

GeolocBiz Docs

Thank you for choosing Geolocbiz. This general guide is intended as a permanent reference of all functions and features of this plugin. Future updates will have their improvements/extensions reflected on this documentation. If a discrepancy with the true functionality were to exist, please don't hesitate to contact the author!

Installation

Once activated, the plugin creates new types of data, menus, pages and everything that is needed to work over the Wordpress platform. If something is accidentally deleted, deactivating and reactivating the plugin should solve the problem. Then, basic configurations include:

- A [Google API](#) Key is necessary to use Google maps. Enter this key on *Geolocbiz > Settings > Maps > Geolocation*. Please bear in mind that the Google Maps service is subject to its own costs, which will respond to the traffic registered on its remote system. Geolocbiz is designed to minimize the use of Google functions that increase such traffic; however, a heavy enough use might not be free for the account that is linked to the Key in use.
- We recommend choosing a default location/zoom on *Geolocbiz > Settings > Maps > Default location*. Once the [Google API](#) Key is validated, the map can be used for this.
- The main (public) Geolocbiz page is located by default on `/geolocbiz`. To provide customers with easy access, some options are available.
 - You may change this and other URL locations on *Geolocbiz > Settings > Design > URLs*.
 - Include a link on the site's navigation menu. On most themes this should be done by adding the page called "Geolocbiz main" (or another) on *Appearance > Menus*.
 - Use a shortcode included in this plugin. For now, the only one available shows the locations on a map centered on a single region (see **Region** below), while allowing easy (optional) access to the main page. In the classic editor or [Elementor](#) (recommended), choose the "shortcode" option among the available elements, and write this code:

```
[geolocbiz]
```

This will load the default region (chosen on the previous step) view with *every* location (on any region, open or closed), on a 300x300px widget, with a title font size of 16px and an access button text font size of 14px. Usually some of these options are best customized at design time, which is why the following parameters are provided (with example values):

```
[geolocbiz height="450" width="600" title_size="18" link_size="16" region="belgrano" mode="open"]
```



The title message will change according to the chosen options and the number of currently available locations, which is why it is recommended to ensure enough width to allow space for the access button.

To remove this button instead, `link_size="0"` may be used. Default mode is "all", which is the same as leaving it empty (or using any other word).

In any configuration, this map **will not work** unless a permission is granted to the page in which it is meant to be displayed, on *Geolobiz > Settings > Maps > Active pages*. This is a design decision intended to save site's resources (and to limit the use of the map service, which may come with a cost).

- We also recommend checking the *Design* page among the settings, where colors and fonts can be changed, besides the selection of parts (pages, buttons, filters) of the plugin to use. In principle, Geolobiz is built as a *modular* system, which allows to deactivate, among other things, the user subsystem.

Components

Geolobiz includes a total of 1 custom post type, 4 taxonomies, 6 public pages (with 6 related templates; 2 of them are *blog* type pages), and 4 user roles. We explain in detail each one of these.

Post types

Branch

The main data type, a single location or physical business. It is a post, since it has its own view on the site, but can also be located dynamically on the public maps. It has no required field, but it is recommended to use at least a title (to differentiate between branches and ensure a proper display), an address and a set of coordinates (the branch **will not show** publically until it can be located on the map). This is the complete list of relevant fields (not counting possible others from a different plugin):

- **Title** - Branch name.
- **Author** - The "manager" of the branch; by default it is the current administrator/manager (except for the owner/branch manager, who **cannot add new branches**, just edit them - see **Roles and permissions** below).
- **Excerpt** - Used as a *description*; despite its name, it may be of any length, and on the public lists a shortened/truncated version will be displayed.
- **Homepage**.
- **Email**.
- **Phone number**.
- **Logo** - *Thumbnail* type image.
- **Address** - Includes all relevant data in a single line, in the form **[street and number], [city], [state], [country]**. In most cases, the country can be ignored; to boost the map search precision, the complete zip code can be used as well (usually alphanumeric). To ensure a proper display on public maps, it is strongly recommended to start the line with **[street and number]**, (the system will assume such information is located before the first comma).
- **Location** - A set of coordinates in the form **[latitude],[longitude]** (notice the lack of space after the comma). Usually there shouldn't be a reason to enter this information manually; it is updated automatically once the address is searched on the map (if there is a result). For last minute adjustments, the visual marker may be dragged (this will NOT change the entered address).

- **Comments on services** - Optional clarifications to make about the chosen services on this particular branch.

At the same time, previously created terms of certain taxonomies may be assigned; see their descriptions below.

Taxonomies

The only required field for every taxonomy (due to Wordpress' architecture) is the title. Any of these *categorizations* can be left unused; just like any other component (except for the main map page), they will not be displayed on any public page until they are used. Notice that multiple regions and categories can be assigned to a single branch (Wordpress' default behavior), but in this case, only the first term on the list will apply (for example, it makes no sense for a branch to appear on 2 different regions).

Service

Useful to represent a special feature that is less general than a **category**. Although only the title is necessary, a short description is recommended (it will be displayed on a popup on the branch profile, if available).

Optionally, it also supports hierarchical ordering; a *parent* service may be chosen (among the ones that exist already). The field *required* is a lock for exclusive use of administrators/managers (see **Roles and permissions** below). The owner cannot assign nor remove (if assigned already) a service marked as *required*. Lastly, a group of related categories may be chosen (see **Category** below); in this case, the given service will only be available on maps showing the corresponding categories. Leaving this field empty means *any* category applies.

Shift

A way to model schedule/business hours with various levels of complexity. Instead of a single datetime range, it can include any amount of *periods* with that format. Dates are not entered manually, but with a dynamic selector that shows automatically. The order of the period's bounds does not affect the range (in fact, they are adjusted so the earliest date is shown on the left). To represent usual working hours per day of the week, choose *mode* to be "Every week" or "Number of weeks". In both cases, the selected range will be the *first* range in which the schedule applies; you may use a "Number of weeks" to specify a future limit, or "Every week" to use it permanently (unless modified or removed from the branch). This has a direct effect on the algorithm that searches for currently open branches. On the branch profile, however, every period with a repetition longer than 12 weeks (3 months) is considered permanent and shown as line of text with days of the week; the rest are displayed on an interactive timeline below.

Region

It may be a state/province, a city or simply an area; in any case, you may choose a location + zoom to allow the user to quickly move to this region and its corresponding locations. Note that there is no connection between the location of a branch and the region it has assigned; if a region with a specific set of coordinates is used, the creator must choose the best view to include its branches. If the region is left without coordinates or zoom, it will not appear on the list of regions for dynamic search, but it will still appear as a filter or search criteria, if such a tool is active (*Geolocbiz > Settings > Design > Available tools for branches search*). Additionally, managers may be chosen (of type **Regional manager**; see **Roles and permissions** below) to be in charge of the region and its corresponding branches.

Category

Most general differentiation of locations; the use of categories is what separates a simple branches locator from a business directory. An icon and exclusive colors may be chosen for each category; if none is selected, default options will be used (or those selected on *Geolobiz > Settings > Design > Map icon styles*). Additionally, managers may be chosen (of type **Category manager**; see **Roles and permissions** below) to be in charge of the category and its corresponding branches.

Public pages

Pages that are created automatically cannot be removed (doing so would only result in its immediate recreation), unless some of them are deactivated on *Geolobiz > Settings > Design > Available pages*. Each page's slug can only be changed in *Geolobiz > Settings > Design > URLs*, while their titles may be changed directly on page listings (bear in mind if needing to use them somewhere else on the site). Next are detailed each of them with its default names.

GeolocBiz main

Main map page with all filters in use and dynamic listing of locations. This page is the only one that cannot be left unused, and the most customizable. Filters work on real time using the browser's timezone and (if necessary) its location. Results are updated using *Javascript*, avoiding a page reload (which is much faster, and also saves Google API usage).

GeolocBiz login

A simple Login page that preserves the site's design (header and footer) and does not work only for Geolobiz users. However, its redirection page after successful login will depend on user role.

GeolocBiz profile

User profile for any Geolobiz user. Profile pics from [Gravatar](#) are used.

GeolocBiz profile edit

Personal profile edition. Notice that (for the moment) there is no user registration page; this system is intended for delegation of administrative tasks, but not full user freedom.

GeolocBiz single

It does not appear among other pages (seen as a *post type*) since it's part of the *blog* Wordpress functionality; it represents a single branch profile. Depending on the access mode to this page (*edit_gb=true*), an edit form may appear in its place.

GeolocBiz archive

Just like the previous case, it's part of Wordpress' *blog*, so it doesn't show on page listings. On the archive all branches are gathered; however, they still may be queried by services, regions and categories. Every selection triggers a page reload with proper parameters, using pagination to separate the list in multiple pages (the post number limit per page is set on Wordpress' own settings; *Settings > Reading*).

Roles and permissions

Some details like redirection URLs and interfaces may change according to user role. Bear in mind that for any user outside Geolobiz, all that's visible of the plugin are the public pages (except edit ones). The user *in charge* of a branch may be of any Geolobiz role, but for it to be an *owner*, they must first be set as its author. Furthermore, email notifications (using `wp_mail`) about recent changes may be set for different user roles on *Geolobiz > Settings > Notifications*.

Administrator

Full permissions, given that they are the site's admin.

General manager

Full permissions **over Geolobiz**, except on settings; on the rest of the site they are equal to a *subscriber*.

Regional manager

Full permissions **over Geolobiz**, except on:

- Settings.
- Regions.
- Branches that are not assigned to any region managed by the user.

Category manager

Full permissions **over Geolobiz**, except on:

- Settings.
- Categories.
- Branches that are not assigned to any category managed by the user.

Owner/branch manager

A single branch manager; more than 1 may be assigned to them, and they will see all of them on their profile. They cannot access the site's admin. They may edit any of their branches (if edit page is active), and the fields that are modified and require approval from one of the admins/managers above will cause that branch to enter a "Pending review" state during which it is not shown publicly. Site admin may choose said fields on *Geolobiz > Settings > Permissions > Fields whitelist*.

Settings directory

Settings are only visible to the site admin (just like Wordpress settings).

- **Maps**
 - **Geolocation** - General maps settings: API key, max number of simultaneous markers. Also, max number of simultaneous categories + default selected categories: these settings may be useful to limit the site's load when the system is used as a large business directory. Lastly, options related to asynchronous JS/Ajax requests: whether to use Ajax to update categories (without reloading the page), and whether to show query parameters. This last option is needed to create custom URLs with preloaded filters.

- **Active pages** - Pages in which to load the shortcode along with its full branches data. This list is generated dynamically; it excludes Geolocbiz pages and those of the Wordpress *blog*, except for the homepage.
- **Default location** - Map default view settings (for when multiple branches, or none, are displayed).
- **Units**
 - **Date & time** - 12-hour mode; month before day.
 - **Distance** - Kilometers vs. miles.
- **Permissions**
 - **Fields whitelist** - Includes taxonomies assignments; only affects the branch owner role.
- **Design**
 - **URLs** - Change slug titles of most pages (except single branch, which is dynamic).
 - **Texts** - Change certain lines of text.
 - **Active pages** - Optionally remove certain public pages from the plugin (and every references to them, uncoupling their entire functionality).
 - **User system access** - Optionally remove some buttons that lead to the user system (if it is used).
 - **Available tools** - Activate/deactivate filters, region search and buttons that lead to indications to physical location on Google Maps app/site.
 - **Colors** - Applying to buttons, texts and popups.
 - **Fonts** - Includes some common fonts, but none others are loaded; to use different styles, apply themes to the site and Geolocbiz will inherit them.
 - **Map icon styles** - Default icon to use on markers (loaded from [Font Awesome](#)) and its open/closed colors.
- **Notifications**
 - **Pending notifications on branches** - Notify admins and/or managers about new changes from owners that require approval. Regional/category managers may receive notifications only from their corresponding branches.
- **Misc**
 - **Bulk upload** - Used both for loading and updating from a `.csv` file; see detailed instructions on every available option on Settings. Since in most cases the coordinates are not included on the file, they must be set manually on each branch (automating this would require bulk use of the Google API, and in fact, the address search service has no guarantee of working). If the upload takes longer than the site's max load time, the same file may be uploaded again (only if branches are set not to update) or, instead, a batch of smaller-sized files with fewer branches.
 - **Uninstall & data** - Options to delete all data/settings on uninstall (usually these settings should not be used).