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Creating Clients

To manually add a new Client, you will want to navigate to IS Tools-->Clients-->Add Client

Adding clients is very simple, but if you are adding them manually there are a few key things to keep in mind:

-- All default fields (except Phone) are required.

-- Clients are created in the User table of the WordPress database, which means that Client usernames and email addresses must be unique. No duplicates. This includes any email addresses that may be in use under other non-WPC users in your WordPress install.

-- The Business Name field will be used to generate the title of the client Hub Page.

-- If you check the 'Send this password to the new user by email' option it will use the email template as defined in the IS Tools → Templates → Email Templates section. It's a good idea to customize and test these templates before sending emails to your clients.

Once you've filled out all of the required fields, click the 'Add Client' button at the bottom. The new client will be created along with their Hub and Portal Pages. You will also be able to see the new client under the Clients tab of the Clients menu.

Client Self-Registration

If you would like your clients to be able to register themselves, this can be easily allowed in the settings. Simply navigate to IS Tools → Settings → Clients/Staff tab, and select "Yes" for the "Open Client Registration" setting.

By default, after a client registers using the form, they will need to be approved by an Admin before their login credentials become activated. Admins can approve pending client registrations by navigating to IS Tools → Clients → Approve Clients

Additionally, Admins can be notified of new registrations by checking the box for "Notify admins about new registrations" located at IS Tools → Settings → Clients/Staff

You can also make it so clients who register using the form are automatically approved, eliminating the need for an Admin to approve them manually, by changing the "Automatically approve clients who register using form" setting.

Convert Existing Users

ATTN:: DO NOT CONVERT YOUR ADMIN USER - THERE IS NO NEED TO DO THIS - AS ADMIN, YOU ARE AUTOMATICALLY SET AS THE ADMIN/MANAGER OVER ALL THE

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PLUGIN FUNCTIONS. This feature is only meant to convert users with lower permission roles (Subscriber, Editor, etc.) into either Managers, WPC-Admins, Client's Staff, or Clients.
When you install IS Tools, you may have existing users already created on your website that you want to now have the capabilities of a Manager, WPC-Admin, Client or Client's Staff.
This functionality makes that conversion possible, while still retaining the characteristics of the users current role as well.

Specific Settings

Table containing all users that are currently not assigned a role by IS Tools.
Steps to use:
STEP ONE: Select checkbox next to all users that you would like to convert
STEP TWO: Use select box to assign a IS Tools role
STEP THREE: Configure options before initiating the conversion process -
Set which meta_value you would like to use for the Business Name of the user.
Assign client to Client Circles (if applicable)
Assign client to Manager (if applicable)
Choose
ATTN:: DO NOT CONVERT YOUR ADMIN USER - THERE IS NO NEED TO DO THIS - AS ADMIN, YOU ARE AUTOMATICALLY SET AS THE ADMIN/MANAGER OVER ALL THE PLUGIN FUNCTIONS.

Importing Clients

If you already have a list of clients, IS Tools makes it fast and easy to import them. You can do this from IS Tools → Clients, using the "Import Clients" feature.
To import, you must first have a list of clients in a CSV format file. You can create this format from any spreadsheet application such as Microsoft Excel or OpenOffice Calc. Your CSV file should be formatted to look like the following:

	A	B	C	D	E	F	G
1	user_login	user_pass	contact_name	biz_name	user_email	phone	send_password
2	alpha	pass123	Andy	Alpha, Inc.	email@alpha.com	800-867-5309	1
3	bravo	pass123	Billy	Bravo, Inc.	email@bravo.com	800-867-5309	0
4	charlie	pass123	Chuck	Charlie, Inc.	email@charlie.com	800-867-5309	1
5	delta	pass123	Dean	Delta, Inc.	email@delta.com	800-867-5309	0
6							
7							
8							
9							
10							

The “send_password” column designates if you would like to send the newly added client an email containing their login and password. Use “1” (no quotes) in the column to send the email, and “0” (no quotes) to not send.

Instructions for creating CSV:

From the Clients Tab under the Clients menu, select the 'Choose File' button and navigate to your CSV file and select it. Click the button labeled @Import!" to import you file into IS Tools. Once the import completes, you will see each of your clients in the client list. Respective HUB and Portal Pages have also been created for each as well and can be found under the HUB Pages and Portal Pages menu items.

Advanced Importing Actions

You may wish to take advantage of some of the advanced importing actions provided by IS Tools

Adding Clients to Circles during import

You can accomplish this in two ways
1. Include a column in your CSV file with the first row showing this value: client_circles --- To add the client to multiple Circles, then separate Circle Titles with pipes (Ex. CircleA|CircleB|CircleC)
2. Use the "Assign to Circle(s)" dialogue provided next to the Import Button
Importing using column headers
IS Tools includes a parsing script in the import process that will look at the first row of each column and try to determine which data field you are attempting to import with that column. If the value in that first row is properly configured, then IS Tools will recognize it and add it properly to the database for that client.
See above example for standard values for the first row
Importing using Custom Fields
To import data associated with Custom Fields that you have already created, you should make the appropriate column's first row reflect the Field Slug that you assigned to that Custom Field. (Example: wpc_cf_whateveryoutyped)

Testing a client account

1) Create test client
After installation, the first thing you will want to do is create a “test client”. This will allow you to familiarize yourself with the interface of WP-Client, and get an idea for how changes you make affect the way your client sees their pages.

2) Login as test client
Once the test client is created, you will want to login as that client in either a different web browser, or an incognito session of your browser. Keep this separate browser open while you

are making changes to the plugin, refreshing the page to see the changes from the client's point-of-view.

File Sharing

Overview
The file sharing system of WP-Client is one of the core functionalities of the plugin. This feature allows the Admin to upload and assign files to each Client/Member, either to large groups (through Circles or File Categories), or individually on a granular level. Clients/Members will only have access to files that are assigned to them, and only when they are properly logged in. This gives the Admin total control over exactly what files their client-base can access. Additionally, Clients/Members can be given the ability to upload files from their HUB Page. Any files that uploaded by a Client/Member will be viewable by any Admin and any assigned WPC-Manager.

Adding Files
WP-Client makes it easy to add files for your clients and assign them in one easy operation. From the uploader interface you can choose which files to upload, assign them to a file category, Client/Member, and Circle. You can also choose to notify the Client/Member via email when a new file is uploaded/assigned to them, and also attach the file to the email.

Adding Files via FTP
For very large files that can't be uploaded because of PHP limitations, you can use FTP to upload files into the indicated directory, and then use the Assign Files from FTP to assign them to Client(s) or Circle(s). WP-Client protects the files in this directory.

Synchronizing Files via FTP
You can optionally upload multiple files at one time to your installation via FTP, and then "sync" those files with one click from the WP-Client admin dashboard. Via FTP, you will want to navigate to the directory "/wp-content/uploads/wpclient/_file_sharing"

Once you have navigated to the appropriate file directory, you will see individual folders, one for each File Category that exists in your installation. These folders follow the format of "Category Name_X", with "X" representing the File Category ID number. To add a file, simply open to desired Category folder, and upload the appropriate file(s) into the folder. Additionally, you can create new File Categories via FTP, just by creating new folders in the "/wp-content/uploads/wpclient/_file_sharing" directory. (NOTE: When creating a new folder in this directory, it is only necessary to name the folder. The Category ID number will be added automatically after your first file sync)

After the desired files have been uploaded and organized via FTP, you can bring the files into the WP-Client admin menu by navigating to IS Tools-->File Sharing. Just click the "Synchronize with FTP" dropdown link, and then the "Synchronize Now" button.

After that, the uploaded files (and any newly created File Categories) will be automatically displayed in the admin file sharing menu, and the files will be available in the HUB Pages of any assigned clients (Clients who are assigned to the corresponding File Categories)

You can also optionally set your installation to automatically synchronize files and categories with FTP, by navigating to IS Tools-->Settings-->File Sharing. Simply set the setting to "Yes", and enter how often you would like the sync to occur (in minutes)

Adding Files from an External Location
This feature gives you the power to assign files from external locations to your Client(s) or Circle(s). Using the public download links from Dropbox, Amazon S3, iCloud or similar services, you would enter that URL in the File URL field. Then, after you assign the file to a category and Client(s) or Circle(s), a link to that file will dynamically appear in the HUB and/or Portal Pages of the assigned users.

FILE CATEGORIES
File Categories allow you to easily organize the files that are uploaded within WP-Client, either from the backend dashboard, or from the frontend Client HUB Page.

Adding Categories
You can add a new category at the time you add or upload a file, but you can also create categories from the Files > Files Categories Tab.

Editing Categories
Next to each category is an Actions Menu. This allows you to either edit or delete a category. In edit mode, you can change the name of a category. Press Save after making changes to commit them or press Close to cancel any changes.

Assigning Categories
If you ever need to reassign all of the items from one category to another category, use the 'Reassign Files Category' form at the bottom of the Files > Files Categories Tab window. In the first field, select the category you want to reassign the files from and in the second field select the category you want to reassign the files to. Use caution when performing this task.

Re-arranging Categories
To change the order in which categories appear, hover the cursor over the order number of the item you want to reposition. You will see an image appear indicating you can Drag & Drop this item into a new position. To do so, simply left-click your mouse button and hold, dragging the item up or down to reposition it, then release the mouse button to change the position.

User Capabilities

Using the settings within the plugin at IS Tools-->Settings-->Capabilities, you can set what kinds of permissions/access you would like your Clients, Staff, Managers, and WPC-Admins to have.

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WPC-Managers

Add Clients
Check this box to allow WPC-Managers to add new clients in the installation. All clients added by a WPC-Manager will be automatically assigned to that WPC-Manager.

Edit Clients
Check this box to allow WPC-Managers to edit the details/profiles of their assigned clients.

Archive Clients
Check this box to allow WPC-Managers to "archive" any of their assigned clients.
NOTE: When viewing the "Archive" tab, WPC-Managers will see all clients that have been archived, not just archived clients that were assigned to them.

Restore Clients
Check this box to allow WPC-Managers to restore clients from the Archive.
NOTE: When viewing the "Archive" tab, WPC-Managers will see all clients that have been archived, not just archived clients that were assigned to them.

Delete Clients
Check this box to allow WPC-Managers to delete clients. This will allow WPC-Managers to delete active clients who are currently assigned to them, as well as the ability to delete any clients who are currently archived.

NOTE: This capability will need to be granted in conjunction with the "Archive Clients" capability in order to allow a WPC-Manager to delete clients, as the two functions are linked.

View Client Details (Without Edit)
Check this box to allow WPC-Managers to "view" client details for their assigned clients, without being able to edit these details.

Add/Edit Internal Notes
Check this box to allow WPC-Managers to view/add/edit "Internal Notes" for their assigned clients.

View Internal Notes (Without Edit)
Check this box to allow WPC-Managers to view "Internal Notes" for their assigned clients, without add/edit capability.

Edit Client's Portal Pages
Check this box to allow WPC-Managers to to edit the Portal Pages that are assigned to their assigned clients.

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NOTE: WPC-Managers will be able to edit all Portal Pages assigned to their clients, not just necessarily Portal Pages that are only assigned to those clients. For instance, let's say Manager A is assigned to Client B. Client B is assigned to Portal Page C. Additionally, Portal Page C is also assigned to Client Z, who is unrelated to Manager A. In this case, Manager A will be able to edit Portal Page C, even though Portal Page C is assigned to an unrelated client (Client Z), in addition to their assigned client (Client B)

View Admin & Managers Files
Check this box to allow WPC-Managers to view/download files that have been uploaded by admins and other WPC-Managers. This will include files that are not assigned or related to any of the WPC-Manager's assigned clients.

Delete Admin & Managers Files
Check this box to allow WPC-Managers to delete files that have been uploaded by admins and other WPC-Managers. This will include files that are not assigned or related to any of the WPC-Manager's assigned clients.
NOTE: To give WPC-Managers the ability to delete admin/manager files, you will want to make sure the "view admin/manager files" capability is also checked.

Upload Media Files
Check this box to allow WPC-Managers to upload files to the WordPress Media Library in your installation.
NOTE: WPC-Managers will only be able to upload new files, and view existing files in the Media Library. They will not be able to edit or delete any files in the Media Library.

Show File Tags Page
Check this box to allow WPC-Managers to view the "File Tags" menu in WP-Client File Sharing.

Add File Tags
Check this box to allow WPC-Managers to add new File Tags when uploading/editing files.

Delete File Tags
Check this box to allow WPC-Managers to delete existing File Tags.

Show Files Download Log
Check this box to allow WPC-Managers to view the File Sharing Download Log.
NOTE: WPC-Managers will only be able to see entries in the Download Log related to their assigned clients.

Login to Clients Account
Check this box to allow WPC-Managers to use the "Login to Client account" function, which allows the WPC-Manager to view the portal (HUB, files, etc) from the point-of-view of the client.
NOTE: This function will only be available for the WPC-Manager's assigned clients.

Show Dashboard

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Check this box to allow WPC-Managers to see the WP-Client "Dashboard" menu when they first login. If not checked, WPC-Managers will see a blank menu after login.

Create Invoices to Client
Check this box to allow WPC-Managers to create new invoices for their assigned clients.

Delete Invoices to Client
Check this box to allow WPC-Managers to delete existing invoices that are assigned to their assigned clients.

Create Recurring Profiles to Client
Check this box to allow WPC-Managers to create new Recurring Invoice Profiles for their assigned clients.

Delete Recurring Profiles to Client
Check this box to allow WPC-Managers to delete Recurring Invoice Profiles that are assigned to their assigned clients.

Create Accumulating Profiles to Client
Check this box to allow WPC-Managers to create new Accumulating Invoice Profiles for their assigned clients.

Delete Accumulating Profiles to Client
Check this box to allow WPC-Managers to delete Accumulating Invoice Profiles that are assigned to their assigned clients.

Add Payment to Invoice
Check this box to allow WPC-Managers to add manual payments to invoices that are assigned to their assigned clients.

Create Estimates to Client
Check this box to allow WPC-Managers to create new estimates for their assigned clients.

Delete Estimates to Client
Check this box to allow WPC-Managers to delete existing estimates that are assigned to their assigned clients.

Modify invoicing items
Check this box to allow WPC-Managers to modify and/or delete existing invoicing items, as well as create new invoicing items.

Modify invoicing taxes
Check this box to allow WPC-Managers to modify and/or delete existing invoicing taxes, as well as create new invoicing taxes.

Create Custom Fields for Invoice

Check this box to allow WPC-Managers to create new Custom Fields in the Estimates/Invoices extension menu.

Clients

Delete Assigned Files
Check this box to allow clients to delete files that have been assigned to them by admins/managers.

Delete Uploaded Files
Check this box to allow clients to delete files that they themselves have uploaded.

Reset Password
Check this box to allow clients to reset their password via their Client Profile.
NOTE: In order to allow clients to reset their password via their Client Profile, the capability "Modify Profile" will also need to be checked.

View Profile
Check this box to allow clients to view their Client Profile, without editing functionality.
NOTE: Clients will still be able to "edit" the information in the fields on their Client Profile, but they will be unable to save the changes.

Modify Profile
Check this box to allow clients to modify the information on their Client Profile.
NOTE: Clients will only be able to edit fields that are not "required" or "read-only", such as their email address, phone number, etc. Fields such as Username and Business Name are not editable.

Add Media
Check this box to allow clients to upload files to the standard WordPress Media Library when editing Portal Pages.

Client's Staff

Reset Password
Check this box to allow Client's Staff to reset their password via their Profile.
NOTE: In order to allow Client's Staff to reset their password via their Profile, the capability "Modify Profile" will also need to be checked.

View Profile
Check this box to allow Client's Staff to view their Profile, without editing functionality.
NOTE: Client's Staff will still be able to "edit" the information in the fields on their Profile, but they will be unable to save the changes.

Modify Profile

Check this box to allow Client's Staff to modify the information on their Profile.
NOTE: Client's Staff will only be able to edit fields that are not "required" or "read-only", such as their email address, phone number, etc. Fields such as Username and Business Name are not editable.

View Clients Invoices
Check this box to allow Client's Staff to view invoices that are assigned to their "parent" clients.

Paid Clients Invoices
Check this box to allow Client's Staff to view and pay invoices that are assigned to their "parent" clients.

WPC-Admin

Edit Posts
Check this box to allow WPC-Admins to access the WordPress menus for Posts and Comments with viewing capability, as well as add new posts.
NOTE: With this capability, any new posts created by WPC-Admins will be placed in "Awaiting Review" status. A proper Admin will need to approve the post before it is published.

Edit Published Posts
Check this box to allow WPC-Admins to edit their own published Posts.

Edit Others Posts
Check this box to allow WPC-Admins to edit other users' Posts.

Login to Clients Account
Check this box to allow WPC-Admins to use the "Login to Client account" function, which allows the WPC-Admin to view the portal (HUB, files, etc) from the point-of-view of the client.

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Invoices

General Concept

Easily create estimates and invoices that your clients can pay online using the provided payment gateways. You can display invoices on your website, send in PDF format via email, or print out and send in traditional snail mail.

Items

The building blocks for Estimates and Invoices are what is known as Items. Items can be thought of as a line item title and description that quantifies a billable service or particular product or sku.

Businesses can use this in many different ways including describing and quantifying the scope and price for one hours work, and then when adding the item to the estimate/invoice, set the quantity to reflect the number of hours.

Of course, it can also be used in the more traditional sense of adding a number of various items to the estimate/invoice to be paid.

Estimates

Estimates can be thought of in a very similar manner as Invoices, and almost as "pre-Invoices". An estimate consists of one or more items with their associated title, description and price point. You can set a date for the estimate is good until, add tax to the estimate, at a discount to the estimate, set your terms and conditions and add a special note to the customer is needed.

When complete, you can save the estimate, and printed out as a PDF, or you can save and send the estimate, which will then email the estimate in PDF format to the assigned client or clients.

It's important to note, that if you create an estimate, and assign that estimate to multiple clients, or to a client circle, when you save the estimate, WP-Client will then create multiple estimates, one for each selected client. After that point, each estimate is its' own individual entity, and each will have to be edited directly if changes are to be made.

If after you create the estimate, you get approval from your client or customer, you can then easily choose to "Convert to Invoice". This basically takes the information and data from the estimate and creates a new invoice with that information. You can then send the invoice to your client by email, and it will be available to them inside their client portal.

Invoices

An invoice consists of one or more items with their associated title, description and price point. You can set a date for when the invoice is due, add tax to the invoice, at a discount to the invoice, set your terms and conditions and add a special note to the customer is needed.

When complete, you can save the invoice, and printed out as a PDF, or you can save and send the invoice, which will then email the invoice in PDF format to the assigned client or clients. The invoice will also be available to the client inside their Portal if it is setup correctly for this to happen.

It's important to note, that if you create an invoice, and assign that invoice to multiple clients, or to a client circle, when you save the invoice, WP-Client will then create multiple invoices, one for each selected client. After that point, each invoice is its' own individual entity, and each will have to be edited directly if changes are to be made.

The invoice can be paid online by viewing the invoice online inside the client portal, and clicking the payment link, which will take the client to their choice of payment gateways. When the payment is processed, WP-Client will mark the invoice as paid, send the admin notification, and send the client a thank you email if that option is enabled.

If the client chooses to pay by check or some other method, you can manually set the invoice has paid by using the "Add Payment" option.

Templates

Templates allow you to customize the email notifications that are sent in relation to Estimates and Invoicing. You can also set the default values for Terms and Conditions, Notes to Customers and the templates that are used to create the Estimates and Invoicing.

Payments

The payments tab is simply a payment history where you can see which invoices have been paid, by what method, and the associated payment information for each.

Settings

From the settings tab you can customize various settings and notification items as well as set up the tax rates that may apply to your industry in your location.

Gateways

Gateways can be configured from the Payments menu item in the sidebar navigation. Initially, Currently PayPal, Authorize.net and Stripe are the only gateways supported. If you are interested in implementing a different payment gateway, please contact us for more information.

Recurring Invoices

You can create a Recurring Profile with a duration and frequency, fill it with any invoice items, taxes, discounts, etc, and assign it to one or more clients. The Recurring Profile will then automatically create and assign new invoices according to your settings, and the invoices will be viewable and payable by the clients in their HUB Page.

You can create a new Recurring Profile by navigating to IS Tools-->Estimates/Invoices-->Recurring Profiles--->Add New Profile

After that, you will be presented with several options from the Recurring Profile creation screen.

Create Invoices as Draft
With this setting, all invoices created by this Profile will be created in "Draft" status. This will allow you to review each invoice individually before it is sent out to the client. Once the invoice is reviewed and approved by you, you can re-save the invoice in "Open" status, and the invoice will be displayed in the client's HUB Page, where it can be viewed and paid.

Create Invoices as Open
With this setting, all invoices created by this Profile will be created in "Open" status. This means, immediately after the invoice is generated, the invoice will be available to view and pay in the client's HUB Page.

Auto-Charge via Payment Gateway
Auto-Charging invoices allows you to assign an invoice to a client, and have that invoice automatically charge multiple times based on a predetermined schedule and frequency. This is very useful for collecting monthly memberships, yearly service dues, recurring retainer fees, and any other scenario where you would need to charge a regular recurring amount to a client. NOTE: After the client makes payment on the first invoice (via their selected payment gateway), their account will be automatically charged the recurring billing amount, based on the settings outlined below. It's also important to note that the recurring charge schedule is based on when the client makes the first payment. For example, if a monthly Auto-Charge Recurring Profile is assigned to a client on the 15th of the month, and the client makes the first payment on the 20th, the client will then be charged monthly on the 20th for future payments regarding that invoice.

Invoice Frequency
The "Create Invoice Every" setting will control how frequently the billing is sent out. For example, if set to "Create Invoice Every 15 Days", a new invoice will be generated for the billing amount automatically every 15 days. The "First Creation Date" is required field, and determines the date that the first invoice is generated by the Recurring Profile.

Billing Cycles
The "Billing Cycles" setting controls how long the billing will last. For example, if "Create Invoice Every" is set to "15 Days", and the "Billing Cycle" is set to "24", the client will be billed every 15 days for 360 days (15 days X 24). If the Billing Cycle is set to "0" or left blank, the client will be billed indefinitely until the admin cancels the recurring charge.

Allow Partial Payment

Checking this box will allow clients to make partial payments on the invoice, for less than the total amount of the invoice. You can also optionally set a minimum required payment along with this setting, or leave as the default of zero. Additionally, if partial payments are allowed on an invoice, clients will be able to make a payment of any amount between the minimum required payment and the total amount. For example, if the total invoice amount is $500, and the minimum required payment is $20, the client can make a payment amount anywhere between $20 and $500. When a partial payment is made, the invoice will remain open and active on a client's HUB Page until paid in full.

Send Email/PDF when Generated
When this box is checked, clients will automatically be notified via email when an "Open" invoice is generated and assigned to them. By default (if this box isn't checked), they will not be notified via email, but the invoice will still be available to view and pay in their HUB Page, regardless of this setting.

Invoice Number
If you have a specific invoice number you would like to use, you can enter it here. If left blank, the invoice number will be automatically generated based on your settings at IS Tools-->Settings-->Estimates/Invoices

Due Date
Use this setting to apply an automatic due date to all invoices generated by this Recurring Profile. In this instance, instead of setting a specific due date, you will set a due date "window", designated by a set number of days. For example, if you set the due date as "21 days", then the due date of the generated invoice will be set to 21 days after the invoice generation date.

Late Fee
If setting a due date, you can also set a Late Fee, or an amount of money that will be added to an invoice if not paid by the due date. This late fee will be automatically applied to an invoice after the previously set due date passes.

Saving Profile
When saving the Recurring Profile, you have the option to "Save Profile as Active", or "Save Profile as Draft", or "Cancel". Saving a Profile as "Active" will mean that the Recurring Profile will begin it's "countdown" towards creating it's first invoice, and if left alone it will generate invoices based on the settings you supplied above. If set to save a Profile as "Draft", all of your settings will be saved, and you will be able to come back and edit the Recurring Profile, but no invoices will be created by the profile. "Cancelling" a Recurring Profile will delete a new profile (that has never been saved), or alternatively will not save any changes you've made to an existing profile.

Accumulating Invoices

Accumulating invoices allow you to bill your client on a regular schedule, but for instances where you may not be charging them the same amount every time. You can think of it as keeping a "running tab" for a client, and then sending them a bill for what they have charged up to a certain point. For example, let's say you have web design company. You have a client, Bob, who comes to you regularly to get things changed on his site, and for various site maintenance. Some months you may charge him $1000, some months it may be $500, and some months it may be nothing. With accumulating invoices, you can add items to an "Accumulating Profile" as they come up, and then at a predetermined timeframe (weekly, monthly, etc), a "snapshot" of that invoice profile will be taken. That snapshot is then turned into an invoice, and the invoice profile is wiped clean, allowing you to start a new "tab" for that customer.

To create a new Accumulating Profile, navigate to IS Tools-->Estimates/Invoices-->Accumulating Profiles, and select "Add New Profile"

Create Invoices as Draft
With this setting, all invoices created by this Profile will be created in "Draft" status. This will allow you to review each invoice individually before it is sent out to the client. Once the invoice is reviewed and approved by you, you can re-save the invoice in "Open" status, and the invoice will be displayed in the client's HUB Page, where it can be viewed and paid.

Create Invoices as Open
With this setting, all invoices created by this Profile will be created in "Open" status. This means, immediately after the invoice is generated, the invoice will be available to view and pay in the client's HUB Page.

Create Invoices as Live
This option functions similarly to the "Create Invoices as Open" setting, with the addition that email notifications will also be sent to the client when the invoice is created.

Invoice Frequency
The "Create Invoice Every" setting will control how frequently the billing is sent out. For example, if set to "Create Invoice Every 15 Days", a new invoice will be generated automatically every 15 days. When a new invoice is generated, it will include any items/taxes/discounts that are included on the Accumulating Profile at that time, and then the profile will be cleared, and all items will be deleted from that profile. The "First Creation Date" is required field, and determines the date that the first invoice is generated by the Accumulating Profile.

Billing Cycles
The "Billing Cycles" setting controls how long the billing will last. For example, if "Create Invoice Every" is set to "15 Days", and the "Billing Cycle" is set to "24", the client will be billed every 15 days for 360 days (15 days X 24). If the Billing Cycle is set to "0" or left blank, new invoices will be created indefinitely until the admin cancels the profile.

Invoice Number
If you have a specific invoice number you would like to use, you can enter it here. If left blank, the invoice number will be automatically generated based on your settings at IS Tools-->Settings-->Estimates/Invoices

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Due Date
Use this setting to apply an automatic due date to all invoices generated by this Accumulating Profile. In this instance, instead of setting a specific due date, you will set a due date "window", designated by a set number of days. For example, if you set the due date as "21 days", then the due date of the generated invoice will be set to 21 days after the invoice generation date.

Late Fee
If setting a due date, you can also set a Late Fee, or an amount of money that will be added to an invoice if not paid by the due date. This late fee will be automatically applied to an invoice after the previously set due date passes.

Do Not Delete Discounts
Check this box if you would like to keep any discounts on the Accumulating Profile after the profile is "wiped" for every new invoice generated. If this box is checked, any discounts you add to the Accumulating Profile will remain on the profile through all invoice generations, until you remove them manually.

Do Not Delete Taxes
Check this box if you would like to keep any taxes on the Accumulating Profile after the profile is "wiped" for every new invoice generated. If this box is checked, any taxes you add to the Accumulating Profile will remain on the profile through all invoice generations, until you remove them manually.

Saving Profile
When saving the Accumulating Profile, you have the option to "Save Profile as Active", or "Save Profile as Draft", or "Cancel". Saving a Profile as "Active" will mean that the Accumulating Profile will begin it's "countdown" towards creating it's first invoice, and if left alone it will generate invoices based on the settings you supplied above. If set to save a Profile as "Draft", all of your settings will be saved, and you will be able to come back and edit the Accumulating Profile, but no invoices will be created by the profile. "Canceling" a Accumulating Profile will delete a new profile (that has never been saved), or alternatively will not save any changes you've made to an existing profile.

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Form Builder Overview

The Form Builder Extension allows you to create custom forms, for public or private viewing by your clients, and insert those forms into pages in your site using provided shortcodes.

When you first install the Form Builder Extension, a new “Form Builder" menu will be added to your main WP-Client sidebar. If you click into the Form Builder menu, you will be presented with a few different tabs.

Forms
From this tab, you will see a table containing all of your existing published and draft Forms. Included in the table will be additional data such as what Clients/Circles the Forms are assigned to (or if they are public), how many Answers have been submitted for each Form, and the Form Type (One-Time, Multiple, or Period). From this table you edit or delete any existing Form, as well as modify what Clients/Circles are assigned to private Forms.

Also from this tab, you can create a new Form by clicking the "Create New Form" button.

Creating A New Form
When creating a new Form, you will have multiple fields to fill out:

Title
This will be the title of the Form that will appear in multiple locations, including as part of the Form itself when displayed for clients in the frontend using the corresponding shortcode.

Step
You can divide the Form into "sections" using Steps. Each step can have as many or as few individual fields as you like, and each Step can be renamed from the default "Step 1, Step 2, etc" by hovering over the Step title and clicking the pencil icon (note that the default Step titles will still appear when building/editing the Form, but frontend users will see the custom titles you set). You can add more Steps by clicking the green + button, and you can delete existing Steps by hovering over the desired Step and clicking the red X.

Fields
Fields will act as the core foundation of your Forms, as these will be how your clients provided information through the Form. Various field types are available, from simple text boxes, to datepickers, to radio buttons, and more. To add a new field to the Form, simply click and drag the desired field type from the right-side box, and drop it into the desired Form Step. From there, you can click on the field within the Form to expand it, and you will be able to fill out details like the title and description labels, set requirement status, and also get a preview of how the field will look on the Form itself. From the "Appearance" tab you will also be able to adjust aspects such as field width, placement of the description text, as well as add some custom CSS classes if desired.

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Settings
These settings default to what you have set at IS Tools-->Form Builder-->Settings (see below for more info). You can choose to modify these settings for this specific Form from this window. Any changes that are made will be automatically saved when the window is closed.

Visibility
Use the "Who can access this Form?" dropdown to determine if you would like this Form to be visible to everyone, only logged-in users, or only specifically assigned Clients and/or Circles.

Notifications
Check this box if you would like assigned Clients to be notified via email when the Form is saved/published. The default notification content can be modified by clicking the "Notification Settings" link below this checkbox.

When the Form is created to your liking, you can choose to Save it (which will make it live), or Save it as a Draft. In either case, after the Form is saved the corresponding shortcode for the Form will be displayed at the top of the page, which you can easily copy and paste it in the desired page of your site where you would like to display the Form.

Saving and Displaying Forms
Once the Form is built and saved/published, you will be able to display the Form using the shortcode that is created after saving. To display a Form in your site, you will just need to insert the corresponding shortcode into the desired page. See example shortcode below:

[wpc_client_form id="ID#" /]

The ID# would be replaced with the numerical ID of the Form, which can be found by clicking "Edit" inside the desired Form. So a real-world Form shortcode might look like this:

[wpc_client_form id="8" /]

Wherever that shortcode is placed, the Form will be displayed in that page for the appropriate users. If a non-permissioned user attempts to view the Form, it will display the Permission Error text (from your settings) instead of the Form.

Answers
From this tab, you will be able to view, search, filter, and optionally delete all of the Form answers that have been submitted by users. By default the table will display the title of answered Form, the client's username (if they were logged-in), their IP address, their browser info, the URL of the page the Form was on, and the date the answer was submitted. From here you can click "View" on any individual submission, and you will be able to additionally view the actual submitted Form field data that the user filled out.

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Settings

From this tab, you will be able to adjust the various settings that are available inside a Form. The settings here will be used as the default values whenever a new Form is created, though you can adjust these settings individually inside a specific Form if desired.

Form Style
Use this setting to determine how multiple steps are laid out and presented to the user when filling out the form, such as in an accordion, in individual "pages", etc. This setting will only apply to Forms with more than one step.

Type
Use this setting to determine if a Form is a One-Time, Multiple, or Period timeframe. One-Time Forms can only be answered once per-user, Multiple Forms can be answered unlimited times per-user, and Period Forms can only be answered once per-user in each timeframe (EX: once per day, once per week, etc).

Give Access to Previous Steps
Use this setting to choose whether or not to give users the option to go back to previous steps in the Form.

Text For Previous Step Button
This will be the text that appears on the button that navigates to the previous step in the Form.

Text For Next Step Button
This will be the text that appears on the button that navigates to the next step in the Form (except for on the last step).

Text For Submit Last Step Button
This will be the text that appears on the button that submits the Form on the last step.

Finish Text
This will be the text that a user will see once they successfully submit a Form. You will also be able to set a custom redirect URL inside individual Forms if desired.

Label Placement
Use this setting to determine if the Form field labels default to left-aligned or top-aligned in relation to their fields.

Description Placement
Use this setting to determine if the Form field descriptions appear above or below their respective fields.

Permission Error
This will be the text that a user sees when they attempt to view a Form that they do not have permission to access.

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Already Answered Error
This will be the text that a user sees when they attempt to view a (non-Multiple) Form that they have already answered.