EasyDealer

Dealer Platform — Setup & Installation Guide

Version 2.1 | easydealer.ca | Built by Big Isle Media

Table of Contents

1. Requirements

2. What's Included

3. Installation — Setup Wizard

4. What the Wizard Does Automatically

5. Logging In for the First Time

6. Site Settings & Branding

7. Adding Vehicles

8. Managing Leads

9. The Sell Your Car Page

10. Testimonials

11. Going Live Checklist

12. Support

1 Requirements

Confirm your hosting meets these requirements before starting.

Requirement	Minimum	Recommended
WordPress	6.0+	6.4 or higher
PHP	7.4+	8.1 or higher
MySQL	5.7+	8.0 or higher
SSL Certificate	Required	Let's Encrypt / cPanel AutoSSL
Hosting	Shared OK	SiteGround, Cloudways, WP Engine

> **SSL Required**
> Your WordPress site must be running on **https://** before installation. Most cPanel hosts offer free AutoSSL — enable it before proceeding.

2 What's Included

Your EasyDealer license gives you access to a single download from your customer portal: **dealer-platform-installer.zip**

This file is a self-contained installer that bundles three components:

- **Dealer Platform Plugin** — vehicle inventory management, lead capture (including cash-for-cars submissions), and the dealer admin dashboard
- **Dealer Theme** — a professional, mobile-responsive automotive theme for the customer-facing website
- **Setup Wizard** — a one-click installer that wires everything together automatically

You only ever upload one file. The wizard handles the rest.

3 Installation — Setup Wizard

Start from a fresh WordPress installation. The wizard installs everything in under a minute.

Step 1 — Upload the Installer

1 **Go to Plugins**
In your WordPress admin, go to Plugins → Add New → Upload Plugin.

2 **Choose file**
Click Choose File and select dealer-platform-installer.zip from your download.

3 **Install & Activate**
Click Install Now, then click Activate Plugin when it appears.

Step 2 — Run the Wizard

After activation, a new Platform Setup entry appears at the top of your WordPress admin sidebar.

1 **Open Platform Setup**
Click Platform Setup in the left admin menu.

2 **Sample data option**
Check Include sample data if you want 3 demo vehicles and 3 testimonials pre-loaded. Recommended for a first install to confirm everything is working. Leave unchecked for a clean production install.

3 **Start Installation**
Click Start Installation. Five steps run automatically — watch the progress bar. This normally takes 30–60 seconds.

4 **Installation Complete**
When you see the green checkmark and "Installation Complete!" message, the platform is fully set up.

What happens during those 5 steps

1. Dealer Platform plugin is installed and activated
2. Dealer Theme is installed and set as the active theme
3. Required pages are verified — including Inventory, Contact Us, Financing, and **Sell Your Car** (auto-created by plugin activation)
4. Default settings configured, permalinks set to /%postname%/
5. Sample vehicles and testimonials imported (if selected)

Step 3 — After Installation

Three buttons appear on the completion screen:

- **Configure Settings** — takes you straight to Site Settings to add your logo, colours, and contact info
- **Add Your First Vehicle** — opens the vehicle editor
- **View Site** — opens your live website in a new tab

> The installer plugin can stay active — it does nothing after setup is complete. You can safely deactivate and delete it once you have confirmed the site is working.

4 What the Wizard Does Automatically

You do not need to manually create any pages, configure permalinks, or set up shortcodes. The wizard handles all of the following automatically:

What gets created	Details
Inventory page	Published at /inventory — vehicle listing powered by [dealer_inventory] shortcode
Contact Us page	Published at /contact-us — contact form powered by [dealer_contact_form] shortcode
Financing page	Published at /financing — powered by [dealer_financing] shortcode (hidden in nav by default until enabled in Site Settings)
Sell Your Car page	Published at /sell-your-car — cash-for-cars intake form powered by [dealer_sell_car] shortcode. Shown in nav by default — see Section 9.
Dealer Admin role	Custom WordPress role with a clean, branded admin — no WordPress clutter
Permalink structure	Set to /%postname%/ for clean URLs like /inventory/2024-honda-civic/
Default settings	Hero title, section visibility, and display options all set to sensible defaults

> **No manual page setup required**
> All four site pages (Inventory, Contact Us, Financing, Sell Your Car) are created automatically by the plugin on activation. Their shortcodes are already in place. You never need to touch them.

5 Logging In for the First Time

After the wizard completes, you are already logged in as a WordPress administrator. When your dealer client logs in, here is what they will see.

The Dealer Admin Experience

Any user assigned the Dealer Admin role sees a fully branded, clean dashboard — not the standard WordPress interface. Specifically:

- The admin bar at the top is replaced with your dealer logo (or "EasyDealer" text if no logo is uploaded yet) in the primary brand colour
- The WordPress sidebar only shows: Dashboard, Vehicles, Testimonials, **Leads**, Site Settings, and Support
- All standard WordPress menus (Posts, Media, Appearance, Plugins, Tools, Settings) are hidden
- The admin bar on the frontend is hidden entirely when browsing the live site
- Logging into WordPress automatically redirects to the custom dealer dashboard — not the WordPress dashboard
- The WordPress footer shows "Thank you for using EasyDealer Dealer Platform" instead of the standard text

Login URL

The dealer logs in at the standard WordPress login page:

https://yourdomain.ca/wp-admin/

Or the standard WordPress login URL:

https://yourdomain.ca/wp-login.php

Setting Up the Dealer Admin Account

The WordPress administrator account (created during WordPress installation) has full access to everything. To create a separate dealer-only login:

1. **Go to Users**
   In your WordPress admin, go to Users → Add New.
2. **Fill in details**
   Enter the dealer's name, email address, username, and a strong password.
3. **Set role**
   Set the Role to Dealer Admin from the dropdown.
4. **Save**
   Click Add New User. The dealer can now log in and will see the clean branded dashboard.

> One shared Dealer Admin account per dealership is the intended setup. The platform is designed for a single dealer login, not multiple team member accounts.

6 Site Settings & Branding

Go to Site Settings in the dealer admin menu. This is where the dealer customises everything about their site.

Logo

Upload the dealer logo to a specific location so the platform can find it:

/wp-content/uploads/easydealer-logo.png

Recommended: PNG format, transparent background, approximately 400x110px. Once in place, the logo appears in the admin bar, on the login screen, and in the site header (via the theme).

Colours

- **Primary Colour** — drives the admin sidebar, admin bar, buttons, links, and accent elements across the entire site and admin dashboard. Set this to the dealer's brand colour. Default is #2563eb (blue).
- **Secondary Colour** — used for secondary UI elements and hover states.

> Colour changes apply instantly across the admin and frontend — no need to clear any cache.

Contact Information

- Phone number (shown in site header and footer)
- Email address (used for lead notification emails and shown in footer)
- Physical address (shown in footer)
- Business hours (shown in footer)

Social Media

Enter URLs for any of the following — icons appear automatically in the header and footer when a URL is set:

- Facebook
- Instagram
- Twitter / X
- YouTube
- TikTok

Homepage Sections

Each section of the homepage can be individually toggled on or off:

Section	What it shows	Default
Hero	Full-width banner with headline and "View Inventory" button. Optional background photo.	On
About	About Us section with custom title and rich text content.	On (if content set)
Latest Arrivals	Grid of most recently added vehicles.	On
Benefits	Why Choose Us grid.	On
Testimonials	Customer review cards.	On
Service Department	Up to 4 customisable service cards.	On

Financing Page

The financing page is created automatically but hidden from navigation by default. To show it:

- Enable Show Financing Page in Site Settings
- Set the intro text, list of lenders, credit information, and the financing application button URL

Sell Your Car Page

The Sell Your Car page is created automatically and is **shown in navigation by default** — it's the platform's cash-for-cars lead capture feature. Configure it right below the Financing settings:

- **Enable Sell Your Car Page** — turn this off if the dealer only wants to sell vehicles, not buy them from customers
- **Page Heading** — the title shown at the top of the page (default: "Sell Your Car")
- **Intro Text** — shown above the form; keep it specific to the dealership, no fixed region or city is assumed by default

See Section 9 for the full customer-facing form and how submissions are handled in Leads.

7 Adding Vehicles

Go to Vehicles in the admin menu and click Add New Vehicle. The vehicle editor is a custom-built form — not the standard WordPress post editor.

Vehicle Details

Field	Notes
Year / Make / Model / Trim	Core identification fields
Price	Displayed on listing card and detail page
Mileage	Displayed in kilometres
Condition	New, Used, or Certified Pre-Owned
Status	Available, Pending, or Sold — controls visibility on inventory page
Stock Number / VIN	Internal reference fields
Exterior / Interior Colour	Shown on detail page
Transmission	Automatic or Manual
Drivetrain	FWD, AWD, RWD, or 4WD
Fuel Type	Gasoline, Diesel, Hybrid, Electric
Engine	e.g. 2.5L I4, 3.5L V6
Body Style	Sedan, SUV, Truck, Hatchback, etc.
Description	Free text shown on the vehicle detail page

Features Checklist

A comprehensive list of 50+ feature checkboxes is available — Bluetooth, Backup Camera, Heated Seats, Navigation, Apple CarPlay, Sunroof, Tow Package, and many more. Checked features are displayed on the vehicle detail page.

Vehicle Photos

- Upload multiple photos per vehicle using the WordPress media uploader
- The first photo in the gallery becomes the thumbnail on the inventory listing card
- Drag to reorder photos in the gallery — the order shown in the editor is the order shown on the site

Vehicle Status

The Status field controls how a vehicle appears on the inventory page:

- **Available** — shows normally on the inventory listing
- **Pending** — shows with a "Pending" badge
- **Sold** — can be configured to hide from listing or show with a "Sold" badge

Deleting Sample Vehicles

If you installed with sample data, go to Vehicles, select the sample vehicles, and delete them before going live.

8 Managing Leads

Every submission on the site — a Contact Us message, a vehicle detail enquiry, or a Sell Your Car submission — creates a lead in the system.

Buyers and Sellers Tabs

Go to Leads in the admin menu. Submissions are split into two tabs so buyer enquiries and sell-your-car requests never get mixed together:

Tab	What's in it
Buyers	Contact Us messages and vehicle enquiry form submissions. Shows name, email, vehicle enquired about, message, and date.
Sellers	Cash-for-cars submissions from the Sell Your Car page. Shows name, phone, vehicle year/make/model, mileage, condition, and uploaded photos.

Each tab has its own status filters (All, New, Contacted, Closed) and lead count, so it's easy to see what still needs a response at a glance.

Viewing a Seller Submission

Click View on any lead in the Sellers tab to see the full submission: seller contact details, vehicle year/make/model, mileage, transmission, fuel type, body style, colour, VIN, condition, and any notes the seller added.

Photos are shown as a thumbnail grid. Click any photo to open a full-screen lightbox — use the arrow buttons, or the left/right arrow keys, to page through all the seller's photos without leaving the page.

Updating Status

Both Buyers and Sellers leads use the same status workflow — New, Contacted, Closed — so the dealer only has to learn one system for both kinds of leads.

Email Notifications

The dealer receives an email notification every time a new lead is submitted — buyer or seller. The notification goes to the email address set in Site Settings → Contact Email. A seller notification includes the vehicle summary and a direct link to the full submission with photos.

> **Check your spam folder**
>
> If lead notification emails are not arriving, check spam. For reliable delivery, configure WordPress to send via SMTP using a transactional email provider such as Postmark, Mailgun, or your hosting's SMTP service. A free plugin like WP Mail SMTP can be used to configure this.

9 The Sell Your Car Page

The Sell Your Car page is EasyDealer's cash-for-cars lead capture feature. It lets a dealer's website visitors submit their own vehicle — with photos — to request a cash offer, without ever leaving the site.

What the Customer Sees

The page is published automatically at /sell-your-car and linked in the main navigation (when enabled in Site Settings — see Section 6). The form is organised into four short sections:

Section	Fields collected
Your Info	Full name, phone, email
Vehicle Info	Year, make, model, mileage, transmission, fuel type, body style, colour, VIN, condition, and additional notes
Photos	One or more photos — exterior, interior, and odometer are recommended
Ownership	A required confirmation checkbox that the submitter owns the vehicle free of any lien

On submission, the customer sees an immediate on-page confirmation — no page reload — so there's no doubt the submission went through.

Where Submissions Go

Every Sell Your Car submission creates a lead in the **Leads** → **Sellers** tab (see Section 8) with all vehicle details and photos attached, and triggers an email notification to the dealer's contact email.

Turning It Off

Not every dealer wants to buy vehicles from the public. If a dealer only wants to sell inventory, go to **Site Settings** → **Sell Your Car Page** and uncheck **Enable Sell Your Car Page**. This removes the page from navigation. (The page itself stays published but unlinked — this does not delete any past submissions.)

> Sell Your Car is **enabled by default** on a fresh install, unlike the Financing page, which is off by default. It's a core differentiator of the platform, so new installs show it out of the box.

10 Testimonials

Go to Testimonials in the admin menu to add and manage customer reviews. Testimonials appear on the homepage in the Testimonials section (when enabled in Site Settings).

Adding a Testimonial

1. **Click Add New**
   Go to Testimonials → Add New.

2. **Enter customer name**
   The post title is used as the reviewer's name (e.g. "Sarah M." or "James T. — Vancouver, BC").

3. **Enter the review text**
   Paste or type the customer's review in the post body.

4. **Set rating**
   Set the star rating (1–5) in the testimonial meta fields.

5. **Publish**
   Click Publish. The testimonial appears on the homepage immediately.

Deleting Sample Testimonials

If you installed with sample data, go to Testimonials, select the three sample reviews, and delete them before going live.

11 Going Live Checklist

Work through both lists before sharing the site URL with customers.

Required before going live	Done ?
Fresh WordPress installation on a live domain	☐
SSL certificate active (site accessible via https://)	☐
dealer-platform-installer.zip uploaded and activated	☐
Setup wizard completed without errors	☐
View Site confirms homepage, inventory, contact, and sell-your-car pages load correctly	☐
Dealer Admin user account created	☐
Sample vehicles and testimonials deleted (if sample data was imported)	☐

Recommended	Done ?
Logo uploaded to /wp-content/uploads/easydealer-logo.png	☐
Primary colour set to dealer brand colour	☐
Hero title and hero background image updated	☐
About section content written and enabled	☐
Contact phone, email, and address entered in Site Settings	☐
Business hours entered	☐
Social media URLs entered (any that apply)	☐
At least one real vehicle added to inventory	☐
Lead notification email tested (submit a test enquiry)	☐
Sell Your Car page reviewed — heading/intro text set, and enabled or disabled as the dealer prefers	☐
Sell Your Car form tested end-to-end (submit a test vehicle with photos, confirm it appears in Leads → Sellers with photos attached)	☐
Site reviewed on mobile device	☐

Recommended	**Done ?**
Financing page content updated if financing is offered	☐
Service department card titles and descriptions updated	☐

12 Support

If anything is not working after following this guide, here is how to get help:

Channel	Details
Email	hello@easydealer.ca
Website	easydealer.ca

Common Issues

Problem	Fix
Inventory page shows 404	Go to Settings → Permalinks and click Save Changes (no changes needed — just saving flushes rewrite rules).
Admin bar still showing WordPress logo	Make sure the logged-in user has the Dealer Admin role, not Administrator.
Lead emails not arriving	Check spam folder. Configure SMTP via WP Mail SMTP plugin for reliable delivery.
Wizard step fails partway through	Refresh the page and run the wizard again — it is safe to re-run and will skip steps already completed.
Sample vehicles still showing	Go to Vehicles, select all sample entries, and delete them.
Sell Your Car photos won't upload	Confirm your host allows file uploads of a reasonable size (most shared hosts default to at least 8MB per file) and that the WordPress uploads folder is writable.

EasyDealer is built and maintained by Big Isle Media — a software development studio based in British Columbia, Canada, building modern tools for small businesses.
bigislemedia.ca