

MIS Webform Pro — Setup & Operations Guide

How to use this guide

Do the parts in order: release first (Part 1), then the store (Part 2), then test each feature on a real site before you sell. Each part lists what to click, what to type, and what goes wrong.

Package	Installed on	Version
MIS Webform (free)	WordPress.org, every customer site	2.0.1
MIS Webform Pro	Customer sites (needs free 2.0.1+)	0.4.0
Easy Digital Downloads + Software Licensing	mistechnolabs.com (sells Pro, issues keys, delivers updates)	Current

The tricky parts are the ones that depend on an outside service: the EDD product ID built into Pro, Google two-way sync, Microsoft Excel sign-in, WhatsApp templates and tokens, and AI keys. Everything else works from the settings screens without setup.

Part 1 — Releasing

Release in this order: free 2.0.1 first (Pro refuses to run on 2.0.0), then set up the EDD product (Part 2), then build Pro with that product's ID.

1.1 Publish free 2.0.1 on WordPress.org

1. Open `mis-webform-2.0.1.zip` and check that `readme.txt` shows **Stable tag: 2.0.1** and the 2.0.1 changelog.
2. Run Plugin Check on a test site with 2.0.1 installed. The diff file lists every change from 2.0.0.
3. Commit to SVN: copy the files into `trunk/`, then `svn cp trunk tags/2.0.1`, then commit.

What 2.0.1 changes for free users: nothing visible. It adds hooks for Pro, keeps running when Pro is active, lifts the one-feed limit only when Pro allows it, and keeps `pro_*` form settings when a form is saved.

1.2 Put the EDD product ID into Pro

Pro identifies itself to your store by the EDD **Download ID** of the MIS Webform Pro product. Licenses can't be activated until it's set.

1. Create the product in EDD first (Part 2.2) and note its ID: **Downloads** → **All Downloads**, hover the product, the ID shows under its name.
2. Open `mis-webform-pro/mis-webform-pro.php`. Set `MISWFPRO_ITEM_ID` to that number (it ships as `0`).
3. `MISWFPRO_STORE_URL` is already `https://mistechlabs.com`. Change it only if the store moves.

For local testing, don't edit the file; override both in the test site's `wp-config.php` instead (Part 3.4).

1.3 Build and upload a Pro release

1. Check the version number in two places in `mis-webform-pro.php`: the `Version:` header and `MISWFPRO_VERSION`. They must match.
2. Zip the folder so the zip contains `mis-webform-pro/` at the top. Keep the `vendor/edd-s1-sdk/` folder inside; it is EDD's official updater.
3. On the store, edit the MIS Webform Pro download. In **Download Files**, upload the new zip. In the **Licensing** box, set **Version number** to the new version, select that file as the **Update file**, and fill the **Changelog**.
4. Update. Licensed sites see the update in Dashboard → Updates; click **Check again** on a test site to see it immediately.

EDD delivers updates only to sites whose license is active and not expired.

Part 2 — Selling Pro with Easy Digital Downloads

EDD with the Software Licensing extension does all of the store work: checkout, license keys, site limits, renewals, refunds and update downloads.

2.1 Install on mistechnolabs.com

1. Install **Easy Digital Downloads** (free, from WordPress.org) and the **Software Licensing** extension (included in EDD's paid passes; download it from your EDD account).
2. Optional: the **Recurring Payments** extension charges the yearly renewal automatically. Without it, customers renew from a reminder email.
3. Set up a payment gateway under **Downloads → Settings → Payments**. EDD includes Stripe and PayPal. For Razorpay, check for an EDD gateway add-on that supports it before you rely on it.
4. Make sure no security, maintenance or "coming soon" plugin blocks requests to the site's home page with `?edd_action=`. EDD's documentation names these as the usual reason activations fail.

2.2 Create the MIS Webform Pro product

1. **Downloads → Add New**. Title: `MIS Webform Pro`. Set the yearly price.
2. In the **Licensing** box: tick **Enable licensing**, set **License length** to 1 year, and **Activation limit** to 1 (or more).
3. For tiers (1, 5, unlimited sites), turn on **variable pricing** and give each price its own activation limit.
4. Upload the Pro zip under **Download Files**, then fill the version and update file as in 1.3.
5. Publish, then note the Download ID for 1.2.

2.3 Renewals, reminders and refunds

- **Downloads → Settings → Extensions → Software Licensing**: turn on renewals, set an optional renewal discount, and edit the expiry reminder emails.
- A customer renews from the reminder email, their account, or the **Renew license** button in Pro (it opens your checkout with the key already filled in). The same key is extended.
- Refunding an order in EDD disables its license; Pro switches off at its next check (within 12 hours).

2.4 Where things are managed

- **You: Downloads → Licenses** lists every key. Open one to extend, disable, change the activation limit, or remove activated sites.

- **Customers:** the purchase receipt shows the key. Their account page (EDD's purchase history) lists keys and lets them manage sites, for example to free a slot after a domain change.

Part 3 — License on customer sites

Pro features run only while EDD says the license is valid for that site; no data is ever deleted when it isn't.

3.1 Customer activation

1. Install free MIS Webform 2.0.1 or newer, then upload and activate MIS Webform Pro.
2. Go to **MIS Webform → Pro Settings**, paste the key and click **Activate**. (The **Manage License** link under Pro on the Plugins screen does the same; both use the same saved key.)
3. The badge turns **Active** and shows the expiry date and sites used. All Pro menus appear.

3.2 How the license is checked

- Pro asks the store twice a day and saves whatever EDD answers, including expired and disabled.
- If the store can't be reached, Pro keeps the last answer and shows the error under the license box. It still turns off on the expiry date.
- **Check again** on Pro Settings asks immediately (useful right after a renewal).
- Messages explain each EDD status: expired, disabled, no activations left, key for another product, bundle key, or site not activated.

3.3 What switches off without a valid license

Feature	While unlicensed
Extra Google Sheets feeds	Keep sending every submission, using routing rules
Routing rules	Keep working on purpose, so data never reaches the wrong sheet

Feature	While unlicensed
File links already in sheets	Show "needs an active license" instead of the file
Two-way sync, sorting, styling, Excel, WhatsApp, AI, Pro dashboard, form search	Off
Pro settings on feeds and forms	Kept; they come back on renewal
Updates	Not delivered by EDD until the license is renewed

3.4 Testing on local sites

Point a local client site at a local EDD store by adding two lines above `/* That's all, stop editing! */` in its `wp-config.php`:

```
define('MISWFPRO_STORE_URL', 'http://localhost:10034');
define('MISWFPRO_ITEM_ID', 123);
```

Use the store's address exactly as in its Settings → General, and the Download ID from Part 2.2. Don't use these lines on live sites.

3.5 Moving or copying a site

- **Domain change:** deactivate on the old site (**Deactivate license on this site**), then activate on the new one. If the old site is gone, the customer removes it in their account, or you remove it in Downloads → Licenses.
- **Staging copy:** EDD treats the copy as a different site; activate it there if the plan allows another site.

Part 4 — Two-way Google Sheets sync

Sync copies edits made in the sheet back to WordPress, matching each row by its Submission ID, never by row number.

4.1 Set up a feed for sync

1. Google Sheets → Sheet Feeds → edit the feed. In step 3 (Columns), turn on **Submission ID** and save.

2. Click **Add missing headers** (or add a "Submission ID" header to row 1 yourself).
Existing rows need their IDs: if they were sent before the column existed, they have none and are skipped.
3. In **Two-way sync**, switch on "Bring sheet changes back to WordPress".
4. Tick the columns people may edit in the sheet. Only these are ever copied back.
5. Optional: tick **Add rows typed into the sheet as new submissions**.
6. Optional: tick **Sync automatically** (every 15 minutes by default; change in Pro Settings).
7. Save, then click **Sync from sheet now** to test.

4.2 Which columns can be edited

Field type	Rule when copied back
Text, phone, hidden, colour, time	Cleaned like normal text
Paragraph (textarea)	Line breaks kept
Email	Must be a valid email
Number, rating, range	Must be a number
Website (URL)	Must be a valid address
Dropdown, radio, gender, country, toggle	Must exactly match one of the field's option values
Date, date-time	As typed; YYYY-MM-DD if the feed writes ISO dates
File, signature, checkboxes, multi-select	Read-only (not offered)

A required field can't be emptied from the sheet. Rejected values are left as they are in WordPress and listed in the Sync Log.

4.3 Conflicts

Pro remembers the last value exchanged for each cell. On each sync, per cell:

- Only the sheet changed → WordPress is updated.
- Neither changed → nothing happens.
- Only WordPress changed → nothing is overwritten (the sheet is simply behind).

- Both changed since the last sync → **neither is overwritten**; the conflict is logged with the submission number and column. Fix it by hand in one place, then sync again.

4.4 Adding rows in the sheet

Leave the Submission ID cell empty and fill the other mapped columns. On the next sync Pro saves a new submission and writes its ID (and Submitted At, if that column exists) into the row. If writing the ID fails, the new submission is removed again so the row isn't imported twice.

Rows added this way don't send notification emails, WhatsApp alerts, or copies to other feeds.

4.5 Limits to know

- Up to 5,000 rows are checked per sync; more are ignored (the log says so).
- Deleting a row in the sheet does **not** delete the submission.
- Editing a submission in WordPress does not push the change to the sheet (MIS Webform has no submission edit screen yet).
- Automatic sync uses WP-Cron, which runs only when the site gets visits. On quiet sites, set up a real server cron job that calls `wp-cron.php` every 5 minutes.
- Each sync reads the whole tab and counts toward Google's API limits; 15 minutes is a safe default.

Part 5 — File links in sheets

With file links on, each upload column gets one link per file instead of the file name; the files themselves never leave the site's private folder.

1. Edit the Google Sheets (or Excel) feed and switch on **Write file links to the sheet**. It only applies to new rows.
2. In **Pro Settings** → **Who can open file links**, choose:
 - **Administrators of this site** (default) — anyone else clicking the link is sent to the WordPress login.
 - **Anyone with the link** — for teams without WordPress accounts. Anyone the sheet is shared with can open the files.
3. Images and PDFs open in the browser; other files download. SVG files always download, because they can carry scripts.

Each link carries a signature, so links can't be guessed by changing a number. Links don't expire.

If a sheet with links was shared with the wrong people, click **Pro Settings → Reset file links**. Every link already in every sheet stops working at once; new rows get new links. Old rows can't be re-linked automatically.

Part 6 — Microsoft Excel

Excel feeds work only with workbooks in a **work or school OneDrive or SharePoint**; Microsoft's Excel API [does not support personal OneDrive](#) (outlook.com, hotmail.com, Microsoft 365 Personal/Family). Pro rejects personal workbooks with a message saying so.

6.1 Register the app in Microsoft Entra (once per site)

The person doing this needs to be able to register apps in the organization's Microsoft 365 (an admin, or a user allowed to).

1. Open entra.microsoft.com → **Applications → App registrations → New registration**.
2. Name: MIS Webform - <site name> .
3. Supported account types: **Accounts in this organizational directory only** (the usual choice).
4. Redirect URI: platform **Web**, and paste the address shown on Pro's **Microsoft Excel → Connection** screen. It is the site's `/wp-admin/admin.php` , with no query string, and must match exactly, including `https` and `www` .
5. Click **Register**. From the Overview page, copy the **Application (client) ID** and **Directory (tenant) ID**.
6. **Certificates & secrets → New client secret**. Pick an expiry (up to 24 months). Copy the secret's **Value** right away; it is shown only once. (Not the "Secret ID".)
7. **API permissions → Add a permission → Microsoft Graph → Delegated permissions**: add `Files.ReadWrite.All` , `User.Read` , `offline_access` . If the organization blocks user consent, an admin clicks **Grant admin consent**.

6.2 Connect Pro

1. Pro → **Microsoft Excel → Connection**. Paste the client ID, the tenant ID, and the client secret. Save.

2. Click **Sign in with Microsoft**, sign in with the account that owns or can edit the workbooks, and accept.
3. You return to the Connection tab showing "Connected as name@company.com".

Put the secret's expiry date in your calendar. When it expires, sending stops with a sign-in error: create a new secret, paste it, and sign in again.

6.3 Create a workbook feed

1. In Excel for the web, open the workbook and click **Share → Copy link** (or copy the address bar).
2. Pro → **Microsoft Excel → Workbook Feeds**: type a feed name, choose the form, **Add feed**.
3. Paste the link, click **Find workbook**, choose the worksheet, and save.
4. Choose columns, then **Add missing headers** (writes row 1) and **Send a test row**. Delete the test row in Excel afterwards.
5. Optional: routing rules, file links, YYYY-MM-DD dates, header style (fill, font, freeze row 1).

Rows go below the last used row and are matched to columns by the headers in row 1, so you can reorder columns freely. Values that start with `=`, `+`, `-` or `@` are stored as text so nobody can inject a formula.

6.4 Not available for Excel yet

Two-way sync, highlight rules and automatic sorting are Google Sheets only. Excel can sort and filter in its own UI.

Part 7 — WhatsApp notifications

Pro sends through Meta's official WhatsApp Business Cloud API, which only lets a business start a conversation with a **message template approved in WhatsApp Manager**. Setup takes about an hour plus template approval time. Meta charges per message; the customer pays Meta directly.

7.1 Create the Meta app and get the phone number ID

1. Have a Meta Business portfolio (business.facebook.com). Verifying the business raises sending limits but isn't needed to start.

2. Go to developers.facebook.com → **My Apps** → **Create app** → use case **Business** (or "Connect with customers through WhatsApp") → link the business portfolio.
3. In the app, add **WhatsApp**. Open **WhatsApp** → **API Setup**.
4. Meta gives a free test number. For real use, click **Add phone number** and verify a number that is **not** currently used in the WhatsApp or WhatsApp Business phone app (or migrate it out first).
5. Copy the **Phone number ID** (a long number, not the phone number itself).
6. In WhatsApp Manager, add a payment method; without it, only the free test number works.

With the test number, messages only reach up to 5 recipient numbers you add under "To" on the API Setup page.

7.2 Create a permanent access token

The token on the API Setup page expires after 24 hours. Use a System User token instead:

1. business.facebook.com → **Business settings** → **Users** → **System users** → **Add**. Role: Admin.
2. **Assign assets**: the app (full control) and the WhatsApp account (full control).
3. **Generate new token** → choose the app → expiry **Never** → permissions `whatsapp_business_messaging` and `whatsapp_business_management`.
4. Copy the token immediately; Meta shows it once.

7.3 Create the templates

WhatsApp Manager → **Message templates** → **Create template**.

Setting	Admin alert template	Visitor template (optional)
Category	Utility	Utility
Name	<code>new_submission</code> (lowercase, underscores)	<code>submission_received</code>
Language	English (the code, e.g. <code>en</code> , goes into Pro exactly)	Same
Body example	New <code>{{1}}</code> submission: <code>{{2}}</code> . Open: <code>{{3}}</code>	Hi <code>{{1}}</code> , thanks – we received your <code>{{2}}</code> request.

Add sample values for each variable when asked. Approval usually takes minutes, sometimes up to a day. Utility templates must not contain marketing; Meta may re-categorise or reject them.

7.4 Connect Pro and turn it on per form

1. **Pro Settings → WhatsApp:** paste the token, phone number ID, API version **v26.0** (Meta's [current version](#)), the alert template name and language, and the default numbers with country code (`+91 98765 43210` ; separate several with commas).
2. Save, then **Send a test message (3 variables)**. It fails if your template has a different number of variables; that's expected, the message shows why.
3. Edit a form → right sidebar **WhatsApp:** switch on the alert, optionally set other numbers, and choose what goes into `{{1}}`–`{{4}}`. Use as many as your template has, in the same order.
4. Visitor messages: switch on, choose the field holding their WhatsApp number and a **consent checkbox** field, and the visitor template. Pro sends only when the box was ticked; WhatsApp requires that opt-in.

Check the API version once a year: Meta retires each version two years after the next one is released.

7.5 Common errors (shown in Pro's WhatsApp log)

Message contains	Fix
template name does not exist / translation	Name or language code in Pro doesn't match the approved template exactly (<code>en</code> vs <code>en_US</code>).
number of parameters	The form's variable choices don't match the template's <code>{{n}}</code> count.
recipient not in allowed list	Still using the test number; add the recipient on API Setup or add a real number.
access token / session expired (190)	Temporary token used; create the System User token (7.2).
unsupported version	Update API version in Pro Settings to the current one.

Part 8 — AI features

Both AI features use the customer's own OpenAI or Anthropic API key, billed to their account, and nothing AI-made is published without an administrator.

8.1 Add the API key

1. Create a key: OpenAI at platform.openai.com → API keys; Anthropic at console.anthropic.com → API keys. Add billing credit there; a key with no credit fails with a quota error.
2. **Pro Settings → AI**: choose the provider, leave the model as suggested (`gpt-4o-mini` or `claude-haiku-5-5`) or type another model name, paste the key, save.
3. **Monthly request limit** (default 200) caps how many AI calls Pro makes per calendar month; 0 means no limit. Failed calls count too.

The key is stored encrypted and never shown again. Type a single `-` in the key box and save to remove it. If the site's security salts in `wp-config.php` change, saved keys can't be decrypted: paste them again.

8.2 AI Form Builder

1. **MIS Webform → AI Form Builder** (or **Create a form with AI** on All Forms).
2. Describe the form in a sentence or two: who fills it in, which details, which choices.
Example: "Course registration: student name, email, phone, course (Python, PHP, React), preferred batch (morning, evening), payment status."
3. Click **Generate form** and review the field list (type, required, options).
4. Not right? Edit the description and **Generate again**. Right? Adjust the name and click **Create form and open builder**.
5. Finish in the builder (notification email, success message), save, then place the shortcode as usual.

The AI can use only MIS Webform's field types; anything else it suggests is dropped. Every form passes MIS Webform's own field checks before it can be created. Drafts are kept for one hour.

8.3 AI WooCommerce products

WooCommerce must be active.

1. Build a product request form with fields for name, description, price, SKU, category and an image upload.
2. Edit the form → sidebar **Create products** → switch on and map each field. Category must hold the name of an **existing** WooCommerce category.
3. **When:** "When I click..." adds a **Create draft product** button on each submission; "Automatically" creates one for every submission.
4. Optional: **Let AI write the title and descriptions.**
5. **Save as:** Draft or Pending review. Pro never publishes.

Comes from	Field
The form only (never AI)	Price, SKU, category, image
AI when switched on, else the form	Title, description, short description

Problems don't stop the draft: a duplicate SKU, an unknown category, a non-number price or a non-image file is skipped and written as a note on the product's **From a form submission** box. Check that box and the AI text before publishing. One submission can only ever make one product.

Part 9 — Release-day test checklist

Run this on a fresh live-domain test site (not `.local`) plus the real store before selling; the automated tests used mocked services, so these are the first real calls.

Store and license

- ☐ Buy Pro with a 100% discount code in EDD; the key appears on the receipt and in the email
- ☐ Activate on the test site; badge shows Active, expiry, 1 of 1 sites
- ☐ Activate the same key on a second live domain; refused with the site-limit message
- ☐ Deactivate on the first site (or remove it in Downloads → Licenses); the second site now activates
- ☐ Click **Renew license** in Pro; pay; after **Check again** the expiry moves one year later on the same key
- ☐ Refund the order in EDD; **Check again** in Pro; Pro turns off
- ☐ Publish version 0.4.1 in the EDD product's Licensing box; the test site offers the update and installs it

- ☐ The **Manage License** link on the Plugins screen shows the same key and status as Pro Settings

Google Sheets

- ☐ Two feeds for one form with different routing rules; each sheet gets only its rows
- ☐ File link opens for an admin; logged-out visitor is sent to login
- ☐ Appearance and highlight rules show in the sheet after saving the feed
- ☐ Edit an email in the sheet → Sync now → submission updated; invalid email rejected in log
- ☐ Change the same value in WordPress and sheet → conflict logged, nothing overwritten
- ☐ Type a new row with empty Submission ID → Sync → new submission, ID written back

Excel, WhatsApp, AI, Reports

- ☐ Excel: sign in, find a SharePoint workbook, add headers, send test row, submit a real form
- ☐ Excel: personal OneDrive link shows the "not supported" message
- ☐ WhatsApp: test message arrives; form submission sends an alert with the right variables
- ☐ WhatsApp: visitor message only when consent is ticked
- ☐ AI Form Builder: generate, create, open in builder, submit the form
- ☐ WooCommerce: create a draft product manually and automatically; check notes and image
- ☐ Reports: numbers match the Submissions screen; CSV downloads

Lapsed license

- ☐ Disable the key in the store → Check again → Pro menus disappear, settings kept
- ☐ Save a form while unlicensed; re-enable; WhatsApp and product settings still there

Part 10 — Troubleshooting

Symptom	Likely cause	Fix
"Pro is installed but its features are off"	No key, expired, disabled, or site not activated	Pro Settings: activate, renew, or Check again

Symptom	Likely cause	Fix
"no store product ID set"	This build still has <code>MISWFPRO_ITEM_ID = 0</code>	Set the Download ID (Part 1.2) and rebuild, or define it in <code>wp-config.php</code> for testing
"Could not reach the license server"	Store down, wrong <code>MISWFPRO_STORE_URL</code> , or a firewall	Check the address; open the store in a browser
"did not give a license answer (HTTP 403/503...)"	Security, maintenance or coming-soon plugin on the store blocks <code>?edd_action=</code> requests	Whitelist those requests or turn the plugin off (EDD troubleshooting)
"key is for a different product"	Wrong Download ID in Pro, or a key for another product	Match <code>MISWFPRO_ITEM_ID</code> to the Pro download
"already active on N sites"	Activation limit reached	Deactivate an old site, or upgrade the price tier
Customer got no key email	Store email not sending	Install an SMTP plugin; resend the purchase receipt from the order
Update doesn't show	Cached, version not higher, no update file selected, or license expired	Dashboard → Updates → Check again; check the Licensing box on the download
Update installs into a second folder	Zip didn't have <code>mis-webform-pro/</code> at the top	Re-zip the folder itself and upload again
Sync: "no Submission ID column"	Column off or header missing in row 1	Part 4.1 steps 1–2
Sync: rows skipped as unknown	IDs from another form, deleted submissions, or duplicated rows	Check the ID cells; each ID may appear once
Excel: "redirect URI mismatch" (AADSTS50011)	Entra redirect address differs from Pro's	Copy it from the Connection tab exactly, platform Web
Excel: "needs admin approval"	Organization blocks user consent	Entra admin: API permissions → Grant admin consent

Symptom	Likely cause	Fix
Excel stops after months	Client secret expired	New secret in Entra → paste → Sign in again
Excel: "can't edit this workbook" (403)	Signed-in account has view-only access	Share the workbook with edit rights
WhatsApp errors	See the table in 7.5	—
AI: "API key was rejected" / quota	Wrong key or no credit	Check the key and billing at the provider
AI: "request limit is used up"	Pro's monthly limit reached	Raise it in Pro Settings → AI
Saved keys stop working everywhere	<code>wp-config.php</code> salts were changed	Re-enter the Google key, AI key, WhatsApp token, Microsoft secret, and sign in to Microsoft again