

The Magnifi Widget for Wordpress: Set Up Guide

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First Steps

1. Go to widget.magnifi.io. If you are already registered as a Widget user, sign in with your email address and password now. If you are not yet a Widget user, click **Sign Up** to Register. Registration includes signing up for a Widget Subscription, which is required to use the Widget.

Types of Widget

2. The Magnifi Widget offers the user a choice of two functionalities
 - **“Call”** which allows you to receive “incoming calls” from your clients; and
 - **“Meeting”** which is a group meeting for which the link can be shared.

Call Functionality:

If you would like your clients to be able to call you directly from your website, activate Call functionality within the Widget. Note that at this time, there can be only one Host (you) for this call. Additional participants can be invited to the call using the meeting link from within the Widget once the meeting has begun.

Meeting Functionality:

Use cases of the Meeting Widget include situations such as

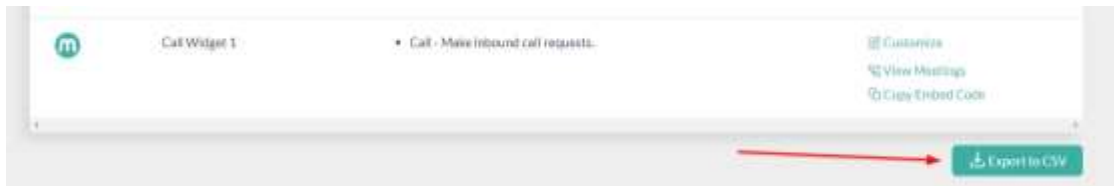
- As the digital venue for an online webinar;
- Including it in a channel to invite your team to a daily stand-up;
- Including it in your project management software to launch a meeting.
- Including it in your customer care centre software to allow customer care reps to easily schedule meetings with clients
- Including it on a password-protected page for authorized members of your organization to schedule meetings.

Creating a Widget

3. Create Widget(s) for the functionality you want to deploy on your Wordpress Website. Detailed instructions for how to create a Widget can be found in the guide [Magnifi Video Widget -Set Up and Use \(Full Version\)](#).

Export your Widget Data from the Widget Admin

4. Navigate to the Widget Management screen at widget.magnifi.io/widgets. Below the list of Widgets there is an “**Export to CSV**” button. Click on this button to download your Widget data file. Save this file somewhere you can access it easily. NOTE: it will download all your Widgets.



Install & Activate the Widget Plugin.

5. Sign into your Wordpress Account and from your Dashboard navigate to the Plugins screen. Select “Add New”. Search for the Magnifi Plugin by using the keyword “Magnifi”, or download the zip file directly from our Website at magnifi.io/wordpress-widget.



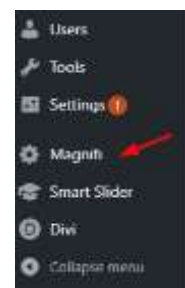
6. Install the Plugin
 - If you searched the Plugin from within Wordpress, just click on the “Install Now” button that comes up with the Magnifi Widget entry.
 - If you downloaded the Zip file, click on the Upload Plugin button on the Plugins screen. Click on Choose File, and select the Widget zip download. Then click the Install Now Button.



7. Click on “Installed Plugins” on your dashboard and scroll until you find the Magnifi Widget. Click on “Activate”.

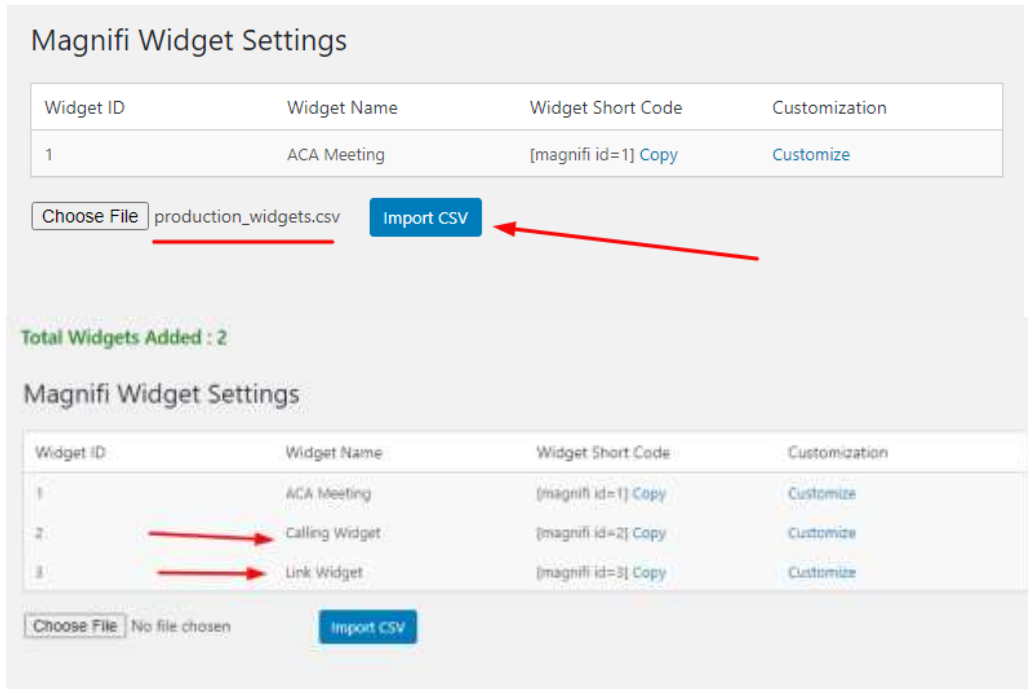


8. You’ll see a new option appear in the dashboard menu down the left panel: Magnifi.



Upload the Widget CSV file

9. Click on “Magnifi” to navigate to the Magnifi screen
10. Click “Choose File” and select the CSV file you downloaded from the Widget Admin. Then click “Import CSV” to upload your Widget data.
11. The Widgets you uploaded will appear as new entries in the Widget ID table



- Widgets will display using the name you gave them in the Widget Admin.
- Each Widget has a Widget Short Code, which you can copy.
- Each Widget has a Customize option, which is where you would enter the specific user data for Group Widgets. For single-host widgets (Call or Meeting), you can ignore customizations.

Embedding the Widget on Wordpress

12. The Short Codes are how you tell Wordpress where to embed the Widget on the site, and which Widget to embed. Copy the Short Code for the Widget you’d like to embed.
13. On your Dashboard, navigate to the Page or Post where you’d like to embed the Widget.
 - You can drop the Widget Short Code in a code block or a paragraph block. Below is an example of the Short Code dropped into a Wordpress sample Post. On the left is the edit screen, and on the right is the published post



14. Widget location within a block can be further adjusted using Custom CSS. The ID for a Widget is “**widget-container-x**” (where x = the widget number assigned by Wordpress on the Magnifi screen). In our example above, we used Widget 2 so the ID for that Widget for CSS purposes would be “**widget-container-2**”

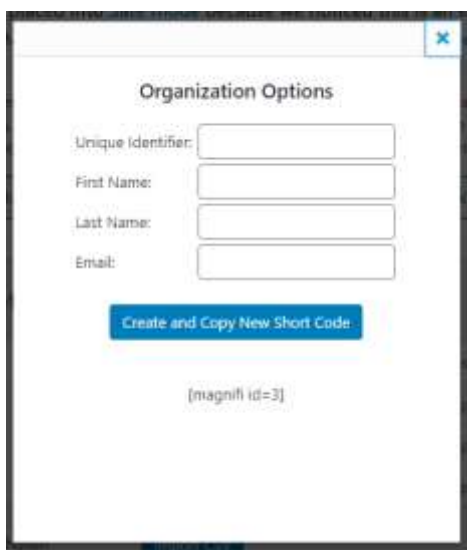
Group Meeting Widgets & Customizations

15. If you need to embed a Group Widget (one with a number of authorized users), you will need to customize the Widget data on the Magnifi screen on the Wordpress dashboard. This customization tells the system who the designated host of the meeting will be in this case.

Magnifi Widget Settings			
Widget ID	Widget Name	Widget Short Code	Customization
1	ACA Meeting	[magnifi id=1] Copy	Customize
2	Calling Widget	[magnifi id=2] Copy	Customize
3	Link Widget	[magnifi id=3] Copy	Customize 

16. Customizations will only take effect on Meeting Widgets (AKA Link Widgets).

- Click on Customize for the Widget you want to embed. That will bring up the Customize screen.
- You’ll need to refer back to your Groups in the Widget. Identify the Group Member who you’d like to make host of this Meeting Widget. You’ll need their Unique Identifier (UUID), their First and Last name, and their Email address.
- On the left you see the blank Customize form, with the original Short Code at the bottom. On the right you see the Customize form filled out with my information as host, and the new, extended Short Code that includes my Host data. Note that in this case we elected to use our email addresses as our Unique Identifier when we created the Widget in the Widget Admin, but the UUID could also be a unique alphanumeric code. You must use the member UUID you assigned to this host in the Group associated with this Widget.



Organization Options

Unique Identifier:

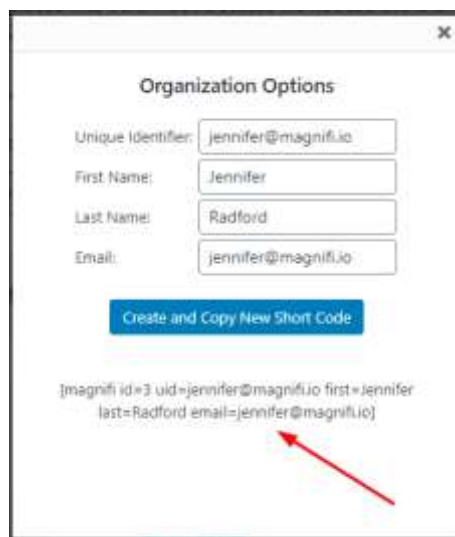
First Name:

Last Name:

Email:

[Create and Copy New Short Code](#)

[magnifi id=3]



Organization Options

Unique Identifier:

First Name:

Last Name:

Email:

[Create and Copy New Short Code](#)

[magnifi id=3 uid=jennifer@magnifi.io first=Jennifer last=Radford email=jennifer@magnifi.io]