

HelpGuru Documentation

Getting Started

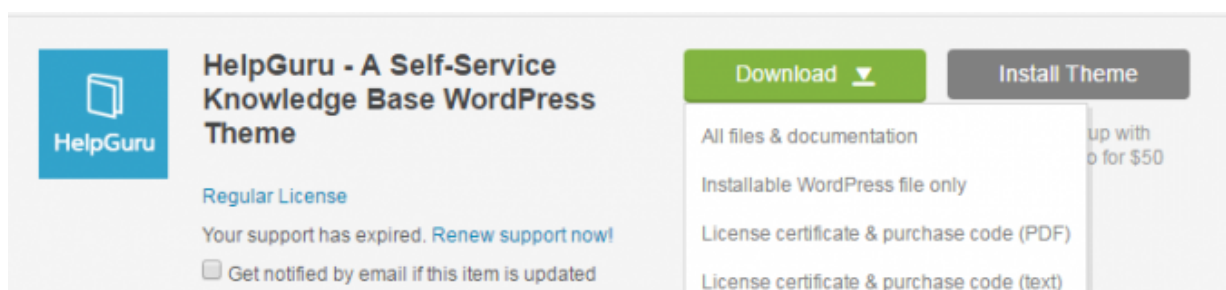
To install the theme you must have WordPress already installed on your server. Please consult the [WordPress installation guide](#) or your web host provider for help with this.

Need help choosing a website host for your new site? See our [Recommended WordPress Web Hosting providers](#)

Upgrade Note: If you are upgrading from an older version of HelpGuru, be sure to read and follow the [HelpGuru Upgrade Documentation](#)

1. Theme Installation

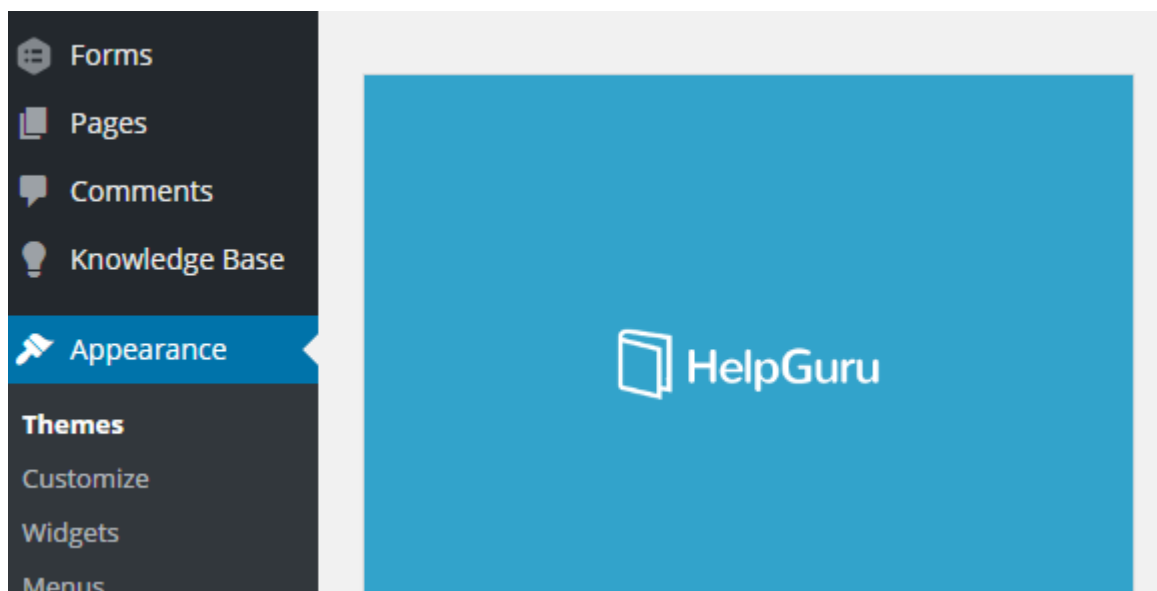
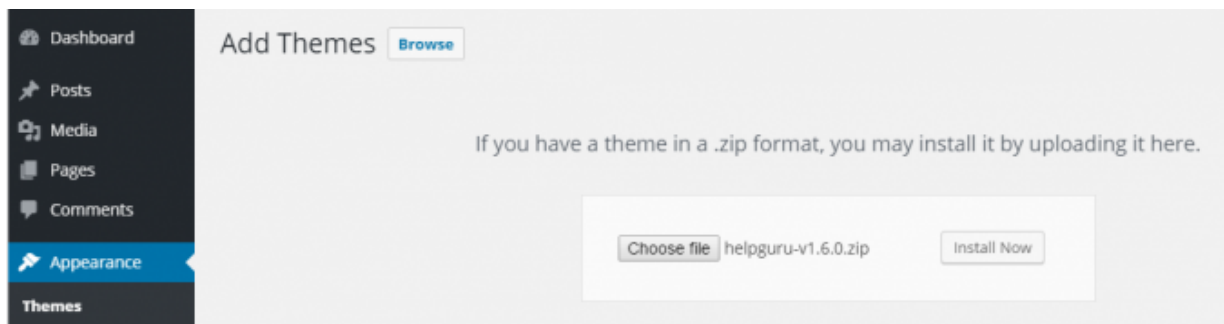
On purchase, you can download HelpGuru from your Downloads section on ThemeForest, you'll need to download the complete theme package with the All files & documentation Download option and extract the helpguru.zip installable theme contained in the package to start the installation process.

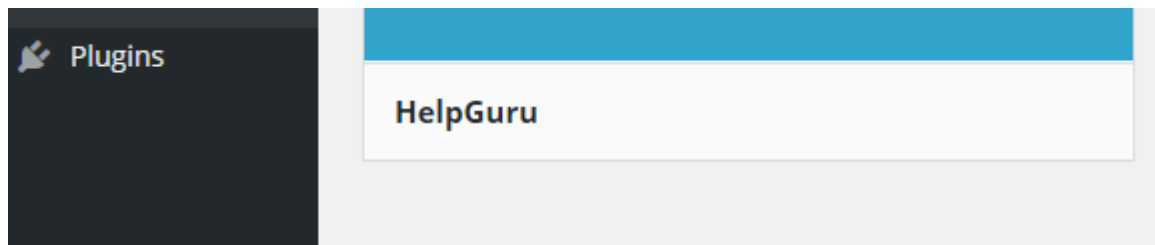


The theme can be installed using either of the following two methods:

- **WordPress Upload (recommended):** In the WordPress admin panel navigate to *Appearance > Add New Themes > Upload*. Go to browse and select the zipped theme folder. Press install now and the theme will be uploaded and installed. This is the helpguru.zip extracted . *If you get a missing style.css error, you will first need to extract helpguru.zip installable theme first.*
- **FTP Upload:** Using your FTP program upload the un-zipped theme folder into the `/wp-content/themes/` folder of your WordPress installation.

Once the theme is uploaded, you need to activate it. Go to *Appearance > Themes* and activate your theme.

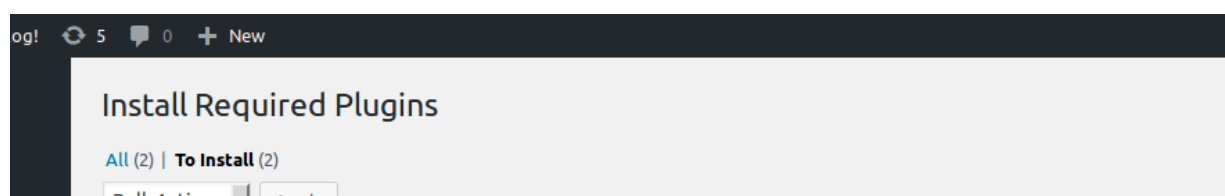
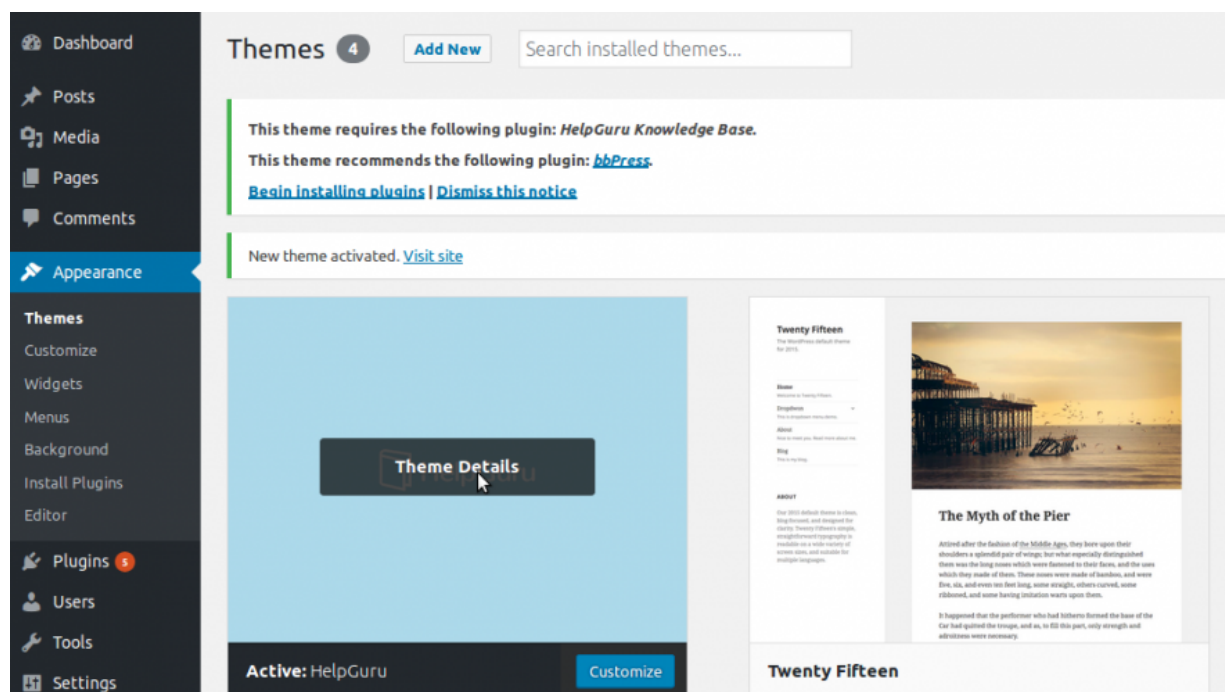


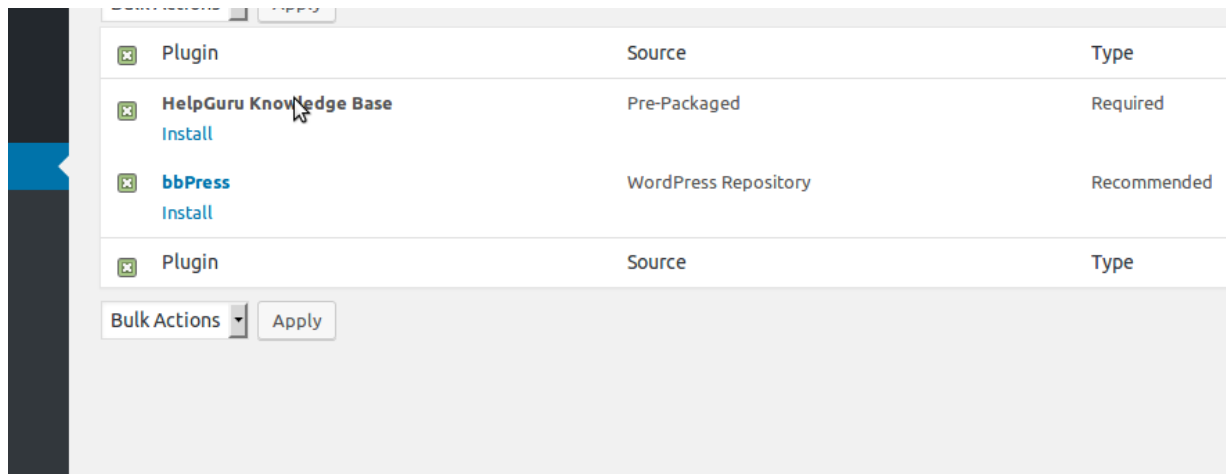


2. Install and Activate Required Plugins

Upon activation, you will be prompted to install HelpGuru Knowledge Base and (optionally) bbPress. These are plugins which enable the functionality of the Knowledge Base and the Forums features of this theme.

Select *Begin installing plugins* and select all the plugins and then install from the drop down. Click Apply. The plugins will be downloaded where appropriate. When the message appears again, return to the install required plugins page and activate each of the plugins in turn.



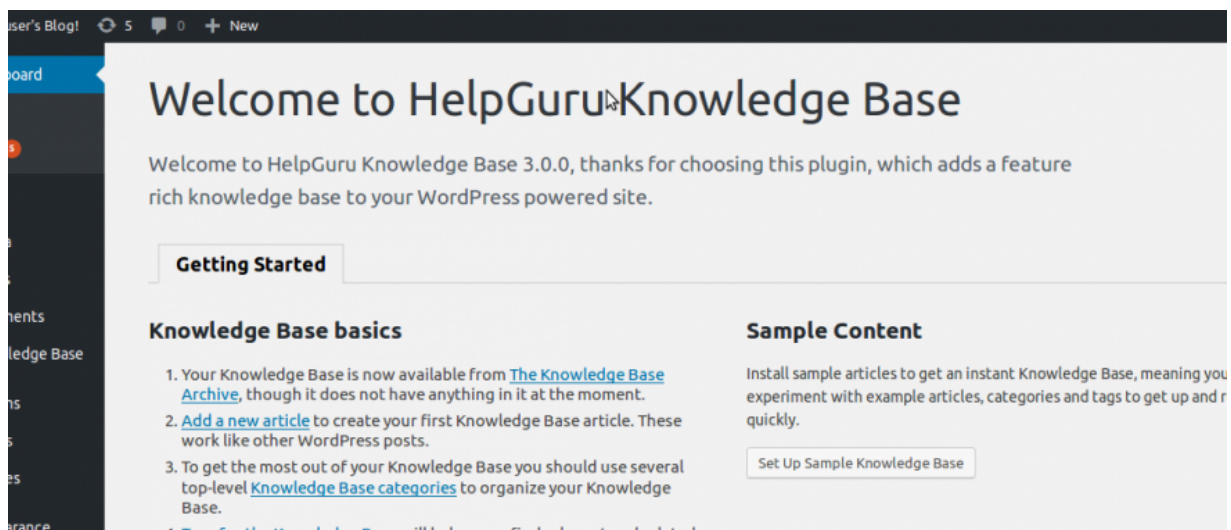


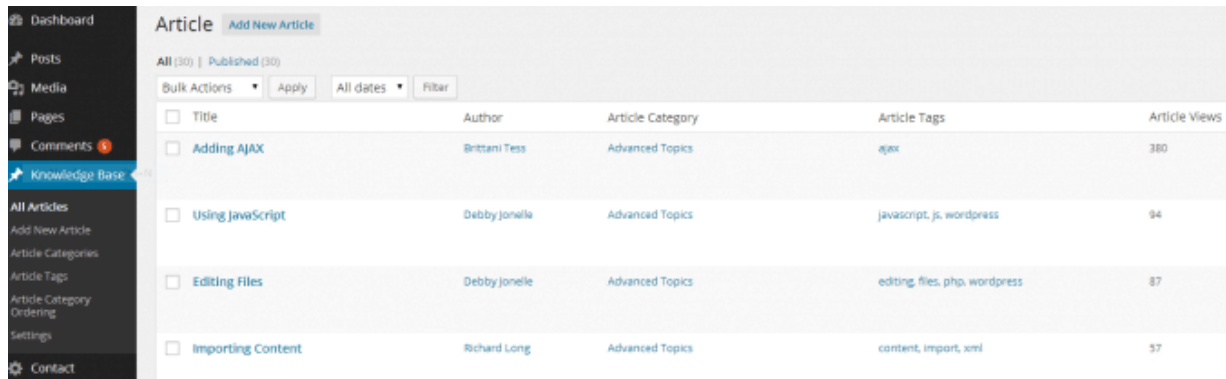
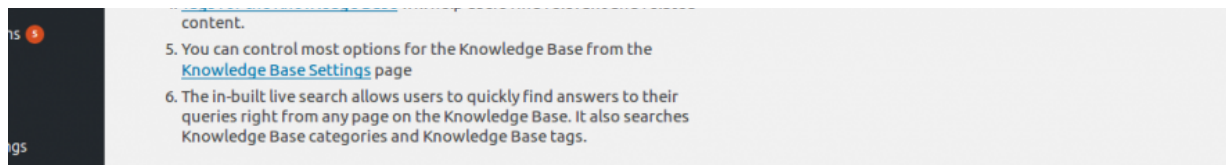
3. Setting up the HelpGuru Knowledge Base

Once you have installed and activated the plugins you will then be able to setup your knowledge base.

You can add content now, either by using the Set Up Sample Knowledge Base button from the Welcome screen, Installing the HelpGuru demo content (see later section) or start creating your own content.

HelpGuru includes a dedicated Knowledge Base plugin, designed for this theme. We do not offer support for the HelpGuru Knowledge Base without HelpGuru as the active theme.





The title, tagline and sidebar position for the HelpGuru knowledge base section can be controlled from the theme customizer in *Appearance > Customize > Knowledge Base*.

The settings for the HelpGuru knowledge base, can be found in *Knowledge Base > Settings*.

General Settings

Control the overall settings for the knowledge base, including

- Breadcrumbs display
- Sort By
- Sort Order
- Number of Articles

Archive Settings

Settings for the main knowledge base archive, including

- Number of columns
- Display article count
- Number of articles to display in archive
- Display subcategories
- Subcategory depth
- Display subcategory articles
- Hide empty categories

Article Settings

Display options for the articles, including

- Enable comments
- Display article usefulness
- Display article views
- Display comment count
- Display related articles

Search Settings

Options for live search functionality, including

- Enable live search
- Focus live search on page load
- Search placeholder text
- Display search result excerpt

Slugs

Set slugs for the knowledge base, including

- Articles slug
- Article Categories slug
- Article Tags slug

Custom Style

Text entry for small style snippets to the knowledge base (or sitewide), note it recommend to use a [customized child theme](#) for modifications.

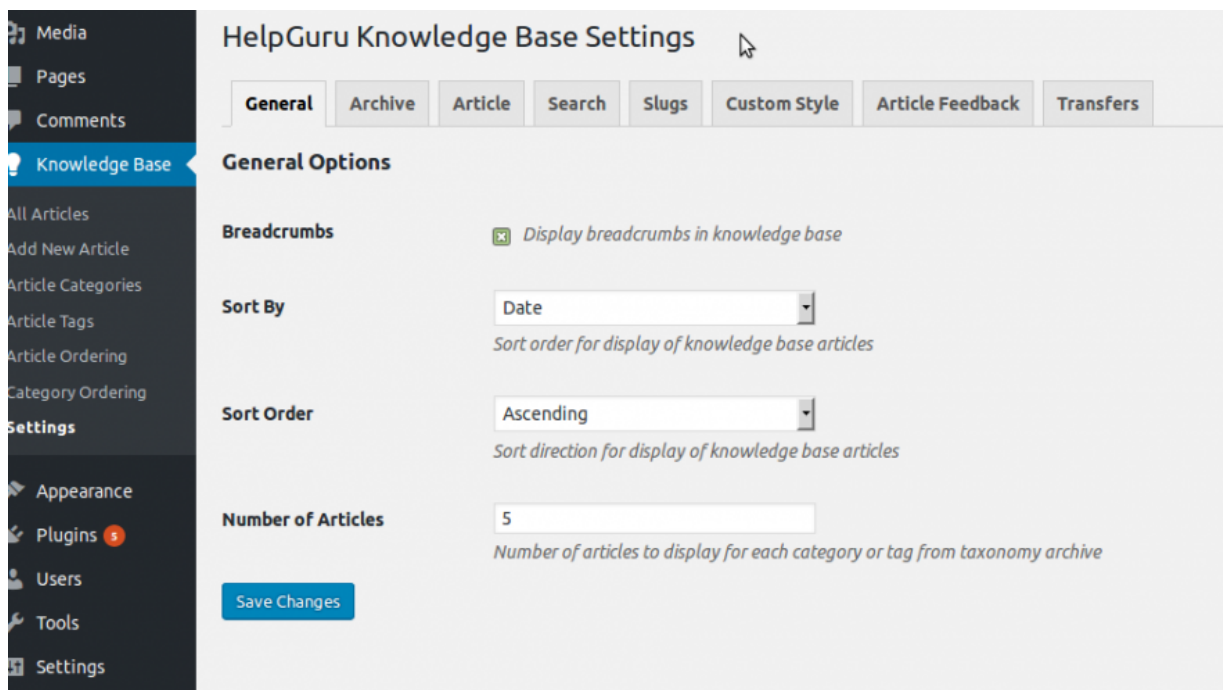
Article Feedback Settings

- Article Feedback
- Options for article feedback, including
 - Enable feedback
 - Enable anonymous feedback
 - Collect upvote feedback
 - Collect downvote feedback

Transfers Settings

Options for capturing transfers/visits to external help or ticketing systems, including

- Default transfer URL
- Load transfer links in new window



4. Setting up bbPress forums

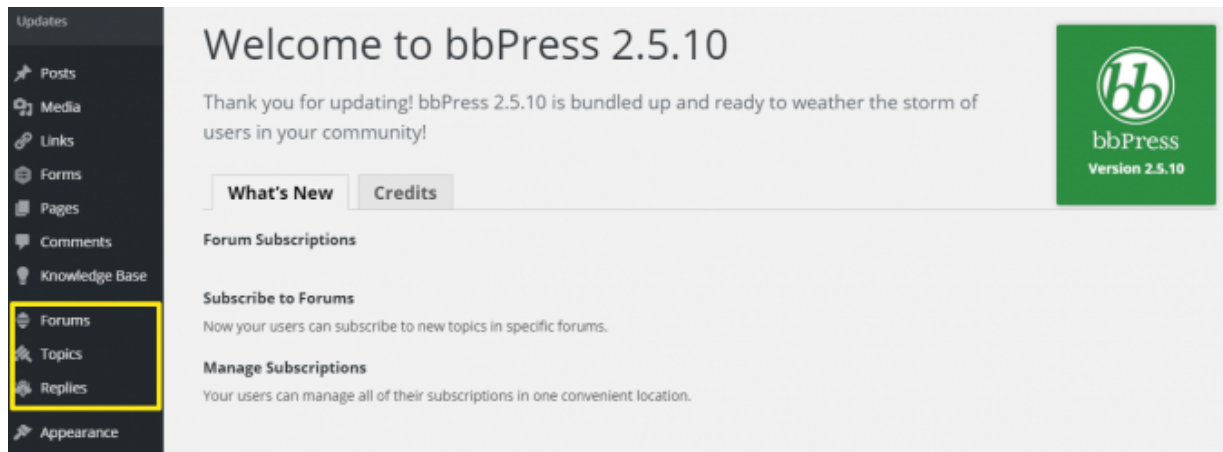
This theme supports [bbPress](#), a popular forum plugin for WordPress. With bbPress you can add forums to your Hero Theme powered site.

When the theme is installed and activated, you may see a notification advising you that bbPress is recommended plugin and prompting to install bbPress. If this does not appear, or you want to install bbPress later search *bbPress* from *Plugins > Add New > Search*.

Install and activate bbPress. Once installed, you will be greeted by bbPress the welcome screen and have three new menus in your administration panel menu – Forums, Topics and Replies. The theme will also display a link to the forum from the front page of your site if you have the front page set up as described below.

Create your first categories and forums by selecting *Forums > New Forum*, or

install the HelpGuru demo content as described below. You and your users can create categories, forums, topics, make replies and build a community to complement your Hero Themes powered site.



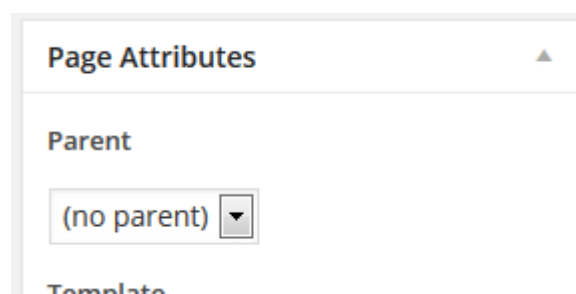
For additional help and support around the general use of bbPress, consult the [bbPress website](#).

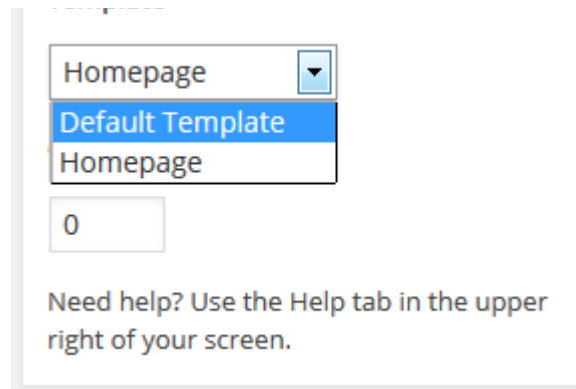
5.1. Home Page and Blog Setup

To setup the homepage page and blog page. Simply go to *Pages > Add New* and create the following pages with no content:

- Blog
- Home

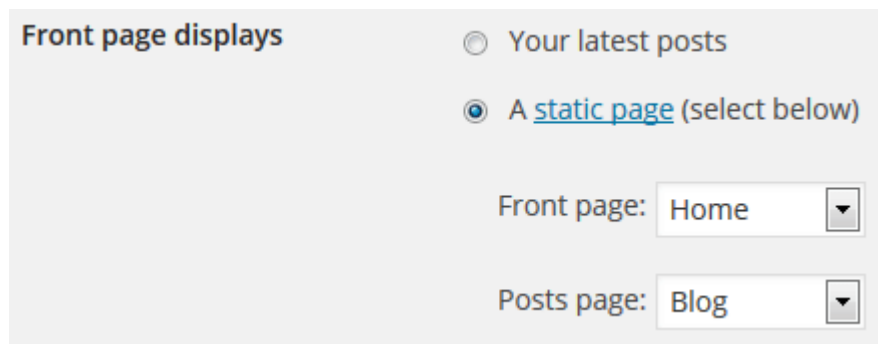
For the Home page, be sure to select the custom **Homepage** template from the Page Attributes metabox to ensure it uses the correct page layout.





Selecting the template from the page attributes meta box

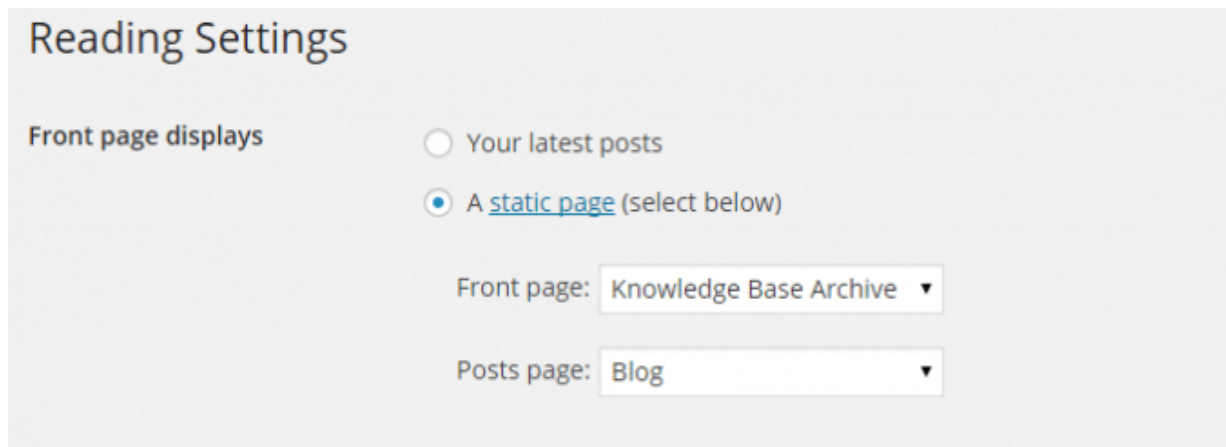
Next we need to assign these pages in WordPress as our homepage and blog page. Go to *Settings > Reading* and set the settings like this:



Controlling the front page options

5.2. Using the Knowledge Base as your Homepage

Alternatively, to use the Knowledge Base as the homepage, set *Front page* to Knowledge Base Archive in *Settings > Reading*.



Reading settings using the knowledge base as the front page

6. Import the Demo content

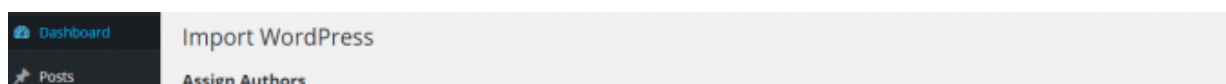
Contained in the HelpGuru theme package is the `helpguru.wordpress.demo.xml` file, which can be used to replicate the content from the [HelpGuru demo site](#).

Note that some manual configuration of widgets and menus is still required and due to licensing restrictions, no images are included.

This is an optional step and only required if you are initially replicating the look of the HelpGuru demo.

To begin installing the demo content, goto Tools > Import and select WordPress from the list. If not installed, the WordPress Importer will be installed.

To import the demo content, select the `helpguru.wordpress.demo.xml`, found in the HelpGuru theme package. Click *Upload and Import*. On the next screen, you can change the authors if you wish, otherwise click *Submit* to complete the import process.



To make it easier for you to edit and save the imported content, you may want to reassign the author of the imported item to an existing user of this site. For example, you may want to import all the entries as `admin`'s entries.

If a new user is created by WordPress, a new password will be randomly generated and the new user's role will be set as subscriber. Manually changing the new user's details will be necessary.

1. Import author: **Admin User (Admin User)**
or create new user with login name:
or assign posts to an existing user: - Select -
2. Import author: **Brittani Tess (demo3)**
or create new user with login name:
or assign posts to an existing user: - Select -
3. Import author: **Richard Smith (richard)**
or create new user with login name:
or assign posts to an existing user: - Select -
4. Import author: **Debby Jonelle (demo1)**
or create new user with login name:
or assign posts to an existing user: - Select -
5. Import author: **Thales Philibert (demo4)**
or create new user with login name:
or assign posts to an existing user: - Select -

Import Attachments

☐ Download and import file attachments

7. Configure the Navigation Menu

To setup your custom menus, navigate to *Appearance > Menus*. Give your menu a name and click *Create Menu*.

With the new menu you can add a variety of items including pages, categories, custom links. To extend the available items, you may need to select the Screen Options tab at the very top of the screen and configure the visible items.

Once you have built and saved your menu, select *Primary Navigation* in the Menu Settings section to assign the menu to the navigation area of the theme.

Menus [Manage with Live Preview](#)

Edit your menu below, or [create a new menu](#).

Pages

Most Recent [View All](#) [Search](#)

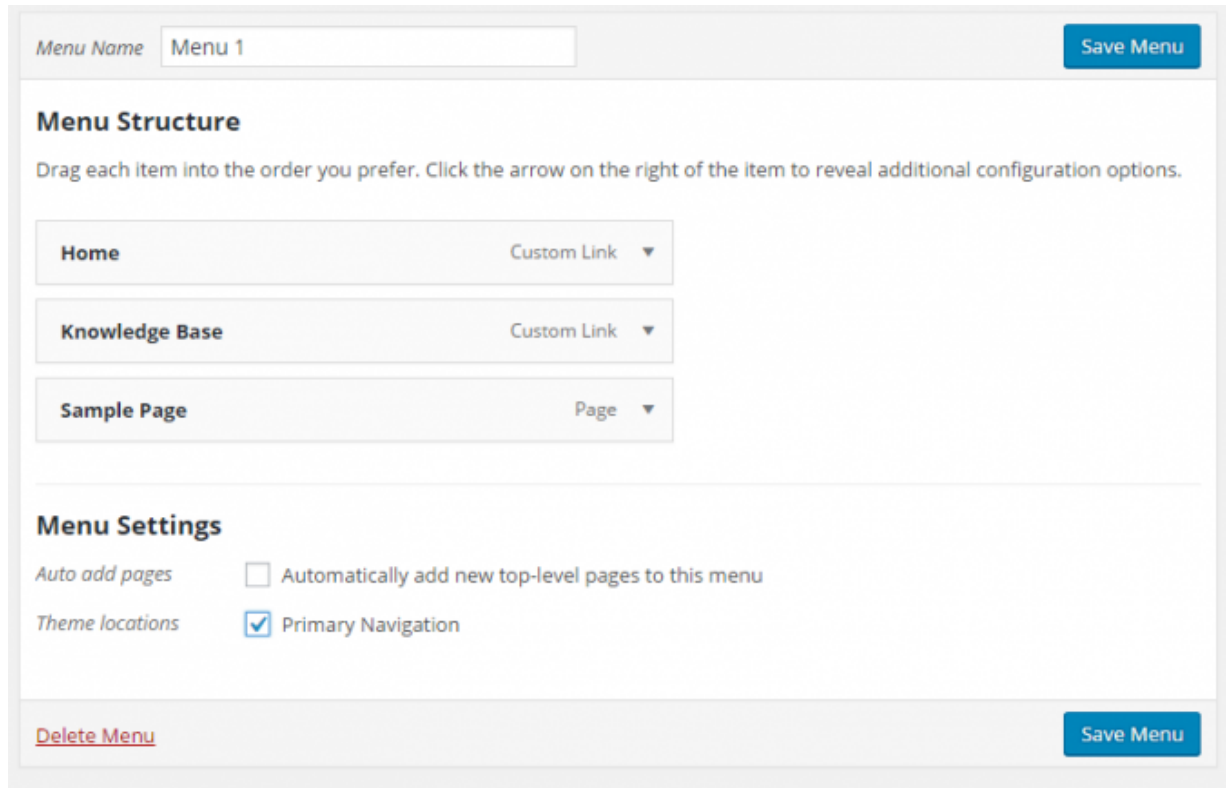
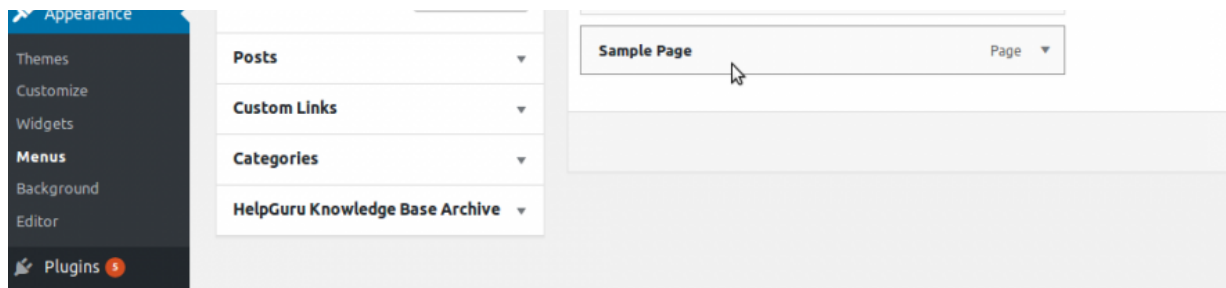
☐ Sample Page

[Select All](#)

Menu Structure

Edit your default menu by adding or removing items. Drag each item into the order you prefer.

Home [Custom Link](#)

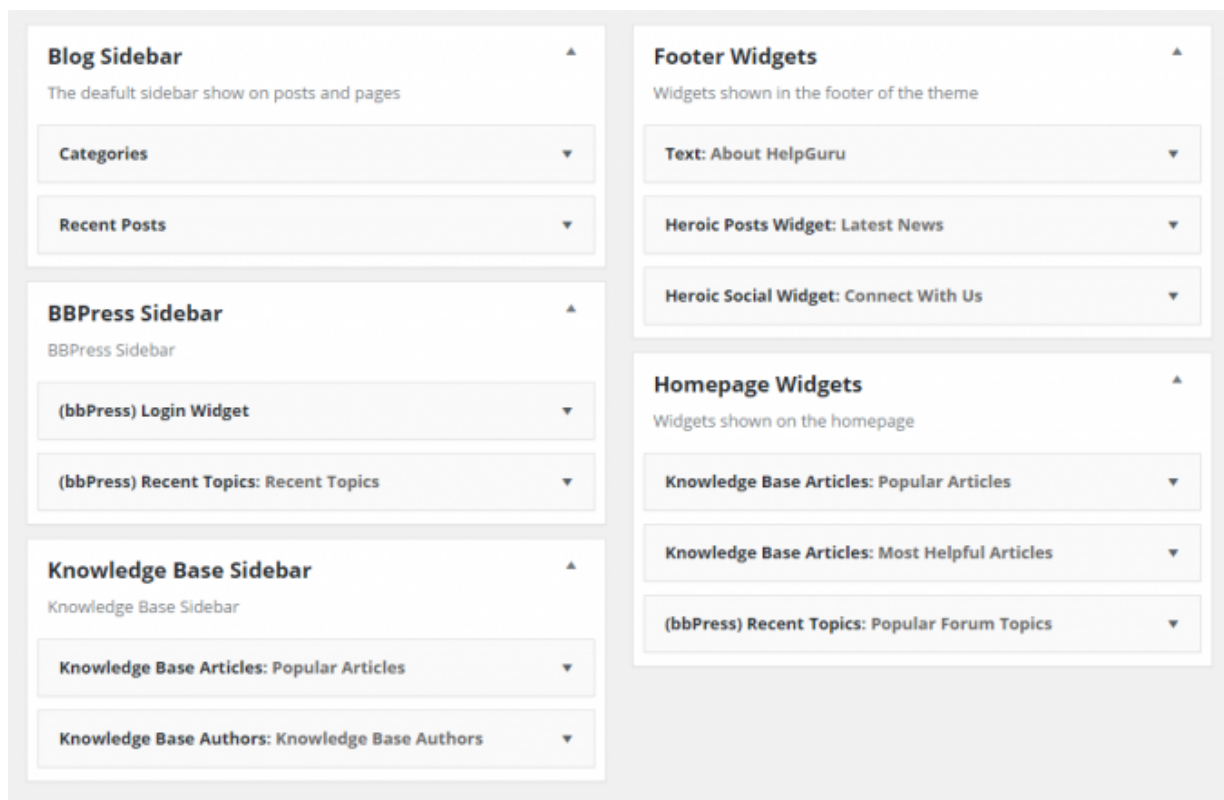


8. Configure the Widgets

This theme features several Widgetized areas, which allow you to drag ‘n’ drop WordPress widgets which can be accessed from *Appearance > Widgets*.

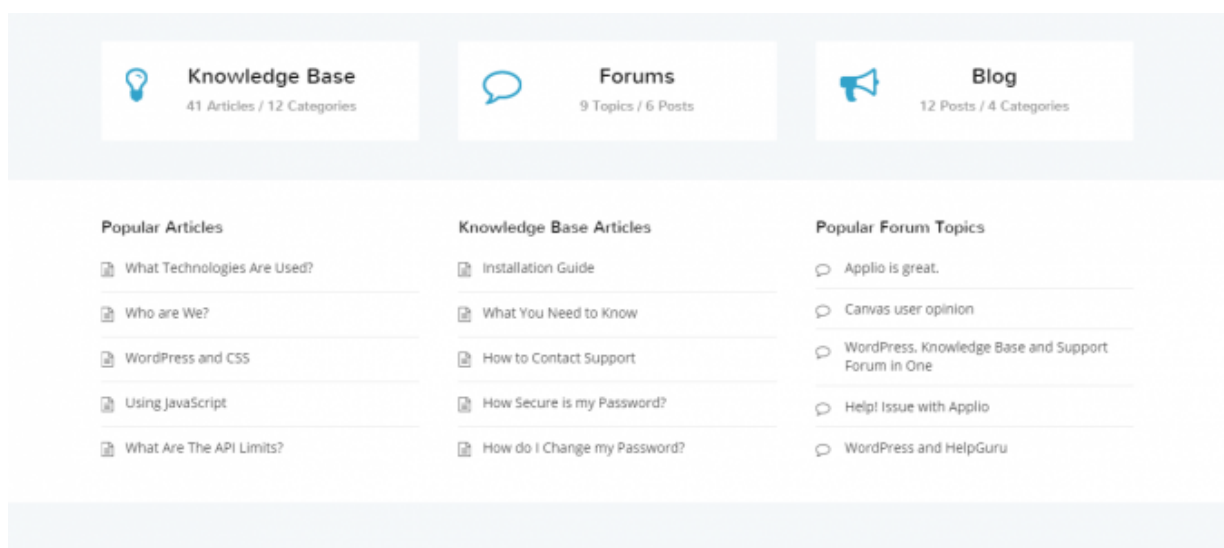
The widgetized areas include: the default sidebar, BBPress Sidebar (if active), Knowledge Base Sidebar, Footer Widgets and Homepage Widgets. To use a widget in one of these areas, drag it from the Available Widgets panel on the left into one of the boxed areas on the right. Various options can then be set, including the title of the widget and what content appears.

Widget availability may depend on what plugins are installed and activated.



9. Using your new theme

With the initial setup done, you can add/edit content. Change colors and layout (see the customizer options in the section below), and craft your help center.



About HelpGuru

This site was set up using the documentation

Latest News




Hello world!

The Business Case for Loving Customers

The Ultimate Database of Customer Service Quotes

75 Customer Service Facts, Quotes & Statistics

Social



Configuration Options

Customizer Settings

You can customize various visual aspects of the theme using the WordPress Live Customizer. Go to ***Appearance > Customize***. Take some time to take a look through the options and customize them for your site.

Header Options

- Site Title – The title for your site
- Tagline – A tagline for your site
- Site Logo – Add a custom logo, recommended size is 200px wide and 55px tall.

Footer Options

- Site Copyright – Enter your site copyright message

Styling Options

- Link Color (Hover) – Select using this color picker
- Link Color – Select using this color picker
- Header BG Color – Select the header background color using this color picker
- Header Font Color – Select the header font color using this color picker

- Page Header BG Color – Select the banner background color using this color picker
- Page Header Font Color – Select the banner font color using this color picker

Header / bbPress / Blog / Knowledge Base Options

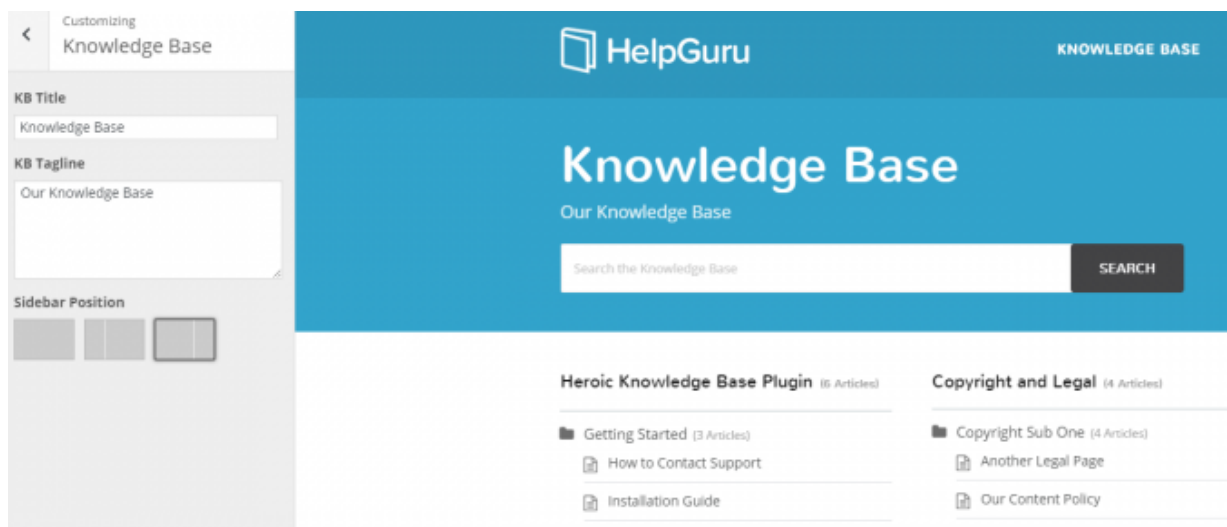
- Headline – The headline that appears in the top banner on this page
- Tagline – A tagline for beneath the tagline on this page
- Sidebar Position – Set the position of the sidebar in these sections (None, Left or Right)

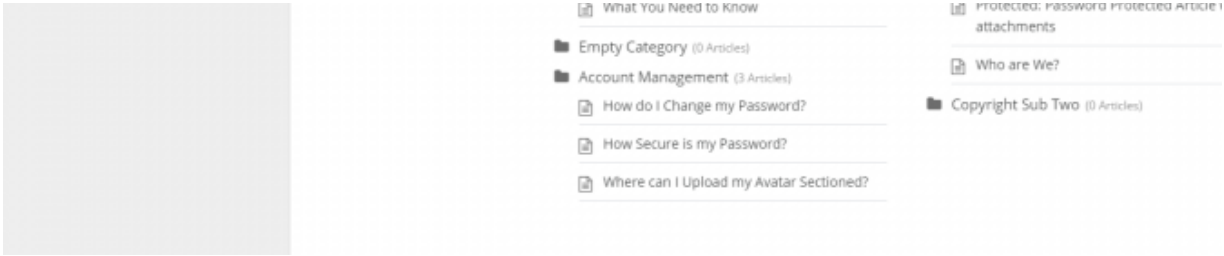
Navigation Options

- Primary Navigation – select the menu you want to use for the main navigation, these can be created or edited from *Appearance > Menus*.

Widgets (bbPress Sidebar, Knowledge Base and Footer Widgets)

- Widgets Shown – add/edit widgets from the live customizer. These can also be controlled from *Appearance > Widgets*.





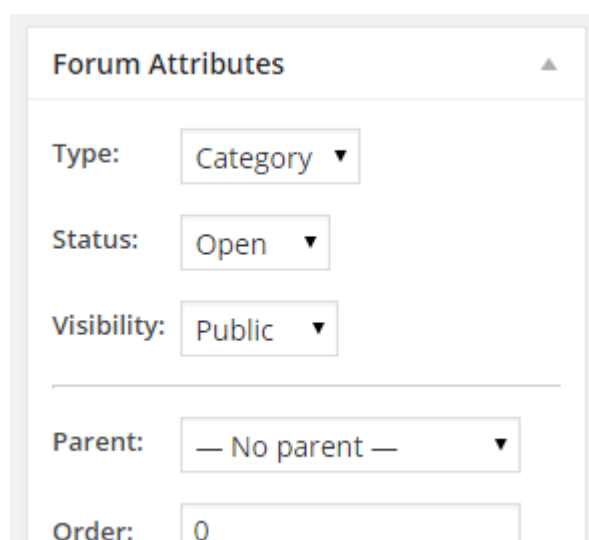
Getting the most out of your theme

Using Categories and Forums

When you set up the forums, it is important to consider the structure of the forums. Setup several categories with sub-forums to ensure it looks aesthetically pleasing.

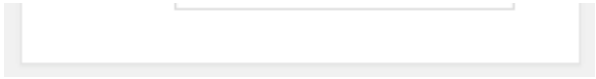
First you need to create several forum Category types, eg General, Product Support, Other. Into these you should put your Forum types, eg Announcements, Feedback and Suggestions, My App Support, Their App Support, etc. These are the sections where users can start individual topics/threads.

Categories and Forums are created in a similar way by selecting *Forums > New Forum*. The forum type is then set on the right under Forum Attributes. Set the parent Category Types under the Type drop-down option. For forums, select Forum as the Type and the Parent as the parent category you wish the forum to appear.



The image shows a 'Forum Attributes' form with the following fields:

- Type:** A dropdown menu with 'Category' selected.
- Status:** A dropdown menu with 'Open' selected.
- Visibility:** A dropdown menu with 'Public' selected.
- Parent:** A dropdown menu with '— No parent —' selected.
- Order:** A text input field containing the number '0'.



Step 1. Creating a parent category

Forum Attributes

Type:

Forum

Status:

Open

Visibility:

Public

Parent:

General

Order:

1

Step 2. Creating a forum in the parent category

The bbPress forums on the [HelpGuru demo forums](#) site are configured with two parent Categories – General and Product Support. In each of these there are several Forums – Announcements, Feedback and Suggestions, Tulip App Support, Product Support, Applio Support.

Dashboard

Analytics

Posts

Media

Pages

Comments 54

Knowledge Base

Contact

Forums

All Forums

New Forum

Topics

Replies

Appearance

Plugins

Users

Forums

New Forum

All (7) | Published (7)

Bulk Actions

Apply

All dates

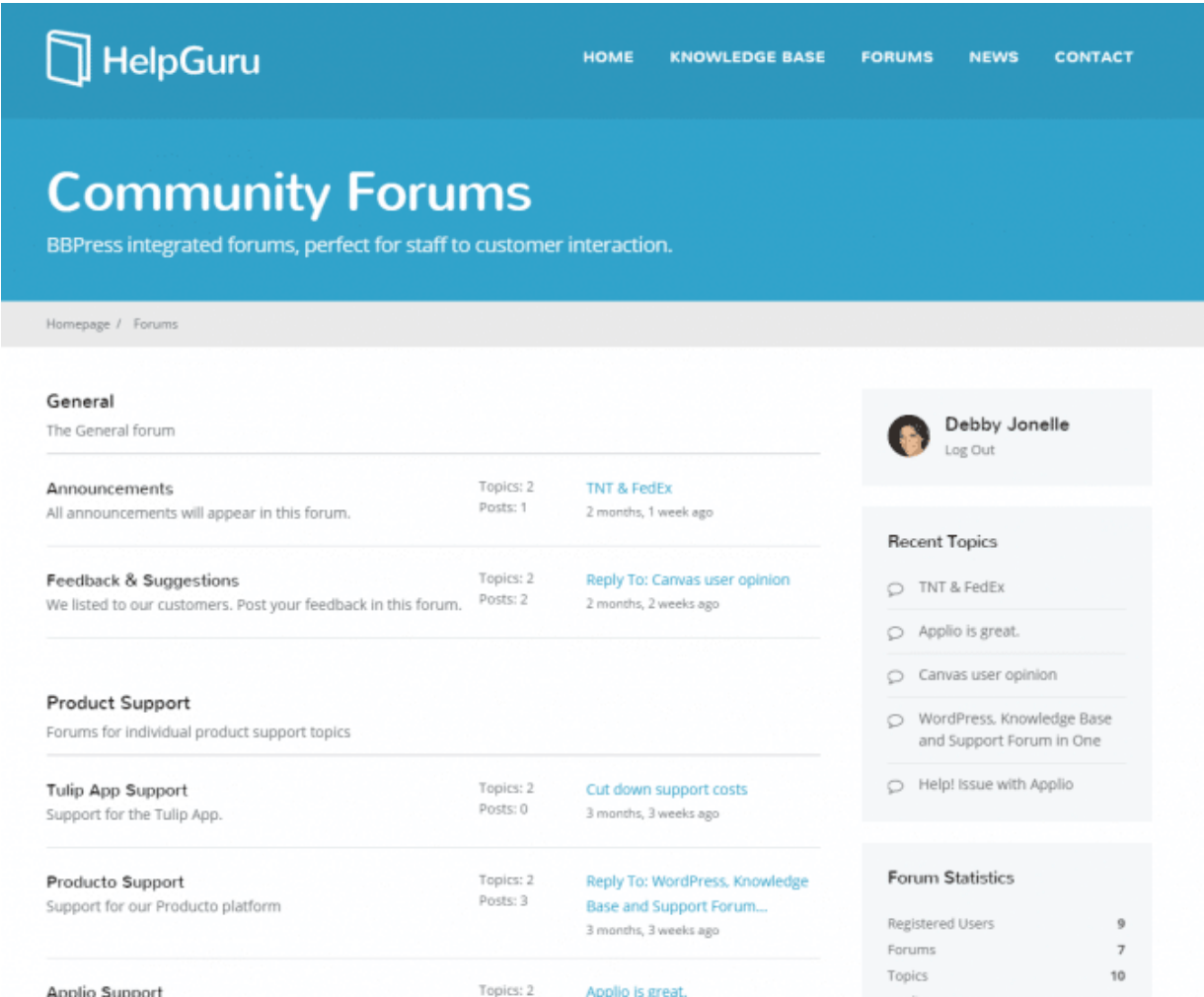
Filter

7 items

<input type="checkbox"/> Forum	Topics	Replies	Creator	Created	Freshness
<input type="checkbox"/> General The General forum	4	3	Chris Mooney	July 24, 2014 12:30 pm	2 months, 1 week ago
<input type="checkbox"/> — Announcements All announcements will appear in this forum.	2	1	Chris Mooney	July 24, 2014 12:32 pm	2 months, 1 week ago
<input type="checkbox"/> — Feedback & Suggestions We listed to our customers. Post your feedback in this forum.	2	2	Chris Mooney	July 24, 2014 12:32 pm	2 months, 2 weeks ago
<input type="checkbox"/> Product Support Forums for individual product support topics	6	4	Chris Mooney	July 24, 2014 12:31 pm	3 months, 3 weeks ago
<input type="checkbox"/> — Tulip App Support Support for the Tulip App.	2	0	Richard Long	July 27, 2014 6:31 pm	3 months, 3 weeks ago
<input type="checkbox"/> — Product Support Support for our Producto platform	2	3	Chris Mooney	July 24, 2014 12:33 pm	3 months, 3 weeks ago

The configuration of the forums on the demo site

This results in a structured appearance in the community forums section of the site.



The appearance of the forums on the demo site

Featured Images

The theme supports the use of featured images. The theme supports auto-resizing of the featured images. Auto-resizing will only occur however when the image is uploaded for the first time, images that have previously been uploaded will not be resized. You can however use the [Regenerate Thumbnails](#) plugin to regenerate the thumbnails to fix this.

To upload a post thumbnail, go to *Posts > Add New* or open an existing post in

editing mode. Locate the Featured Image module and click the Set featured image link.

Clicking the link will open up the WordPress image uploader where you will upload your image. Simply make sure that it is either the same size or larger than what the final thumbnail will be. Once you're done uploading the image, simply click the link that says "Set Featured Image", which is next to the button to insert it into the post.

For more on how to use the WordPress' Post Thumbnail feature, please see this article [from WordPress on featured image support](#).

Homepage Menu Blocks

HelpGuru's homepage varies depending on whether the forum is active, it does not display a forum link if bbPress is not installed/activated.

To change the blocks you will need to customize the Homepage template, please refer to our guide on [customizing your theme](#).