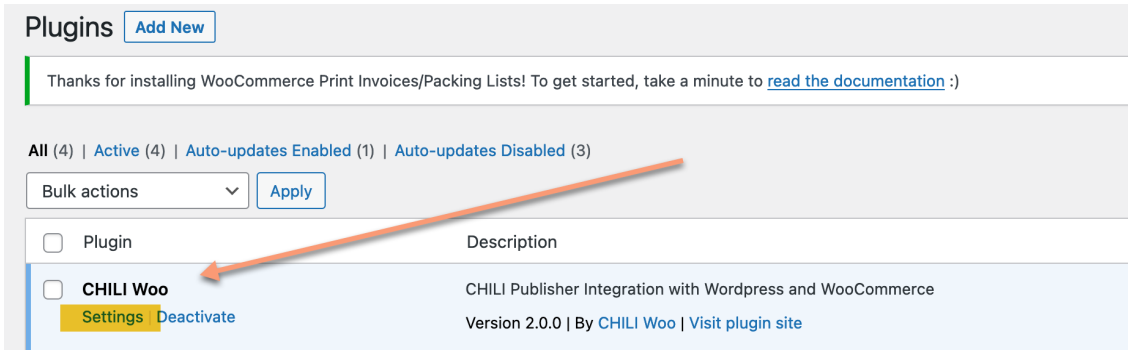6. You have installed the CHILI WOO plugin

Once Installed you will need to ACTIVATE both plugins. (Both plugins must be activated)
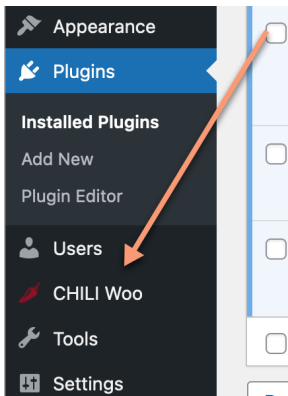
Select - **Activate**
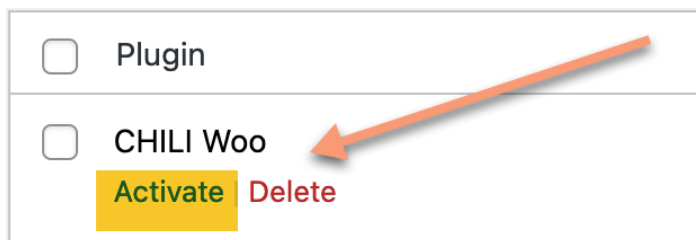
Once activated there are two ways to get to the **Settings** Area.

    a. Select Settings from the Plugin Page as shown below

    b. In the Main Dashboard Menu select the CHILI Woo listing as shown below:

Settings Page

On the Settings Page you will notice three tabs, make sure you are in the SETTINGS tab as shown below.

CHILI Woo

Settings | Info

API Type: REST ⌄

CHILI BackOffice Login URL: Web address of your CHILI BackOffice login page

1. Start by entering the URL of your CHILI BackOffice login page. This is the URL / Website you use to access CHILI and manage your users, templates, and other CHILI files.

2. Next you will need your CHILI Publisher credentials:

CHILI User Name: CHILI Username

CHILI Password: CHILI Password

This can be the admin account you use to access CHILI Publisher (at the URL you entered in step 1) or a special account created specifically for the CHILI WOO plugin with permissions tailored to the plugin.

Verify the API Key is working

When you get to this point, click UPDATE at the bottom of the page to save the CHILI BackOffice Login URL, User Name and Password. This will calculate both the REST Environment URL and the Environment Name and will attempt to connect to your CHILI instance. If the connection is successful, a value will appear in the API Key box.

API Key: KgaM9cik_P_cOPco4fCAdKKBVinYHv... Expires: 04/01/2021 17:19:13

Note: If there are any problems obtaining the API key, check your CHILI Publisher login and password. If you are still having problems reach out to CHILI Publisher Support. The CHILI Woo plugin will not work if it does not have permission to the API Key.

3. Next enter the subdomain (DNS CNAME) configured with CHILI Publisher

CHILI Editor (Subdomain) URL: https:// chili .mychilistore.com

(The above information is just shown as an example)

Add the short code

At this point we will need to create a WordPress Page for the editor. You will need to create the page <u>before </u>you proceed with the rest of the setup. You can save the settings and navigate away or open a new tab and navigate to the PAGES area on the dashboard.
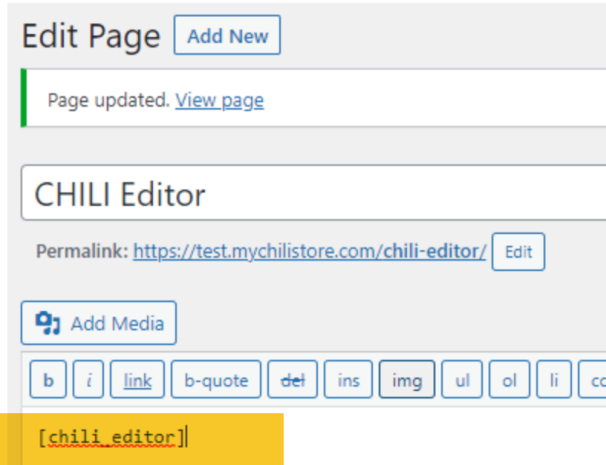
1. Go to PAGES and select **ADD NEW**
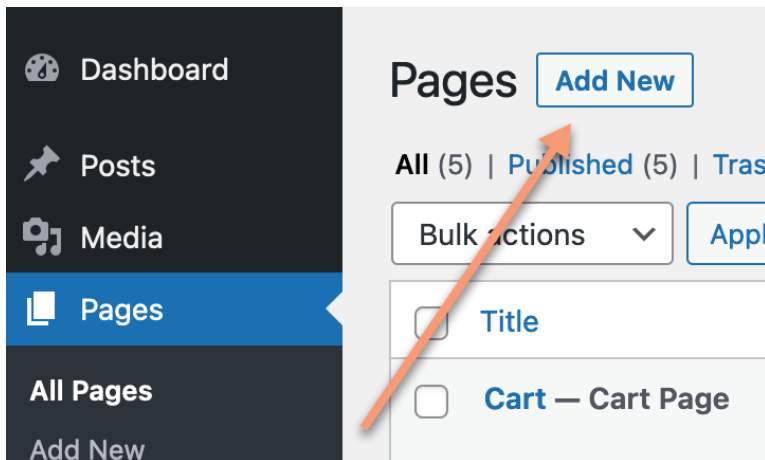
2. Name the page anything you want, we recommend Chili Editor, but any name will work as long as you can recall the name.

3. Make sure you are in **TEXT** mode by selecting TEXT shown below
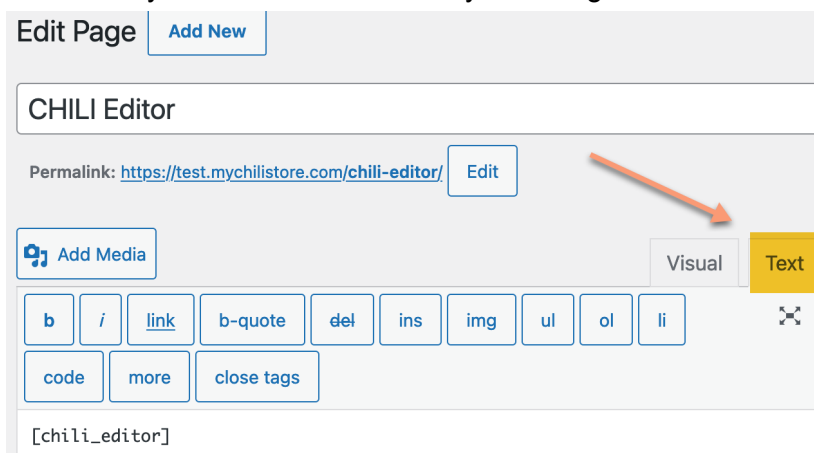
4. Enter the following <u>exactly</u> **[chili_editor]**

5. While not required we recommend setting the page to **Full Width**. These settings will depend on the theme you are using and how you plan to present the CHILI Editor to your customers.
6. Select Update and then go back to the CHILI WOO Plugin Settings page.
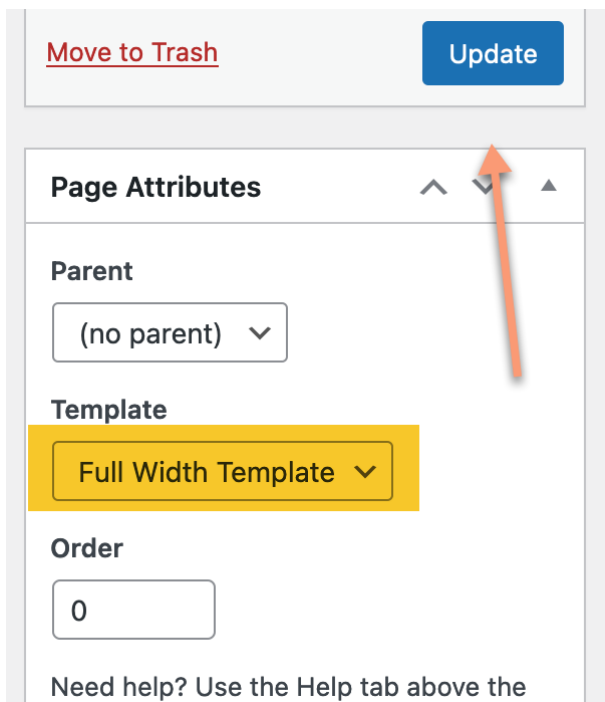
Go back to the Plugin Settings page

1. Once we have the page created with the short code we can now set the page

Using the menu pick the page you placed the shortcode **[chili_editor]**

2. Next we will add your **CHILI Publisher document default settings**:
a. Default Workspace
b. Default View
c. Default Constraints

NOTE: Default documents and settings are used only when these settings are not set at the product level. The reason they are optional is because you can set these settings at the product level and therefore you do not need to set them here.

For example, this is useful if you use the same Work Space for all products, setting it here means you can avoid setting it on all products. We recommended setting a default here in case you forget to set it at the product level the customer will not receive an error.

It is important to note that these settings must be set at the product level if you choose to ignore them here. Optional does not mean they are optional for the site to work, they must be set somewhere. You have two choices, setting them here or at the product level, not setting them or not having them set is not an option.

You can copy and paste this information from your CHILI Publisher account, or if you have setup the API already simply hit the SELECT Button. (this will only work if you have the API credentials installed and saved first.
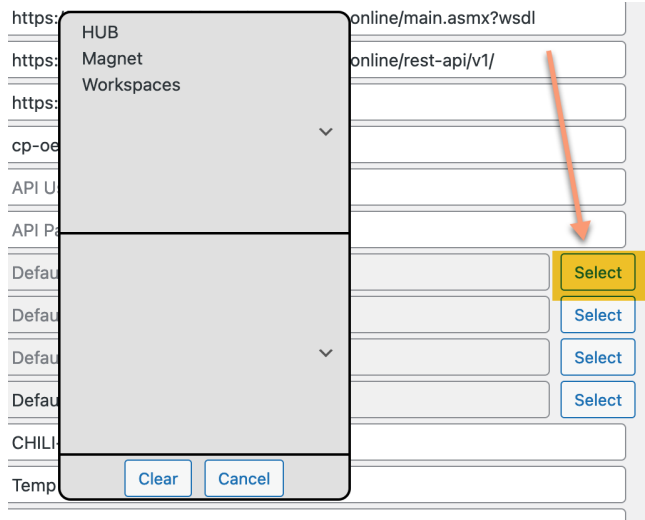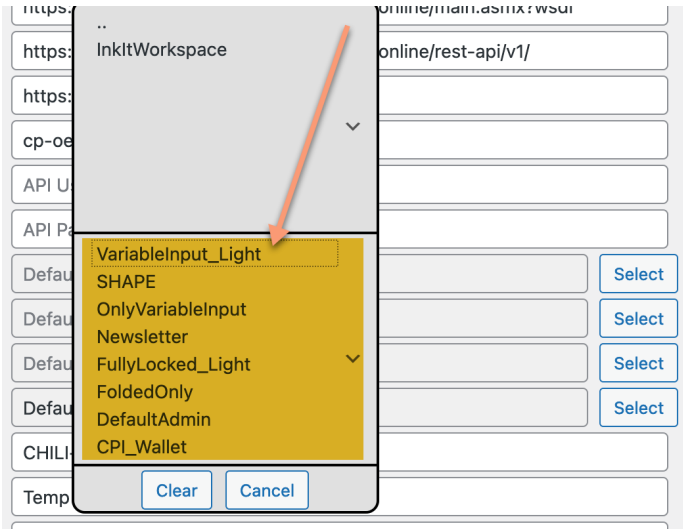
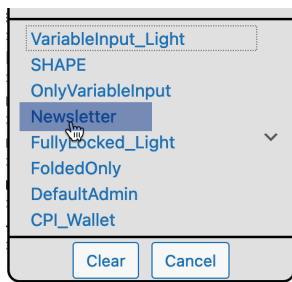Once you open the directory window select a directory
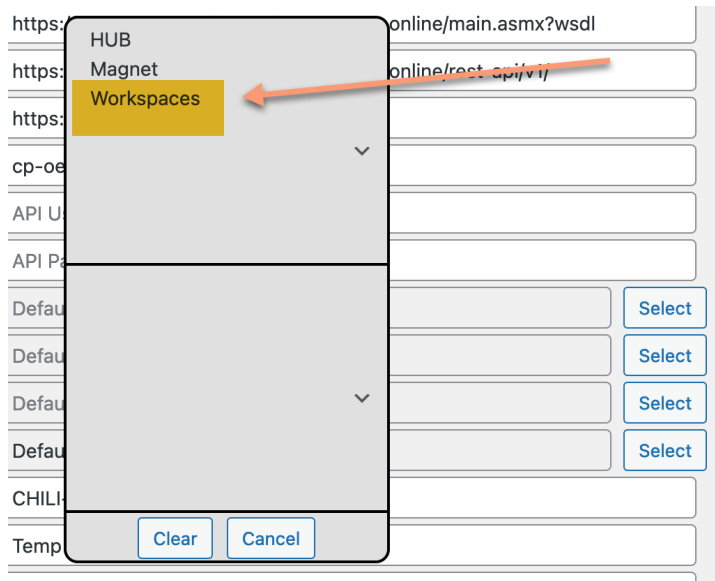
And you will see all the items in that directory

Select any ONE (as shown in the example below) - once you select it will fill close the window and fill in your selection

4. The next item is the **Default PDF export settings.** This field is NOT optional, but if you did not create nor have an PDF settings, simply locate the default and use that one. Many people leave this as default.

5. Next item up is the **PDF preview Watermark text**

Enter the text you wish to show on your lo-res or customer PDF files. These marks will prevent the PDF output from counting against your quota. For more information on watermarks or Quotas please reach out to CHILI Publisher Support.

6. The next setting is the **Local Preview/Temp and Local Output Folder** locations

Local Preview/Temp Folder:	/var/www/MyChiliStore.com/htdocs/	Temp
Local Output Folder:	/var/www/MyChiliStore.com/htdocs/	Orders

These are a personal preference, and act as the location for your output files on your WordPress server. We recommend Temp and Orders as shown

Later once you create a test order you will be able to view these folders and see your files. *** Note - they are case sensitive - *so Orders is not the same as orders*

Index of /Orders

Name	Last modified	Size	Description
Parent Directory		-	
17/	2021-03-26 11:45	-	

Apache/2.4.41 (Ubuntu) Server at test.mychilistore.com Port 443

Index of /Temp

[Name](#)	[Last modified](#)	[Size](#)	[Description](#)

[Parent Directory]() -

4cb39a76-f598-465d-9963-95888019adf2.pdf 2021-03-26 11:35 432K

b9c74b3e-6293-4d1c-b6ba-d39193ee7ffd.png 2021-03-26 11:32 99K

Apache/2.4.41 (Ubuntu) Server at ~~test.mychilistore.com~~ Port 443

7. The final item on the setting page is the **CHILI Server Document / Template Folder**

CHILI Server Document/Template Folders

Temporary Document Folder:	Folder to place temporary/working copies of documents while editing
Cart Document Folder:	Folder to place documents placed in a customer's cart
Ordered Document Folder:	Folder to place copies of ordered documents

These folders come into play as a CHILI Woo product moves through the ordering process.

Temporary Documents are ones that a customer starts and perhaps builds a custom document but does not add it to the shopping cart. These are almost always something that do not need to be saved for any length of time.

Cat Documents are just what they sound like, documents that the customer added to the cart. Once a document moves to the cart we move the document from the Temporary folder to the Cart folder.

The **Ordered folder i**s where we store CHILI documents that have been ordered. We move the Document from the Cart folder to the Ordered folder when a customer checks out.

These are not the finished Hi Res files, but rather the CHILI document used to create the files. Over time you to save server space you may want to eliminate the files in the Temp folder and/or the cart folder if they are no longer needed.

It is important to note that the final file is only created when a WooCommerce order moves to the Processing state. This can happen in many ways, but it is designed so orders that are on hold or not paid for do not create the hi res and count against your quota.

Once you have the plugin installed we can move to enabling a product to use CHILI Publisher:

Create a CHILI WOO Product

In this section we will upgrade a product to use CHILI Publisher. There are two things worth noting:

1. Any product can be activated to use CHILI WOO
2. In order to upgrade a product, the product must exist first
3. Creating a product in WooCommerce is not something we will cover in this document. We recommend reading https://docs.woocommerce.com/document/managing-products/
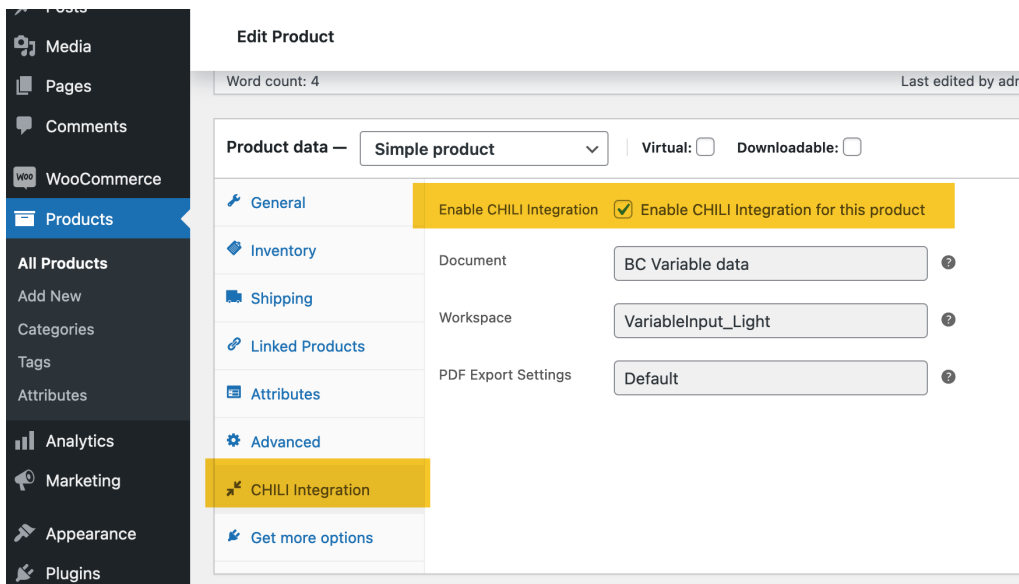
Either create a **NEW** product
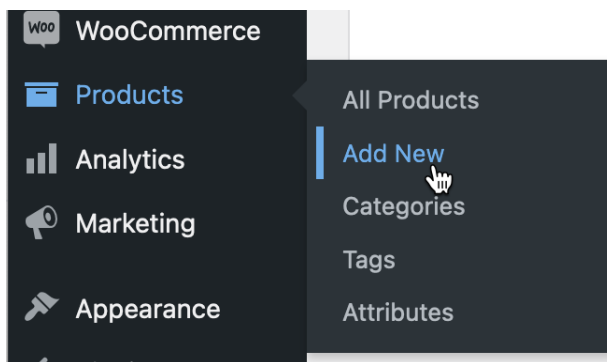
or pick an existing product and select **EDIT**
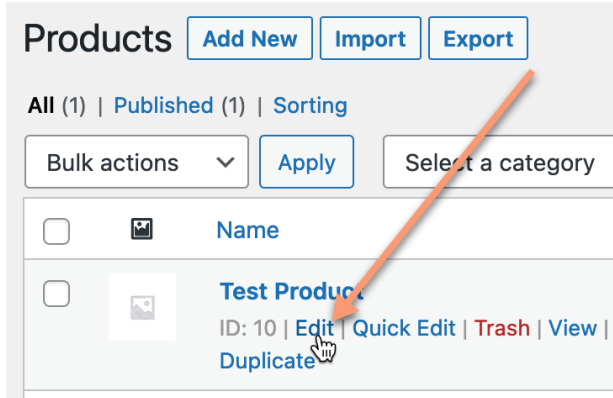
On the product page, scroll down until you see the **PRODUCT DATA** area. Click on the **CHILI Integration** Tab as shown below:

Check the ENABLE check box to enable CHILI WOO for a given product.

Note: Unchecked a product will have the **ADD TO CART** button

Note: Checked a product will have the **CUSTOMIZE** button

*For more information on CHILI PUblisher please reach out toCHILI support.
https://my.chili-publish.com/

*For more information or help with the CHILI Plugin please visit our CHILI Woo website.
https://chiliwoo.com