S² | Smart Suite

Powered by The Get Smart Group

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How to install and activate Smart Suite for WordPress

After your subscription purchase to one of our Plugin Products you will get a link to download Smart Suite. Included in the package is a copy of this user guide, the zipped WordPress ready folder, and the Terms of Service.

1. Open your preferred web browser (Chrome, Firefox, Safari, etc.) and log into your WordPress account.

2. Navigate to the Plugins page of WordPress, located on the left side of the page.

3. Click the “Add New” button next to the Plugins title on the screen.

4. Select the “Upload Plugin” button next to the Add Plugins title on the screen.

5. Using the WordPress suggestions, locate and choose the smart-suite.zip file you downloaded.

6. Click “Install Now”.

7. You should see a confirmation of your installation. Please click the blue “Activate Now” button just under your installation confirmation text.

8. After activating your plugin, you will be taken to the homepage of your Smart Suite.

Congratulations! You’ve completed your Smart Suite installation. You now have access to the Smart Suite plugin products and services. Simply navigate to the Smart Suite tab to access your subscribed plugin products. The tab should display as S^2 Smart Suite and be located on the left side of your screen in the WordPress menu area.

Once you have activated and subscribed to any of the Smart Suite plugin products, you will have the opportunity to grow your suite by subscribing to additional plugin products within Smart Suite’s homepage.

Quick Links:
eCommerce Connector for RB Solutions - Initial Setup Instructions

Navigating Smart Suite

Home Page

Your Subscriptions

This area will display in active plugin products. You can access your plugins by clicking in the Access Plugin button on the plugin preview window or by utilizing the WordPress, navigation on the left side of the window.

Available Plugins

You can review any available plugin products for Smart Suite here. Subscribing to a new plugin is easy! Just click the subscribe now button and follow the prompts.

Plugins Coming Soon

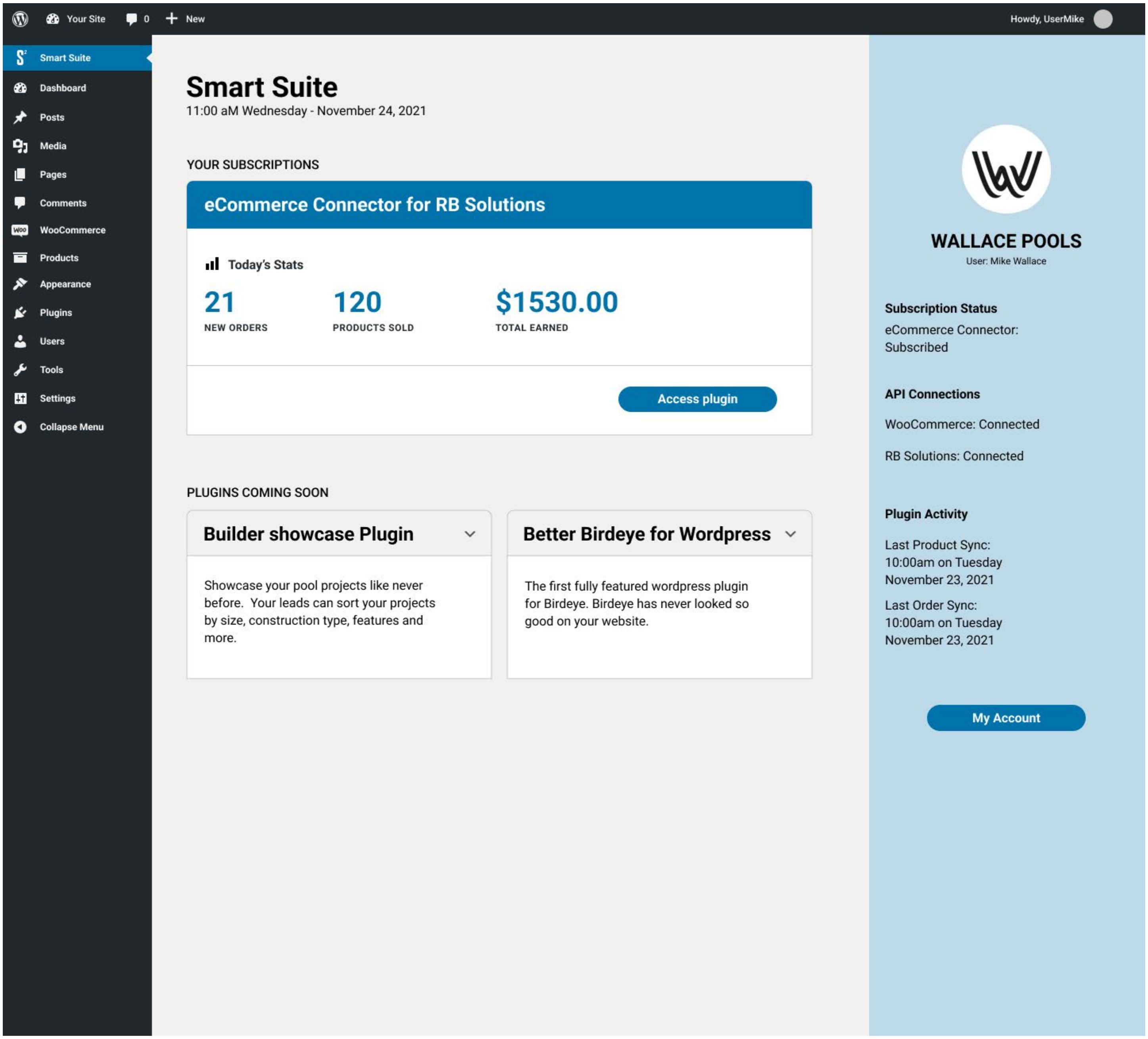
We utilize this area to let you know what's coming for Smart Suite.

User Profile Area

On the right hand side of the homepage screen, you will see a bar with information about your Smart Suite connections and activity. Please note: we utilize a raspberry alert icon beside the headers to let you know when this area needs review.

> Subscription Status - Any active subscriptions are displayed here with a status.
>
> API Connections - The connection status for any relevant third-party services coordinating with your plugin product Integration is displayed here.
>
> Plugin Activity - Displayed here is the most recent timestamp for your plugin syncing.

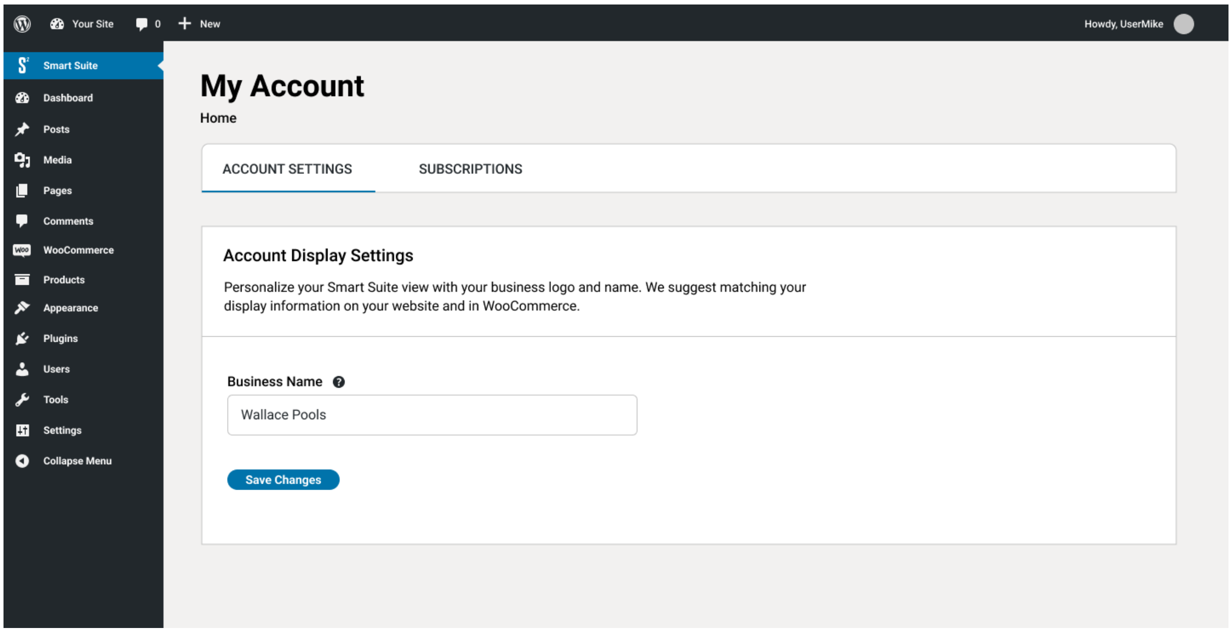
You can access your account area by clicking the My Account button on the right side of your Smart Suite home screen.


Your Site
0
New
Howdy, UserMike
Smart Suite
Dashboard
Posts
Media
Pages
Comments
WooCommerce
Products
Appearance
Plugins
Users
Tools
Settings
Collapse Menu
Smart Suite
11:00 aM Wednesday - November 24, 2021
YOUR SUBSCRIPTIONS
eCommerce Connector for RB Solutions
Today's Stats
21
NEW ORDERS
120
PRODUCTS SOLD
$1530.00
TOTAL EARNED
Access plugin
PLUGINS COMING SOON
Builder showcase Plugin
Showcase your pool projects like never before. Your leads can sort your projects by size, construction type, features and more.
Better Birdeye for Wordpress
The first fully featured wordpress plugin for Birdeye. Birdeye has never looked so good on your website.
WALLACE POOLS
User: Mike Wallace
Subscription Status
eCommerce Connector: Subscribed
API Connections
WooCommerce: Connected
RB Solutions: Connected
Plugin Activity
Last Product Sync: 10:00am on Tuesday November 23, 2021
Last Order Sync: 10:00am on Tuesday November 23, 2021
My Account

My Account

Account Settings

Account Display Settings - You can adjust your user name and add a photo here for your profile image. We suggest using your company's logo.



Subscriptions

You can manage your subscriptions here. Any active subscriptions will be displayed here. Click "Save" once your changes are completed.

Status - You can edit your subscription status here to unsubscribe, which will terminate your access to that specific plugin product. Your Smart Suite plugin for Wordpress will still be active.

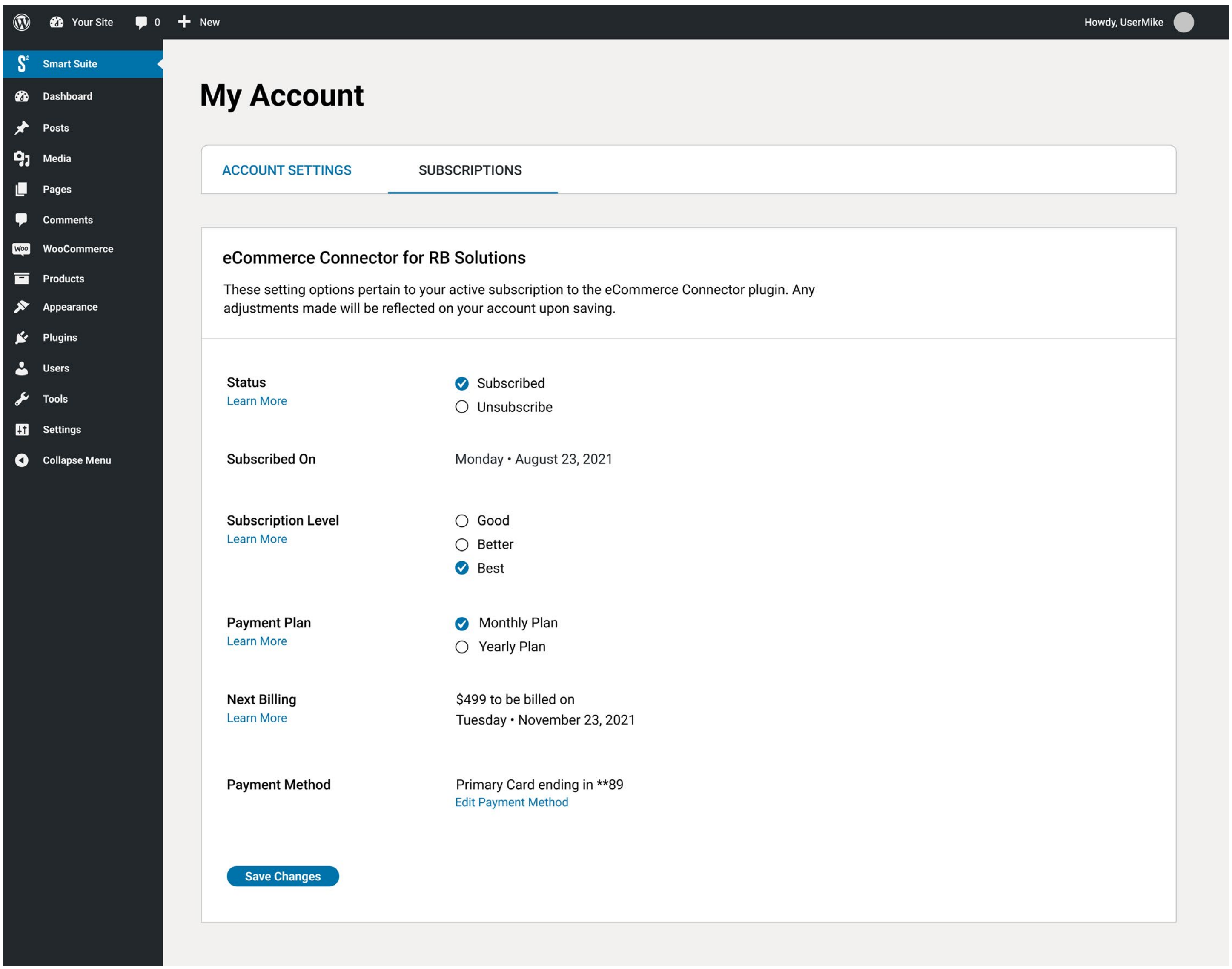
Subscription Level - We offer subscription sizes to fit any business. Any changes made here will be reflected on your next bill.

> *For eCommerce Connector users - We make scaling your business easy! If your usage grows outside of the selected subscription plan, we up size you to the correct fit. This change will be reflected in your next billing cycle and an email confirmation will be sent to reflect your subscription changes.*

Payment Plan - Any adjustments here will be reflected on the next billing cycle.

Next Billing - This can not be directly edited. The billing cycles is based off the date your subscription started.

Payment Method - When a Smart Suite account is created, we save the card for billing purposes. You can edit the primary card information here, which will be reflected in your main account as well.



Manage your subscriptions

Managing your subscriptions is easy with My Account inside of Smart Suite. To review and edit your subscriptions, simply navigate to the My Account page inside of Smart Suite and select the Subscriptions tab. All active subscriptions are displayed here.

If you would like to change your subscription level, you can do so by selecting the level of your choice and clicking “Save” at the bottom of the screen. Any billing adjustments needed will be reflected on your next billing cycle.

We serve businesses of all sizes. To ensure that you can scale with confidence, we’ve created our levels based off of Product Inventory of your webstore not the amount of orders you receive. If you grow past your subscription size, you are automatically upgraded to the proper subscription fit. These adjustments are reflected on your next billing cycle. If you have any questions, please reach out to our support team at 866-502-9385

Billing cycles are based off of the date a user subscribes to a plugin product. For our monthly payment plan, users will be billed every month on the numerical date of their original subscription purchase.

If you wish to cancel your subscription service, you may do so by unsubscribing to the no longer desired plugin product. Your plugin product access will be terminated at the end of your current billing cycle.

Support

Smart Suite support is provided by The Get Smart Group. For plugin product support, please visit the plugin product’s support page and follow the prompts to be connected with a team member who can assist.

If you would like additional assistance with Smart Suite or would like to know more about how The Get Smart Group can help you grow your business, please reach out to our staff at 866-502-9385.

eCOMMERCE
CONNECTOR
Powered By The Get Smart Group

For RB

How to subscribe

Visit the Smart Suite website at featurestheyforgot.com. Review and select your desired subscription level on the eCommerce Connector for RB product page.

- You'll be asked to create an account for Smart Suite and submit payment using our Stripe services form.

- Your billing cycle will begin on the day you subscribe.

    - Example: If you were to purchase, on November 23rd, a Better subscription to the eCommerce Connector for RB Solutions with a monthly payment plan.... then your billing dates will be on the 23rd of each month.

    - Once a credit card is added to your account it is linked and can be used to add any additional subscription purchases or upgrades for your Smart Suite.

    - You can edit this information in your Account Settings within Smart Suite.

- At the end of your transaction you will be given a download link. Please download the Smart Suite package and follow your installation and activation instructions. We will also include this download link in a follow up email thanking you for your purchase.

If you need assistance with your subscription purchase or have questions about which level to pick, please call us at 415-800-2040 x720.

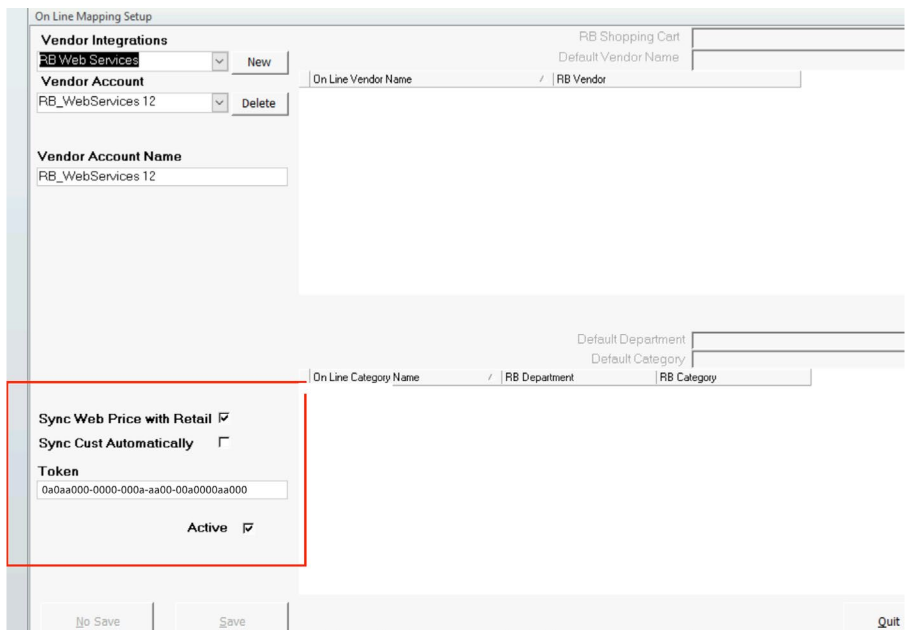
Completing you initial setup

On your first visit to the Smart Suite for Wordpress you will be asked to complete your setup for the eCommerce Connector you purchased a subscription to. The following steps outline this process.

Add your connected services information

Enter your RB Solutions API Key and RB Solutions API Company ID into the requested fields.

You can locate these by following the directions provided by RB Solutions or this abbreviated outline below.



1. From the main RB menu, click ‘Tools’
2. Click Online Parts Setup
3. Enter the RB Passcode
4. In the Vendor Integrations drop-down, Select RB Web Services.
5. The Vendor Account, Vendor Account Names, and Token all appear and is input by Technical Support. If you don’t see this please contact RB Support.
6. Copy the Token (API Key) by highlighting it and using CTRL-C to Copy.

You can find the API Company ID for your business by referencing your RB Start Up screen.

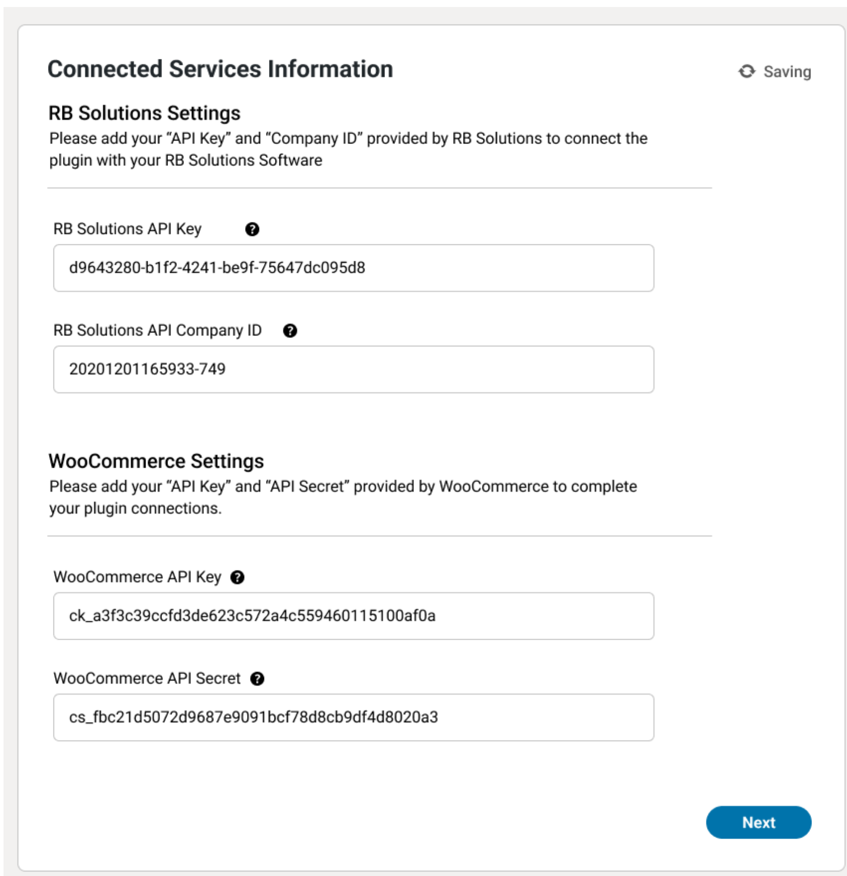
- If you are already in RB you will need to quit and open it up again.
- On the Start Up screen above the function options displayed is a dropdown menu that should display your ID next to your company name.
- Copy the numerical # after your company name in the drop down menu.

Add your connected services information (cont.)

Enter your WooCommerce API Key and WooCommerce API Secret in the requested fields.

- You can locate these by following these directions

1. To create or manage keys for a specific WordPress user, go to WooCommerce > Settings > Advanced > REST API.
2. Click the “Add Key” button. In the next screen, add a description and select the WordPress user you would like to generate the key for. Use of the REST API with the generated keys will conform to that user’s WordPress roles and capabilities.
3. Choose the level of access for this REST API key, which can be Read access, Write access or Read/Write access. Then click the “Generate API Key” button and WooCommerce will generate REST API keys for the selected user.
4. Now that keys have been generated, you should see two new keys, a QRCode, and a Revoke API Key button. These two keys are your Consumer Key and Consumer Secret.



Import your products

This initial import of products serves as references for the product displays on your website. It creates the product list for your webstore.

We suggest having a spreadsheet of your current product names handy to keep track of your selection progress.

Select a Department using the drop-down menu provided. This selection populates the categories displayed in your second drop down menu where you need to select a Category. Click Search Products to populate the results.

Search results are displayed in bundles. When expanded, the bundles display product information such as ID, Product Name, SKU, Price, Sale Price, Quantity, Dimenions, Weight, and Status of product in the plugin.

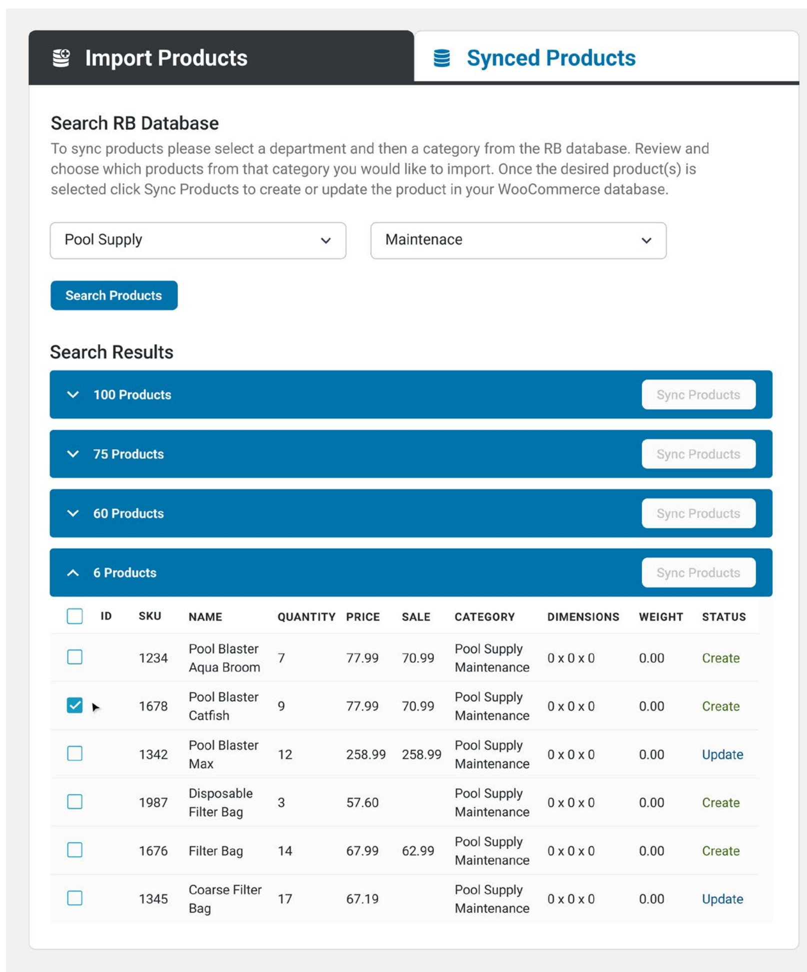
> Tip: For your initial setup, all products show a status of Create.

Next, by using the check boxes you have options to select individual products, multiple products or the entire bundle to import.

Once confirmed and imported, these products show the action available as Update (instead of Create).

Repeat this process until all products are added to your product listing.

We recommend doing the initial import in one sitting, but if you need to leave and return to the import process, you can do this in the Manage Product Sync area of your plugin.



Using your eCommerce Connector for RB Solutions

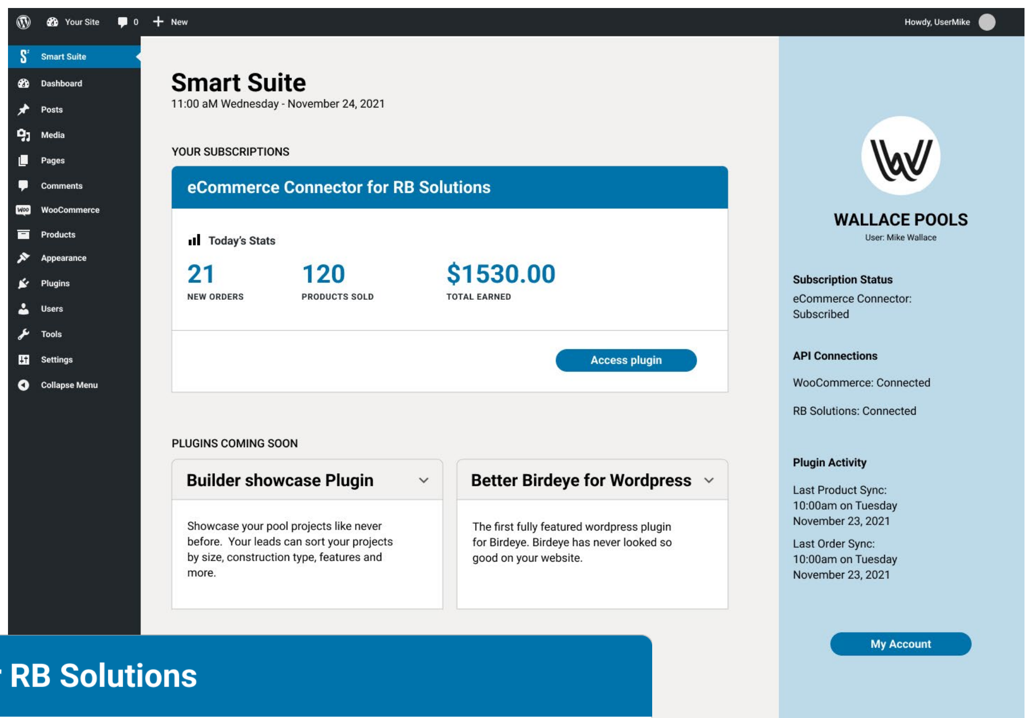
This area of the user guide assumes you have already subscribed to Smart Suite and completed the initial setup of the eCommerce Connector. If you have not done so, please visit our site to begin that process.

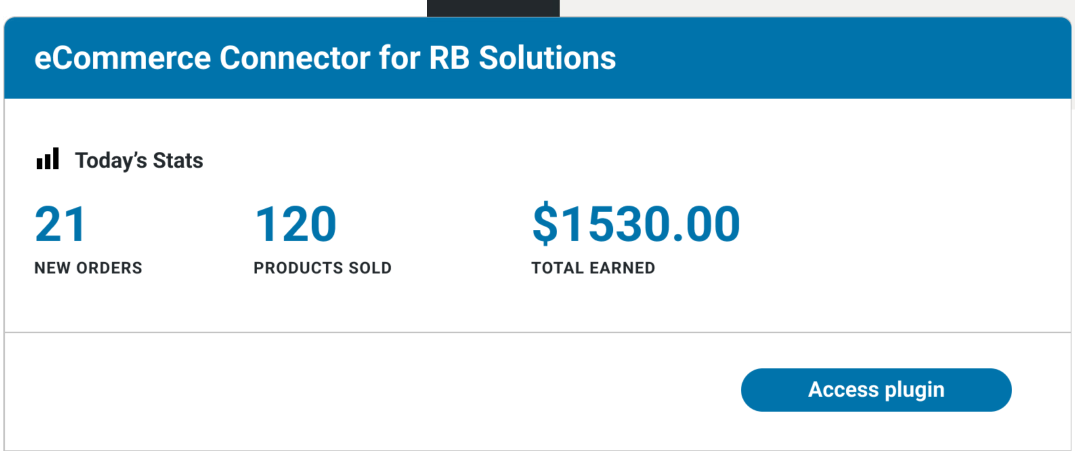
Smart Suite Homepage Preview

Preview Window & Plugin Access

Today's Stats - Displays the current stats for your webstore. Use this preview window to quickly determine your website's sales numbers for the day and access your plugin.

- New Orders count
- Products Sold count
- Total Earned amount





eCommerce Connector Home Screen

Plugin Menu

Located on the right side of your WordPress screen you will find the navigation area for your plugin. Any areas selected will be displayed in a window to the left of your menu.

- Manage Product Sync
- Manage Orders
- Support
- Plugin Settings

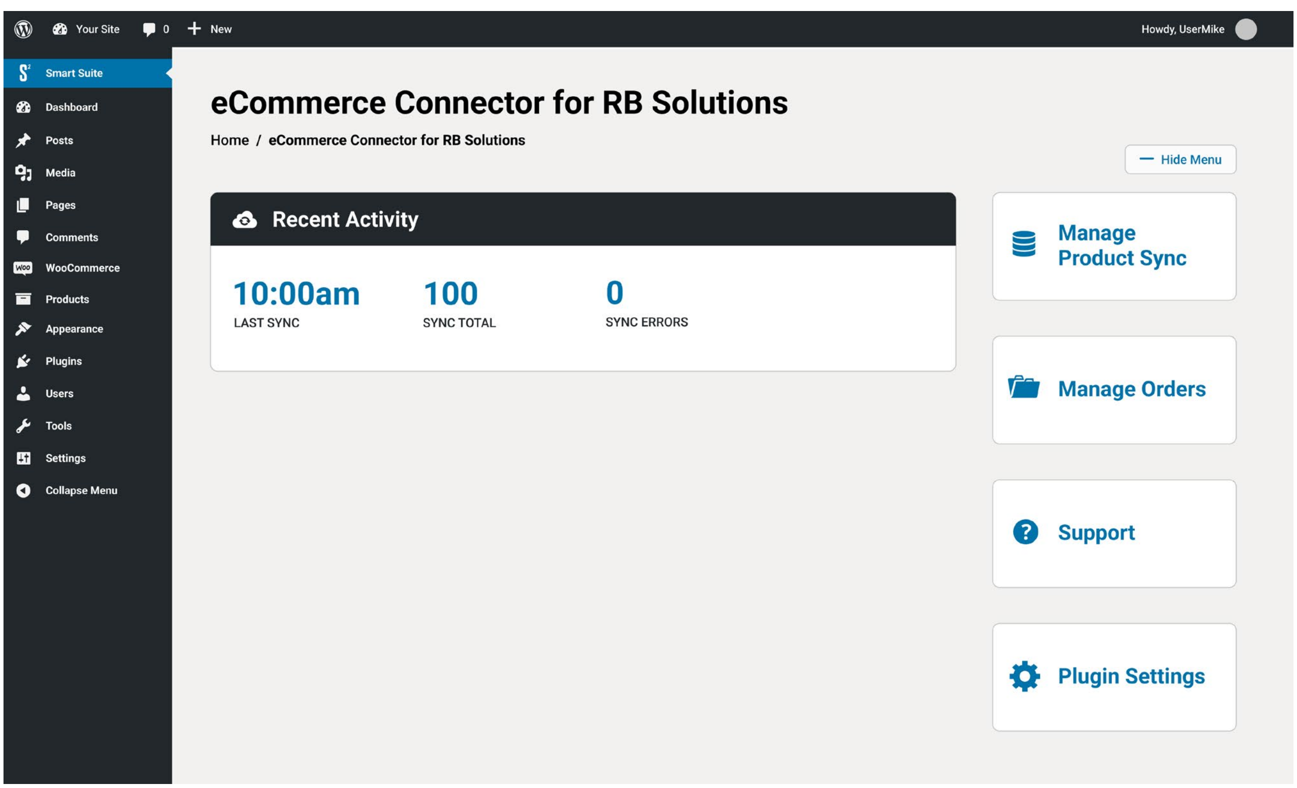
Hide/View Menu Function

As of 2023 we've adapted the menu on the right hand side to hide or show depending on the needs of the window to the left of it. You can use the menu button to display or hide the plugin menu as needed for your screen formatting.

Recent Activity Window

We have generated a quick view of the most important items users want to see when accessing the plugin.

- Time Stamp of the most recent sync for that day
- Number of successful Product Syncs that day
- Sync Errors are displayed here for quick resolutions



Managing Your Products

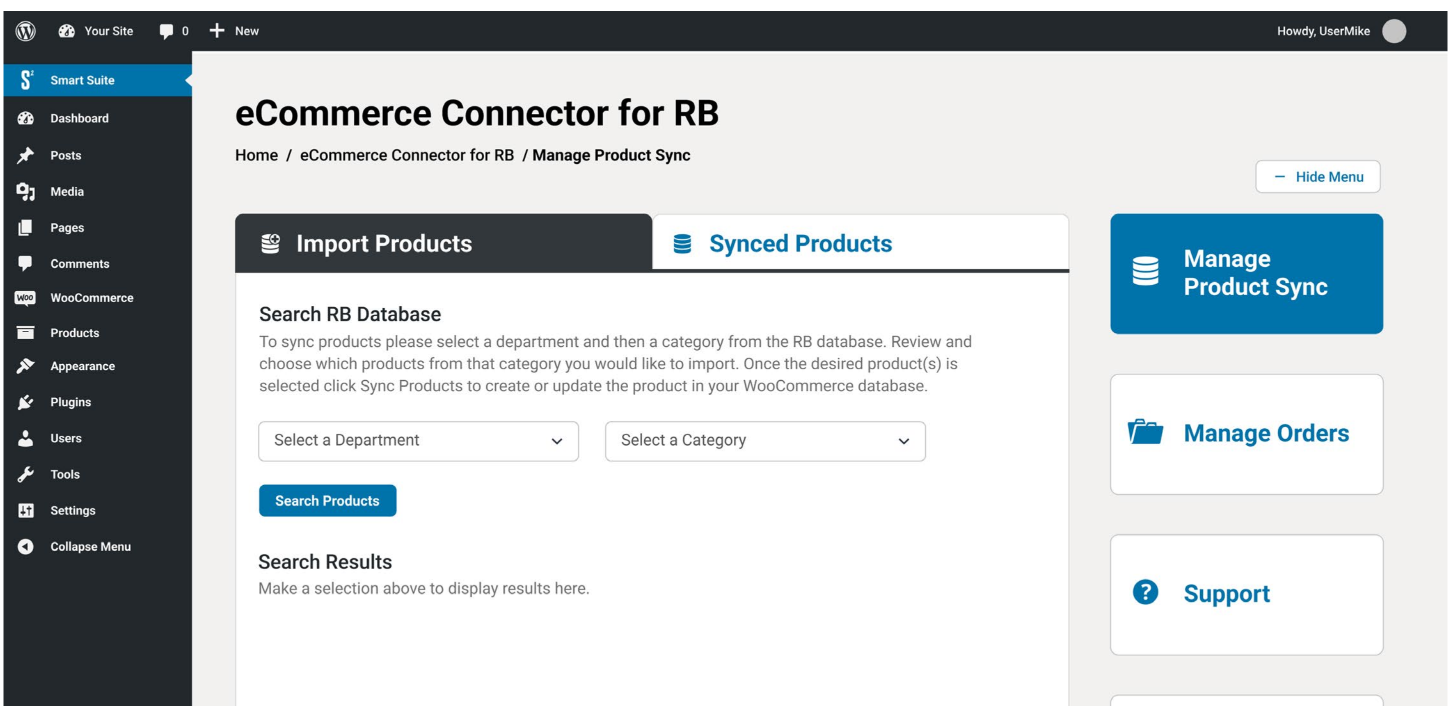
With the options to create or update your products, you will be able to easily share your RB Solutions database information with your webstore product display and inventory.

Import Products

With the search and select feature, you are able to Create or Update your RB Solution products in your webstore.

1. Navigate to the Manage Product Sync page by selecting it on the sidebar navigation menu.
2. Select your Department and Category then click Search Products.
3. Search results display below in bundles.
4. Open a Product Bundle and use the multi-select check boxes to select which products you want to create or update in your webstore.
5. Click Sync Products in the Bundle Bar.
6. Confirm your Sync action in the confirmation window.
7. Repeat this process until your selections are complete.

This feature also allows for the Dynamic Inventory Sync to display proper inventory counts for your webstore, making it easy for your customers to purchase with confidence.



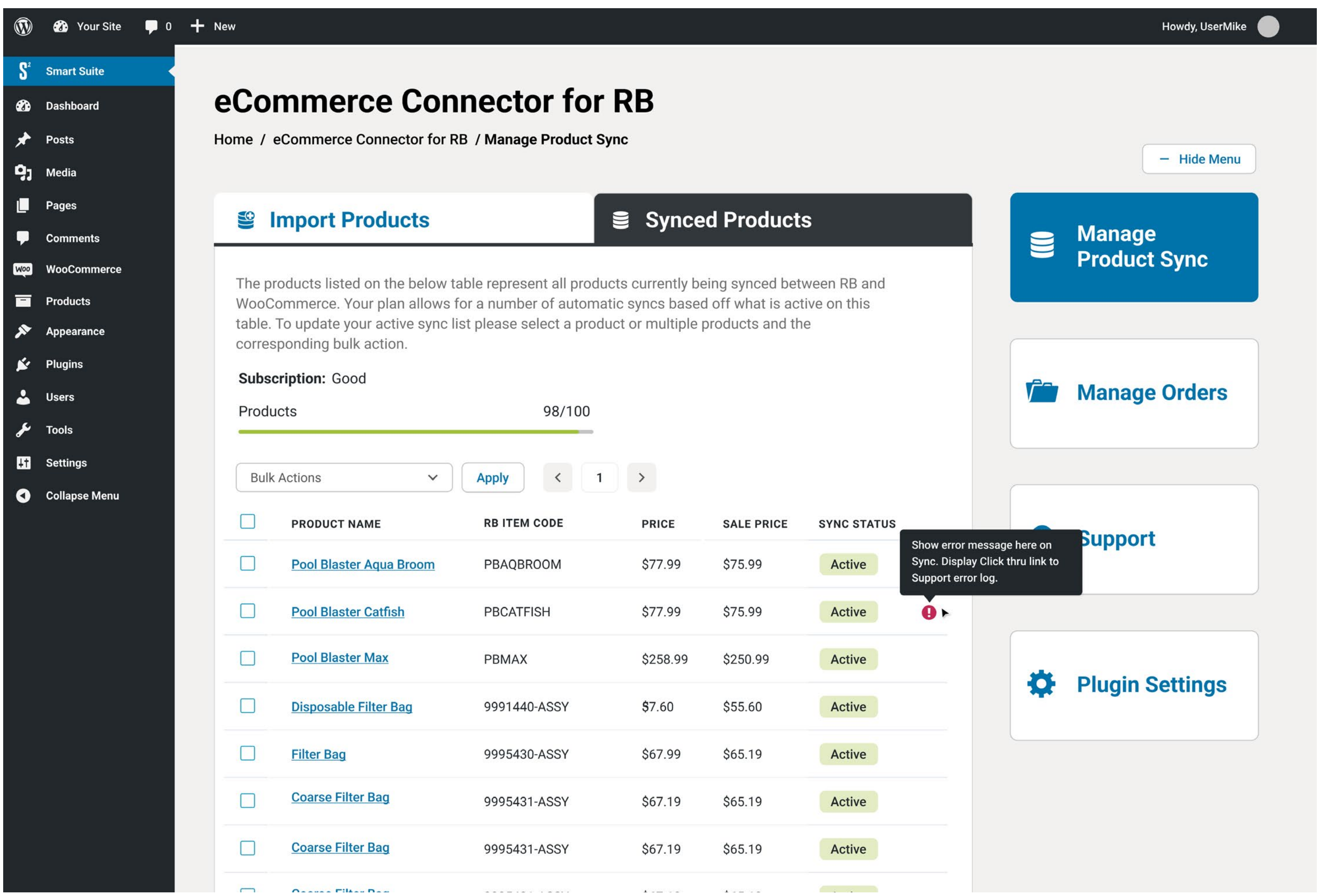
Synced Products

With the option to manage your synced products list right within your plugin you're able to select which of your imported products you would like to have included in your daily automated syncs. To help keep track of your product balances we've included a summary bar of your subscription level and product count.

1. Select the products you would like to manage the sync status on.
2. Depending on the desired edit to your list of products, select the bulk action of Activate or Deactivate.
3. Click Apply to complete your bulk action.

Please Note: All imported products populate with a Sync Status of Active by default.

If you would like additional assistance with your webstore product display, we offer enhanced webstore service packages. Please reach out to one of our team members for assistance adding images and unique descriptions for your products.



Managing Your Orders

This area of the plugin allows you to connect webstore-placed orders with your RB Solutions point of sale software. Send Orders to RB Solutions all with a few clicks, all on one screen.

Navigate to the Manage Orders page by selecting the Manage Orders button on the sidebar navigation menu.

Table Navigation

Navigate to the Manage Orders page by selecting the Manage Orders button on the sidebar navigation menu.

- Page navigation with Left and Right arrows or a page number entered into the text box will allow you to skip to that page directly.
- Drop-down menu with Bulk Action options and an Apply button to complete the action for every order selected.
- Search feature can be used to locate specific orders by customer name, ID #, and amount.
- Page Count and Previous/Next page navigation can be found at the bottom of the table.

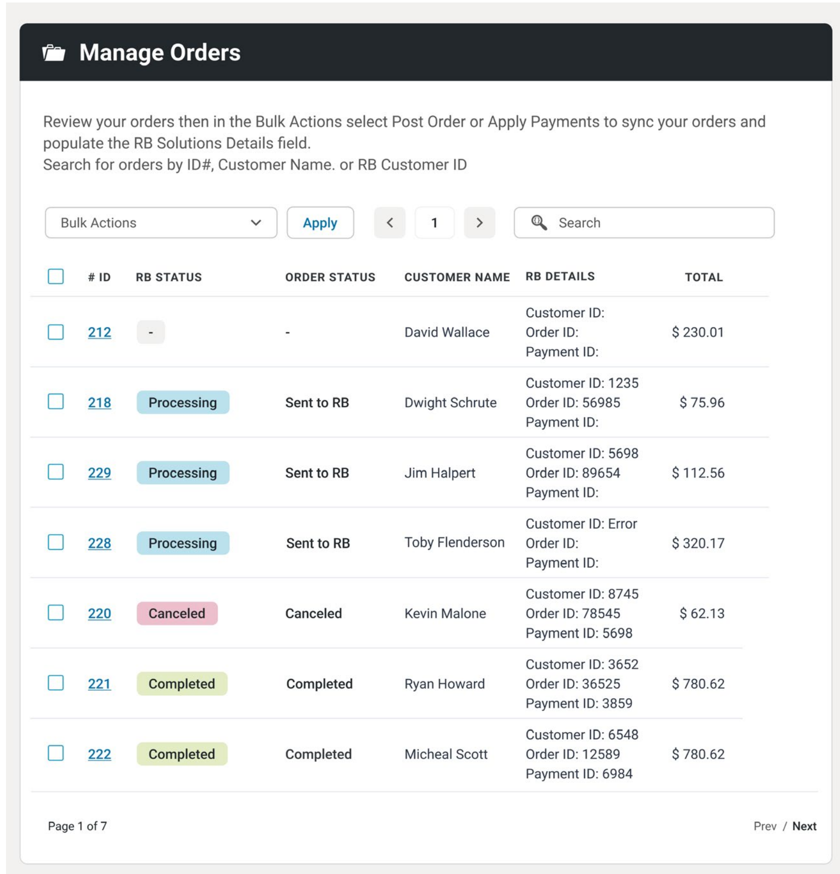
Feature Options

Post Online Orders - Send orders placed on your online store directly into RB Solutions. This action creates an exact order within RB Solutions POS with all the order details prefilled.

It’s important to remember that the details of your customers order are managed in either WooCommerce or RB Solutions. This plugin provides the integrated support between these services that previously required manually entry of the order, customer matching, and details.

Table Features

The table displayed shows the web orders placed in the order of the newest to oldest, with the most recent at the top. There are several columns to display order information.



Manage Orders

Review your orders then in the Bulk Actions select Post Order or Apply Payments to sync your orders and populate the RB Solutions Details field.
Search for orders by ID#, Customer Name. or RB Customer ID

Bulk Actions | Apply | 1 | Search

# ID	RB STATUS	ORDER STATUS	CUSTOMER NAME	RB DETAILS	TOTAL
212	-	-	David Wallace	Customer ID: Order ID: Payment ID:	$ 230.01
218	Processing	Sent to RB	Dwight Schrute	Customer ID: 1235 Order ID: 56985 Payment ID:	$ 75.96
229	Processing	Sent to RB	Jim Halpert	Customer ID: 5698 Order ID: 89654 Payment ID:	$ 112.56
228	Processing	Sent to RB	Toby Flenderson	Customer ID: Error Order ID: Payment ID:	$ 320.17
220	Canceled	Canceled	Kevin Malone	Customer ID: 8745 Order ID: 78545 Payment ID: 5698	$ 62.13
221	Completed	Completed	Ryan Howard	Customer ID: 3652 Order ID: 36525 Payment ID: 3859	$ 780.62
222	Completed	Completed	Micheal Scott	Customer ID: 6548 Order ID: 12589 Payment ID: 6984	$ 780.62

Page 1 of 7 Prev / Next

- Check box - You can select all the orders viewed in the page by clicking the box in the header or select individual orders by using the individual check boxes along the first column.

- # ID - This ID number is the WooCommerce order identification number. You can go directly to the order in WooCommerce by clicking this hyperlink.

- Status - This is the current status of the order. You can see notes on the most recent order by hovering your mouse cursor over the status area for each order.

- RB Status - This is the status of the order within RB Solutions based off the actions completed in the eCommerce Connector for RB.

- Customer Name - The name entered by the customer during the order process.

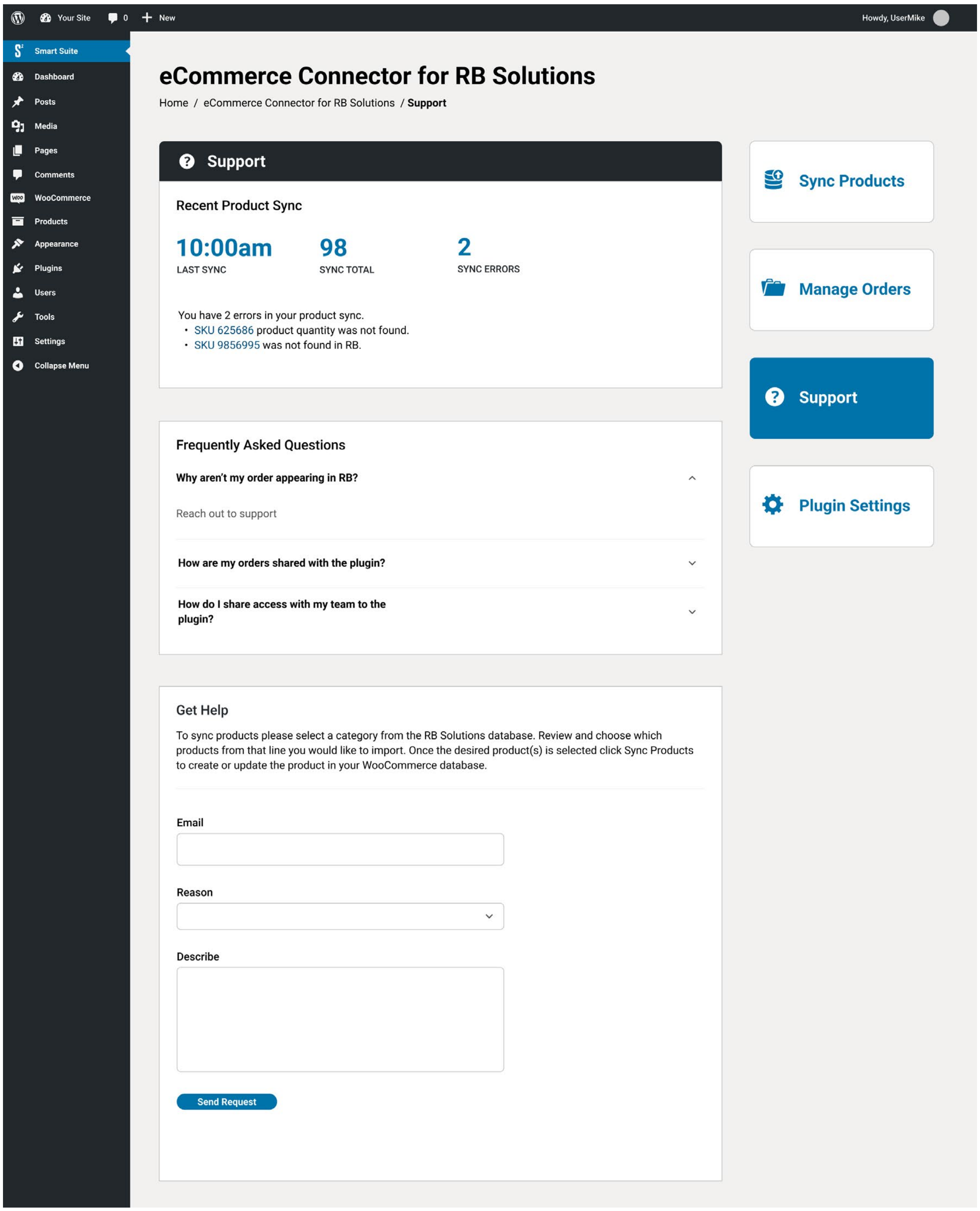
- RB Details -
  - Customer ID - The Customer Match feature will display the matched customer's RB Solutions Customer Identification number here.
  - Order ID - This is the RB Solutions order identification number created when an order is pushed from your webstore into RB via the Post Order action.
  - Payment ID - This populates with the associated payment ID after payment information is sent to RB Solutions

- Total - This is the total amount of the order.

- Error - This icon only displays when the order has an error message. Hover over the icon with your mouse cursor to view the message.

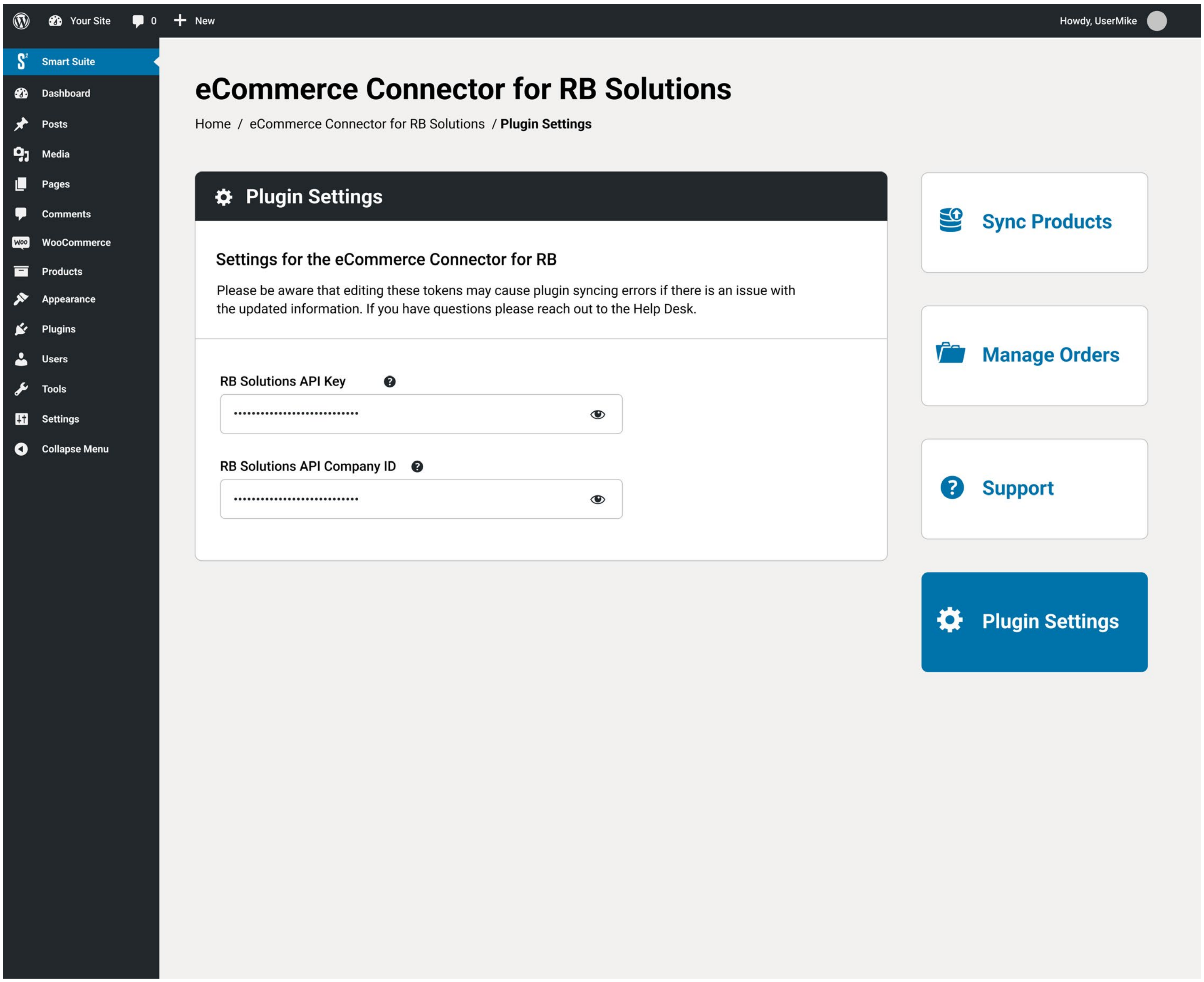
Support

This area allows you to see the sync log for your products. When you have an error in your product syncing an error log here will display the error message for you to resolve. The product number is a hyperlink that will take you directly to where you can edit the product details in WooCommerce's Product area. Review frequently asked questions and submit a support ticket for help from one of our support staff.



Plugin Settings

This area should remain unchanged but should you need to make changes to your settings you can do that here. We recommend reaching out to our plugin support team if you have any questions.



Glossary

Smart Suite
A Wordpress plugin and the home for a collection of solution focused plugin products for WordPress users, powered by The Get Smart Group.

Client ID
This unique ID is created to identify your account within The Get Smart Group databases.

GSG Token
The GSG Token is highly secure data formated and used to transmit sensitive information between two parties in a compact and self-contained manner.

Website URL
The website associated with the WooCommerce webstore account.

API Key
An application programming interface (API) key is a code used to identify and authenticate an application or user. You'll need an API Key for your connected services to complete any plugin integration setups.

Bundle Bar
When searching for a category or products in our Product section, results are bundled into groupings. Groupings are based on a backend timing request. To view a bundle of products, click the drop down arrow to open the bundle and display the table of product information.

Create
Selecting this creates a product in the connected WooCommerce webstore. Utilizing the product information provided by the users RB Solutions database.

Update
This selection updates the previously created product with current product specs within the users RB Solutions database.

Customer Match
This integration searches for existing customers in RB Solutions using the customer details from the online order. If a match is found, the integration matches the online orders with the associated customer profile in RB Solutions.

Dynamic Inventory Sync
Keep your website's products updated with current stock tallies from your RB Solutions inventory. When product inventory numbers change as a result of a webstore sale the plugin will sync and update the inventory accordingly in RB Solutions.

Post Order
This action within Manage Orders takes the selected order from the user's WooCommerce webstore account and duplicates it for the connected RB Solutions account. With this action a RB Solutions Order ID number will be generated and added to the orders information.

Apply Payments
This is the second action within Manage Orders. When a customer completes a purchase and submits payment on the connected WooCommerce webstore it generates a token for the payment authorization and method. This action adds that token information to the RB Solutions order in the RB Solutions database, reflecting a 0.00 balance for the order.