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Introduction

Thank you for choosing Directories Pro for WordPress, a suite of plugins for building directories on your WordPress site. Directories Pro lets you build any kind of directory such as a community driven local business directory like Yelp.com, Google+ Places, or Yahoo! Local, a user directory, a website directory, a property directory, etc.

We hope that this documentation will help you in building and managing directory websites with Directories Pro.

Getting Started

In this section, we will walk through the steps from installation to setting up a basic directory on your WordPress site with Directories Pro.

Installation

Follow the steps below to complete the installation of Directories Pro.

Check installation requirements

The followings are required of your server (or your website) to install Directories Pro:

- **PHP 5.4.0** or greater
- **MySQL 5.0.3** or greater
- **WordPress 4.5.0** or greater

Once your server has been confirmed to meet all the requirements above, proceed to the next step to download and install Directories Pro.

Download package

Directories Pro can be downloaded from https://codecanyon.net/downloads/. Note that you will need to login with a CodeCanyon (or Envato) account in order to have access to the download page. Once you are on the page, scroll down to where it says **Directories Pro for WordPress** and then click the green **Download** button on the right and then the **All files and documentation** dropdown link. Your browser should start downloading the file instantly.

Locate the file downloaded on your computer (the name of the file is **codecanyon-21800540-directories-pro-for-wordpress.zip**), and double click the file to unzip (unarchive) the package. You should then see a folder named **DirectoriesPro-x.x.x** (where *x.x.x* represents the version number) created containing the following files:

- directories-x.x.x.zip
- directories-pro-x.x.x.zip
- directories-frontend-x.x.x.zip
- directories-payments-x.x.x.zip
- directories-reviews-x.x.x.zip
- documentation.pdf

As you can see, Directories Pro consists of 5 plugins that you will install and activate on your site in the next step.

Install and Activate Plugins

Now that you have the plugin files in hand, follow the steps below to install and activate them on your site.

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Select **Plugins** -> **Add New** from the side menu.
3. Click the **Upload Plugin** link at the top of the page.
4. Click **Browse...** and then locate the **directories-x.x.x.zip** file on your computer.
5. Click the **Install Now** button.
6. Wait until the page refreshes, and the click the **Activate Plugin** link.

If the installation is successful, you will be redirected to the Plugins page and should be able to see the *Directories* plugin highlighted in blue, which means the plugin is installed and currently active.

7. Repeat steps 2-6 for **directories-pro-x.x.x.zip** (*Directories Pro* plugin).

   Note: Make sure the *Directories* plugin is already activated. Do not use the bulk activation feature.

8. Repeat steps 2-6 for **directories-frontend-x.x.x.zip** (*Directories - Frontend* plugin), **directories-reviews-x.x.x.zip** (*Directories - Reviews* plugin), and **directories-payments-x.x.x.zip** (*Directories - Payments* plugin). Although these plugins are optional, we do recommend installing and activating them all if you are unsure.

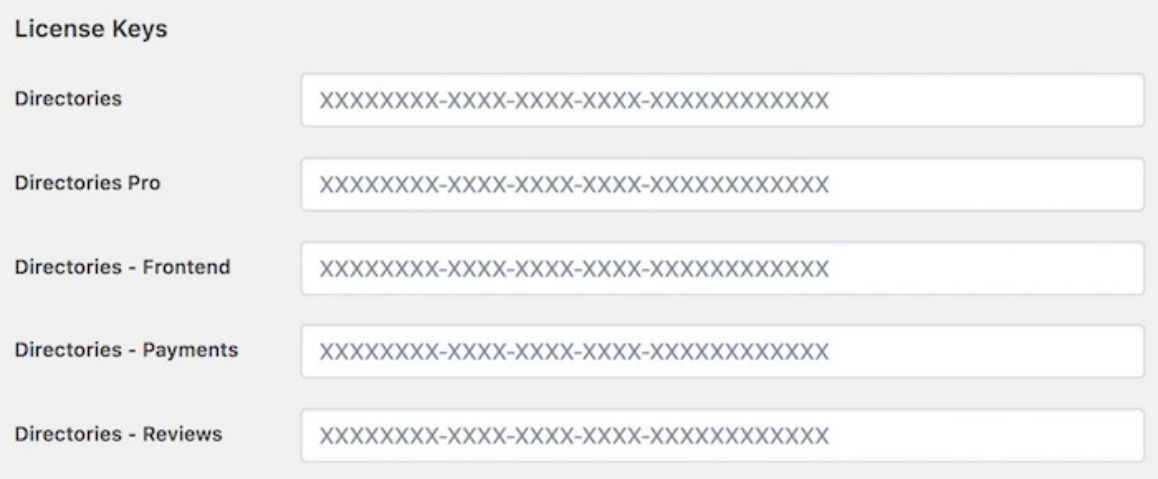
   Note: You can use the bulk activation feature to activate all these plugins at once.

Register your License Key (Purchase Code)

In order to protect valid purchasers of the plugin, some parts of Directories Pro are deactivated or inaccessible until your site is validated with a license key. If you currently do not have your license key in hand, make sure to download one from https://codecanyon.net/downloads/.

Once you have obtained your license key, follow the steps below to validate your site.

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Click **Directories** in the admin sidebar.
3. Click the **Settings** tab and then the **Licenses** sub-tab.
4. Copy and paste your purchase code to all the text input fields displayed.

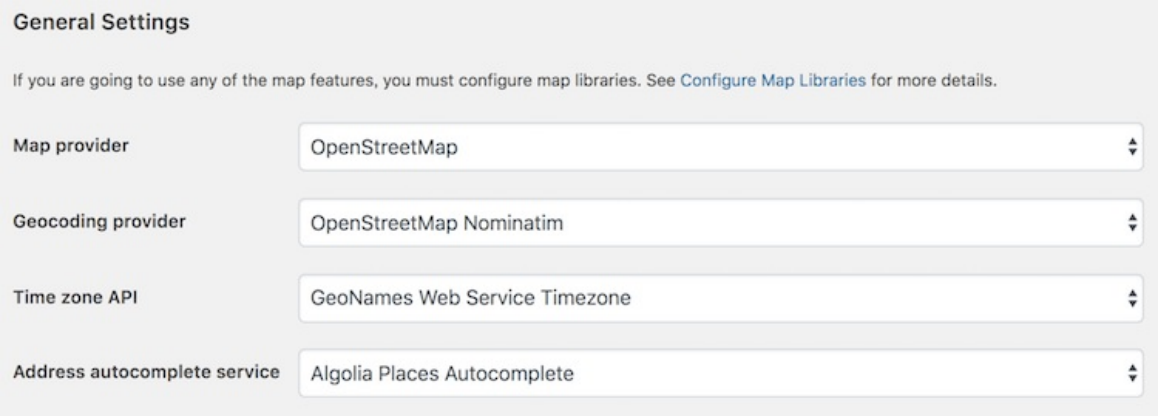


5. Click **Save Changes** at the bottom of the popup window.

Configure Map Libraries

If you are going to use any of the map features, you will also need to configure map libraries used in Directories Pro.

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Click **Directories** in the admin sidebar.
3. Click the **Settings** tab and then the **Map** sub-tab.
4. Scroll down to **General Settings** and configure the following:



- **Map provider** - Select the provider of map tiles used to render maps. This is required to display or locate listings on a map.
  - **Google Maps** - free for mobile, partially free for web, requires Google Maps API browser key.
  - **OpenStreetMap** - free.
- **Geocoding provider** - Select a geocoding service provider to enable geocoding and reverse geocoding of addresses. Geocoding lets users search your directory by arbitrary location address. Reverse geocoding is used to find an address of a location when the map in the add listing form is clicked, and then auto-fill the address form field.
  - **Google Maps Geocoding** - partially free, requires Google Maps API browser and server keys, very reliable.
  - **OpenStreetMap Nominatim** - free, not very reliable.
  - **Mapbox Geocoding** - free up to 50,000 requests per month, then $0.50 per 1,000 requests, requires Mapbox access token.
- **Time zone API** - Select a time zone API used to fetch the time zone ID of a location, which is used to determine whether or not the business listing is currently open at its location. The time zone configured in WordPress settings will be used if none selected.
  - **Google Maps Time Zone** - partially free, requires Google Maps API browser and server keys.
  - **GeoNames Web Service Timezone** - free, requires GeoNames user name and their free web services enabled.
- **Address autocomplete service** - Adds an autocomplete (or autosuggest) feature to the location search field of the directory search form.
  - **Google Maps Place Autocomplete** - partially free, requires Google Maps API browser key.
  - **Algolia Places Autocomplete** - free up to 100,000 requests per month, then $0.40 per 1,000 requests, requires Algolia application ID and API key.

Obtaining a Google Maps API key

Note: You can skip this section if you have not enabled any of Google Maps API services.

1. Create an API project
   i. Make sure that you already have a valid account from Google and then go to Google API Console. If you are not logged into Google, you will be prompted to login first.

ii. On the Dashboard page of Google API Console, create a new project or select an existing project.

iii. Click **+ENABLE APIS AND SERVICES** and enable the following APIs found under the **Maps** category:

- **Google Maps JavaScript API** - required if **Map provider** is *Google Maps*.
- **Google Maps Geocoding API** - required if **Geocoding provider** is *Google Maps Geocoding*.
- **Google Maps Time Zone API** - required if **Time zone API** is *Google Maps Time Zone*.
- **Google Places API Web Service** - required if **Address autocomplete service** is *Google Maps Places Autocomplete*.

2. Generate a browser key

   A server key is required to use Google Maps JavaScript API, Google Maps Time Zone API or Google Places API Web Service with Directories Pro.

   Follow the steps below to create a browser key for Google Maps API:

   i. On the **Credentials** page, click the **Create credentials** dropdown button and click **API key**.

   ii. On the **API key created** popup, click **RESTRICT KEY**.

   iii. Under **Key restrictions** -> **Application restrictions**, select **HTTP referrers (web sites)** and enter the URL of your site.

   iv. Scroll down and click **Save**.

3. Generate a server key

   A server key is required to use Google Maps Geocoding API or Google Maps Time Zone API with Directories Pro.

   Follow the steps below to create a server key for Google Maps API:

   i. On the **Credentials** page, click the **Create credentials** dropdown button and click **API key**.

   ii. On the **API key created** popup, click **RESTRICT KEY**.

   iii. Under **Key restrictions** -> **Application restrictions**, select **IP addresses** and enter the IP address of your server.

   iv. Scroll down and click **Save**.

4. Enable billing

   As of July 16, 2018, Google requires you to enable billing for each of your API projects in order to use their Google Maps APIs. To enable billing, click the following link to Google Cloud Platform and follow the instructions displayed. https://console.cloud.google.com/projectselector/billing/enable

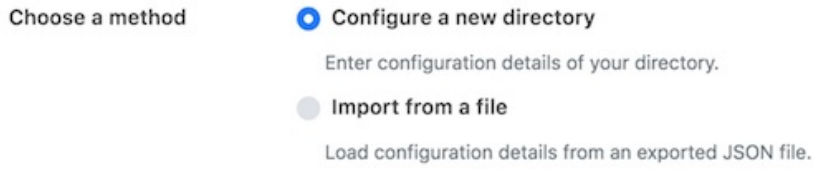
Creating Your First Directory

Now that you have installed Directories Pro, you are ready to start adding directories to your site.

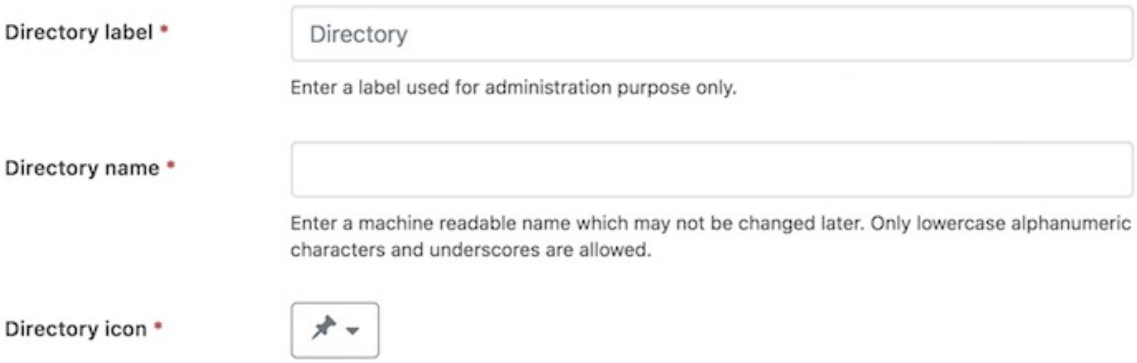
Follow the steps below to create a new directory.

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Click **Directories** in the admin sidebar.

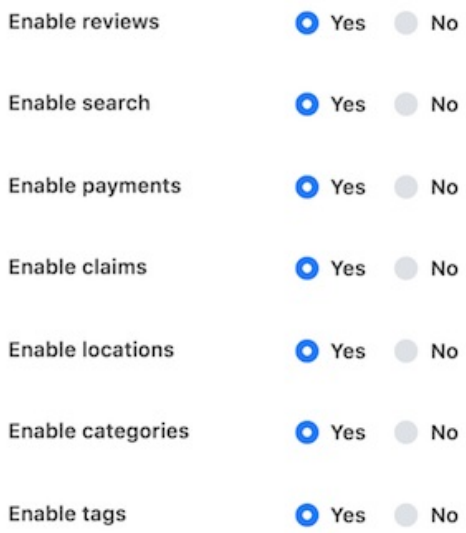
3. Click the **Add Directory** green button under the **All Directories** tab which will open a popup window.
4. In the popup window, choose *Configure a new directory* for **Choose a method**.



5. Configure the following settings for your directory.



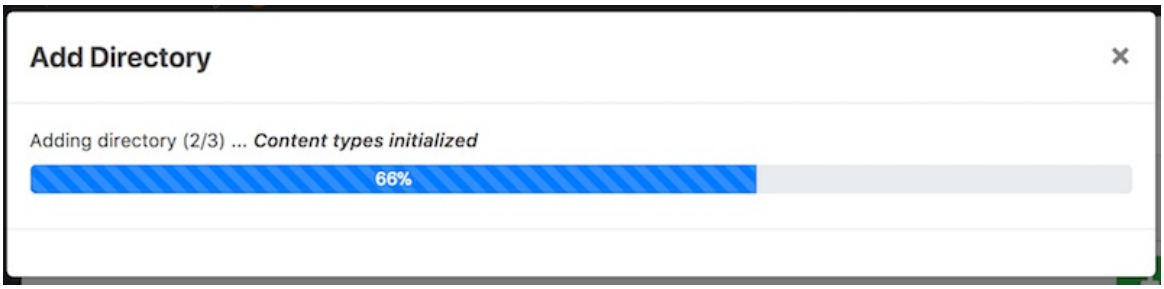
   - **Directory label** - Enter a label for your directory which is used for administration purpose only. This will also be used as the menu item label of the directory in the admin sidebar.
   - **Directory name** - Enter a machine readable name which may not be changed later. Only lowercase alphanumeric characters and underscores are allowed with maximum of 12 characters.
   - **Directory icon** - Select an icon to be displayed for the menu item of the directory in the admin sidebar.



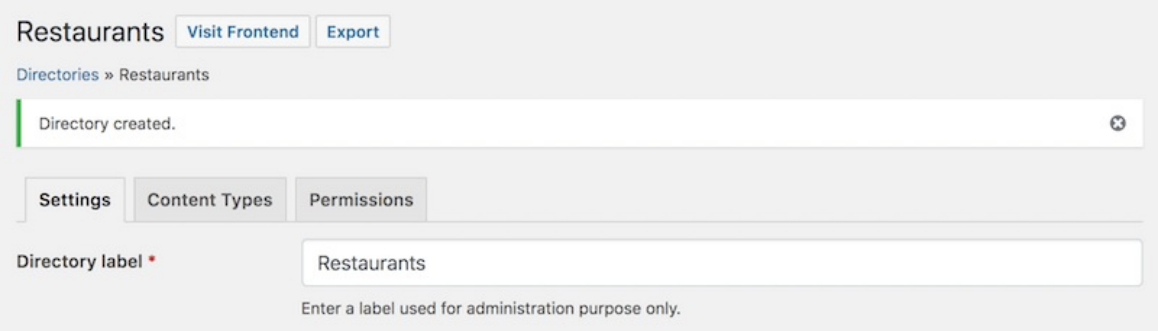
- **Enable categories** - Whether or not to enable categories for your directory. Categories can be used to organize listings in hierarchical groups.
- **Enable tags** - Whether or not to enable tags for your directory. Tags can be used to organize listings in groups according to common keywords or phrases.
- **Enable reviews** - Whether or not to allows users to submit reviews for listings with customizable rating criteria. See Reviews for more details.
- **Enable search** - Whether or not to enable the search feature which lets you create a search form for your directory.
- **Enable payments** - Whether or not to enable paid listings in your directory. See Monetization for more details.
- **Enable claims** - Whether or not to allow users to claim their listings. See Claiming Listings for more details.
- **Enable locations** - Whether or not to enable locations for your directory. Locations can be used to organize and display listings in groups by geographical location.

Note: The subsequent pages of this chapter assume that you have enabled all the features above.

6. Once you are ready, click the **Add Directory** button at the bottom of the popup window. A progress bar will show up indicating the status of the directory creation process. Make sure that you do not close the window until the process is complete.

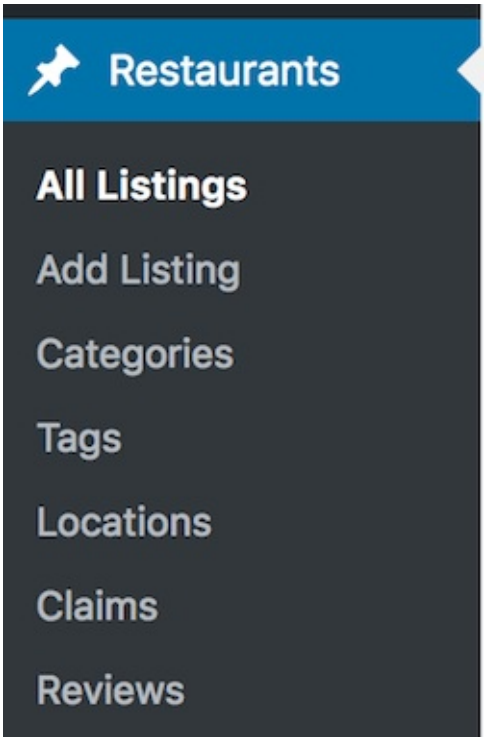


When the process is complete, the pop window closes and you will be redirected to the main administration page of the directory created.



From this page you can configure settings, content types, and permissions of the directory.

Also notice that a new menu section for the directory has been added to the admin sidebar containing links to manage content of your directory. If the label of your directory is "Restaurants", then you will see a new menu section labelled "Restaurants" created as shown below:



Congratulations, you have successfully created your first directory!

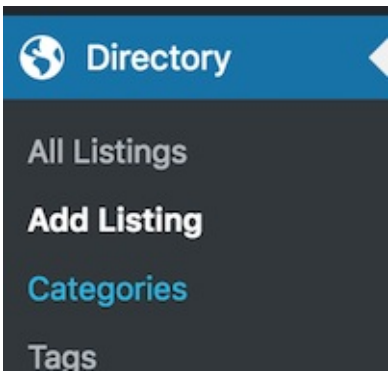
Adding and Managing Listings

Listings in Directories Pro are a custom post type, therefore you can create them in the same way as blog posts and pages in WordPress.

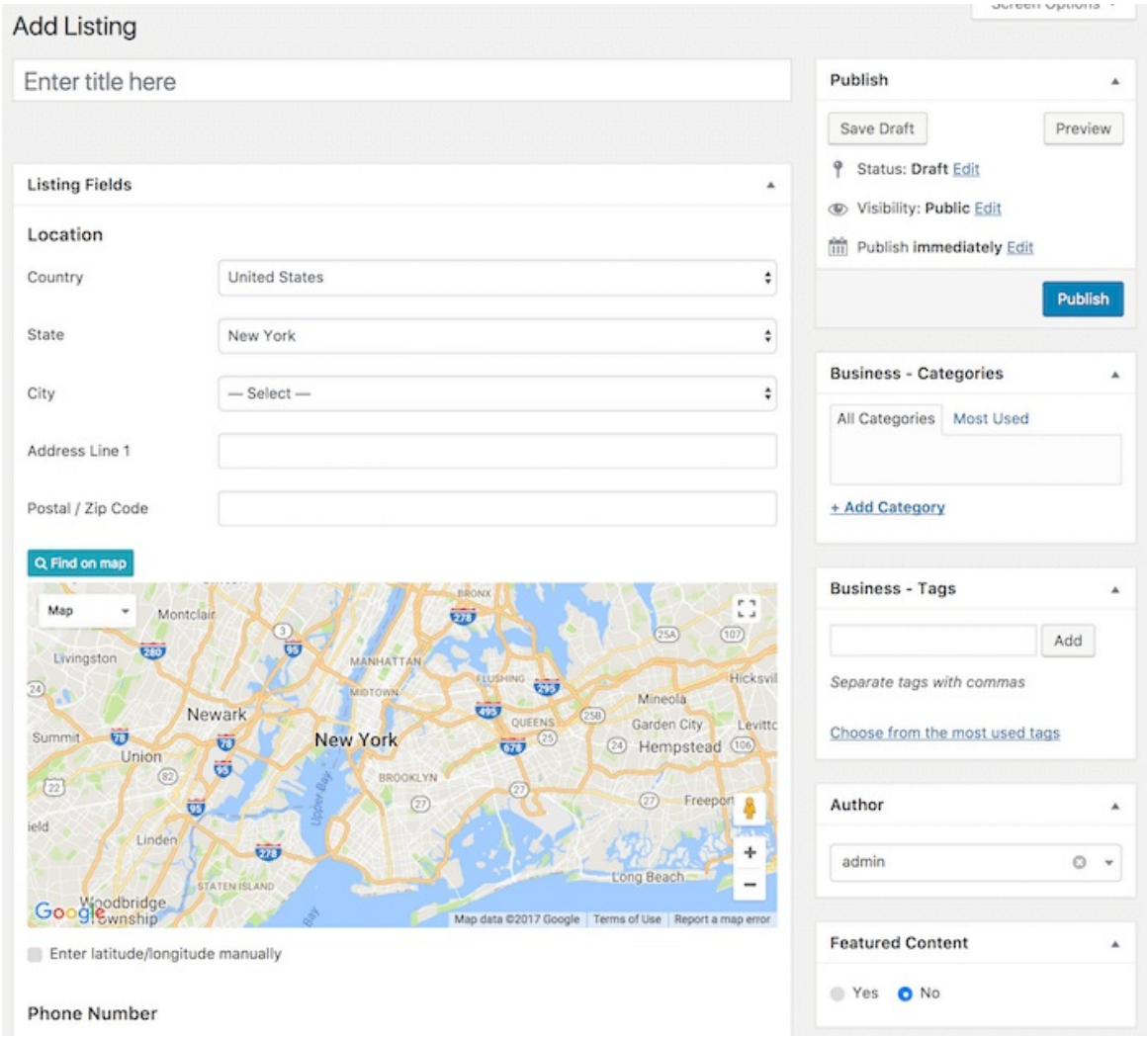
Adding a listing

Follow the steps below to add a listing to your directory.

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Select **Add Listing** under your directory menu in the admin sidebar.

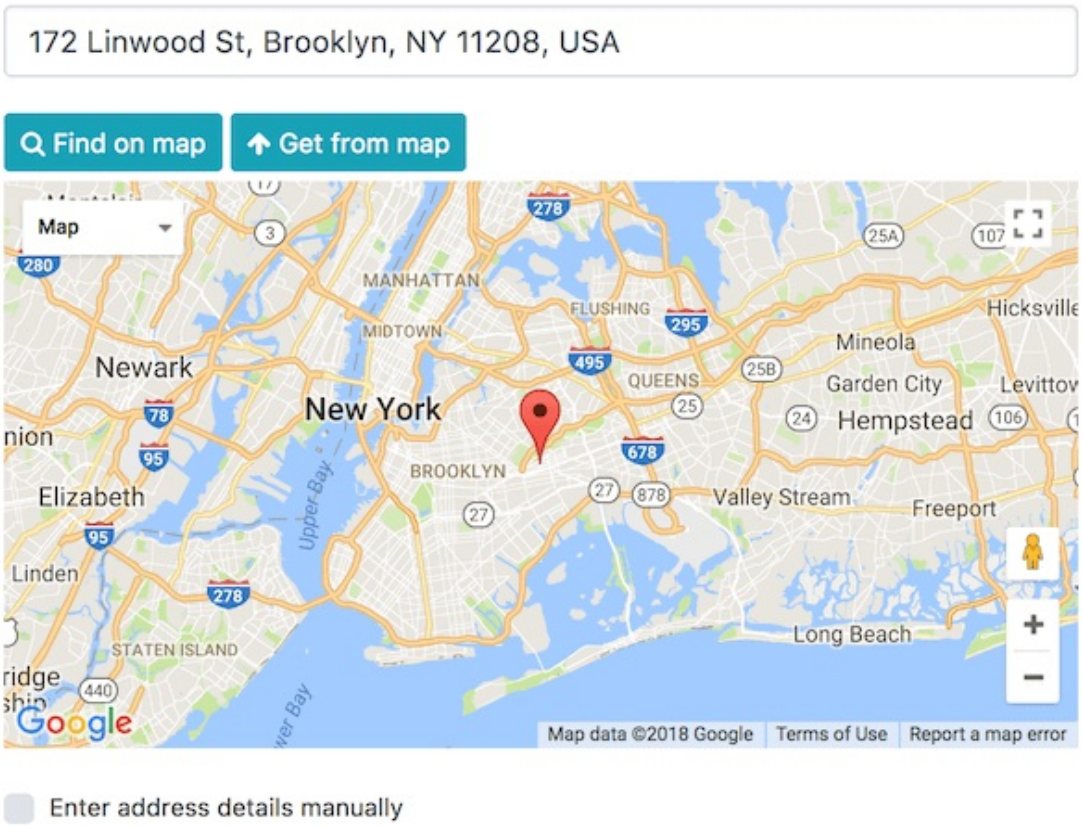


The Add Listing page should look like below.



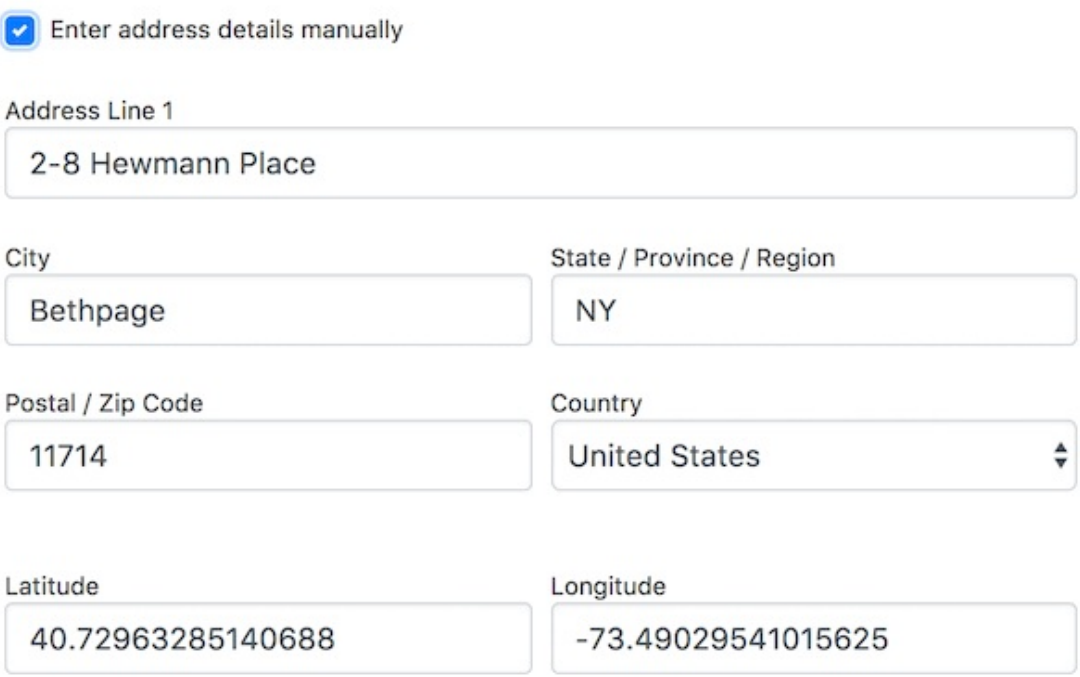
Enter the title of your listing into the text field where it says **Enter title here**.

3. Next, enter detailed information of your listing to the fields under the **Listing Fields** section where the following fields are available by default.
    - **Location** - Enter the location of the listing.

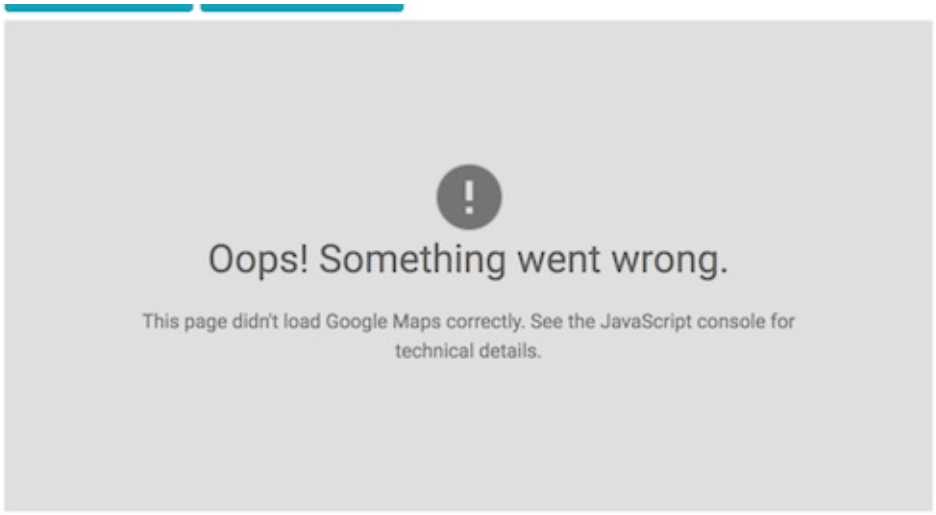


You can also have the field filled out automatically by clicking on the map.

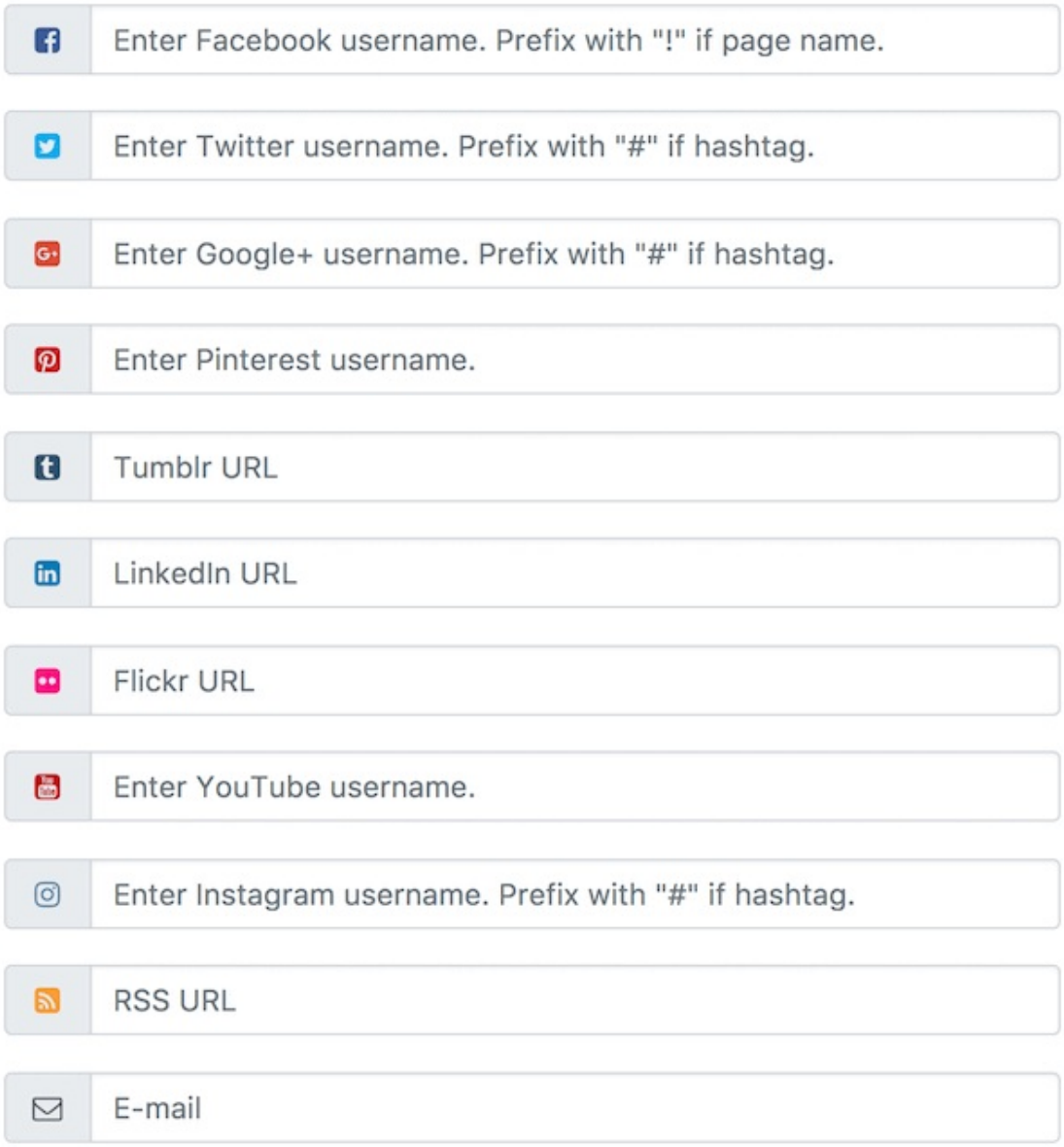
Clicking on the map will also automatically assign values to each address component of the field and latitude/longitude coordinates. If you prefer entering or selecting the fields manually, check the **Enter address details manually** checkbox below the map which will reveal additional fields.



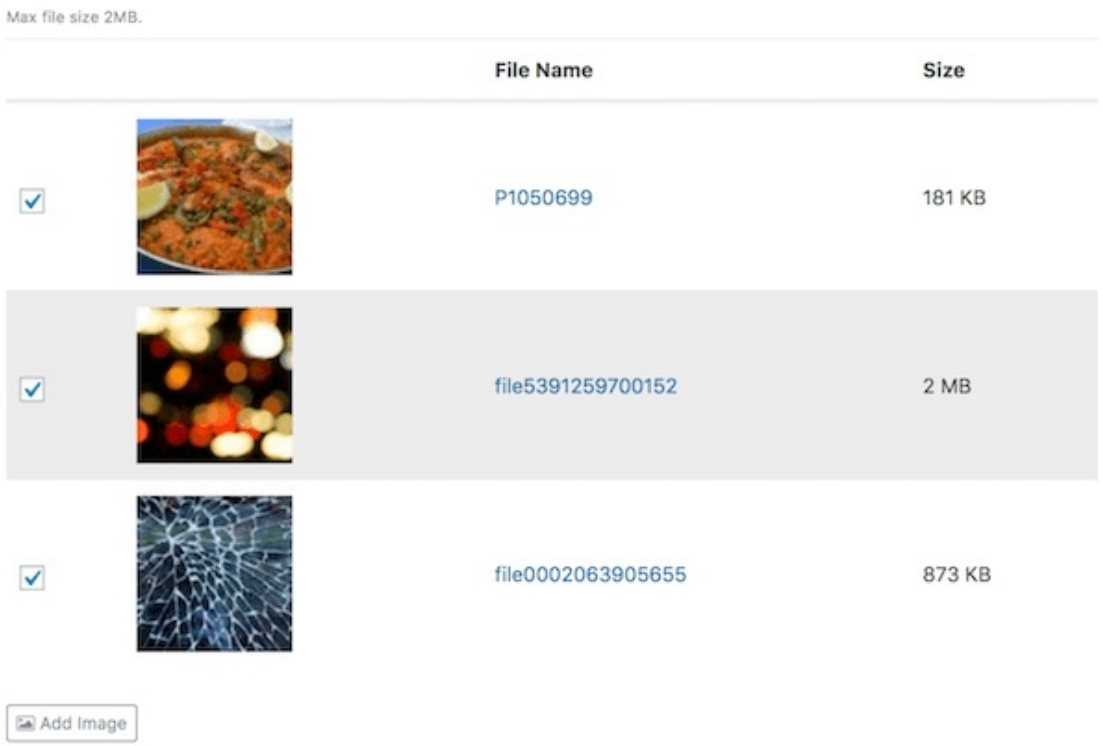
Note: If you are seeing an error message such as "*Oops! Something went wrong.*" on the map as shown below, make sure that you have configured an API key for Google Maps API. See Setting up Google Maps API for more details.



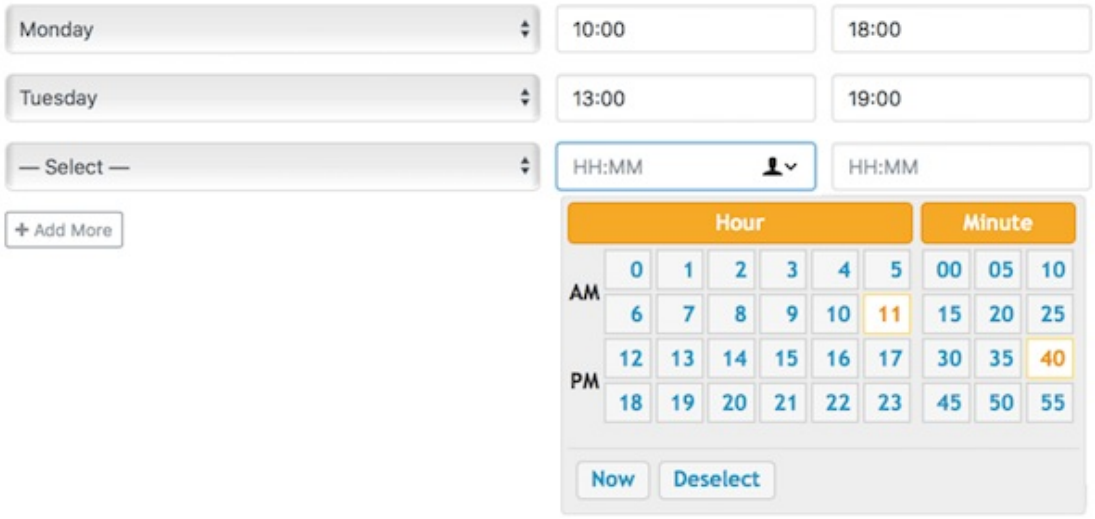
- **Phone Number** - Enter the phone number of the listing.
- **Fax Number** - Enter the fax number of the listing.
- **E-mail Address** - Enter the contact E-mail address of the listing.
- **Website URL** - Enter the website URL of the listing.
- **Social Accounts** - Enter social media accounts associated with the listing. Some accounts require a full URL while others require only a user, page, or hashtag name.



- **Listing Description** - Enter the detailed description of the listing. Shortcodes may be used in this field.
- **Photos** - Upload photos of the listing. If multiple photos are uploaded, the photo in the first table row of the field will become the featured photo. You can drag the rows in the table to swap the featured photo or rearrange the display order of photos.



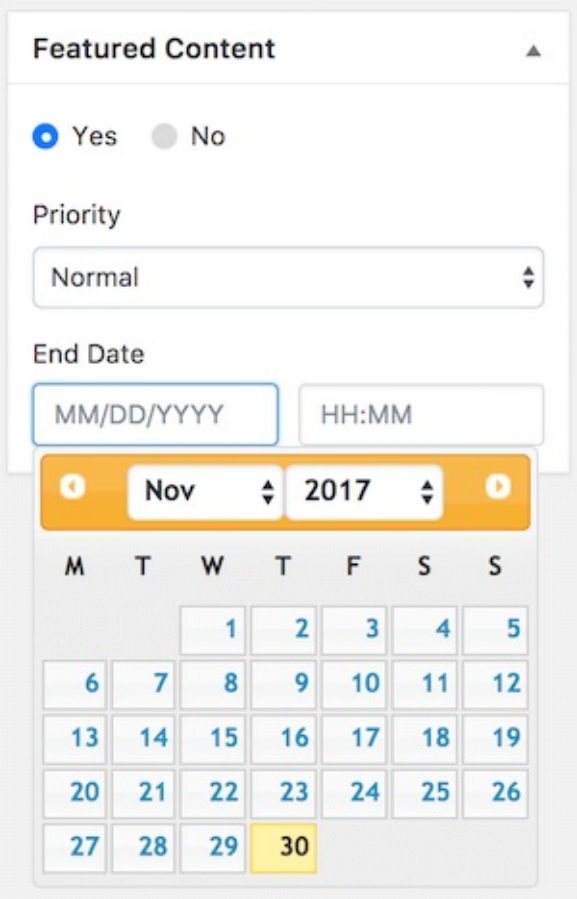
- **Opening Hours** - Select a day of week and specify a time range. You can add as many entries as you wish by clicking on the **Add More** button.



- **Date Established** - Click inside the text box to open a date picker popup and select a date.
- **Price Range** - Specify a price range by dragging the circles on the sides.

4. Some other fields available on the side are as follows:
   - **XXXX - Categories** (where XXXX is the directory label) - Select from existing categories or create new categories for the listing.
   - **XXXX - Tags** (where XXXX is the directory label) - Select from existing tags or create new tags for the listing.

- **Author** - Set the author of the listing. If no author is selected, then the listing becomes claimable and users with a valid permission will be able to claim the listing and become the author. See Claiming Listings for more details.
- **Featured Content** - Select **Yes** to make the listing featured.



The **Priority** option specifies the priority of the listing within all featured listings. Featured listings with a higher priority level are displayed above featured listings with lower priority levels when listings are sorted by featured listings first.

End Date specifies the date at which the listing is un-featured.

5. Click the **Publish** button to create and publish your listing immediately, or click **Save Draft** to publish it later.

Editing a listing

To edit a listing:

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Select **All Listings** under your directory menu in the admin sidebar.
3. In the listings table, hover over to the row of the listing that you wish to edit and click the **Edit** link that appears in the **Title** column.
4. Make any changes needed to the listing and then click **Update**.

Deleting a listing

To delete a listing:

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Select **All Listing** under your directory menu in the admin sidebar.
3. In the listings table, hover over to the row of the listing that you wish to delete and click the **Trash** link that appears in the **Title** column. This will move the listing to Trash.
4. In order to permanently delete the listing, click the **Trash** link above the listings table, find the listing that has just been moved to trash and then click **Delete Permanently**.

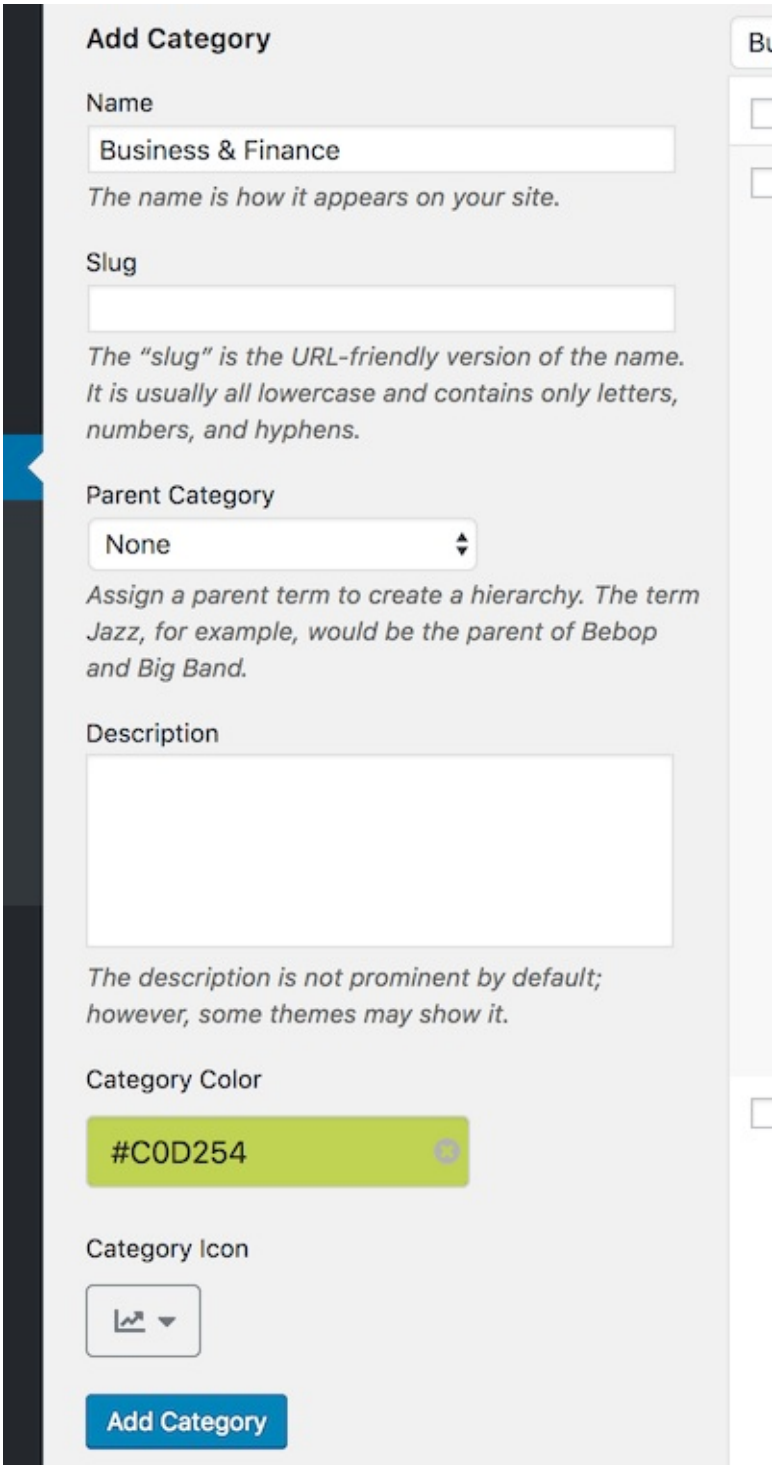
Adding and Managing Categories and Tags

Categories and tags in Directories Pro are used to organize listings into groups, just like categories and tags you have when writing posts in WordPress. For example, a business directory may have categories such as *Restaurants*, *Shopping*, *Education*, *Hotels*, and tags like *Good for kids*, *Has parking*, and *Alcohol*. The difference between categories and tags is that categories are hierarchical in structure while tags are a flat namespace.

Adding a category

Follow the steps below to create a category for your directory.

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Select **Categories** under your directory menu in the admin sidebar.
3. To add a category, use the **Add Category** form displayed next to the category list table as shown below:



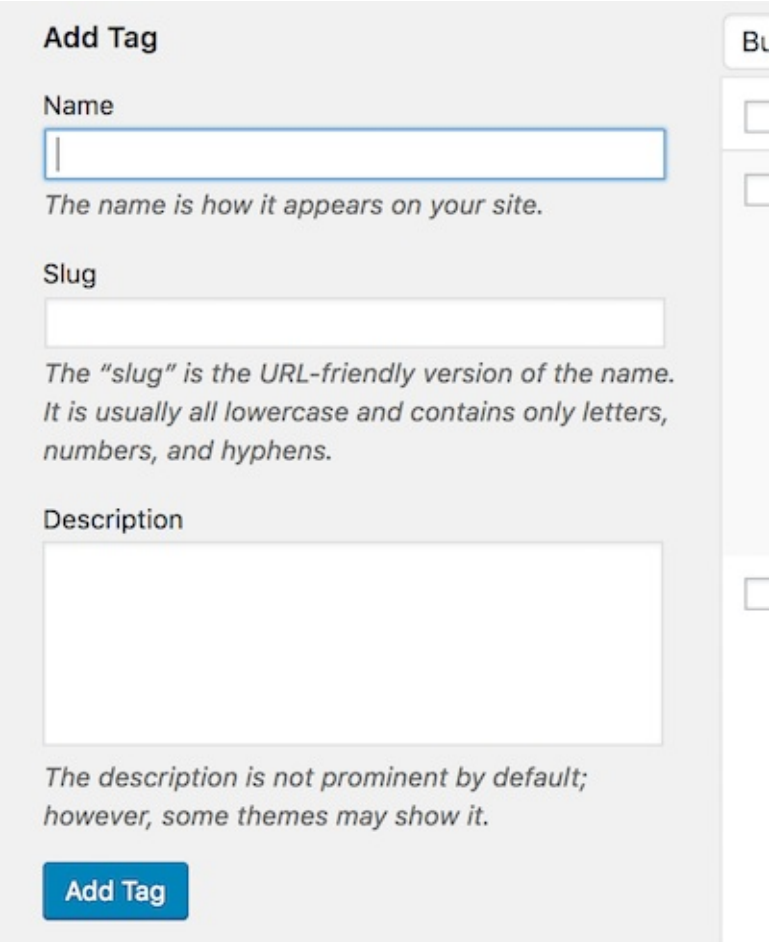
- **Name**, **Slug**, **Parent Category**, **Description** - Enter these fields as you do with categories for posts in WordPress.
- **Category Color**, **Category Icon** - Select an icon and a color that best represents the category.

4. Click the **Add Category** button to add your category.

Adding a tag

Follow the steps below to create a tag for your directory.

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Select **Tags** under your directory menu in the admin sidebar.
3. To add a tag, use the **Add Tag** form displayed next to the tag list table as shown below:



   Enter **Name**, **Slug**, and **Description** fields as you do with tags for posts in WordPress.

4. Click the **Add Tag** button to add your tag.

Editing a category/tag

To edit a category/tag:

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Select **Categories** or **Tags** under your directory menu in the admin sidebar.
3. In the category/tag list table, hover over to the row of the category/tag that you wish to edit and click the **Edit** link that appears in the **Name** column.
4. Make any changes needed and then click **Update**.

Deleting a category/tag

To delete a category/tag:

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Select **Categories** or **Tags** under your directory menu in the admin sidebar.
3. In the category/tag list table, hover over to the row of the category/tag that you wish to delete and click the **Delete** link that appears in the **Name** column.
4. In the popup window, click **OK** to delete the category/tag.

Managing Locations

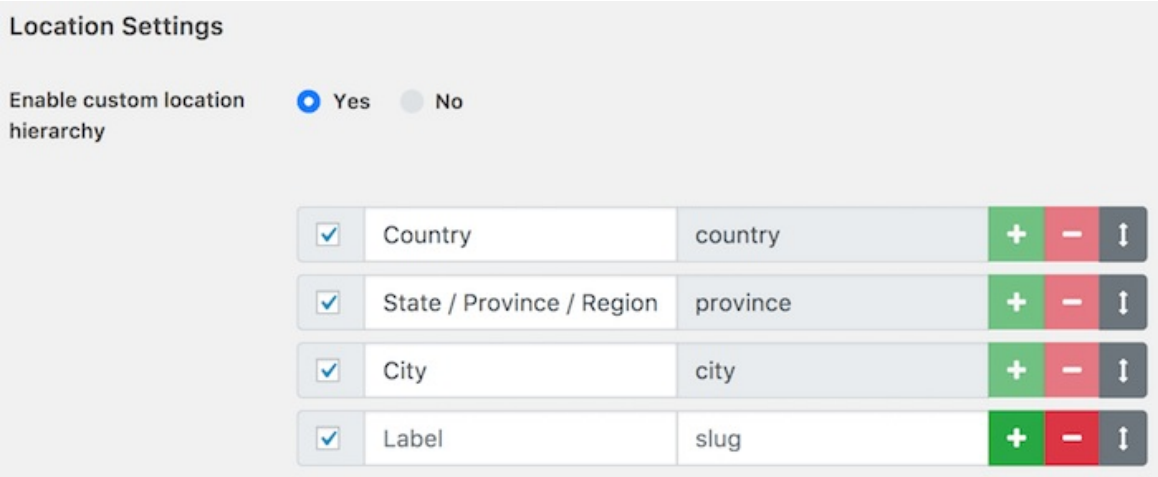
Locations let you group listings geographically, such as by countries, states, and/or cities. Locations is a custom taxonomy and are hierarchical in structure just like categories.

Setting up location hierarchy

Before adding locations to your directory, the location hierarchy must first be defined. By default, the location hierarchy is configured as *Country -> State / Province / Region -> City*. That is, locations at the first level of the hierarchy are treated as countries, locations at the second level as states, provinces, or regions, and locations at the third level as cities.

If you wish to change the default configuration; for example you may want to add a new *Town* level under *City*, or remove the *Country* level because your listings are all located within a single country; you may do so by following these steps.

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Click **Directories** in the admin sidebar.
3. Click the gear icon in the row of the directory to edit.
4. Under the **Content Types** tab, click the **Edit** button in the **Location** row.
5. Scroll down to the **Location Hierarchy Settings** section and select *Yes* for **Enable custom location hierarchy**.



   Here you can modify labels, remove one or more levels in the hierarchy, and/or add new levels to the hierarchy.

   Note: If you remove all the options, listings can not be associated with locations.

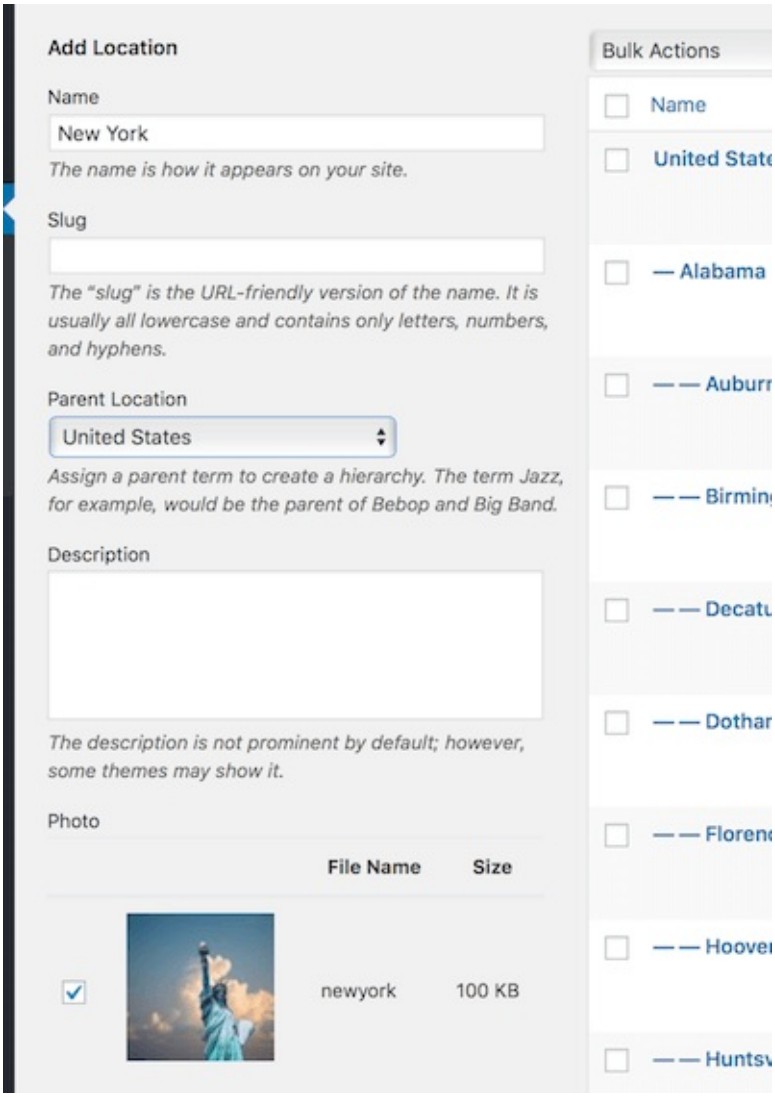
6. After making changes, scroll down the page and click **Save Changes**.

Adding a location

Follow the steps below to add a location to your directory.

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Select **Locations** under your directory menu in the admin sidebar.

3. Use the **Add Location** form displayed next to the location list table as shown below:



   Enter the **Name** of location and then optionally fill out the **Slug** and **Description** fields, select a **Parent Location** and/or upload a photo for the location from the **Photo** field.

4. Click the **Add Location** button to add your location.

Editing a location

To edit a location:

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Select **Locations** under your directory menu in the admin sidebar.
3. In the location list table, hover over to the row of the location that you wish to edit and click the **Edit** link that appears in the **Name** column.
4. Make any changes needed to the location and then click **Update**.

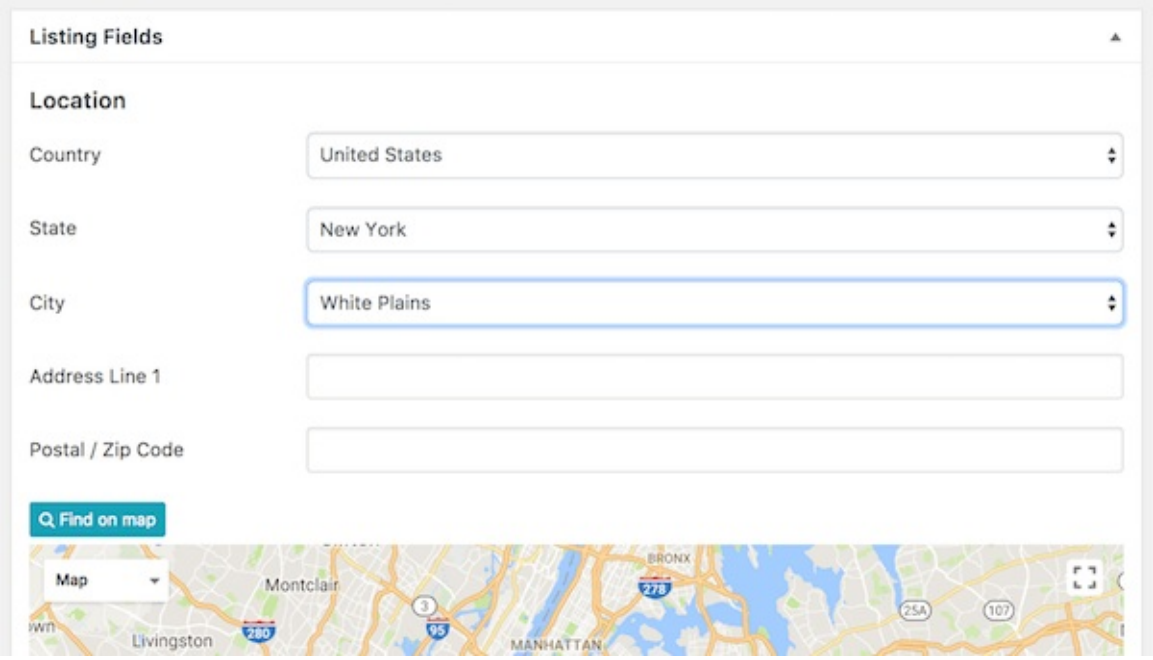
Deleting a location

To delete a location:

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Select **Locations** under your directory menu in the admin sidebar.
3. In the location list table, hover over to the row of the location that you wish to delete and click the **Delete** link that appears in the **Name** column.
4. In the popup window, click **OK** to delete the location.

Assigning locations to listings

Locations can be assigned to listings just like categories and tags. However, unlike categories and tags, the field for selecting a location is displayed under the **Listings Fields** metabox along with address and map fields as shown below.



Dropdown fields (Country, State, and City fields in the screenshot above) are displayed for specifying a location for the listing, each field corresponding to a single level in the location hierarchy. Note that you will need to actually select an option from each dropdown field in order to reveal subsequent level dropdown fields.

Displaying Content with Views

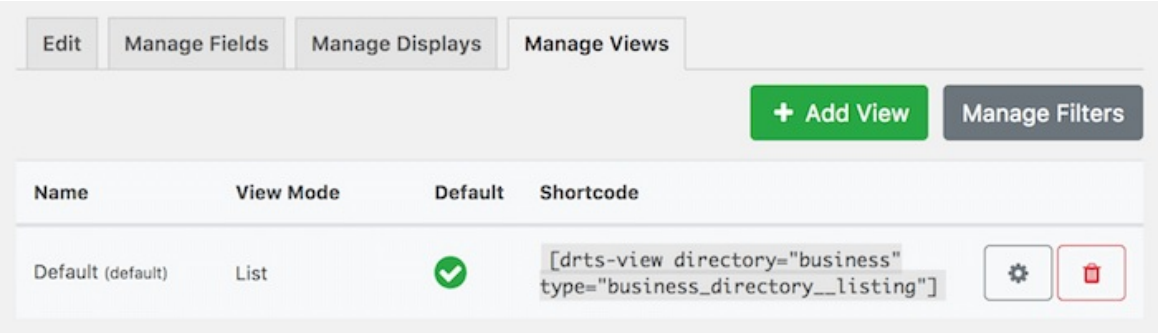
What are views? A view is simply a set of criteria and configurations to query, sort, and display content items in various ways. For example, you can use views to display listings in a standard list format, a photo slider, on a map with map markers, or display photos of locations in a masonry layout. Views are enabled for listings, categories, tags, locations, and reviews in Directories Pro.

Configuring the default view for listings

Listings shown on the directory index page and single taxonomy pages of your directory in the frontend are displayed by a single view setup for listings by default (hereafter "default view"). You can customize how and what listings are displayed on those pages by modifying the settings of the default view.

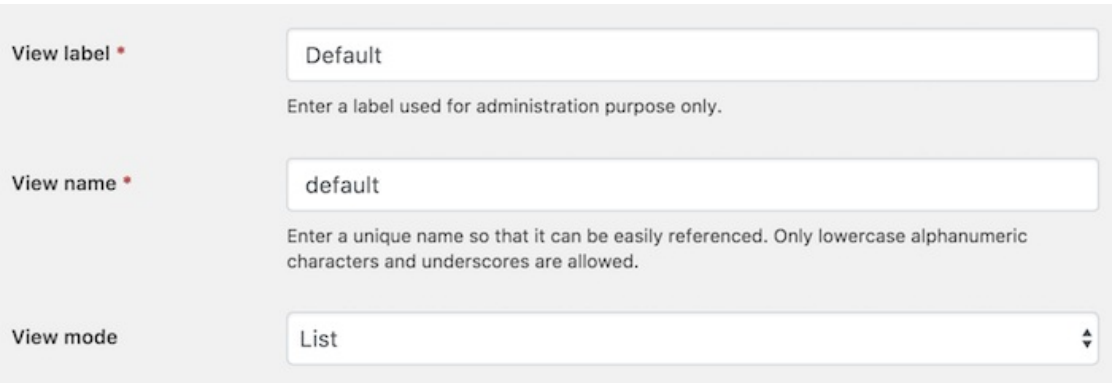
Follow the steps below to configure the default view.

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Click **Directories** in the admin sidebar.
3. Under the **All Directories** tab, click the gear icon in the row of the directory to edit.
4. Under the **Content Types** tab, click the dropdown button in the **Listing** row and then click **Manage Views**.



   As can be seen above, there is already a view created for listings. Also notice the green check icon shown for the view in the **Default** column which indicates that the view is a default view.

5. To configure the view, click the gear icon in the row of the view.
   - **General Settings**



     - **View label** - Label of the view used for administration purpose only.

- **View name** - Unique name assigned to the view so that it can easily be referenced. Only lowercase alphanumeric characters and underscores are allowed.
- **View mode** - Mode (or format) used to display content items with the view. By default there are 3 view modes available for listings; *List*, *Masonry*, and *Photo Slider* view modes.

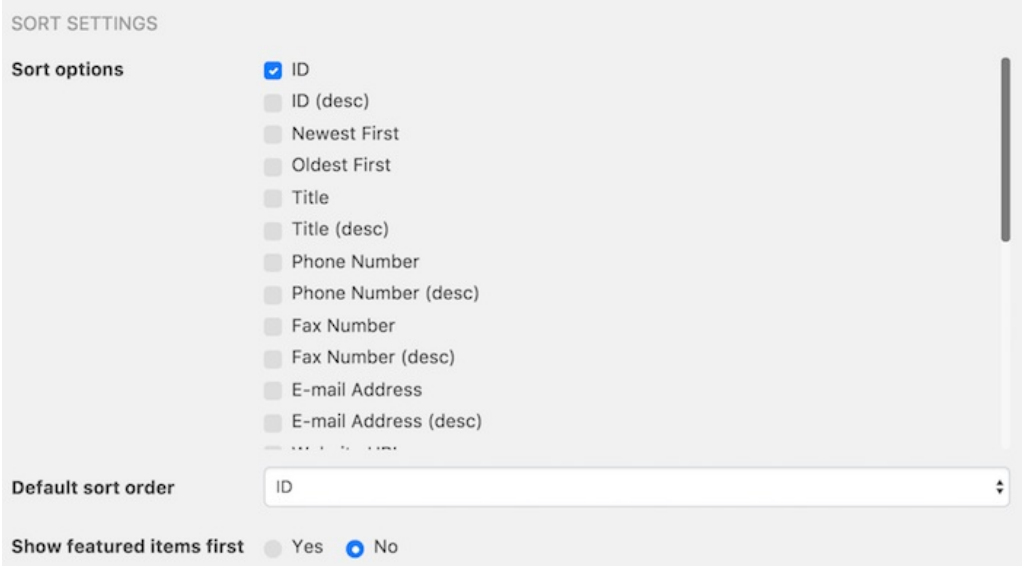
  The following are sample outputs of listings for each view mode.

  - List view - default, with map, with map above
  - Masonry view - default
  - Photo slider view - default
  - Map view - default

- **View Mode Settings** - Shows settings specific to the view mode selected under General Settings.
  - Settings specific to *List* view mode:
    - **Enable grid layout** - Whether or not to enable displaying items in grid layout.
    - **Disable row layout** - Whether or not to disable displaying items in row layout.
    - **Set grid layout as default** - Whether or not to display items in grid layout by default.
    - **Grid layout gutter width** - Width of gutters between items in grid layout.
    - **Grid layout columns** - Select the number of columns shown in Grid layout.
  - Settings specific to *Masonry* view mode:
    - **Number of columns** - Select the number of columns shown in masonry layout.
  - Settings specific to *List*/*Masonry*/*Map* view mode:
    - **Show map** - Whether or not to display a small map along with the list of listings.
    - **Map coordinates field** - Field that provides lat/lng coordinates to show on map.
    - **Map position** - Select where to display the small map, above or next to the list of listings.
    - **Map width** - Specify the horizontal display ratio of the map, *12* being 100% wide.
    - **Map height** - Height of the map in pixels.
    - **Map marker icon** - Select what to show as an icon inside map markers.
    - **Scroll to item on marker click** - Whether or not to scroll the screen to the position where the listing is displayed in the list when a marker on the map is clicked.
    - **Enable sticky map** - Whether or not to make the map stick to the top of the viewport when scrolling up and down the list.
    - **Enable full screen mode** - Whether or not to allow viewing the list and the map in full screen. When enabled, a button will be displayed on the map to toggle full screen mode.
    - **Full screen map width** - Specify the horizontal display ratio of the map on the page when in full screen mode, where 12 being 100% wide.
    - **Enable map infobox** - Whether or not to display a small popup window (infobox) over the map containing listing information when a marker is clicked on the map.
    - **Map infobox width** - Specify the width of the map infobox in pixels.

- **Open infobox on item hover** - Whether or not to show the map infobox when hovering over listings in the list.
- **Customize format of address on infobox** - Whether or not to specify a custom format for the address shown in the map infobox.

- Settings specific to *Photo slider* view mode:
  - **Image field** - Select the field used to display a photo image for each content item in the slider.
  - **Image size** - Select the size of photo images in the slider.
  - **Number of columns** - Select the number of columns to display in each slide.
  - **Show slide indicators** - Whether or not to show small dot slide indicators.
  - **Show prev/next arrows** - Whether or not to show prev/next navigation arrows.
  - **Show photo captions** - Whether or not to show a caption text for each photo.
  - **Autoplay slides** - Whether or not to automatically play the slides when the slider is loaded.
  - **Autoplay speed in milliseconds** - Specify the slider autoplay speed in milliseconds.
  - **Enable centered view** - Whether or not to enable centered view with partial prev/next slides.
  - **Fade in/out slides** - Whether or not to use fade in/out effect instead of sliding.
  - **Slider height** - Set the height of the slider in pixels.
  - **Photo padding** - Set the length of horizontal padding applied to each photo in pixels.
  - **Show thumbnails** - Whether or not to show a thumbnail navigation.
  - **Number of thumbnail columns** - Select the number of thumbnail columns to display in the thumbnail navigation.
- Settings commonly available with every view mode (except for some that may not exist for certain view modes):
  - **SORT SETTINGS**

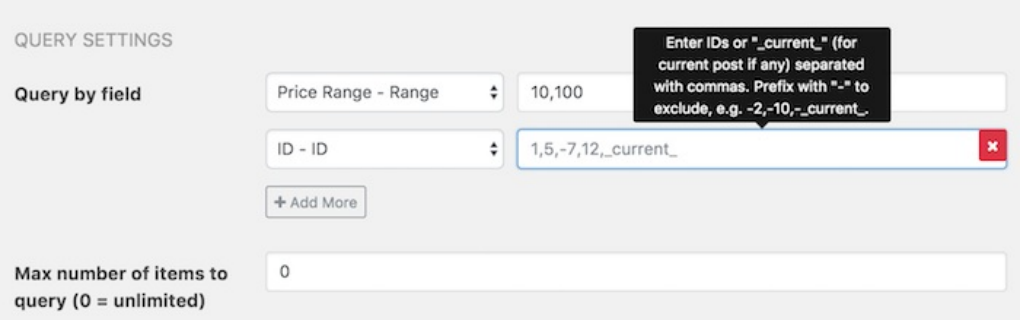


- **Sort options** - Select sorting options that should be available in the **Sort by** dropdown displayed above content items. You can change the display order of the options by dragging them up and down. You can also unselect all options to disable the Sort By dropdown.
- **Default sort order** - Select the sort option that should be applied by default. Make sure to select one from the ones enabled for **Sort options**, otherwise the first sort option available will be used as the default.
- **Show featured items first** - Whether or not to display featured items above those non-featured.

- **PAGINATION SETTINGS**

- **Disable pagination** - Whether or not to completely disable pagination.
- **Items per page** - Set the number of items to show per page.
- **Allow selection of number of items per page** - Whether or not to let viewers select the number of items shown per page.
- **Allowed number of items per page** - Select the number of items per page options available for the viewers to choose from.

- **QUERY SETTINGS**

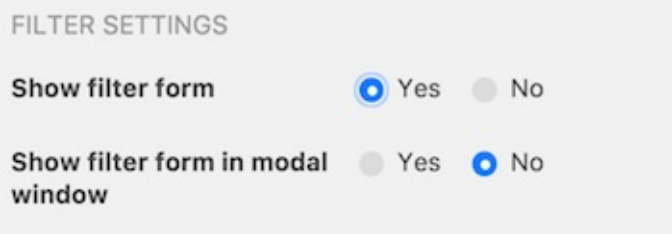


- **Query by field** - By default, the view will display all public (and private if allowed in permission settings) listings. If you wish to display a certain type of listings only, e.g. featured listings, listings that belong to certain categories, listings with a certain custom field value, you can do so by adding custom query criteria using this setting.

  Select a field from the dropdown and then enter a value into the next text box specific to the selected field. Click inside the text box to display a tip on what value you can enter for the field. You can add as many field criteria as you like by pressing the **Add More** button.

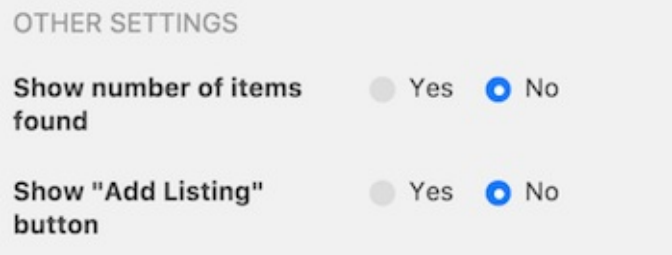
- **Max number of items to query (0 = unlimited)** - Specify the maximum number of items to query from the database. Enter 0 to fetch all that match the query.

- **FILTER SETTINGS**



  - **Show filter form** - Whether or not to display a filter form. For more details on filters, see Adding and Managing Filters.
  - **Show filter form in modal window** - Whether or not to display a filter form in a modal popup window instead of displaying the form above content items.

- **OTHER SETTINGS**



  - **Show number of items found** - Whether or not to show the total number of content items found as well as the number of items currently displayed on the page.
  - **Show "Add Listing" button** - Whether or not to show a button which links to the Add Listing page.

6. Click **Save Changes** to save the view.

Adding a view

You can create additional views for each content type which can then be displayed using a shortcode.

Follow the steps below to add a new view for listings to your directory.

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Click **Directories** in the admin sidebar.
3. Under the **All Directories** tab, click the gear icon in the row of the directory to edit.
4. Under the **Content Types** tab, click the dropdown button in the **Listing** row and then click **Manage Views**.
5. Click the **Add View** green button.
6. Configure the view. See the Configuring the default view for listings section above for details on each setting.
7. Scroll down the page and press **Save Changes**.

You will be redirected back to the manage views page if the view is created successfully. You can then optionally set the view as the default view by clicking on the greyed out check icon under the **Default** column in the row of the view just created.

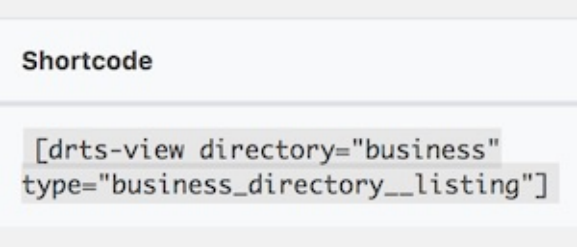
Note: There can only be one default view for each content type in your directory.

Adding a view for other content types

The steps for adding or configuring a view for other content types are exactly the same as above for listings. Simply go to the **Manage Views** page for each content type from the **Content Types** tab of your directory admin page and add or configure views from there.

Displaying a view with shortcode

Views can also be displayed using shortcodes. Copy the shortcode text displayed in the **Shortcode** column for each view and then paste the copied text to the content section of any WordPress post/page or use it in your theme template file with the do_shortcode() function.



You can optionally use the **cache** parameter to cache the content generated by the shortcode, for example:

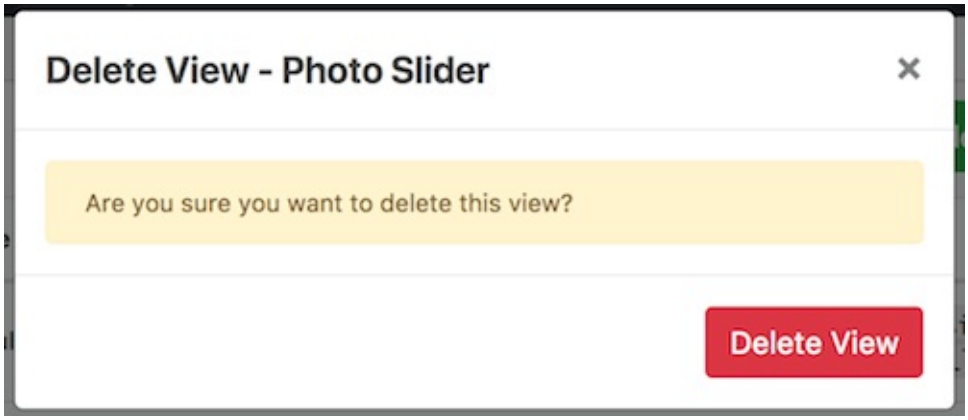
```
[drts-directory-view directory="directory" cache="1"]
```

This lets the content generated by the shortcode to be cached for a day by default. If you need to increase or decrease the cache duration, you can instead pass a cache lifetime value in seconds using the cache parameter. For example, the code below tells the content to be cached for an hour (3600 seconds):

```
[drts-directory-view directory="directory" cache="3600"]
```

Deleting a view

To delete a view, click the button with a red cross icon in the row of the view that you wish to delete, and then click the **Delete View** button in the popup window.



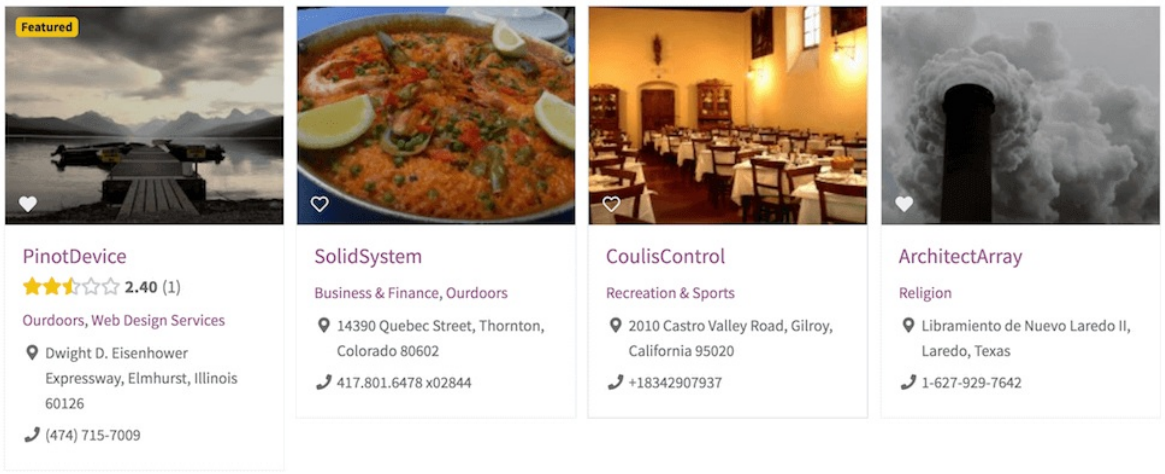
Note: You can not delete a view that is currently set as the default view.

Examples

Here are some examples of views and instructions on how to configure them.

Recent Listings

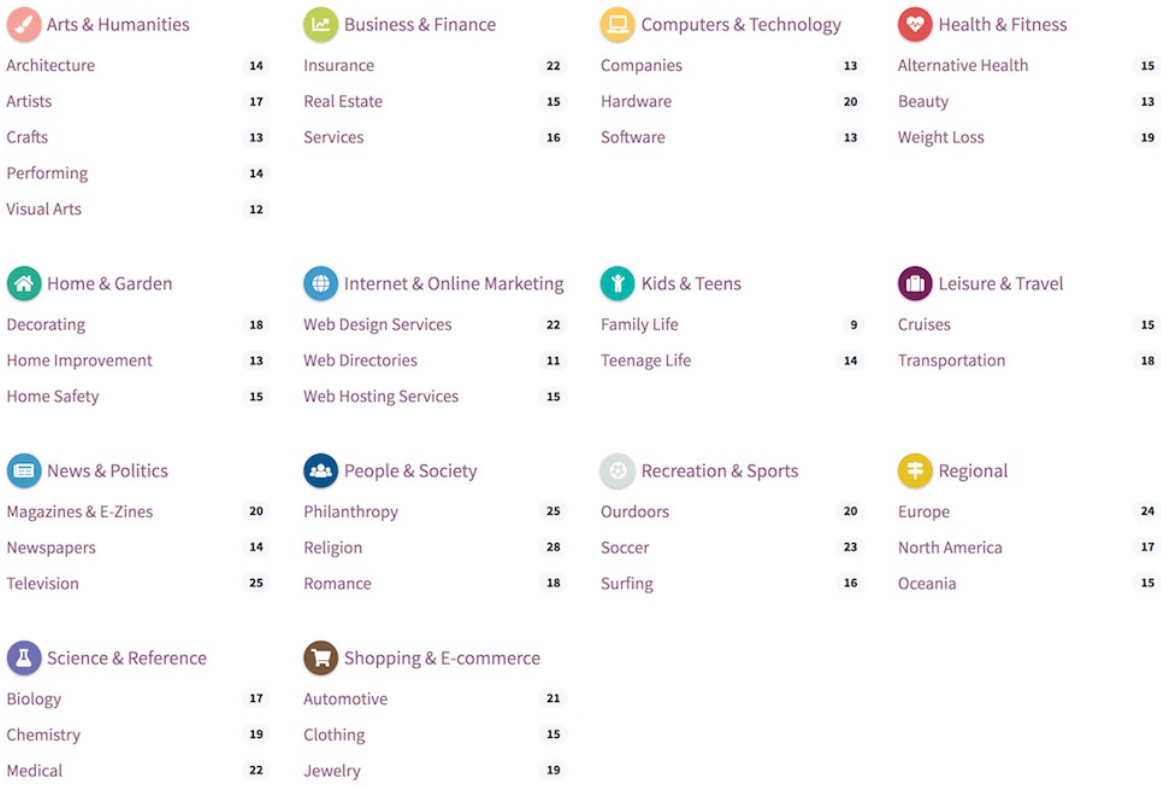
Display 4 most recent listings:



1. Go to **Directories** -> [**Your Directory**] -> **Content Types** -> **Listing** -> **Manage Views**.
2. Click the **Add View** button.
3. Enter *Recent Listings* for **View label**.
4. Select *List* for **View mode**.
5. Switch on **Disable row layout**.
6. Under the **Sort Settings** tab, check *Newest First* and uncheck all others for **Sort options**.
7. Select *Newest first* for **Default sort order**.
8. Under the **Query Settings** tab, enter *4* for **Max number of items to query (0 = unlimited)**.
9. Click the **Add View** button at the bottom of the popup window.
10. Copy the shortcode generated for the view and use it on any page.

Categories

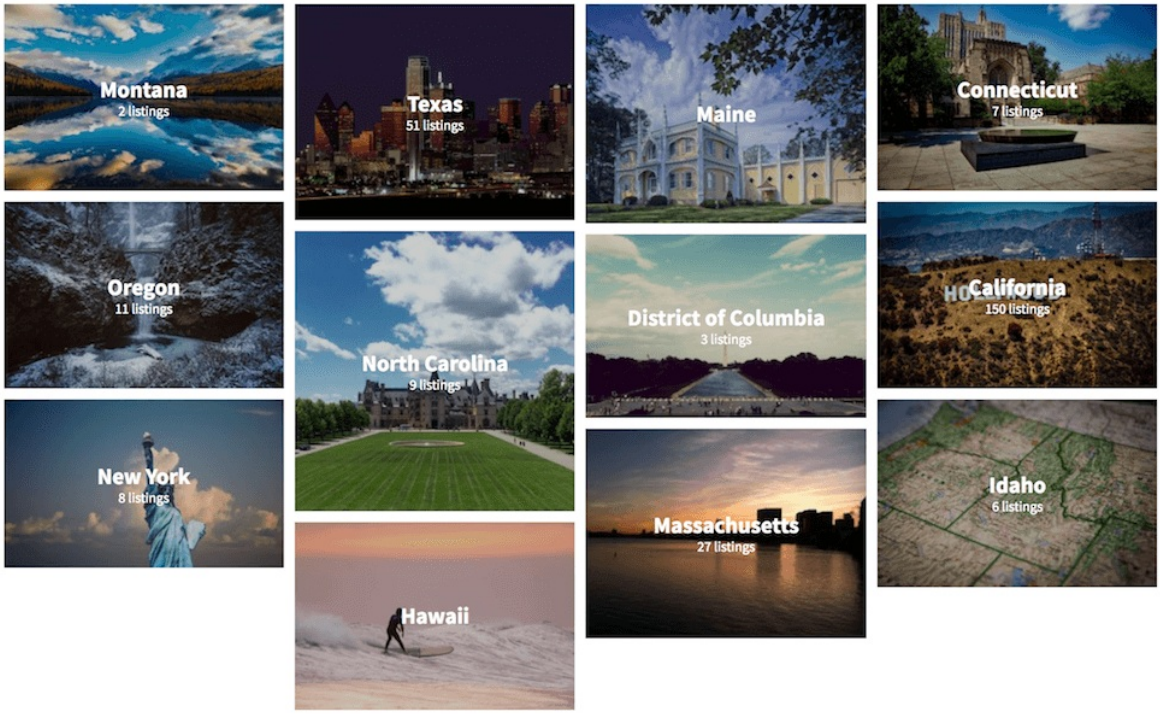
Display all categories in grid layout grouped by top level categories:



1. Go to **Directories** -> [**Your Directory**] -> **Content Types** -> **Category** -> **Manage Views**.
2. Click the **Add View** button.
3. Enter *Categories* for **View label**.
4. Select *List* for **View mode**.
5. Switch on **Disable row layout**.
6. Select *Medium width* for **Grid layout gutter width**.
7. Under the **Sort Settings** tab, check *Title* and uncheck all others for **Sort options**.
8. Select *Title* for **Default sort order**.
9. Under the **Query Settings** tab, select *Parent Category - Parent Term* and enter *0* in the text field for **Query by field**.
10. Under the **Pagination** tab, switch on **Disable pagination**.
11. Click the **Add View** button at the bottom of the popup window.
12. Copy the shortcode generated for the view and use it on any page.

Popular Locations

Display 12 random locations that have a photo and at least 3 listings:



1. Go to **Directories** -> [**Your Directory**] -> **Content Types** -> **Location** -> **Manage Views**.
2. Click the **Add View** button.
3. Enter *Popular Locations* for **View label**.
4. Select *Masonry* for **View mode**.
5. Under the **Sort Settings** tab, check *Random* and uncheck all others for **Sort options**.
6. Select *Random* for **Default sort order**.
7. Click the **Query Settings** tab, scroll down to **Query by field**. Select *Photo - Image* and enter *1* in the text field. Click **Add More**, select *Term content count - Term content count* and enter *3* in the text field.
8. Enter *12* for **Max number of items to query (0 = unlimited)**.
9. Under the **Pagination** tab, switch on **Disable pagination**.
10. Click the **Add View** button at the bottom of the popup window.
11. Copy the shortcode generated for the view and use it on any page.

Featured Listings

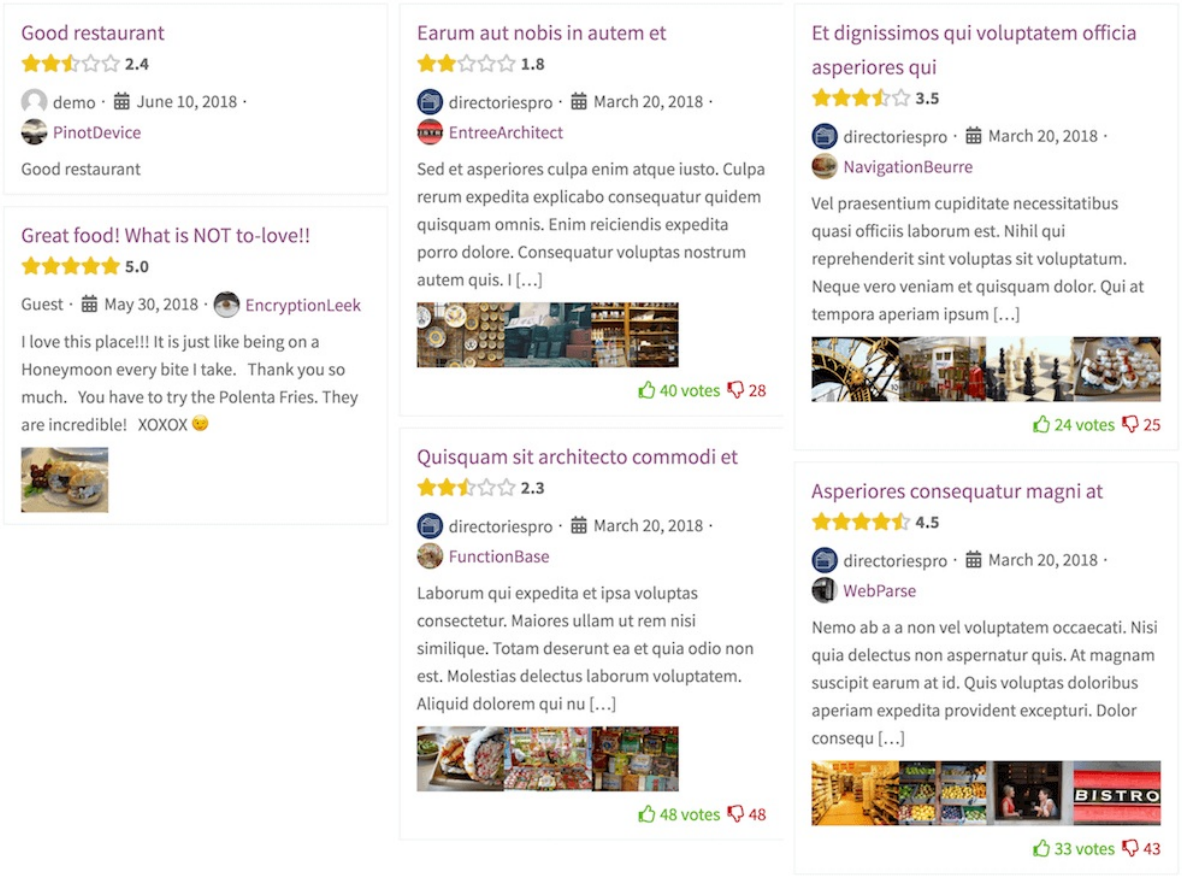
Display maximum of 12 random featured listings in a photo slider:

1. Go to **Directories** -> [**Your Directory**] -> **Content Types** -> **Listing** -> **Manage Views**.
2. Click the **Add View** button.
3. Enter *Featured Listings* for **View label**.
4. Select *Photo slider* for **View mode**.
5. Select *Photos (Image)* for **Image field**.
6. Select *Thumbnail* for **Image size**.
7. Select *5* for **Number of columns**.
8. Switch on **Enable centered view**.

9. Switch on **Disable row layout**.
10. Enter *135* for **Slider height**.
11. Enter *5* for **Photo padding**.
12. Under the **Sort Settings** tab, check *Random* and uncheck all others for **Sort options**.
13. Select *Random* for **Default sort order**.
14. Under the **Query Settings** tab, select *Featured Content - Featured Content* and enter *1* in the text field for **Query by field**.
15. Under the **Query Settings** tab, enter *12* for **Max number of items to query (0 = unlimited)**.
16. Click the **Add View** button at the bottom of the popup window.
17. Copy the shortcode generated for the view and use it on any page.

Recent Reviews

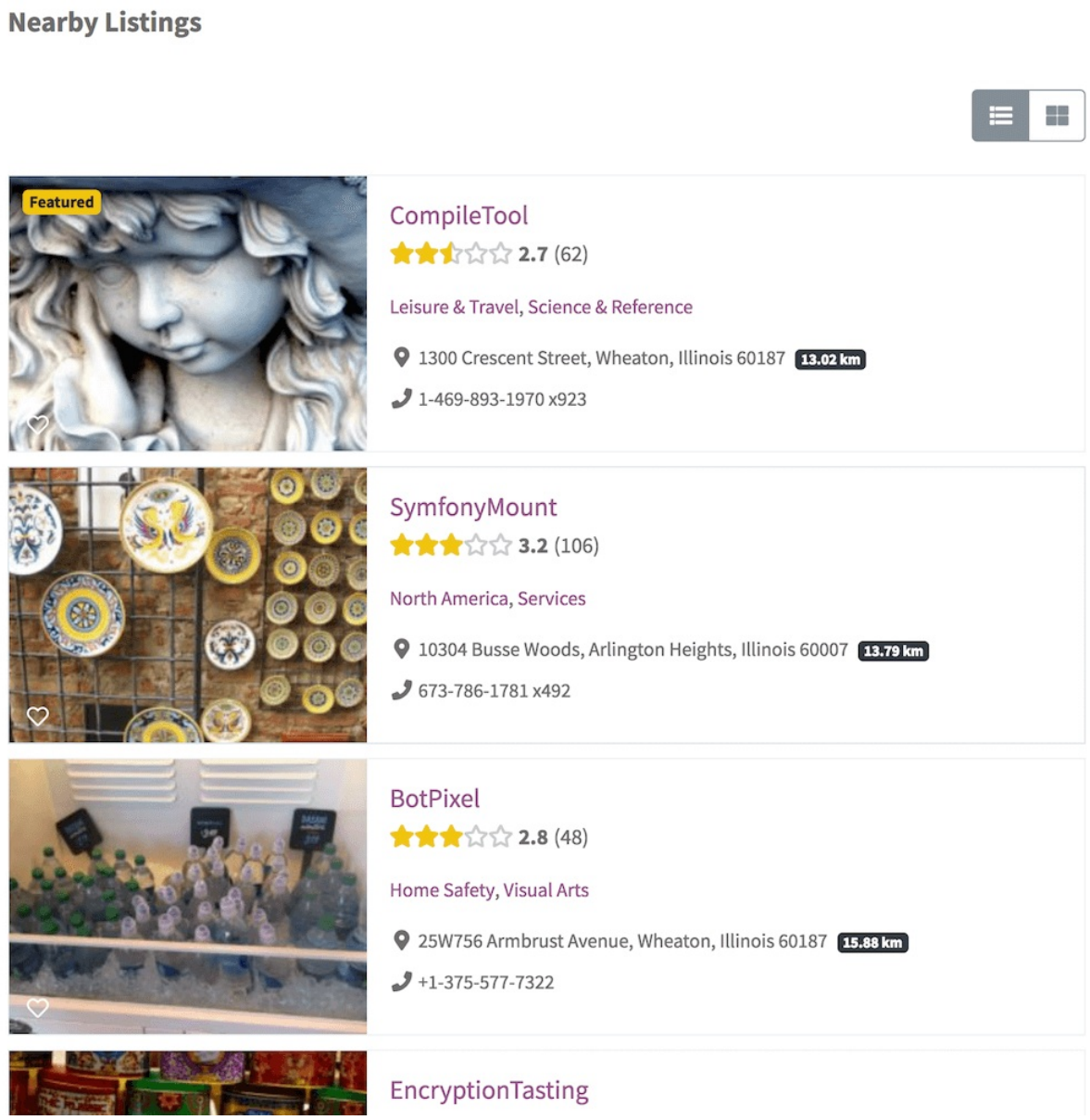
Display 6 most recent reviews in masonry layout:



1. Go to **Directories** -> [**Your Directory**] -> **Content Types** -> **Review** -> **Manage Views**.
2. Click the **Add View** button.
3. Enter *Recent Reviews* for **View label**.
4. Select *Masonry* for **View mode**.
5. Under the **Sort Settings** tab, check *Newest First* and uncheck all others for **Sort options**.
6. Select *Newest first* for **Default sort order**.
7. Under the **Query Settings** tab, enter *6* for **Max number of items to query (0 = unlimited)**.
8. Under the **Pagination** tab, switch on **Disable pagination**.
9. Click the **Add View** button at the bottom of the popup window.
10. Copy the shortcode generated for the view and use it on any page.

Nearby Listings

Display maximum of 10 nearby listings within 20km (or 20mi) from the location of the currently viewed listing sorted by distance:



1. Go to **Directories** -> [**Your Directory**] -> **Content Types** -> **Listing** -> **Manage Views**.
2. Click the **Add View** button.
3. Enter *Nearby Listings* for **View label**.
4. Select *List* for **View mode**.
5. Under the **Sort Settings** tab, check *Distance* and uncheck all others for **Sort options**.
6. Select *Distance* for **Default sort order**.
7. Under the **Query Settings** tab, select *Location - Location* and enter *_current_,20* in the text field for **Query by field**.
8. Click the **Add more** button, select *ID - ID* and enter *-_current_* (do not forget to prefix with "-") in the text field.
9. Under the **Query Settings** tab, enter *10* for **Max number of items to query (0 = unlimited)**.
10. Click the **Add View** button at the bottom of the popup window.
11. Copy the shortcode generated for the view.
12. Go to **Directories** -> [**Your Directory**] -> **Content Types** -> **Listing** -> **Manage Displays**.

13. Click the **Detailed** sub-tab.
14. Click the green **+** button at the bottom.
15. In the popup window, click the **Content** tab and then click the **Text** element.
16. Under the **General** tab, paste the shortcode copied in step 10 into the **Text content** textarea field.
17. Under the **Heading** tab, select *Custom label* for **Label** and enter *Nearby Listings* into the **Custom label** setting field.
18. Click the **Add Element** button at the bottom of the popup window.
19. Press **Save Changes** at the bottom of the page.

Adding and Managing Fields

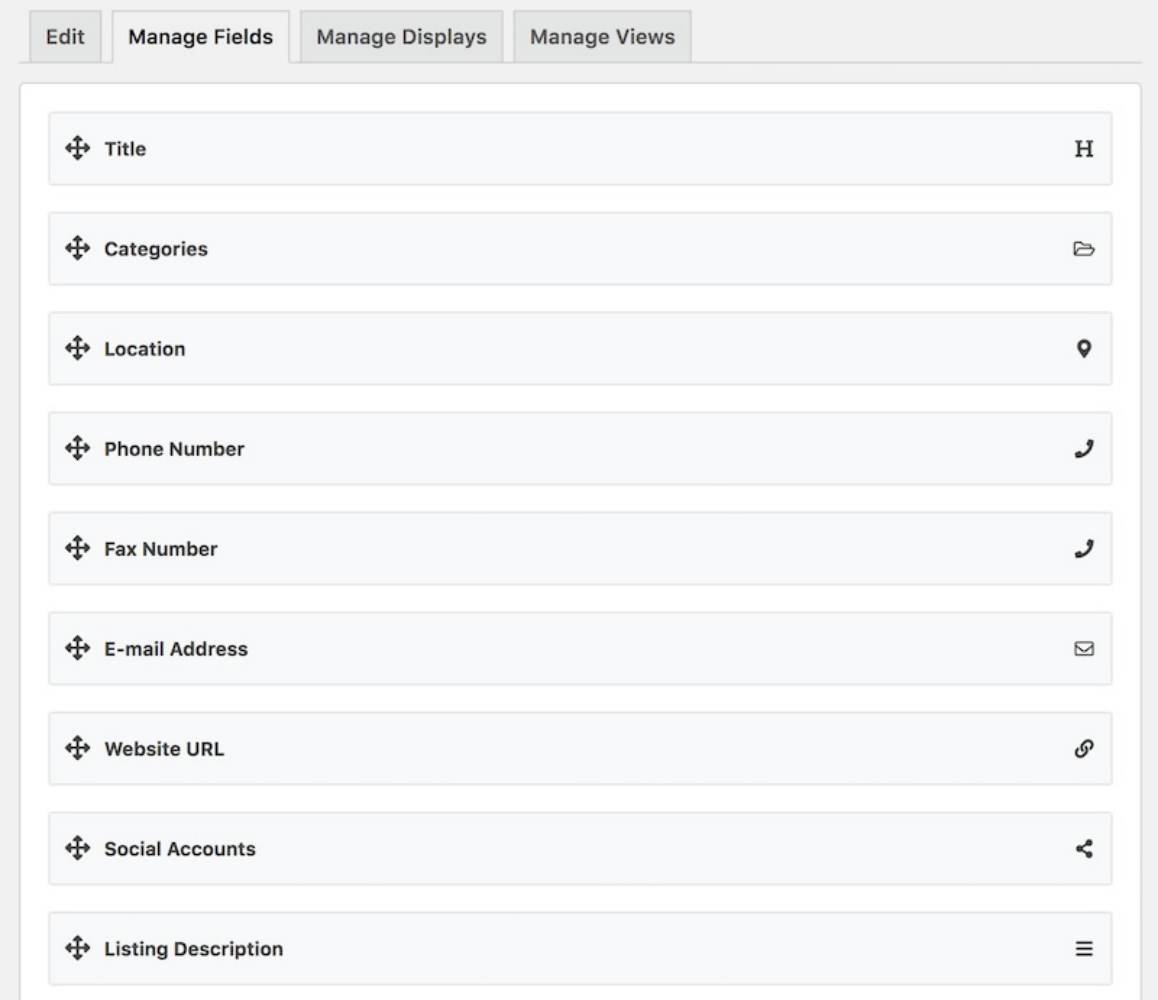
Posts and taxonomy terms in Directories Pro are composed of pre-defined set of fields. These are called **default fields**, which are defined automatically and only once during plugin activation.

On the other hand, **custom fields** are fields that can be defined manually in addition to the default fields. These fields are used to store and display additional pieces of information for each content item, and can be freely defined or deleted.

Editing a default field

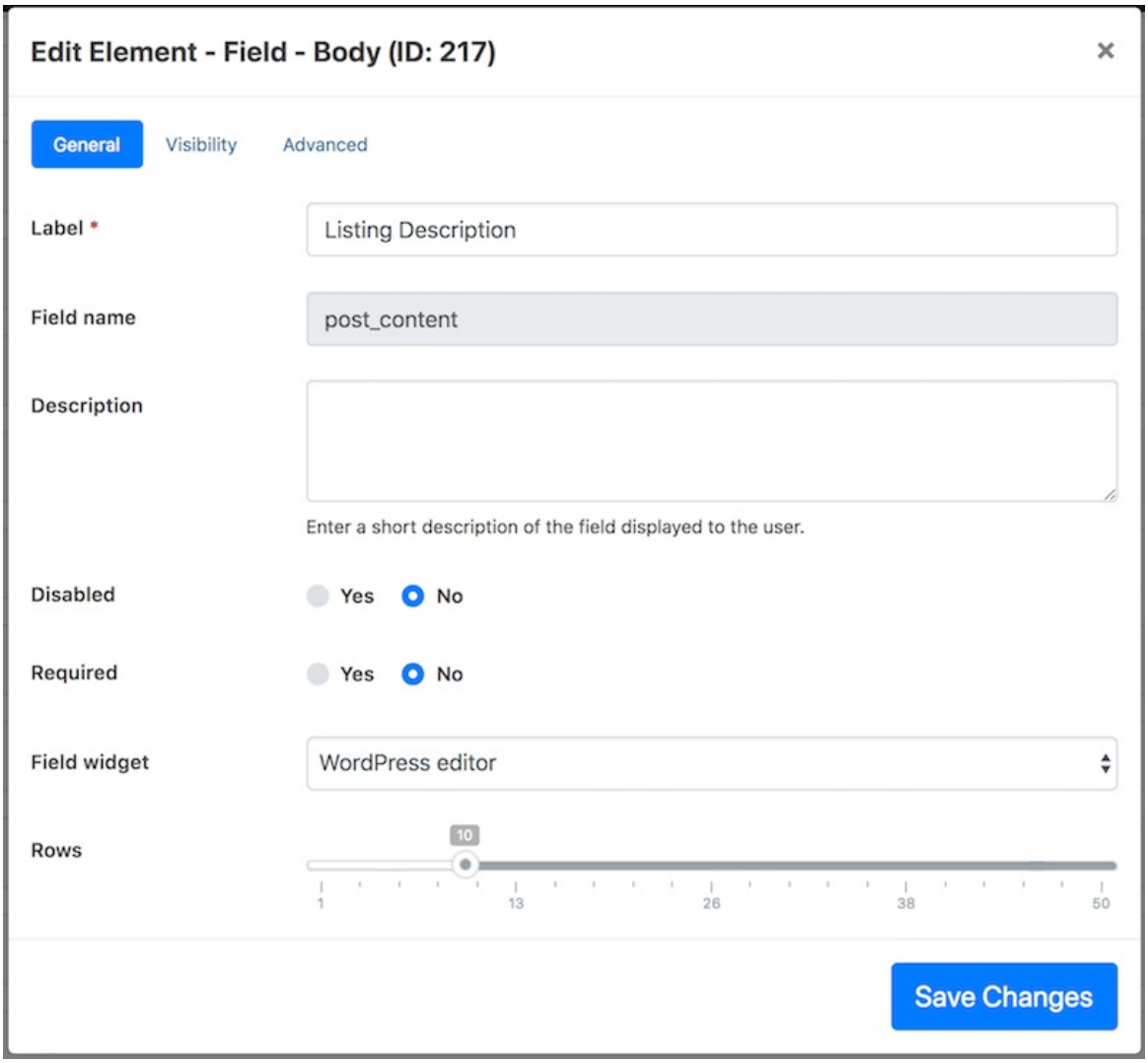
We will explain here in detail how you can edit a default field, by actually editing one of the default fields defined for listings.

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Click **Directories** in the admin sidebar.
3. Under the **All Directories** tab, click the gear icon in the row of the directory that you wish to configure.
4. Under the **Content Types** tab, click the dropdown button in the **Listing** row and then click **Manage Fields**.



This page shows a drag and drop editor that lets you manage fields for listings. It lets you design the listing submission form used both in the backend and the frontend. Each grey box in the editor is referred to as an *element* in this documentation.

5. Hover over to the **Listing Description** element and click the gear icon which will open a popup window containing a configuration form for the element.

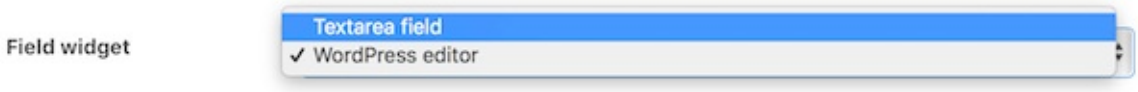


   - **General Settings** - Configure general settings of the element. The options displayed here depend on the type of the element currently being edited.

     Some notable options are:

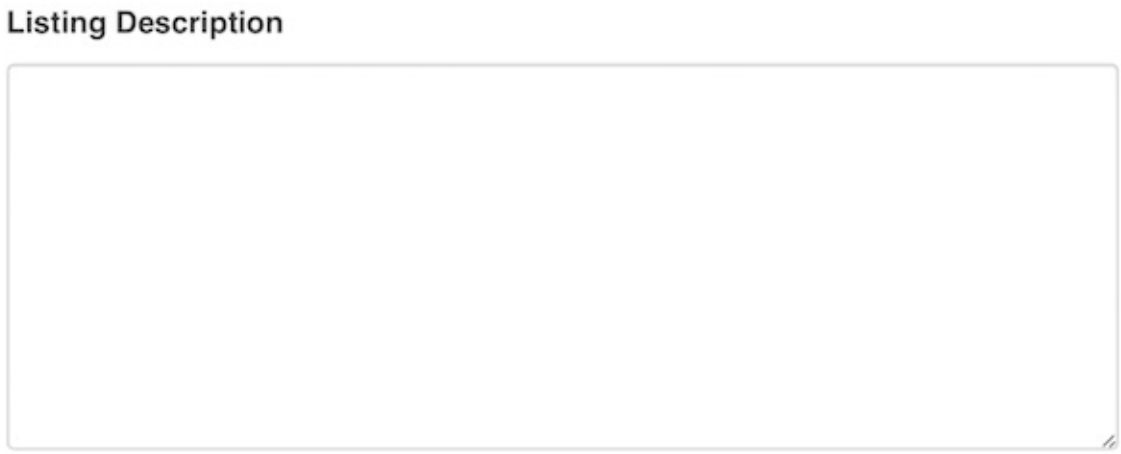
     - **Label** - Label for the field in the add listing form. This setting may not be empty.
     - **Form field type** - Choose how the field is displayed in the listing submission form.
   - **Visibility Settings** - Shows settings related with the visibility of the element, such as an option to restrict the element to be viewed by certain user roles.
   - **Advanced Settings** - Shows a setting for adding a CSS class to the element.

6. Select *Textarea field* for **Form field type** under the **General Settings** tab.



7. Press the **Save Changes** button.

Now that the form field type of the field has been changed from **WordPress editor** to **Textarea field**, click **Add Listing** under your directory menu in the admin sidebar.

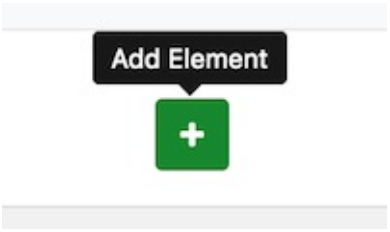


As you can see, the **Listing Description** field now displays a simple textarea field instead of the default WordPress rich text editor.

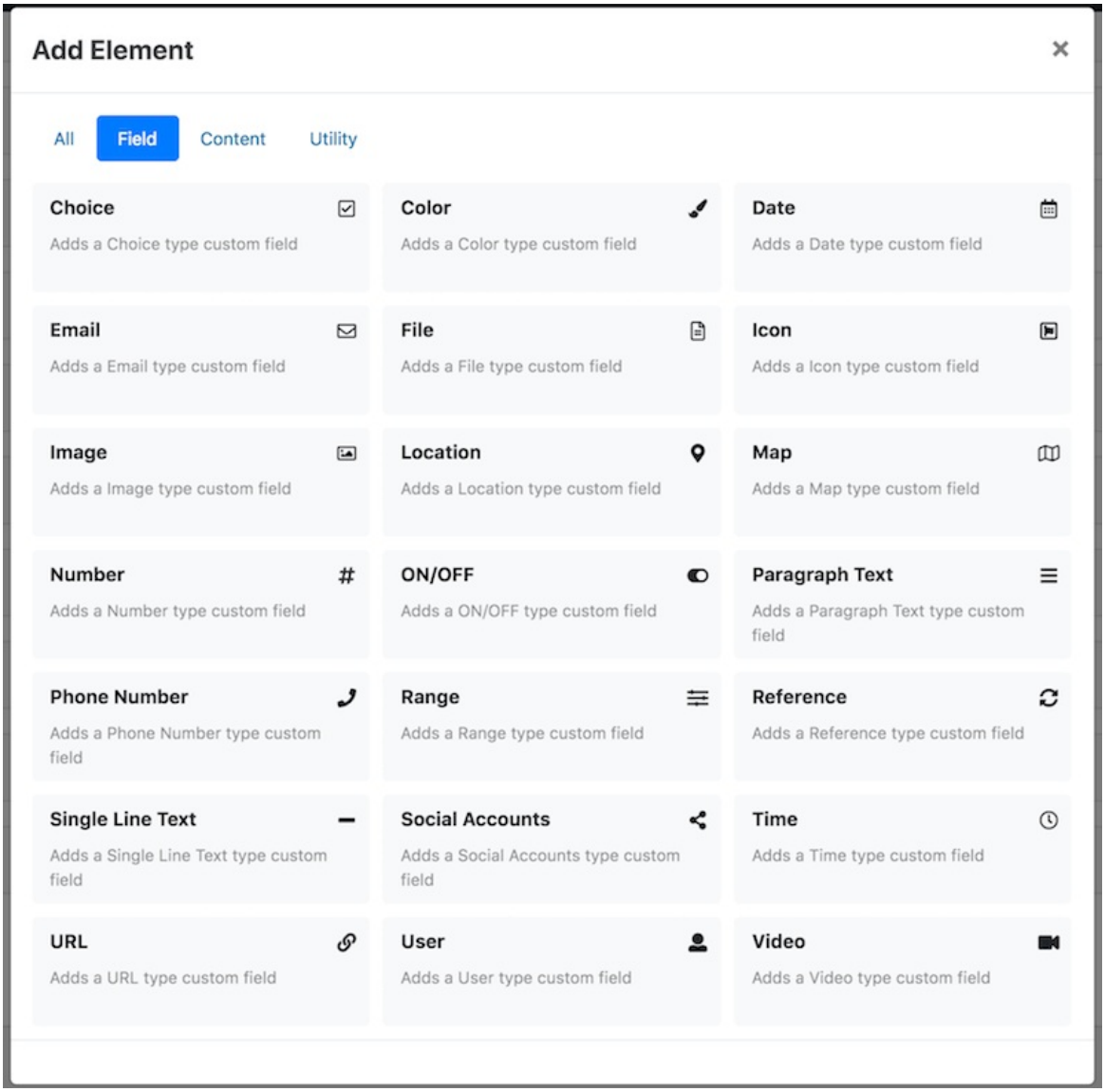
Adding a custom field

We will explain here how you can define a custom field, by actually adding a new custom field to listings.

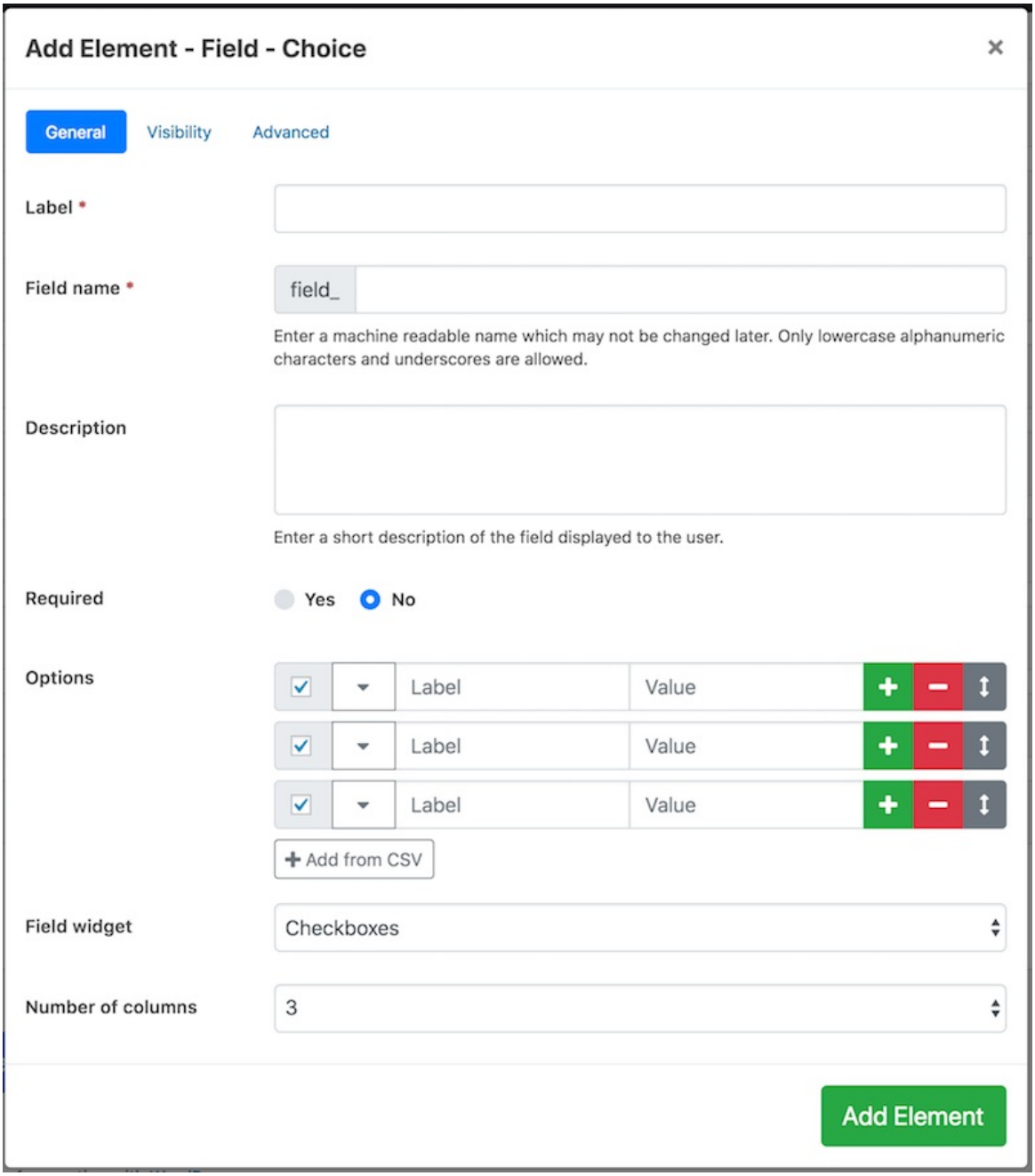
1. On the form editor page, click the green **Add Element** button with a plus sign at the bottom of the page:



A popup window will appear as below:



2. Click the **Field** tab, hover over to the **Choice** element and click.



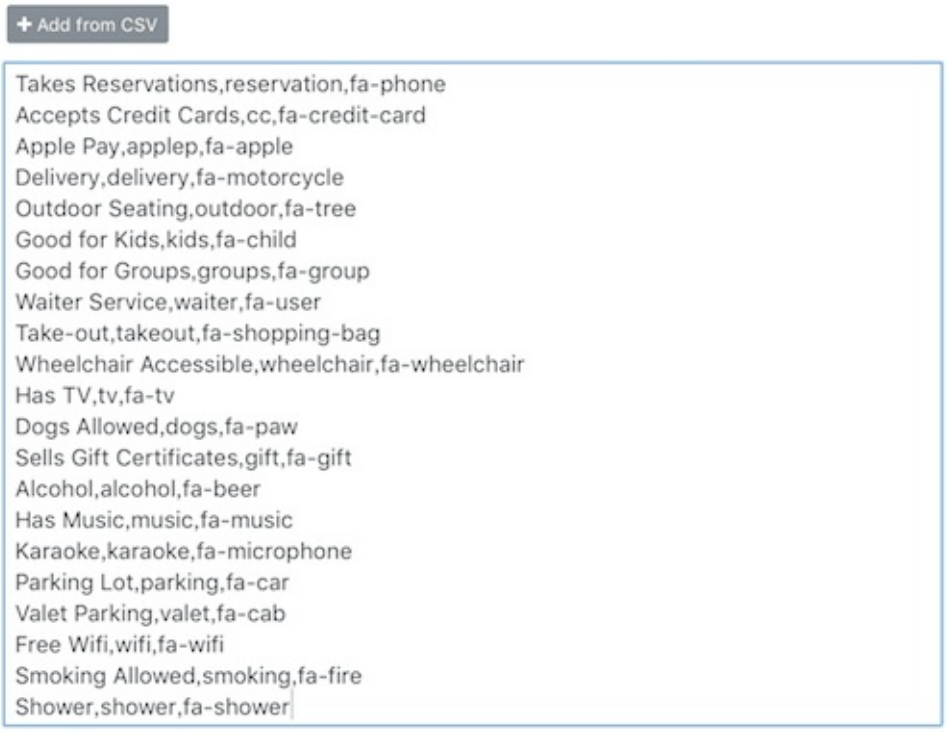
- **General Settings**

  Enter or select the following values for each setting:

  - **Label** - *Features*
  - **Field name** - *features*
  - **Options** - Click the **Add from CSV** button, then copy & paste the whole text below into the textarea.

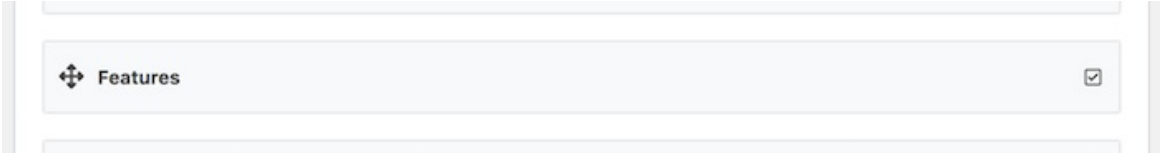
```
Takes Reservations,reservation,fa-phone
Accepts Credit Cards,cc,fa-credit-card
Apple Pay,applep,fab fa-apple-pay
Delivery,delivery,fa-motorcycle
Outdoor Seating,outdoor,fa-tree
Good for Kids,kids,fa-child
Good for Groups,groups,fa-users
Waiter Service,waiter,fa-user
```

```
Take-out,takeout,fa-shopping-bag
Wheelchair Accessible,wheelchair,fa-wheelchair
Has TV,tv,fa-tv
Dogs Allowed,dogs,fa-paw
Sells Gift Certificates,gift,fa-gift
Alcohol,alcohol,fa-beer
Has Music,music,fa-music
Karaoke,karaoke,fa-microphone
Parking Lot,parking,fa-car
Valet Parking,valet,fa-taxi
Free Wifi,wifi,fa-wifi
Smoking Allowed,smoking,fa-fire
Shower,shower,fa-shower
```

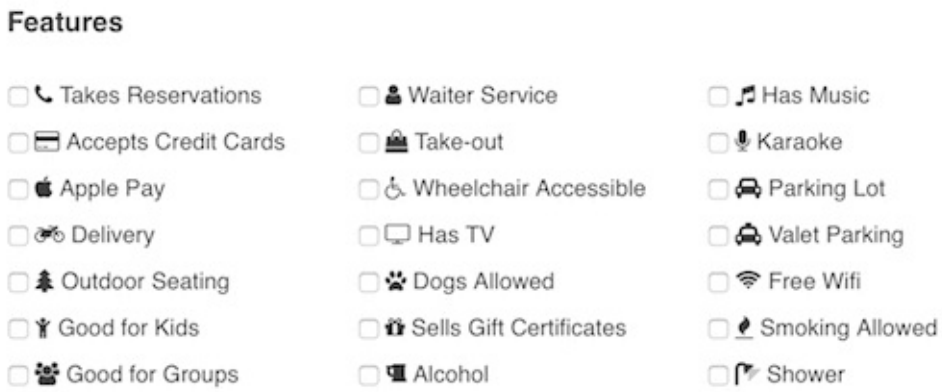


- **Form field type** - *Checkboxes*
- **Display inline** - *No*
- **Number of columns** - *3*
- **Max number of values** - *Unlimited*

3. Press the **Add Element** button at the bottom of the popup window. A new field element labelled **Features** will be added to the editor as below.



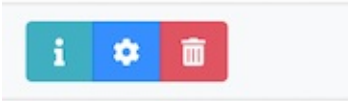
Now, visit the **Add Listing** page of your directory. You should see the newly added **Features** field in the add listing form as below.



Deleting a custom field

Follow the instructions below to delete a custom field.

1. On the form editor page, hover over to the custom field element which you wish to delete, and then click the red trash icon.

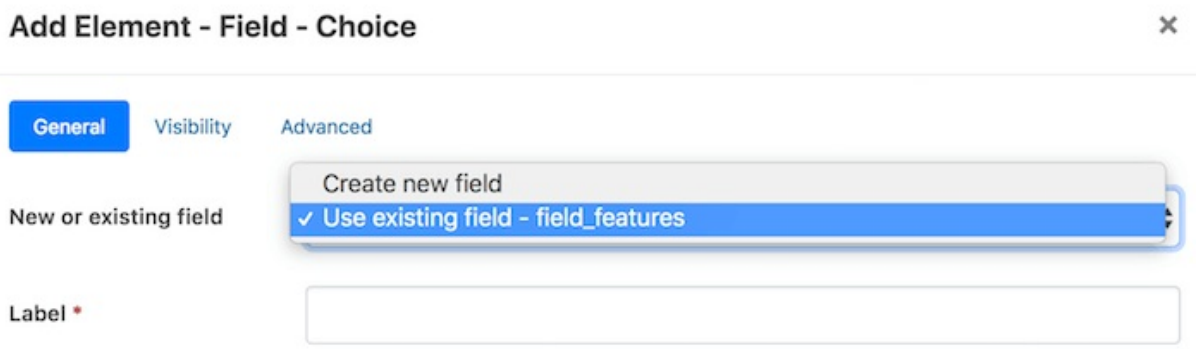


2. Click **OK** in the popup alert box.
3. The field element will disappear and is removed from the add listing form.

Re-using custom fields

Custom fields are re-useable. That is, you can add custom fields that you have created previously to another content type in the same directory or to content types of other directories. Note that you can not add a custom field again to a content type that already has the field assigned.

In order to re-use a custom field, simply select from one of the existing fields from the **New or existing field** dropdown shown in the field configuration form when adding a field.

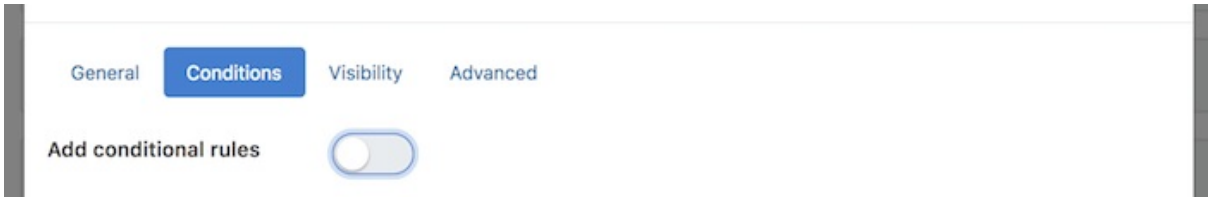


Adding conditional rules

Note: This feature is available from version 1.1.0.

Conditional rules let you define dependencies between fields. That is, you can have certain fields shown/hidden depending on the values of other fields.

To add conditional rules, click the **Conditions** tab in the popup form when adding or editing a field.



Then, toggle the **Add conditional rules** switch.

Select **Show this field** or **Hide this field** from the first dropdown and then **if all of the following match** or **if any of the following matches** from the next dropdown.

You can then add as many rules as you like by selecting fields that the current field depends on and entering values that need to be matched with those fields in order for the current field to be shown or hidden.

For example, select *Categories*, *is one of*, and enter *1,5,10* to the text field so that your field will be shown/hidden if one of the three categories (categories with ID 1, 5, or 10) is selected for the Categories field of the content item being edited.

Use the **Add More** button to add more rules. To delete a rule, hover over to the rule that you wish to remove and click the red button displayed.

Available elements

There are by default 3 types of elements that can be added to build the form: **Field**, **Content**, and **Utility** element types.

Below are the default elements available for each element type.

Field

Field elements add fields to the form for accepting various type of inputs.

- **Choice** - A multi-purpose field which lets you choose values from one or more options. It can be rendered as a select list, radio buttons, or checkboxes.
- **Date** - Lets you enter date and time (optional) values via an intuitive user interface.
- **Email** - Lets you enter e-mail addresses. Optionally lets you enable MX record checks to ensure the e-mail addresses exist.

- **File** - Enables uploading various type of files to be attached to the content item. Uploads can be restricted by file extension and/or size.
- **Image** - Enables uploading image files to be displayed with the content item. Uploads can be restricted by file size.
- **Location** - Lets you select a location on a map and enter address details for the location.
- **Number** - Lets you enter numeric values either through a text or slider field.
- **ON/OFF** - Renders a checkbox field.
- **Paragraph Text** - Lets you enter multi-line text values. It can be rendered as a plain textarea or WordPress rich text editor field.
- **Phone Number** - Lets you enter phone numbers with an option to configure an input mask.
- **Range** - Displays a slider input interface to select a specific range of numeric values.
- **Reference** - Lets you select other content items, either of the same content type or a different one, with auto-suggestions. Content items can even be from other directories as well.
- **Single Line Text** - Lets you enter single line text values with optional features such as input validation and masking.
- **Social Accounts** - Presents fields to enter social media account info.
- **Time** - Shows an intuitive user interface which lets you enter time or time range values and/or select days of week.
- **URL** - Lets you enter URLs.
- **User** - Lets you select user accounts registered on the site with auto-suggestions.
- **Video** - Lets you add videos by specifying video URLs or IDs.

Content

Content elements are used to display or embed custom content into the form.

- **HTML** - Lets you add a custom HTML text to the form.
- **JavaScript** - Lets you embed a custom JavaScript code into the form.
- **Text** - Lets you add custom non-HTML text to the form.

Utility

Utility elements include elements that can organize or group other elements, or elements that do not belong to other element types.

- **Columns** - Groups multiple elements and display them in columns.
- **Group** - Groups multiple elements to act like a single element.
- **Separator** - Adds a horizontal line separator used to separate elements.
- **Tabs** - Groups multiple elements and display them in tabs.
- **reCAPTCHA** (requires *Directories - Frontend* plugin) - Displays a CAPTCHA field using Google reCAPTCHA API.

Managing and Customizing Displays

Displays define how individual posts and taxonomy terms are rendered in the frontend. The following is the list of displays available by default.

- **Detailed** - This display is used to render the full detail of a content item when visiting its permalink URL.
- **Summary** - This display renders summarized information of each content item, usually when a group of content items are displayed. For example, when listings are displayed on the directory index page in List or Masonry view mode.
- **Dashboard Row** (requires *Directories - Frontend* plugin) - This display is used to render each content item as a table row in the frontend dashboard.

Note that not all content types have all the displays above available.

Editing a display

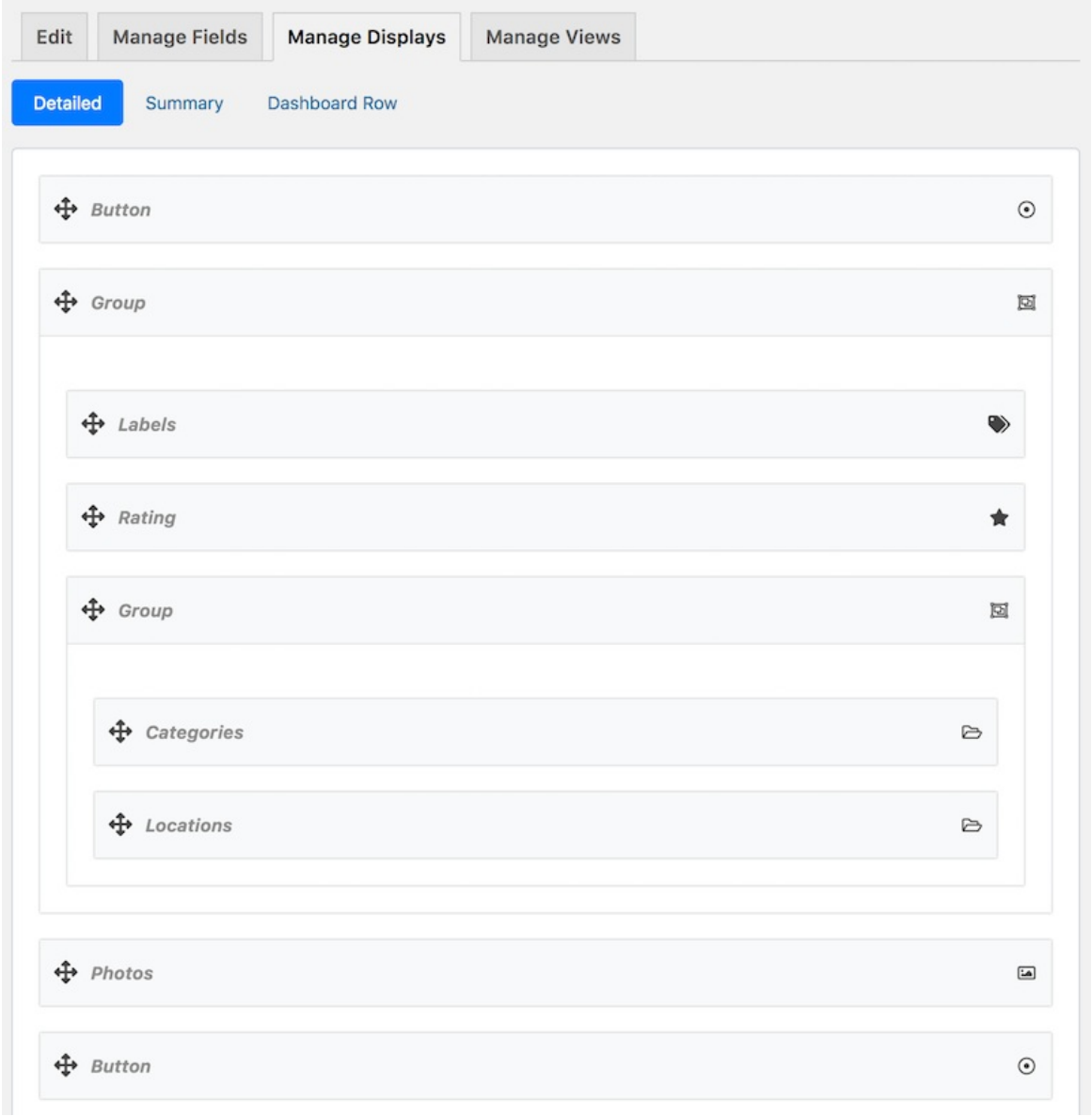
Displays can be edited using a drag and drop display editor in the backend. We will explain here in detail how you can customize a display by actually editing the **Detailed** display for listings. Here you will add the following 2 new sections to the display.

- **Features** - lists all the services and amenities available with the currently displayed listing.
- **Related Listings** - displays listings related with the currently displayed listing in row and grid layouts.

Editing the Detailed display for listings

Follow the steps below to start editing the **Detailed** display for listings.

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Click **Directories** in the admin sidebar.
3. Under the **All Directories** tab, click the gear icon in the row of the directory to edit.
4. Under the **Content Types** tab, click the dropdown button in the **Listing** row and then click **Manage Displays**. The page should now look like below showing a drag & drop display editor.

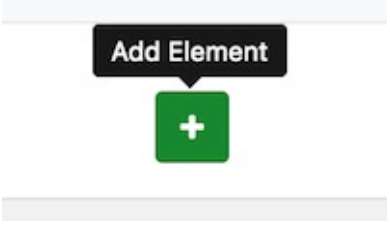


Each grey box in the editor is referred to as an *element* in this documentation.

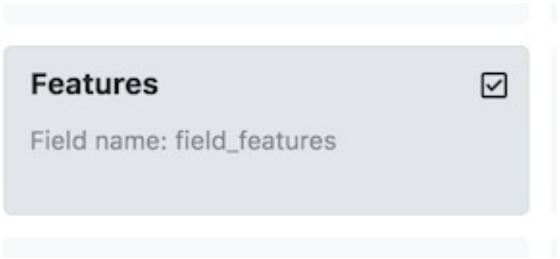
You can drag the elements to wherever you wish for a certain content to appear, configure elements, or add new elements to the display.

Adding the Features section

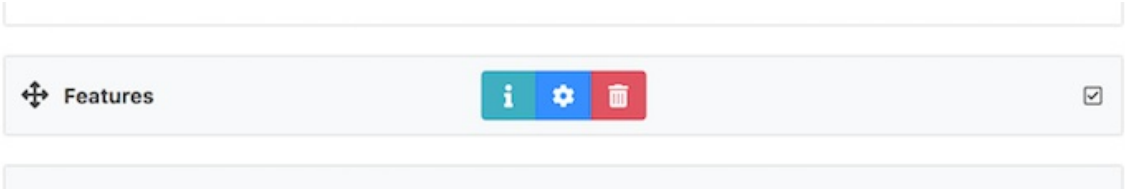
1. Before proceeding to the next step, make sure first that you have created a custom field titled **Features** using the **Choice** type field by following the instructions in Adding and Managing Fields - Adding a custom field.
2. On the display editor, make sure the **Detailed** sub-tab is selected. Then, scroll down to the bottom of the page and then click the green **Add Element** button with a plus sign which opens a popup window.



3. In the popup window, select the **Field** tab and click **Features**.



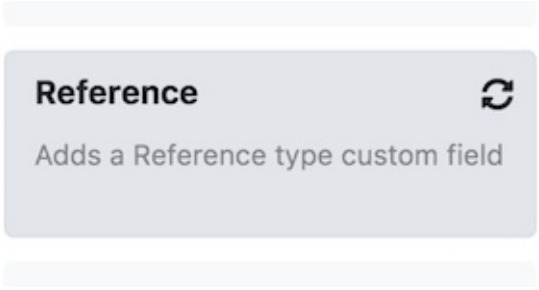
4. Under the **General Settings** tab, configure settings as follows.
    - **Label** - *Default label*
    - **Show label as heading** - *Yes*
    - **Field Renderer** - *Checklist*
5. Leave other settings as-is and click the **Add Element** button at the bottom of the popup window. This will add a **Features** field element to the display as below.



Adding the Related Listings section

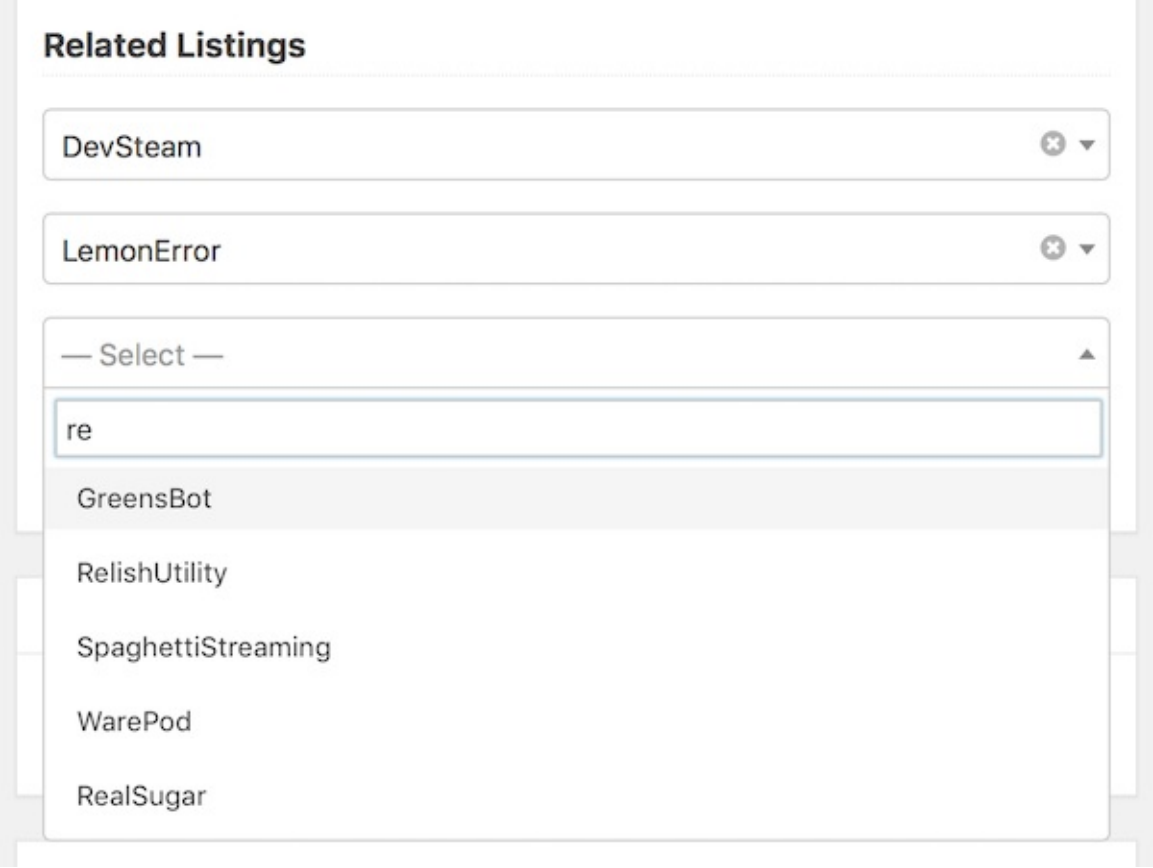
We will first add a new custom field to listings so that listing authors or administrators can select related listings when adding/editing a listing. Follow the steps below to add such field.

1. Click the **Manage Fields** tab.
2. Click the green **Add Element** button with a plus sign at the bottom of the page.
3. In the popup window, select the **Field** tab and click **Reference**.



4. Under the **General Settings** tab, configure as follows.
    - **Label** - *Related Listings*
    - **Content Type** - *XXXX - Listing* (where XXXX is the label of your directory)
    - **Max number of values** - *Unlimited*
5. Press the **Add Element** button at the bottom of the popup window. A new field labeled **Related Listings** will be added to the form editor.

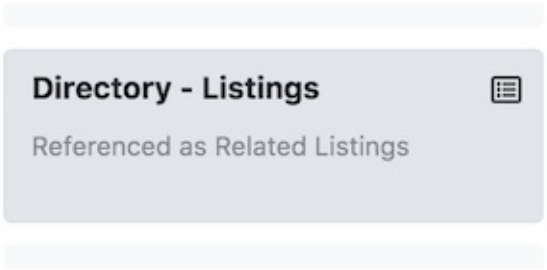
Try adding or editing listings and see how the field works. The field in the listing form should look similar to below.



The field has an auto-suggest feature enabled so that you will see auto-suggested listings below the field while typing into the field. Add some related listings using the field so that they can be displayed with the **Detailed** display.

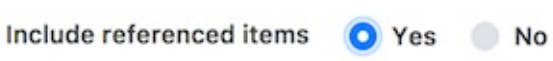
Now, let's go back to the display editor page of the **Detailed** display and add an element to the display that will render related listings.

1. On the **Detailed** display editor, click the green **Add Element** button with a plus sign at the bottom.
2. In the popup window, select the **Content** tab and click the element labeled **XXXX - Listings** (where XXXX is the label of your directory) which has a description shown as *Referenced as Related Listings*.



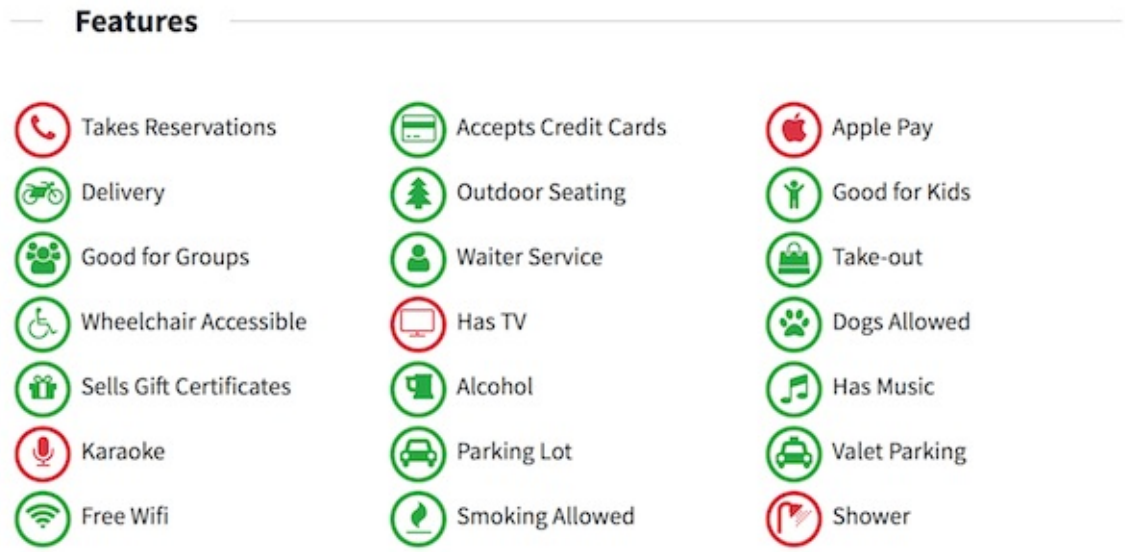
The element will display listings that are referencing the current listing as a related listing. For example, if listing **A**, **B**, and **C** were selected as related listings when adding or editing listing **D**, then the element will display listing **D** as a related listing when viewing listing **A**, **B**, or **C**. By default, the display element will not display anything for listing **D**.

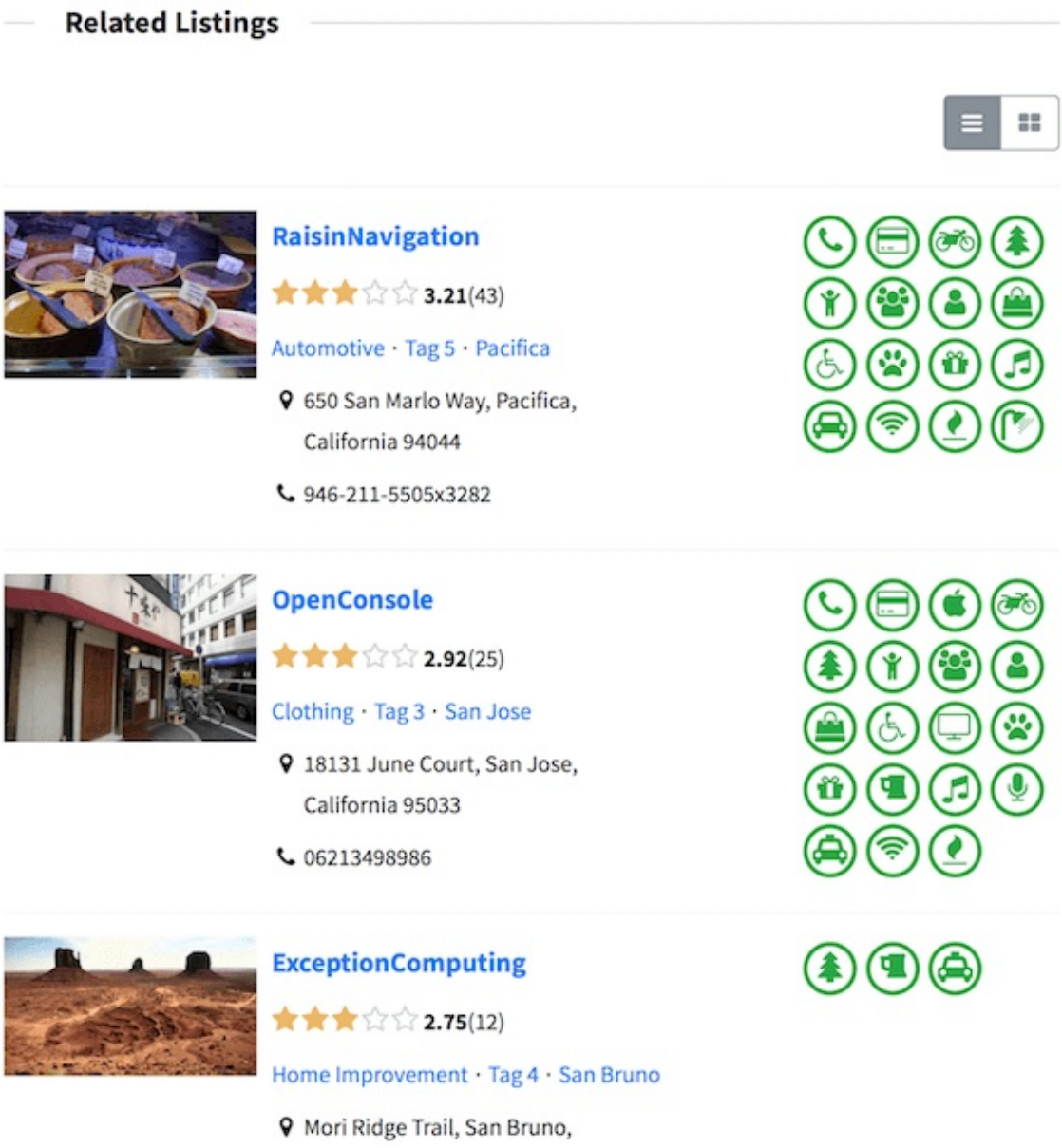
However, you may also want to show listings **A**, **B**, and **C** as related listings when viewing listing **D**. In that case, select *Yes* for the **Include referenced items** option under the **General Settings** tab.



3. Leave other options as-is and click the **Add Element** button at the bottom of the popup window.

That's all for editing the display. Try adding or editing listings and see how the **Detailed** display is rendered on single listing pages in the frontend. The **Features** and **Related Listings** sections on the page should look similar to below.

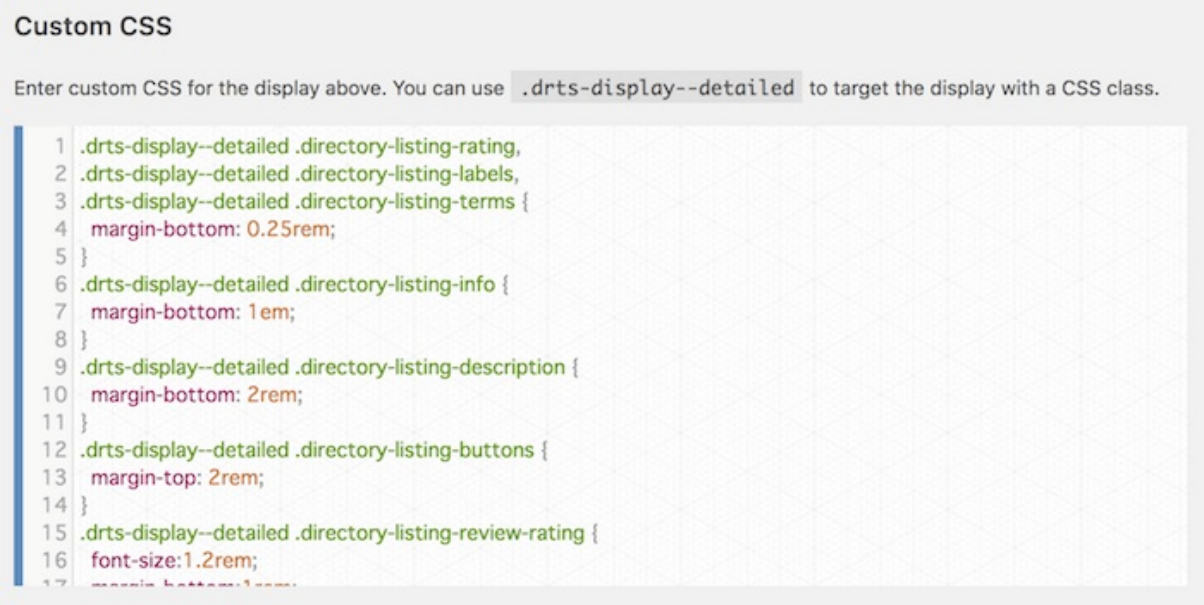




Styling elements

You can style an element by adding a CSS class to the element and then applying custom CSS rules to the class. When adding or editing an element, click the **Advanced** tab and enter a custom CSS class name to the **CSS class** setting. You can insert multiple CSS class names by separating them with a space.

To add custom CSS rules to the class, you can either add them to the style.css file of your current theme or via the custom CSS editor available for each display which can be found under the display editor.



We recommend using the CSS editor since that allows you to export and import your custom CSS rules as well when you export and import directory settings.

Available elements

There are by default 3 types of elements that can be added to displays; **Field**, **Content**, and **Utility** element types.

Below is the list of elements available by default. Note that some elements may be available for certain content types only. You should also see more elements available if you add custom fields.

Field

Field elements render field values of the content item to display.

- **Author** - Renders a thumbnail image and/or the username of the content author.
- **Opening Hours** (Listing) - Renders a table of opening hours.
- **Categories** (Listing) - Renders a list of categories associated with the listing.
- **Date Established** (Listing) - Renders the established date entered for the listing.
- **Description** (Category / Tag / Location) - Renders the description of the taxonomy term.
- **E-mail Address** (Listing) - Renders the e-mail address entered for the listing.
- **Fax Number** (Listing) - Renders the fax number entered for the listing.
- **Field Template** - Displays custom content rendered by a template file and have it act as a field. See Template Files for more details.
- **Listing Description** (Listing) - Renders the description entered for the listing.
- **Location** (Listing) - Renders the location address of the listing in a customizable format.
- **Locations** (Listing) - Renders a list of location taxonomy terms associated with the listing.
- **Payment Plan** (Listing) - Renders the name and/or expiration date of the payment plan associated with the listing.

- **Phone Number** (Listing) - Renders the phone number entered for the listing.
- **Photos** (Listing) - Renders photos uploaded for the listing.
- **Price Range** (Listing) - Renders the price range specified for the listing.
- **Publish Date** (Listing / Claim / Review) - Renders the date/time of the content published.
- **Rating** (Review) - Renders overall rating score or rating bars.
- **Review** (Review) - Renders the review body.
- **Social Accounts** (Listing) - Renders links to social media pages associated with the listing, embeds Facebook Page plugin or Twitter Feed.
- **Tags** (Listing) - Renders a list of tags associated with the listing.
- **Title** - Renders the title of the current content item with an option to link the title to the permalink URL of the content item or to a URL of another field.
- **Website URL** (Listing) - Renders a link to the URL entered for a listing.
- **Message** (Claim) - Renders the message text entered for the claim.
- **Thumbnail** (Category) - Renders the thumbnail image of the category.
- **Photo** (Location) - Renders the photo image of the location.

Content

Content elements let you add various types of content to the display.

- **Button** - Renders call to action buttons.
- **Child Terms** (Category / Tag / Location) - Renders child terms of the taxonomy term
- **Comments** (Listing / Review) - Renders comments submitted for the listing.
- **Contact Form** (Listing) - Renders a contact form for sending messages to the listing author.
- **HTML** - Renders a custom HTML text, with support for WordPress shortcodes.
- **JavaScript** - Renders a custom Javascript code.
- **Labels** (Listing / Claim / Review) - Renders small tags adding context to the listing.
- **Rating Stars** (Listing) - Displays rating of the listing with interactive star icons.
- **Review Ratings** (Listing) - Renders overall review score or rating bars in a customizable format.
- **Statistics** (Listing / Review) - Displays various statistics of the content item with icons and numbers.
- **Template** - Displays custom content rendered by a template file. See Template Files for more details.
- **Text** - Renders a custom non-HTML text.

Utility

Utility elements let you organize or group elements.

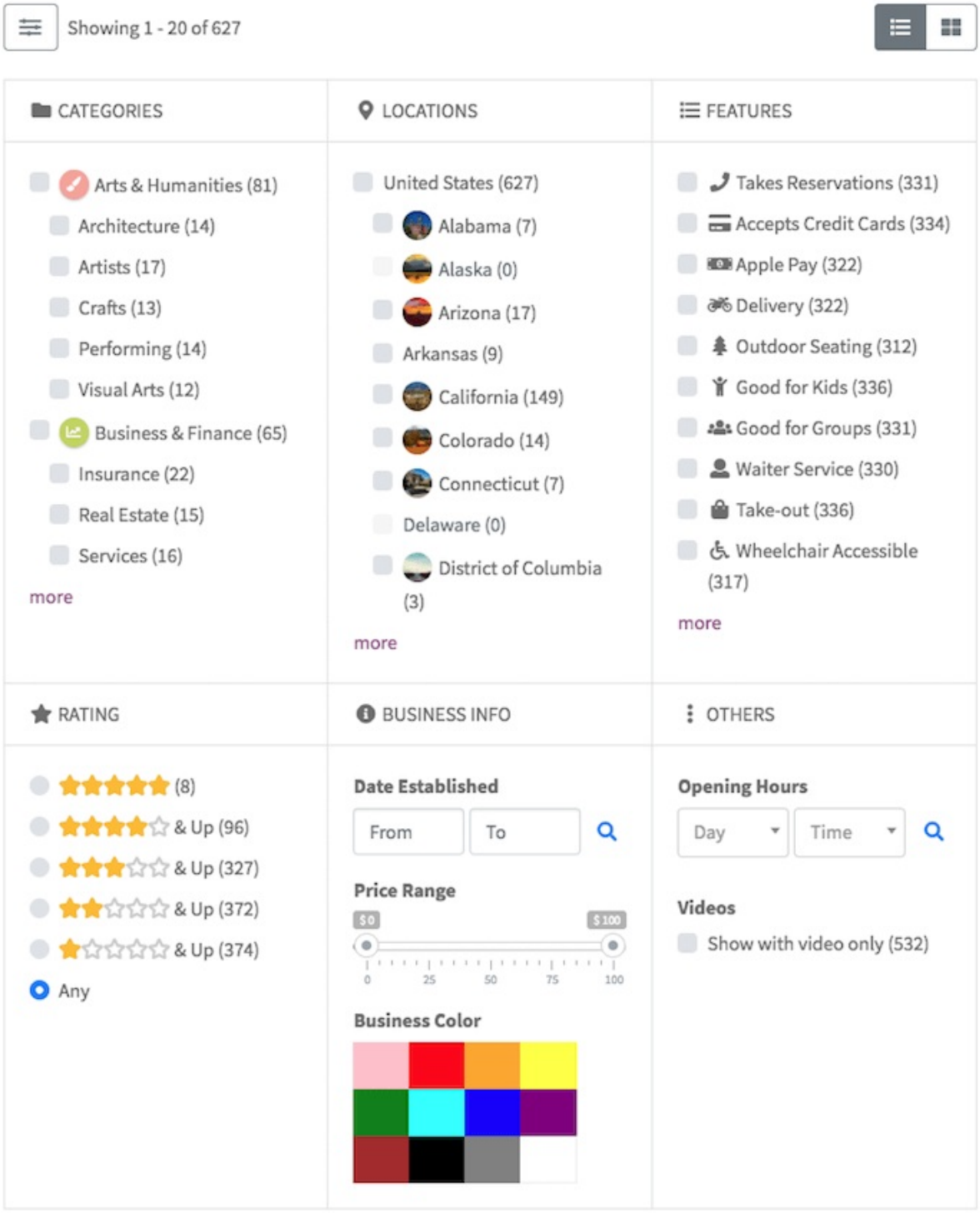
- **Columns** - Groups and displays multiple elements in columns.
- **Field List** - Groups multiple **Field** type elements and renders them as a definition list.

- **Group** - Groups multiple elements to act like a single element.
- **Separator** - Adds a horizontal line to separate elements.
- **Tabs** - Displays multiple elements in tabs.

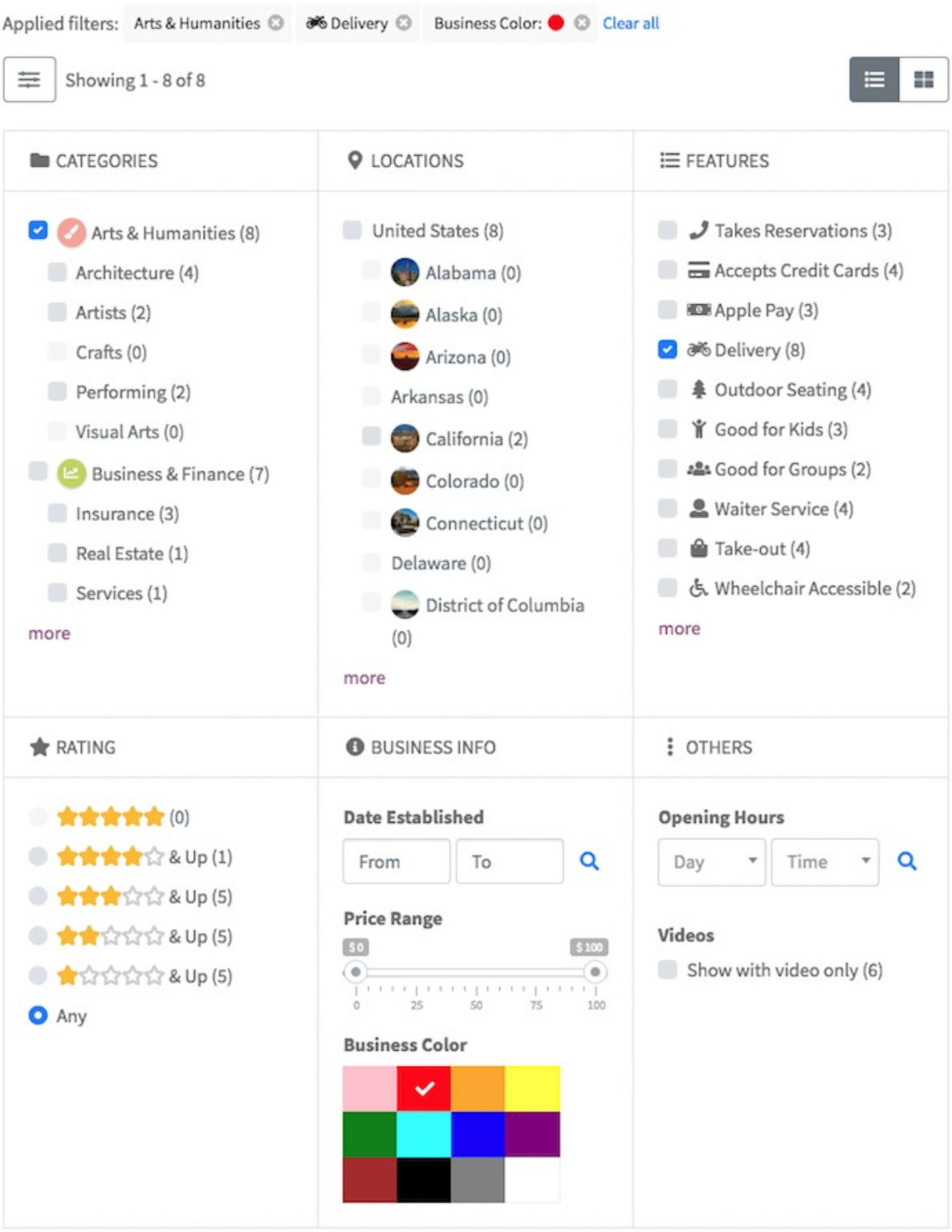
Adding and Managing Filters

If your directory is a property directory, you may want users to be able to view property listings within a certain price range only. Or if it is a restaurant directory, some visitors may only be interested in finding restaurants that serve Thai cuisine. This is where filters come into play. Filters allow your site visitors to limit or narrow content items displayed based on additional criteria. If your directory contains a large number of content items, then filters are a must-have for improving site usability.

Visit the directory index page in the frontend to play around with the default filters already setup for your directory by the system. If your site does not have enough content to test the filters, you can try it on our demo site at https://demo.directoriespro.com/listings-with-filters/. Click on the filter button above the listings to open a filter form. Try clicking on the checkboxes or changing the values in the filter form and see how the listings below the filters are updated automatically.



Also notice the numbers in parentheses for each option in the filter form indicating post counts are updated dynamically (which we refer to as *facet counts*) and options without any posts are greyed out depending on the filters currently selected as can be seen below:



Adding a filter

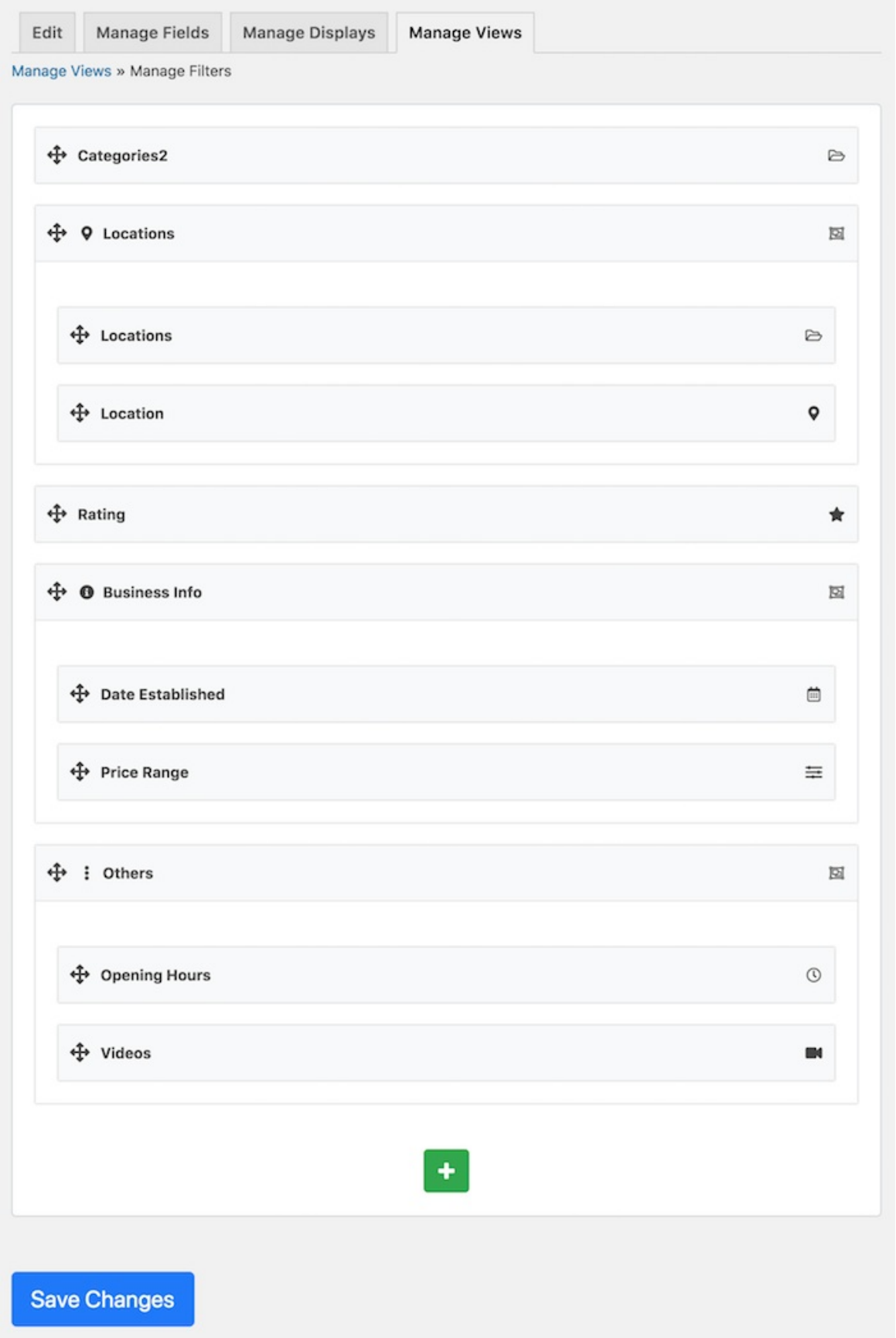
Filters filter content items based on field values. Therefore before adding a filter, you must first choose an existing field or create a new field to which to apply the filter.

In this section we will add a filter to the **Features** field of listings. Make sure first that you have already created the field by following the instructions in Adding and Managing Fields - Adding a custom field.

Follow the steps below to create a filter for the **Features** field:

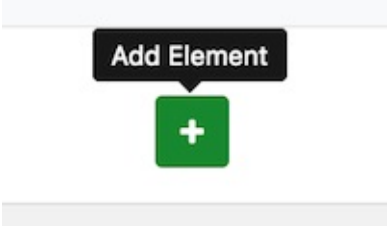
1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Click **Directories** in the admin sidebar.
3. Under the **All Directories** tab, click the gear icon in the row of the directory to edit.
4. Under the **Content Types** tab, click the dropdown button in the **Listing** row and then click **Manage Filters**.

   This will navigate you to the following page showing a drag & drop filter form editor:

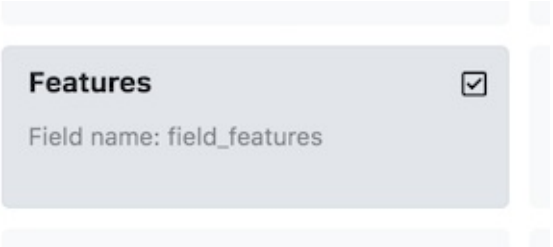


Each box in the editor is referred to as an *element* in this documentation.

5. Click the green **Add Element** button with a plus sign at the bottom of the page which will open a popup window.

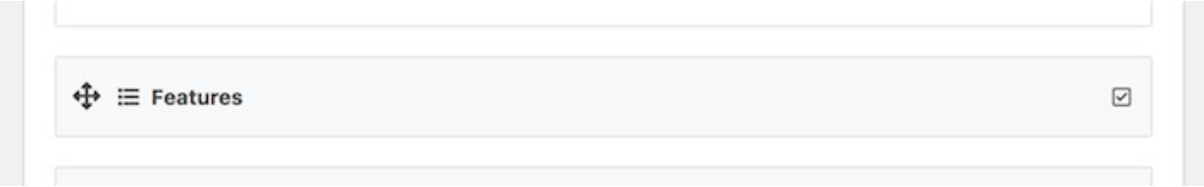


6. In the popup window, select the **Field** tab and click **Features**.



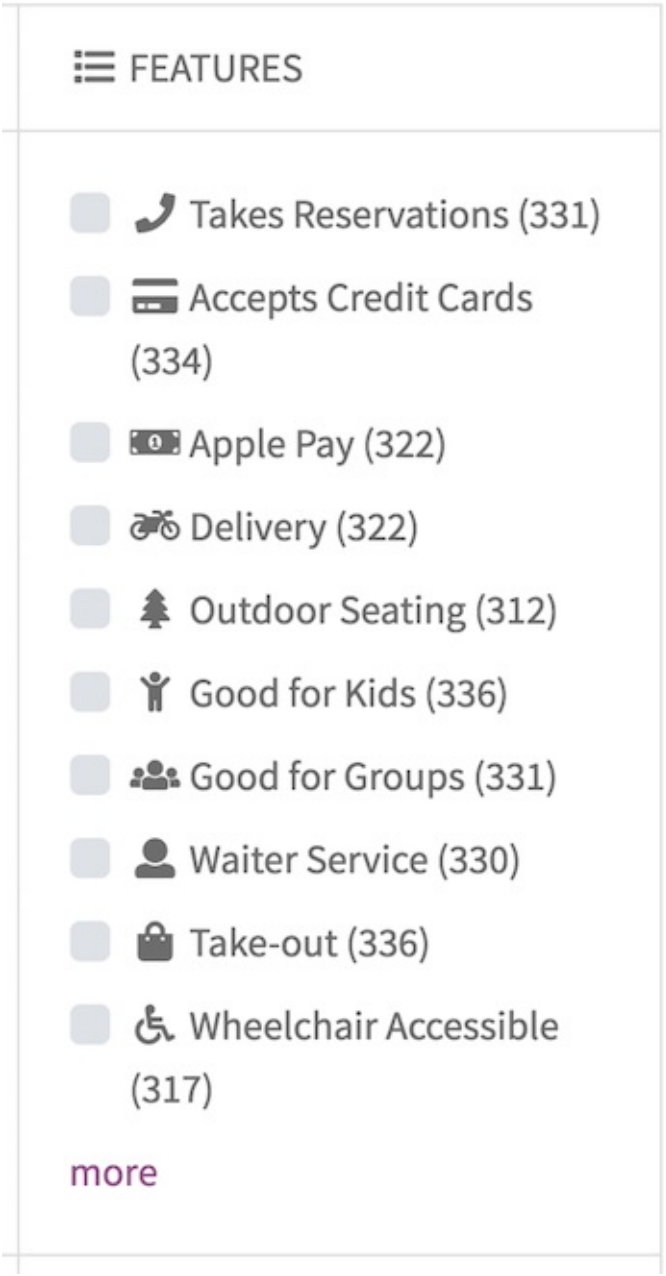
7. In the popup window under the **General** tab, configure the element as follows:
    - **Label** - *Icon + Default label*
    - **Icon** - Select any icon you like
    - **Show label as heading** - *Yes*
    - **Match any or all** - *Match all*
8. Leave other settings as-is and click the **Add Element** button at the bottom of the popup window.

You should see the filter element to the editor as below:



You can drag the element to wherever you wish the filter to appear in the filter form.

And below is how the filter is displayed in the frontend:



Note that the filter form is responsive. That is, filters are displayed in 3 columns only when there is enough space. When there is not enough space to show the filters in multiple columns, for example when the filter form is placed in the sidebar or when viewing on a small screen devices, the filters are displayed in a single column.

Deleting a filter

Follow the instructions below to delete a filter for listings:

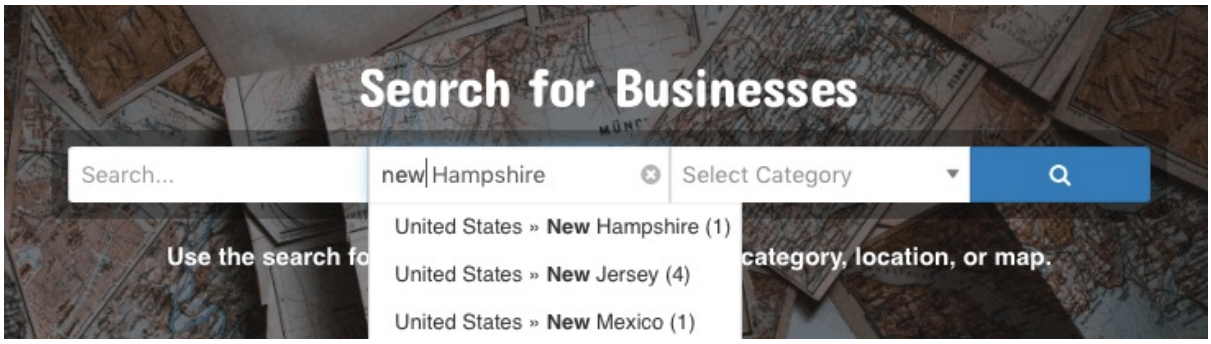
1. On the filter form editor, hover over to the filter which you wish to delete, and then click the red trash icon.
2. Click **OK** on the popup alert box.
3. The filter will disappear and is removed from the filter form.

Disabling facet counts

Facets counts (post counts that are updated dynamically depending on the current search/filter criteria) are enabled by default. If you wish to disable the feature, go to **Directories** -> **Settings**, click the **Filters** sub-tab and uncheck the **Enable facet counts** option under the **Filter Settings** section.

Adding Search

The search feature lets you setup a basic search form for your directory.

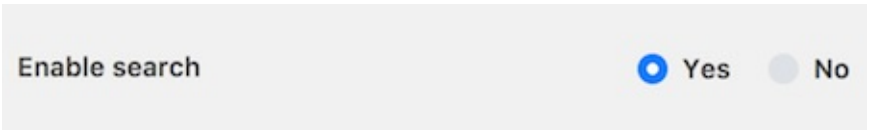


If you already have setup filters for your directory following the instructions in Adding and Managing Filters, then you may not feel the need for setting up another interface for finding listings. However if there is a large number of filters, providing a basic search form as the initial entry point to your directory should greatly help in improving user experience. This way, for example, users can first make a general search using the search form on the home page and then narrow down the search results using the filters on the directory index page.

Enable search

Follow these steps to enable search for your directory:

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Click **Directories** in the admin sidebar.
3. Under the **All Directories** tab, click the gear icon in the row of the directory to edit.
4. Under the **Settings** tab, scroll down the page and select *Yes* for **Enable search**.



5. Scroll further down and click **Save Changes**.

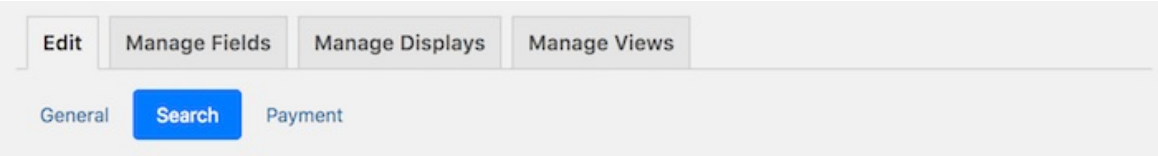
By default, you can view the search form of your directory by appending **/search** to the URL of the directory index page. For example if your directory index page is **http://example.com/directory**, the search form can be viewed at **http://example.com/directory/search**.

Configuring search

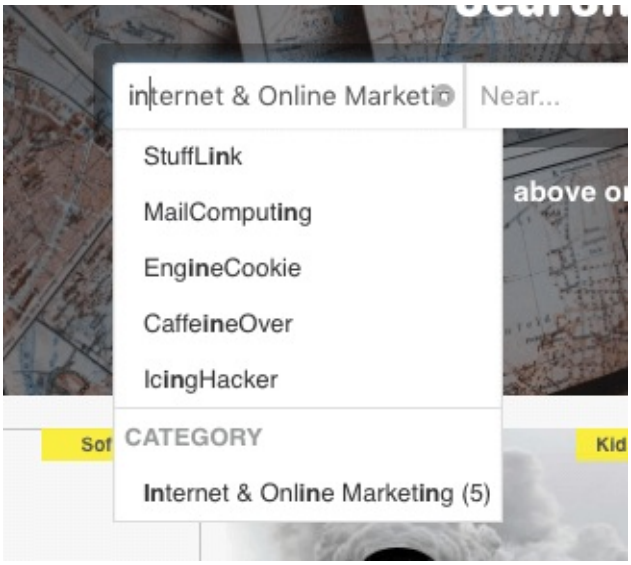
Follow the steps below to configure and customize the search form for your directory.

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Click **Directories** in the admin sidebar.
3. Under the **All Directories** tab, click the gear icon in the row of the directory to edit.
4. Under the **Content Types** tab, click the **Edit** button in the **Listing** row.

5. Click the **Search** sub-tab under the **Edit** tab.



- **Keyword Search**



The keyword search field lets visitors enter random keywords that are then matched against field values of listings in the directory. By default, only values of the listing title and description fields are matched, however you can also include taxonomy terms and/or other custom fields that support keyword search.

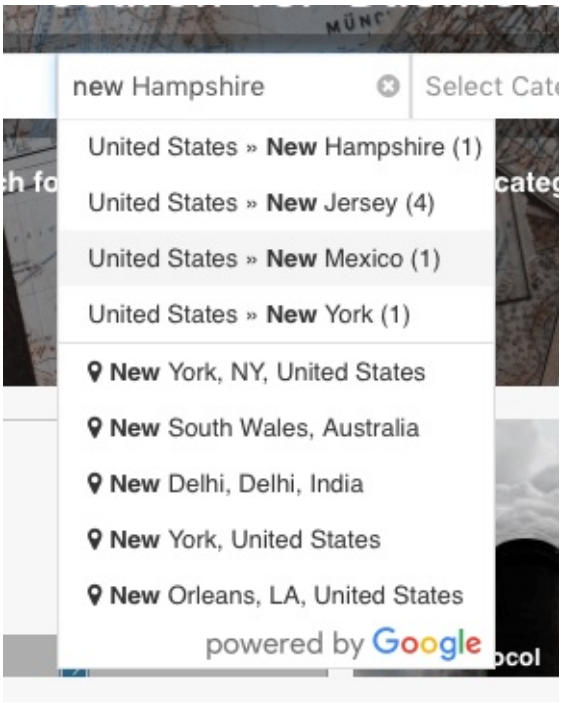
- **Hide this field** - Whether or not to hide the keyword search field from the search form.
- **Min. length of keywords in characters** - Keywords having the number of characters less than the number entered here will be ignored.
- **Default match type** - Select **Match any** to have the search return items containing one or more keywords entered, or **Match all** to restrict search results to items containing all keywords entered.
- **Search child content items** (requires *Directories - Reviews*) - Whether or not to match keywords against review title and content.
- **Search taxonomy term names** - Whether or not to match keywords against category/tag/location term names.
- **Extra fields to include in search** - Select custom fields that should be included in keyword search.

  Note: Only the fields with field types that support keyword search (*Single Line Text*, *Paragraph Text*, *Number*, and *Choice* field types by default) are listed as options for this setting.

- **AUTO-SUGGEST SETTINGS**
  - **Enable auto suggestions** - Whether or not to display suggestions (listings, categories, tags, and/or locations) while typing into the keyword field.
- **FORM FIELD SETTINGS**
  - **Field icon** - Select an icon to be displayed in the keyword search field.
  - **Placeholder text** - Default text to be displayed in the keyword search field when there are no keywords entered.

- **Display order** - Display order of the keyword search field in the search form.

- **Location Search**



The location search field lets users enter arbitrary text containing location information, such as a street address, a zip/postal code, a province name, etc. The field will query Google using Google Maps Geocoding API in the background for one or more latitude/longitude coordinates based on the location information entered, which are then used to match against location data of each listing in the directory.

Note: Make sure Google Maps API is configured to use this field. See Installation - Setting Up Google Maps API for details on setting up the API.

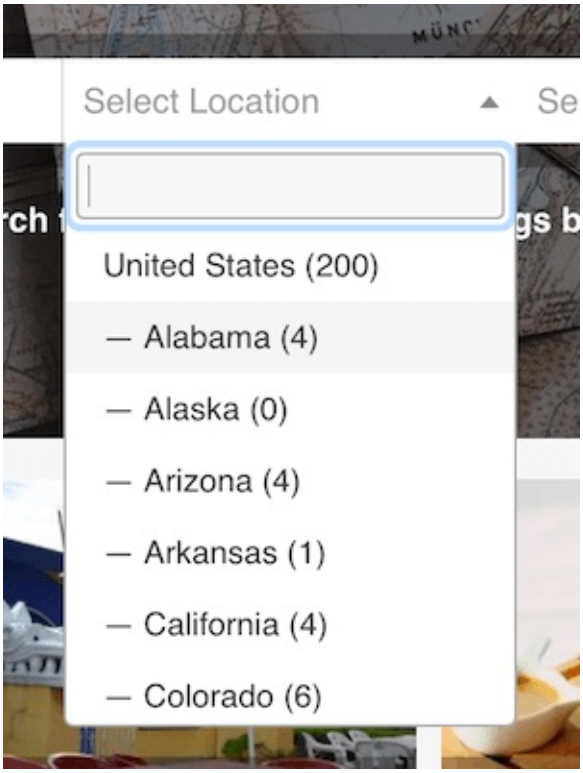
- **Hide this field** - Whether or not to hide the location search field from the search form.
- **Google Place Autocomplete - Place type** - Select the type of auto-suggested location information returned by Google Maps Places API.
- **Google Place Autocomplete - Country code** - Enter one of the two-letter country codes (http://en.wikipedia.org/wiki/ISO_3166-1_alpha-2) to restrict auto-suggestions returned by Google Maps Places API to a specific country.
- **Default search radius** - Limit listings in the search results to those within a certain search radius from the location entered in the location search field. Select *Auto* (recommended) to let Google Maps API calculate the optimal search radius.

  Note: The reason *Auto* is recommended for this setting is that for example if a user enters a street name, you do not want the search radius 100km to be applied to the search since the user is most likely looking for listings in that street only and the user should certainly has no interest in listings 100km away from that street. If the default search radius is set to *Auto*, Google will take care of such issue and determine the optimal search radius based on the value entered in the location search field.
- **Enable search by user's current location** - Whether or not to display the *My current location* option in the field. When the option is clicked, the system will try to locate the current address of the user and enter the address into the field if a valid address was fetched successfully.

Note: This setting is ignored if your site is not able to send/receive user data under the secure context (HTTPS) due to browser security restrictions.

- **AUTO-SUGGEST SETTINGS**
  - **Autosuggest terms** - Whether or not to auto-suggest location taxonomy terms.
  - **Depth of term hierarchy tree (0 for unlimited)** - Specify the maximum depth of the location hierarchy from which auto-suggested location terms will be fetched. Enter **0** for unlimited depth.
  - **Hide if no posts** - Whether or not to hide location taxonomy terms without any posts from the auto-suggest list.
  - **Hide post counts** - Whether or not to hide post count numbers of auto-suggested location taxonomy terms.
  - **Include parent term paths in term title** - Whether or not to display the hierarchy path of parent location terms (e.g., U.S.A. -> New York -> Albany) for each auto-suggested location term.
- **FORM FIELD SETTINGS**
  - **Field icon** - Select an icon to be displayed in the location search field.
  - **Placeholder text** - Default text to be displayed in the location search field when there is no text entered in the field.
  - **Display order** - Display order of the location search field in the search form.

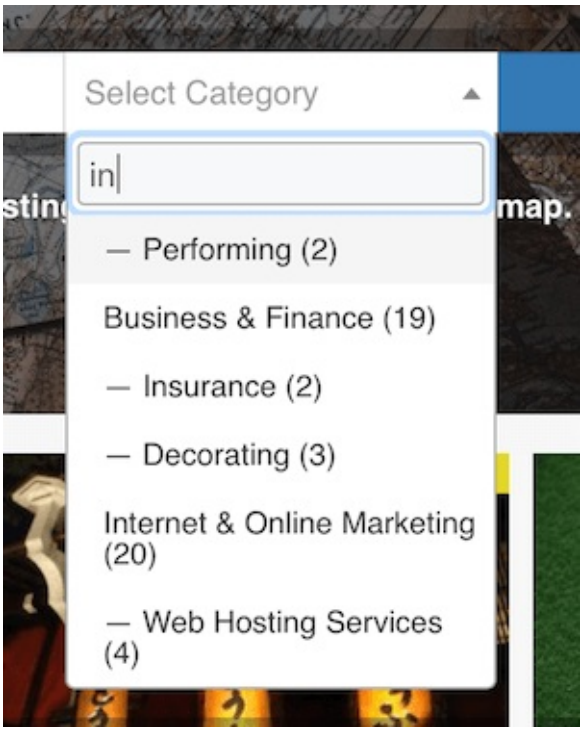
- **Location Selection Search**



The location selection search field lets users select a location taxonomy term from a dropdown. Use this field instead of the **Location Search** field if you do not wish to have visitors enter random address but let them simply select one of the pre-defined location taxonomy terms in your directory.

- **Hide this field** - Whether or not to hide the location selection search field from the search form.

        - **Depth of term hierarchy tree (0 for unlimited)** - Specify the maximum depth of the location hierarchy from which location terms will be fetched and displayed in the dropdown. Enter **0** for unlimited depth.
        - **Hide empty terms** - Whether or not to hide location taxonomy terms without any posts.
        - **Hide post counts** - Whether or not to hide post count numbers of location taxonomy terms.
        - **FORM FIELD SETTINGS**
            - **Display order** - Display order of the location select search field in the search form.
    - **Category Selection Search**



      The category selection search field lets users select a category taxonomy term from a select dropdown.

        - **Hide this field** - Whether or not to hide the category selection search field from the search form.
        - **Depth of term hierarchy tree (0 for unlimited)** - Specify the maximum depth of the category hierarchy from which category terms will be fetched and displayed in the dropdown. Enter **0** for unlimited depth.
        - **Hide empty terms** - Whether or not to hide category taxonomy terms without any posts.
        - **Hide post counts** - Whether or not to hide post count numbers of category taxonomy terms.
        - **FORM FIELD SETTINGS**
            - **Display order** - Display order of the category selection search field in the search form.
6. Click **Save Changes** to save the settings.

Search form shortcode

The search form can also be displayed using the `[drts-directory-search]` shortcode. By using the shortcode you can embed the search form to another WordPress page, a theme template file, or even in a sidebar widget.

The following is the list of parameters available with the shortcode:

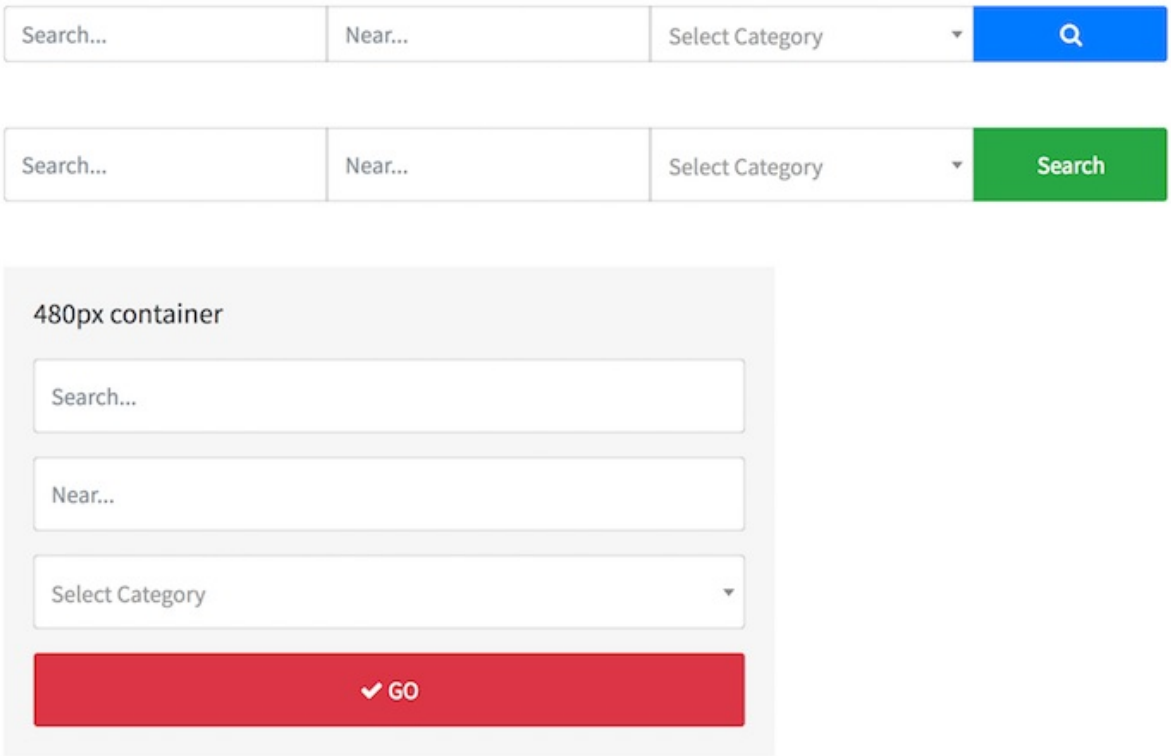
- **directory** (required) - Machine name of the directory the search form is for.

- **btn_text** - Specify a custom text used for the search form button label, defaults to none.
- **btn_icon** - Specify the name of a FontAwesome icon used for the search form button, defaults to *fas fa-search*.
- **btn_color** - Specify the name of color scheme used for the search form, one of *primary*, *secondary*, *success*, *warning*, *danger*, *info*, *dark*, *light*, defaults to *primary*.
- **size** - Size of the search form, either *lg* for large sized form or none, defaults to none.
- **style** - Custom CSS styles applied to the search form, added as the style attribute to the <form> tag.
- **fields** - Specify the fields to be displayed in the search form, using field names separated by a comma. This will override the **Hide this field** setting of each field. Valid field names are *keyword*, *location_address*, *term_location_location*, *term_directory_category*.

Example:

```
[drts-directory-search directory="my_directory"]
```

The following is some sample output of the shortcode:



Adding Widgets

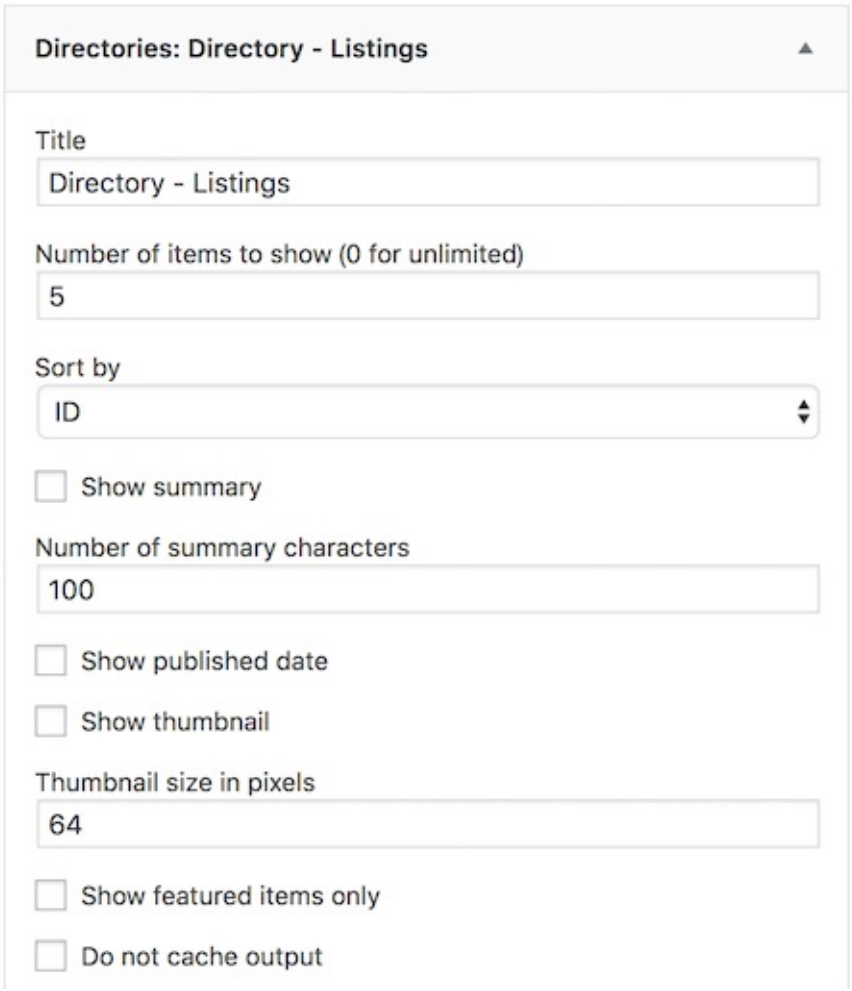
There are several widgets in Directories Pro that can be displayed in your theme's widget areas, including sidebars, footers, headers and the homepage.

Available widgets

- **Directories: Directory - Listings** - Displays a list of listings in a specific order and configuration.
- **Directories: Directory - Categories** - Displays a list of categories in the directory with thumbnail images.
- **Directories: Directory - Locations** - Displays a list of locations in the directory.
- **Directories: Directory - Related Listings** - Displays a list of listings related with the current listing displayed, in a specific order and configuration.
- **Directories: Filter Form** - Displays a filter form configured for listings. See Adding and Managing Filters for details on filters.
- **Directories: Display Element** - Displays one of the display elements enabled for the Detailed display of a content type. See Managing and Customizing Displays for details on displays.

Highlighted widgets

Directories: Directory - Listings



The **Directories: Directory - Listings** widget allows you to display a list of listings by custom criteria in a specific order.

For example, to show the latest listings in your directory with thumbnails, select *Newest First* for **Sort by** and check the **Show thumbnail** option.

To show 10 random featured listings, enter *10* for the **Number of items to show (0 for unlimited)** option, select *Random* for **Sort by** and check the **Show featured items only** checkbox.

Directories: Filter Form

Filters can be displayed in a widget using the **Directories: Filter Form** widget.

Note: The widget is displayed on the directory index and single taxonomy term pages only, and the filters in the widget are always displayed in a single-column layout.

Once you have enabled the widget, make sure that filters are disabled on the directory index and single taxonomy term pages of the directory to avoid a conflict with the filters in the widget. In order to do so you will need to edit the default view configured for listings.

1. Click **Directories** in the admin sidebar.
2. Under the **All Directories** tab, click the gear icon in the row of the directory to edit.
3. Under the **Content Types** tab, click the dropdown button in the **Listing** row and then click **Manage Views**.
4. Click the gear icon in the row of the default view.

5. Scroll down to **FILTER SETTINGS** under the **View Mode Settings** section.
6. Select **No** for the **Show filter form** option.
7. Scroll down the page and press **Save Changes**.

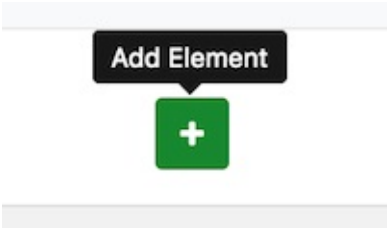
Directories: Display Element

The **Directories: Display Element** widget is different from other widgets in that the widget is displayed only on single content item pages, such as single listing, single category, single location pages. The purpose of the widget is to move or copy a certain part of the currently displayed content item from the main content section of the page to where the widget is displayed.

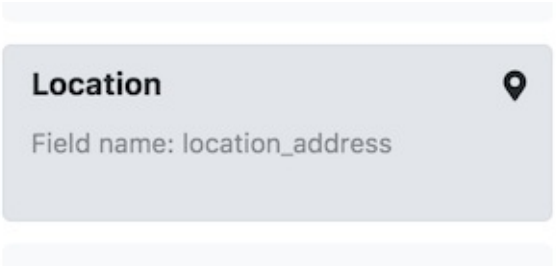
For example, you may want to show the map of the currently displayed listing in the sidebar. Here are the steps:

Before adding the widget, you will need to first add a map to the single listing page and make it accessible by the widget.

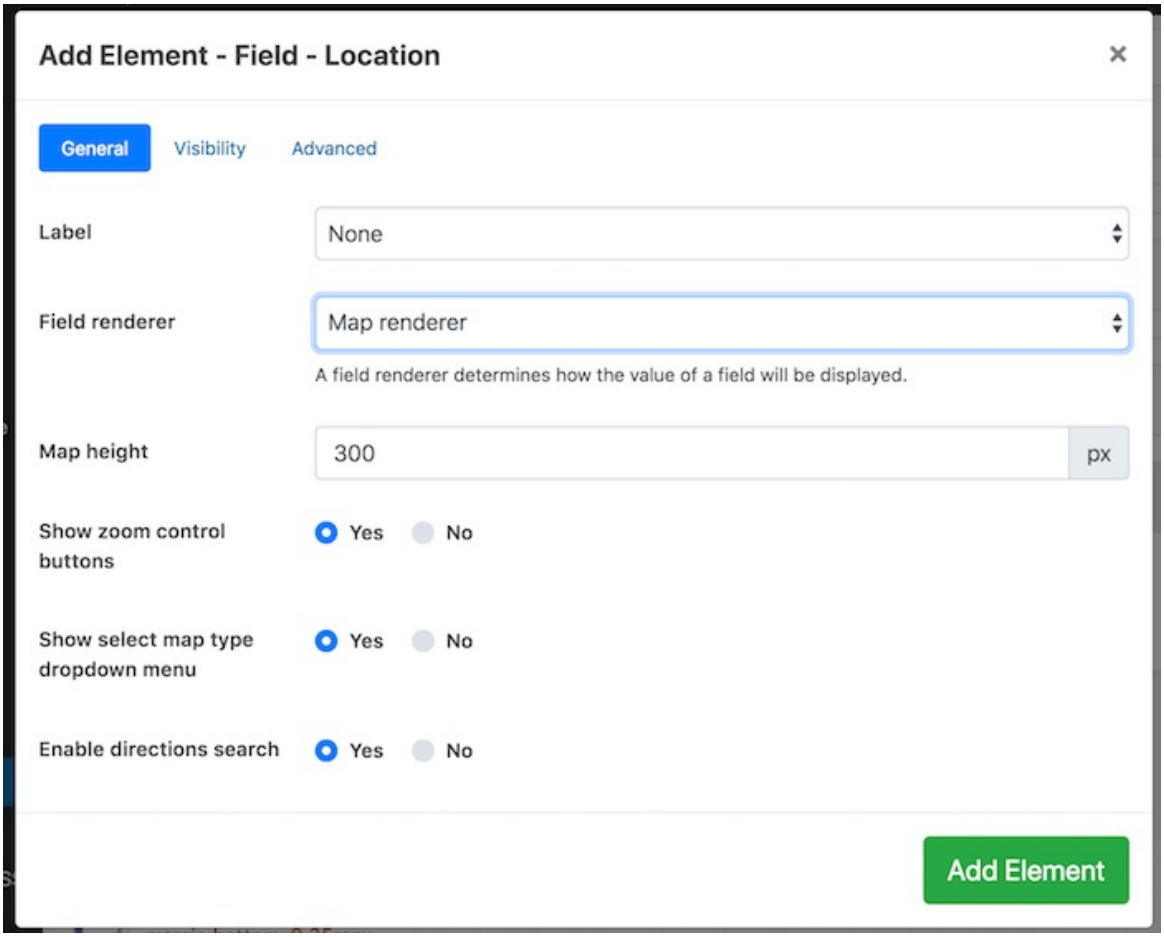
1. Click **Directories** in the admin sidebar.
2. Under the **All Directories** tab, click the gear icon in the row of the directory to edit.
3. Under the **Content Types** tab, click the dropdown button in the **Listing** row and then click **Manage Displays**.
4. Click the **Detailed** sub-tab.
5. Scroll down the page and click the green **Add Element** button with a plus icon at the bottom of the page which will open a popup window.



6. In the popup window, click the **Fields** tab and then click the **Location** element.



7. In the **General** tab, select **Map Renderer** for the **Field Renderer** setting and leave other settings as-is.



8. Click the **Visibility** tab.

Select **Yes** for **Add rendered content to global scope** which will allow the Display Element widget to access the content rendered by this element.

Optionally, select **Yes** for **Remove rendered content from display** so that the content rendered by this element is removed from the main content section of the single listing page.

9. Click the **Add Element** button at the bottom of the popup window.

Now, let's add a **Directories: Display Element** widget:

1. Go to **Appearance** -> **Widgets** and click the **Directories: Display Element** widget and press **Add Widget**.
2. Enter *Map* for **Title** and select *Directory - Listing - Location* for **Select display element**, which is the element we've added to the **Detailed** display of listings.

3. Click **Save**.

Visit the single listing page of a listing in the frontend, and you will see the map of the listing displayed in the sidebar (or wherever you placed the widget) instead of in the main content section of the page as shown below:

Frontend Submit and Dashboard

The *Directories - Frontend* plugin allows users to submit and manage their content from the frontend without going to the backend dashboard.

If you have not yet installed and activated the *Directories -Frontend* plugin, follow the steps below:

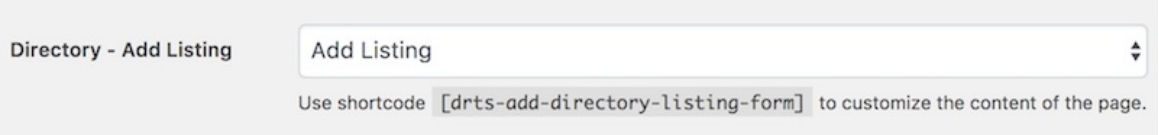
1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Select **Plugins** -> **Add New** from the side menu.
3. Click the **Upload Plugin** link at the top of the page.
4. Click **Browse...** and then locate the **directories-frontend-x.x.x.zip** (where *x.x.x* represents the version number) file saved on your computer. If you do not have the file, you can download the package from https://codecanyon.net/downloads.
5. Click the **Install Now** button.
6. Wait until the page refreshes, and then click the **Activate Plugin** link.

Setting Up Frontend Submission and Dashboard Pages

Accepting frontend submission

In order to let users submit listings from the frontend, make sure first that a valid WordPress page is assigned as the page for displaying the listing submission form.

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Click **Directories** in the admin sidebar.
3. Click the **Settings** tab and then the **Pages** sub-tab.
4. Make sure a valid page is selected for **XXXX - Add Listing** (where XXXX is the name of your directory).



5. Scroll down the page and press **Save Changes**.

When you visit the page in the frontend, it should look like below:

Add Listing

Title *

Categories

— Select —

+ Add More

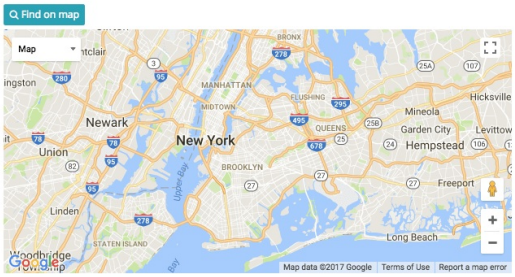
Location

Country — Select —

Address Line 1

Postal / Zip Code

Find on map



Enter latitude/longitude manually

Phone Number

Fax Number

E-mail Address

Website URL

http://

Listing Description

Add Media | Visual | Text

b | i | link | b-quote | del | ins | img | ul | ol | li | code | close tags

Photos

Max file size 2MB.

FILE NAME	SIZE

Add Image

Business Hours

— Select — HH:MM HH:MM

+ Add More

Date Established

MM/DD/YYYY

Price Range

$0 $100

0 25 50 75 100

Tags

Submit

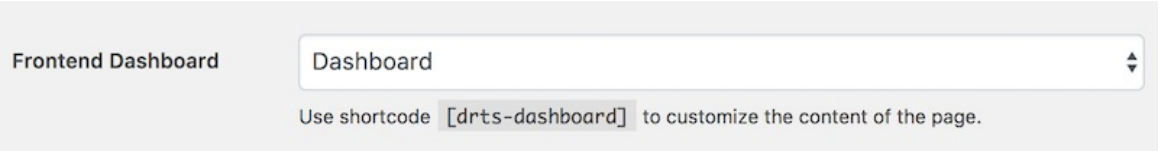
As with backend submission, the **Create Listings** permission is required to add listings through the frontend submission form (See Permissions for details on permissions). If a user without the permission tries to view the page, the user will be redirected to the directory index page if the user is a registered user or prompted to either login or register if the user is a guest user.

Once a listing is submitted successfully through the form, the post status of the listing becomes **Published** if the user submitted the listing has the **Publish Listings** permission. If the user does not have the **Publish Listings** permission, then the post status of the listing is set to **Pending** and requires manual update of the post status from the backend dashboard by the administrator in order for the listing to be published in the frontend.

Setting up frontend dashboard

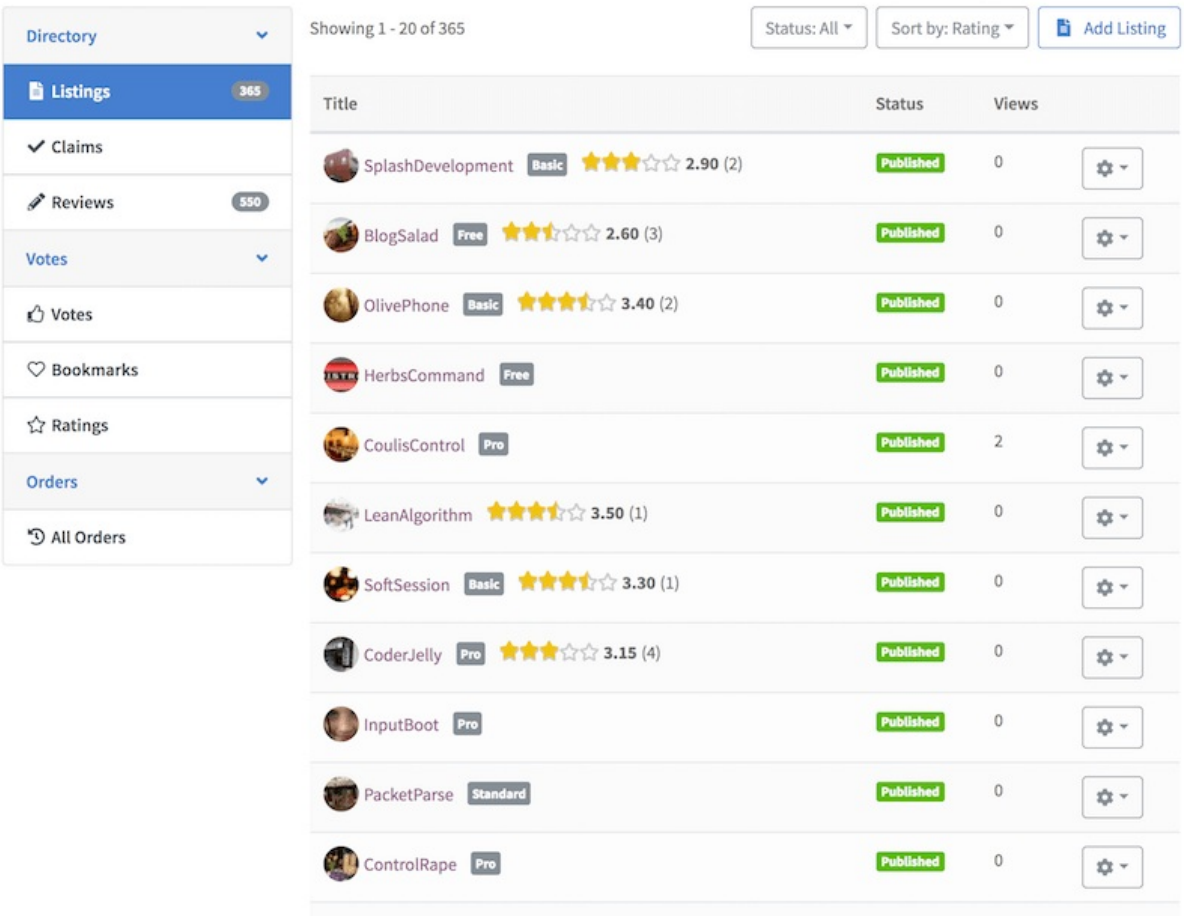
Frontend dashboard lets users manage their content from the frontend side of your site. In order to enable it, make sure that a valid WordPress page is assigned as the page for displaying the frontend dashboard.

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Click **Directories** in the admin sidebar.
3. Click the **Settings** tab and then the **Pages** sub-tab.
4. Make sure a valid page is selected for **Frontend Dashboard**.



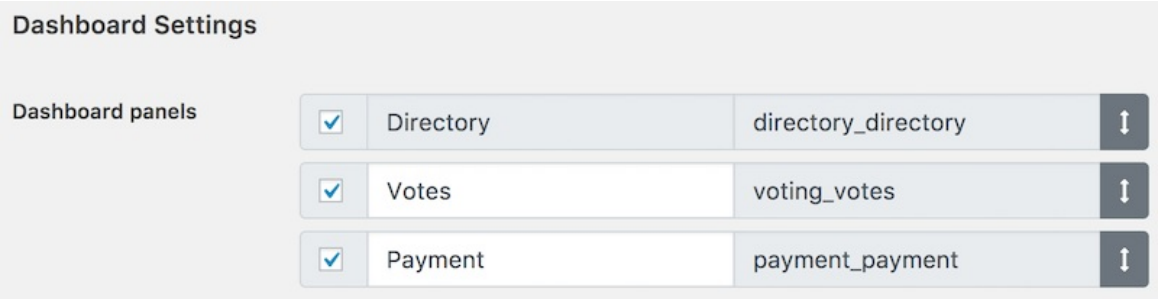
5. Scroll down the page and press **Save Changes**.

When you visit the page in the frontend, it should look like below:



You can also configure which dashboard panels should be displayed in the dashboard, as well as their labels and display order.

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Click **Directories** in the admin sidebar.
3. Click the **Settings** tab and then the **Dashboard** sub-tab and scroll down to **Dashboard Settings**.

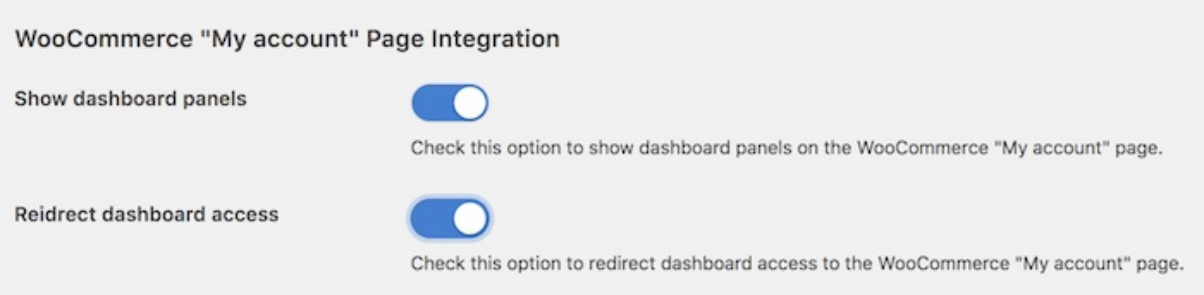


Select or de-select options to enable/disable panels. You can also edit the label of each panel and/or drag each option to change the display order.

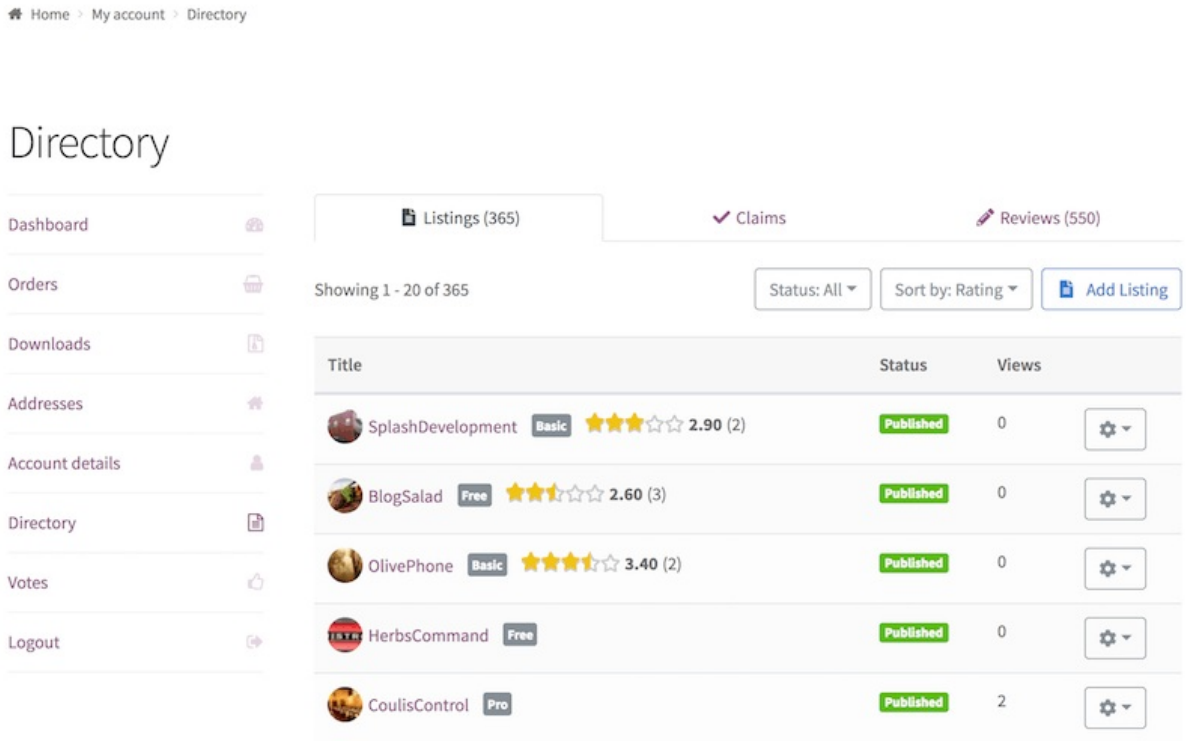
WooCommerce "My account" page integration

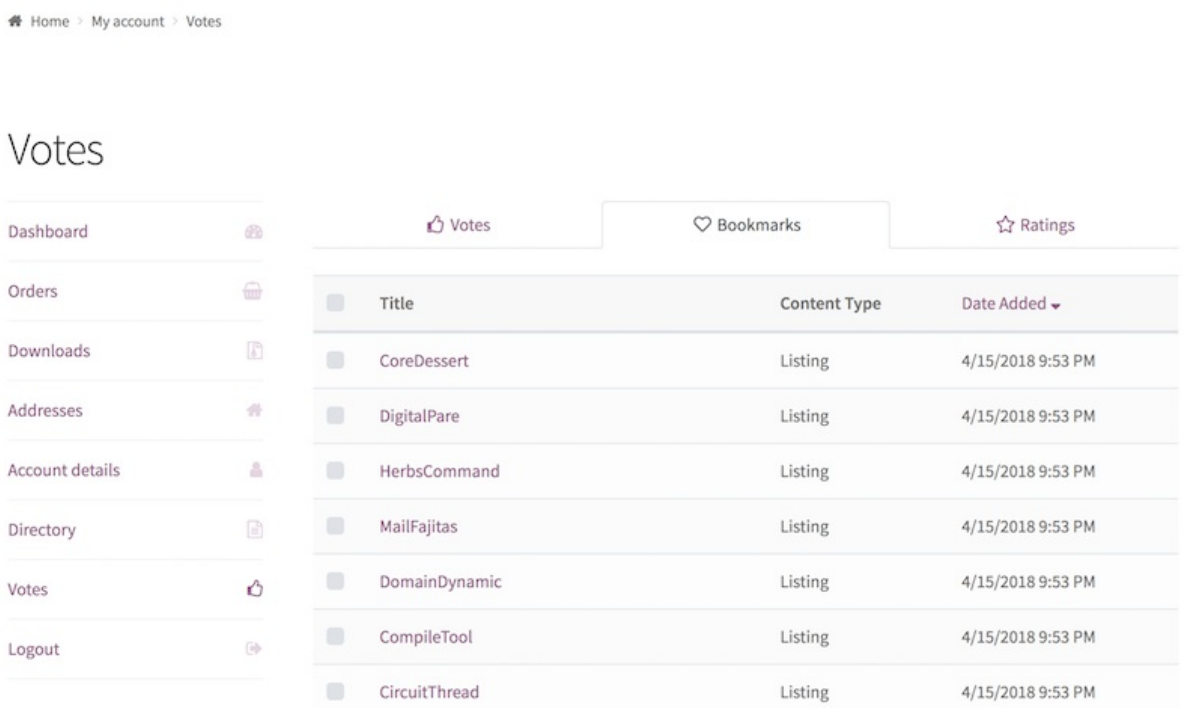
If the *Directories - Payments* plugin is activated on your site and *WooCommerce* is selected as the payment component (See Monetization for details), you can have the dashboard displayed on the *My accounts* page of WooCommerce.

In order to do so, toggle the **Show dashboard panels** option under **WooCommerce "My account" Page Integration**.



Then the WooCommerce *My account* page will display the dashboard fully integrated as below:





You can also turn on the **Redirect dashboard access** setting so that any attempt to access the directory dashboard page is automatically redirected to the WooCommerce "My account" page. Note that this will not work when you are using the [drts-dashboard] shortcode on the directory dashboard page.

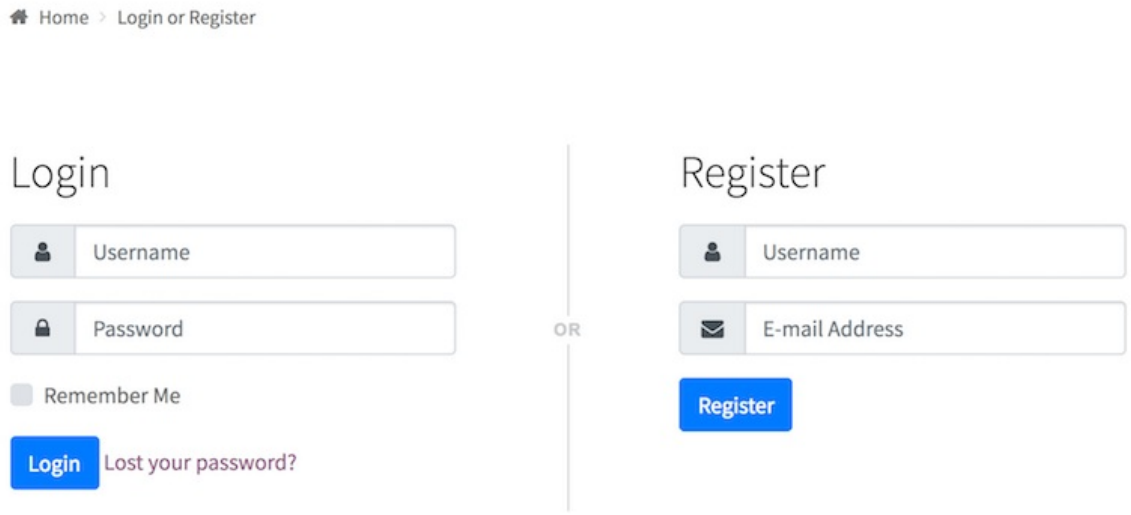
User Login/Registration and Guest Posts

User Login/Registration Settings

Guest users are redirected to the default WordPress login page when they try to submit listings from the frontend (unless guest posting is enabled, see Guest Post Settings). However, the design and layout of the default WordPress login page does not match your current theme which may be confusing to some visitors.

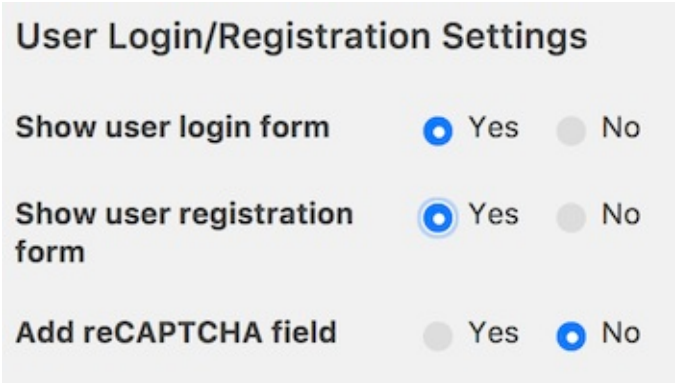
This is when you can enable the custom login/registration form feature. When enabled, login and registration forms are displayed on a standard WordPress page using the layout of your WordPress theme.

Below is an example of how the login/registration page looks like when the feature is enabled:



Follow the steps below to enable and configure custom user login/registration forms:

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Click **Directories** in the admin sidebar.
3. Click the **Settings** tab and then the **Frontend Submit** sub-tab and scroll down to the section labelled **User Login/Registration Settings**:

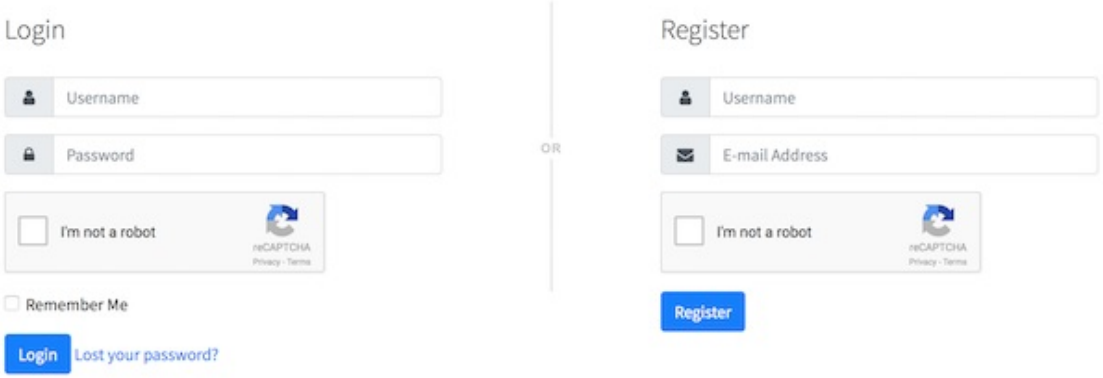


   - **Show user login form** - Whether or not to show a custom login form to guest users.
   - **Show user registration form** - Whether or not to show a custom registration form to guest users.

Note: Make sure user registration is enabled in WordPress (Settings -> General -> Membership), otherwise the registration form will not display even when Yes is selected for this option.

- **Add reCAPTCHA field** (requires reCAPTCHA add-on) - Whether or not to add a CAPTCHA field to the login and registration forms for spam prevention. For more details on reCAPTCHA, see Preventing Spam with reCAPTCHA.

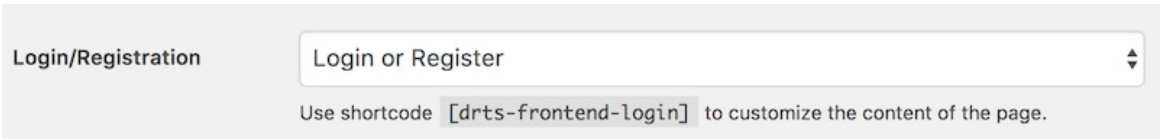
  Here is how the forms look like when the reCAPTCHA field is enabled:



4. Scroll down the page and press **Save Changes**.

In addition, make sure that a valid WordPress page is assigned as the page for displaying the login and registration forms.

1. Click the **Pages** sub-tab and scroll down to **Page Settings**.
2. Make sure a valid page is selected for **Login/Registration**.



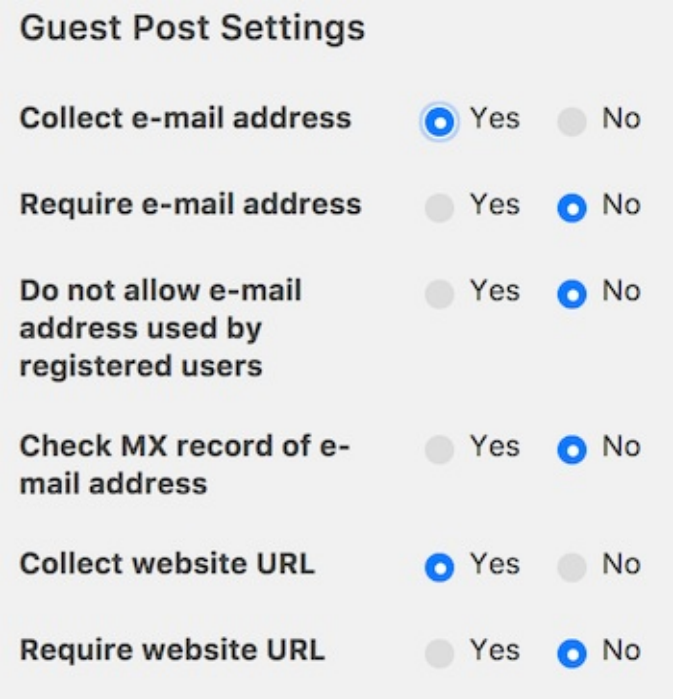
3. Scroll down the page and press **Save Changes**.

Guest Post Settings

In Directories Pro, you can let visitors submit listings to your directory without login or registration by granting the **Create Listings** permission to the **Guest** user role (see Permissions for details).

Guest users are by default required to enter their name and e-mail address when posting. There are additional options such as requiring them to enter a website URL and un-requiring the e-mail address field. In order to configure what data should or should not be collected from guest users, follow these steps:

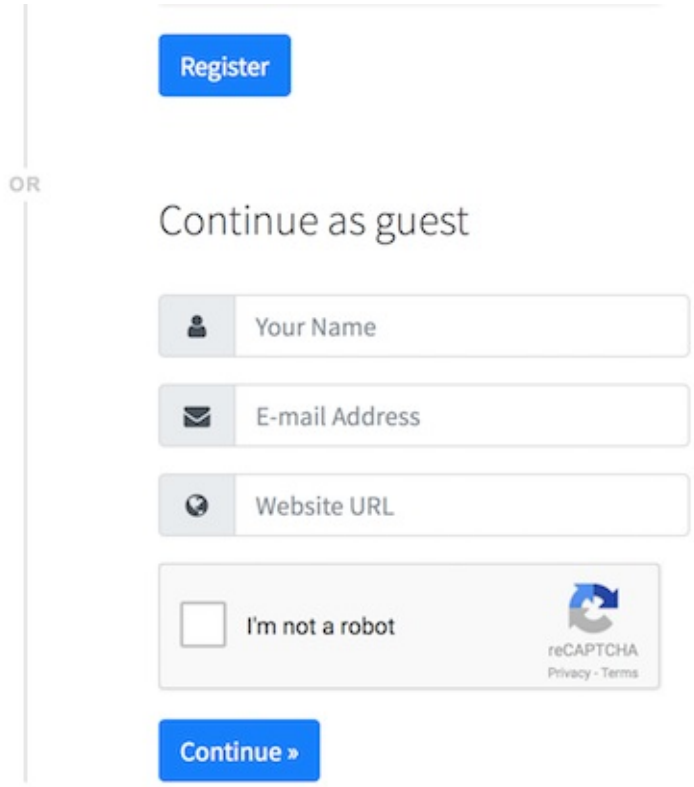
1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Click **Directories** in the admin sidebar.
3. Click the **Settings** tab and then the **Frontend Submit** sub-tab and scroll down to the section labelled **Guest Post Settings**:



- **Collect e-mail address** - Whether or not to show an e-mail address field.
- **Require e-mail address** - Whether or not to require an e-mail address to be entered.
- **Do not allow e-mail address used by registered users** - Whether or not to prevent from entering an e-mail address that is associated with an existing user account.
- **Check MX record of e-mail address** - Whether or not to make sure a valid MX record is found for the domain of the e-mail address entered, to prevent fake e-mail addresses.
- **Collect website URL** - Whether or not to show a website URL field.
- **Require website URL** - Whether or not to require a website URL to be entered.

4. Scroll down the page and press **Save Changes**.

In the frontend, a form similar to below will be shown to guest users when they try to submit a listing:



The guest user can then fill out the fields and click the **Continue** button to proceed to the add listing page.

Preventing Spam with reCAPTCHA

reCAPTCHA is a free service provided by Google which lets you embed a CAPTCHA field to forms on your site to stop posts submitted by robots or abusive scripts.

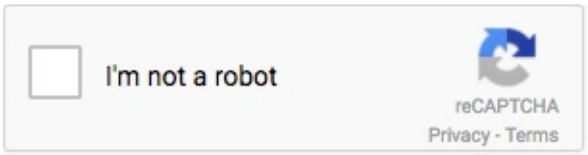
Setting up reCAPTCHA

Follow the instructions below to setup reCAPTCHA:

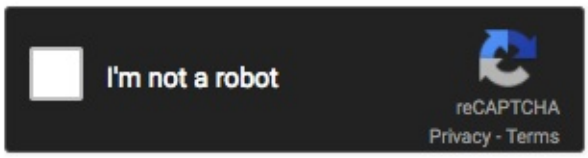
1. Generate Google reCAPTCHA API keys for your site. Make sure to select **reCAPTCHA V2** as the type of reCAPTCHA when registering your site.
2. Go to the WordPress administration dashboard and click **Directories** in the admin sidebar.
3. Click the **Settings** tab, then the **reCAPTCHA** sub-tab and configure the following:

   - **reCAPTCHA API site/secret key** - Enter the API keys generated on Google in step 1.
   - **reCAPTCHA theme** - Select the color theme of the CAPTCHA field.

     Light:

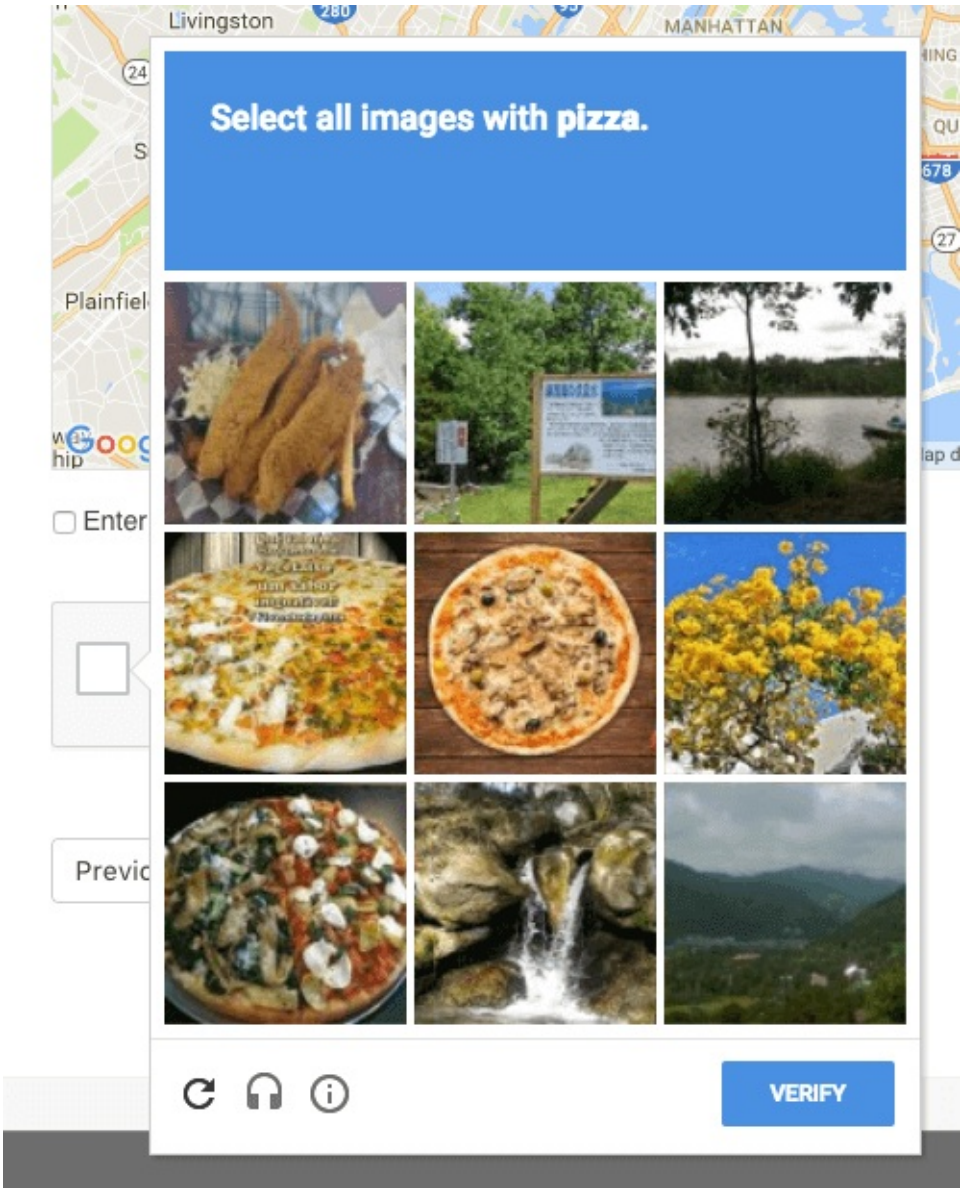


     Dark:

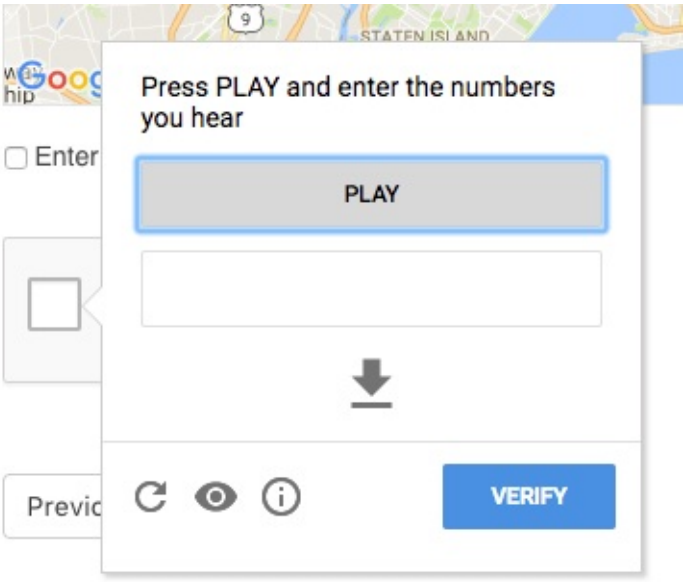


   - **reCAPTCHA type** - Select the type of CAPTCHA to serve. Note that the challenge popup is displayed only when the user stays on the page for more than 5 minutes.

Image:

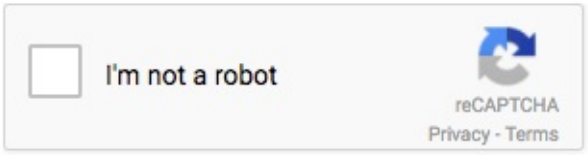

Livingston
MANHATTAN
Select all images with pizza.
Plainfiel
Enter
Previc
VERIFY

Audio:

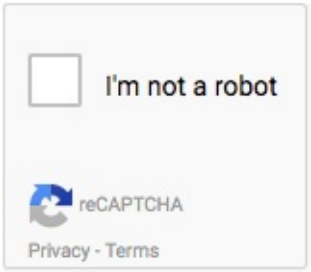


- **reCAPTCHA size** - Select the display size of the CAPTCHA field.

  Normal:



  Compact:

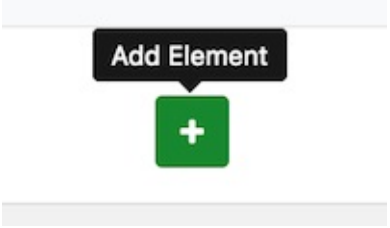


4. Scroll down the page and press **Save Changes**.

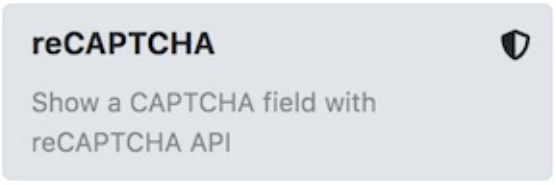
Adding reCAPTCHA to forms

Follow the steps below to add reCAPTCHA to the listing submission form on the add listing page.

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Click **Directories** in the admin sidebar.
3. Under the **All Directories** tab, click the gear icon in the row of the directory to edit.
4. Under the **Content Types** tab, click the dropdown button in the **Listing** row and then click **Manage Fields**.
5. Click the green **Add Element** button with a plus sign at the bottom of the page.



6. In the popup window, click the **Utility** tab, hover over to the **reCAPTCHA** element and click.



7. Leave the settings as-is, and press the **Add Element** button at the bottom of the popup window to add the reCAPTCHA element.

reCAPTCHA can also be added to the claim listing form and the review submission form by repeating the same steps above for **Claim** or **Review** instead of **Listing**.

If custom login/registration forms are enabled, reCAPTCHA can also be added to those forms. See User Login/Registration and Guest Posts for more details.

Monetization

The *Directories - Payments* plugin lets you monetize your site by charging users for posting their listings on your directory or adding premium features to listings. By default, purchase and payment are handled by WooCommerce, meaning that all the features provided with the WooCommerce plugin become automatically available.

If you have not yet installed and activated the *Directories - Payments* plugin, follow the steps below:

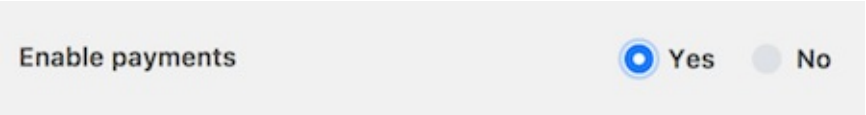
1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Select **Plugins** -> **Add New** from the side menu.
3. Click the **Upload Plugin** link at the top of the page.
4. Click **Browse...** and then locate the **directories-payments-x.x.x.zip** (where *x.x.x* represents the version number) file saved on your computer. If you do not have the file, you can download the package from https://codecanyon.net/downloads.
5. Click the **Install Now** button.
6. Wait until the page refreshes, and then click the **Activate Plugin** link.

Make also sure that you have installed and activated the WooCommerce plugin. If not, see the following page for installation instructions: https://docs.woocommerce.com/document/installing-uninstalling-woocommerce/

Enable payments for your directory

Follow these steps to enable payments for your directory:

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Click **Directories** in the admin sidebar.
3. Under the **All Directories** tab, click the gear icon in the row of the directory to edit.
4. Under the **Settings** tab, scroll down the page and select *Yes* for **Enable payments**.



5. Scroll further down and click **Save Changes**.

Monetization Options and Payment Plans

The *Directories - Payments* plugin provides the following monetization options for your directory:

1. Charge users for submitting new listings
2. Charge users for claiming existing listings
3. Charge users for renewing or reactivating their listings
4. Charge users for upgrading or downgrading their listings
5. Charge users for adding extra features to their listings

Payment plans

In order to actually charge users, payment plans need to be setup for your directory. There are 2 types of payment plans that you can setup; **Base** and **Add-on** plans.

Base plans

Base plans define base features that should be enabled for listings associated with the plans. A listing may not have multiple base plans associated at the same time. Base plans can be purchased when users submit new listings, claim existing listings, renew their listings, or upgrade/downgrade their listings (correspond to 1-4 monetization options above).

Add-on plans

Add-on plans provide additional features to listings (corresponds to the 5th monetization option above) on top of the features provided with a base plan. A listing must already have a base plan associated in order to have add-on plans applied. There is no limit on how many add-on plans can be purchased for a single listing.

Adding Payment Plans

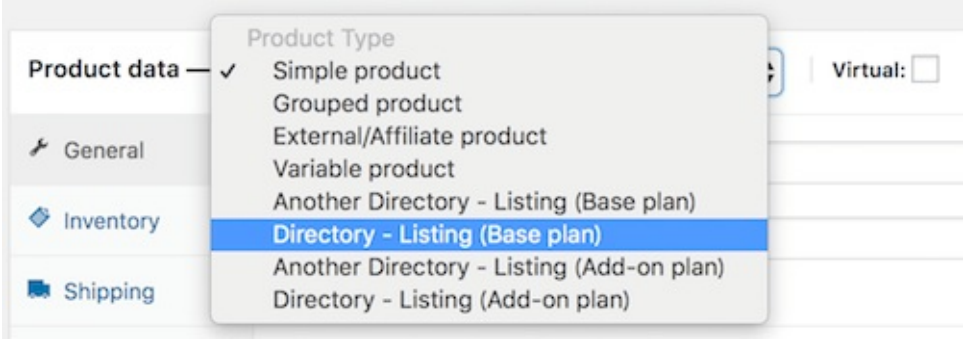
In WooCommerce, everything is sold as a product. Therefore payment plans for Directories Pro also need to be defined as WooCommerce products. In order to define base and add-on payment plans as WooCommerce products, the following product types are added automatically to WooCommerce:

- Directory - Listing (Base plan)
- Directory - Listing (Add-on plan)

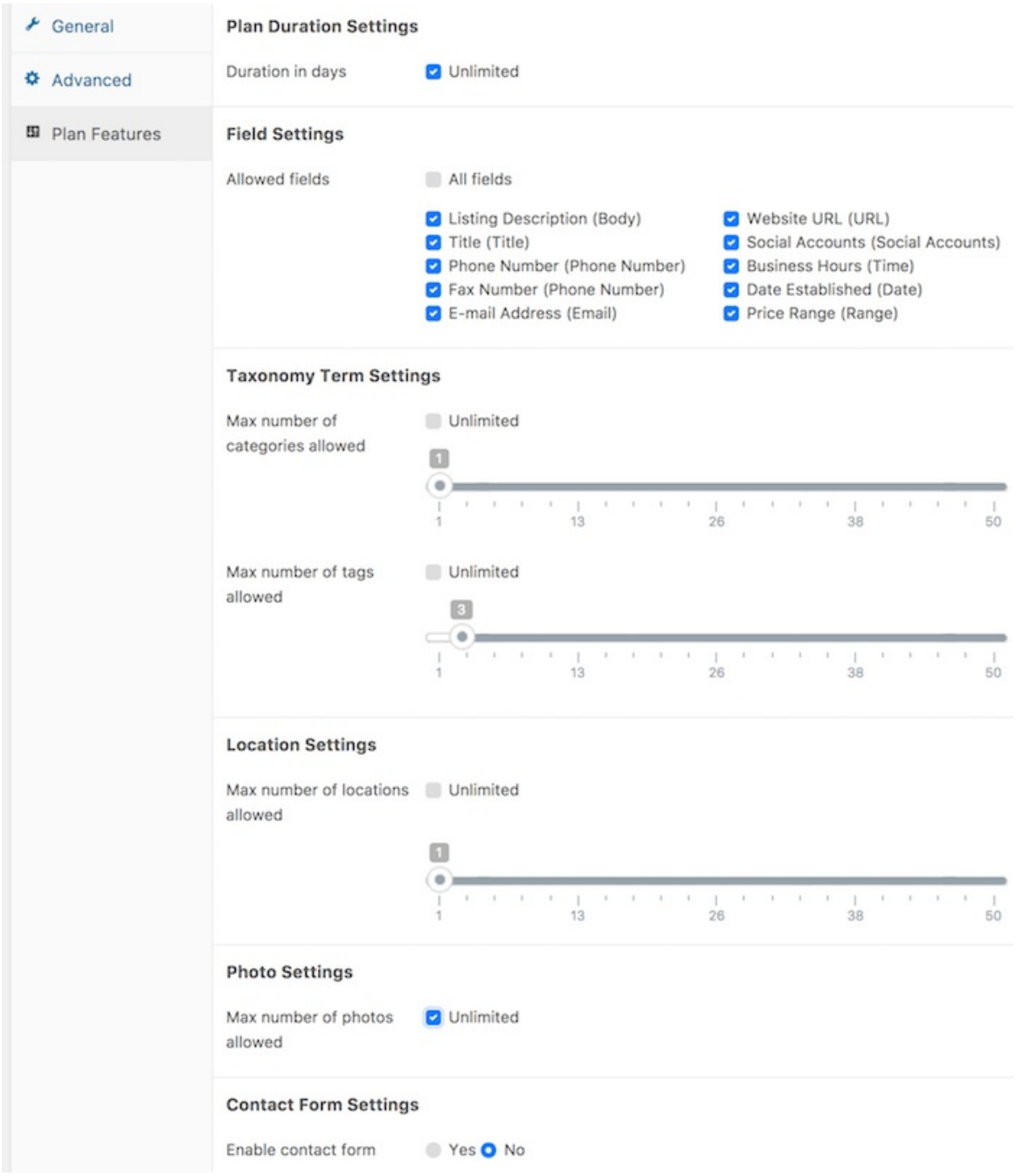
Adding a Base plan

Follow the steps below to define a WooCommerce product for a Base plan:

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Select **Products** -> **Add New** from the side menu.
3. Enter the name of your payment plan into the text field where it says **Product name** which is a required field. Optionally enter the description of your payment plan into the textarea field under the product name field.
4. Select the **Directory - Listing (Base plan)** product type option from the dropdown menu in the **Product Data** panel.



5. In the **General** tab, enter the **Regular price** field and optionally the **Sale Price** field if you wish to sell the payment plan at a discounted price.
6. In the **Plan Features** tab, configure the features that will be enabled for listings associated with this base plan.



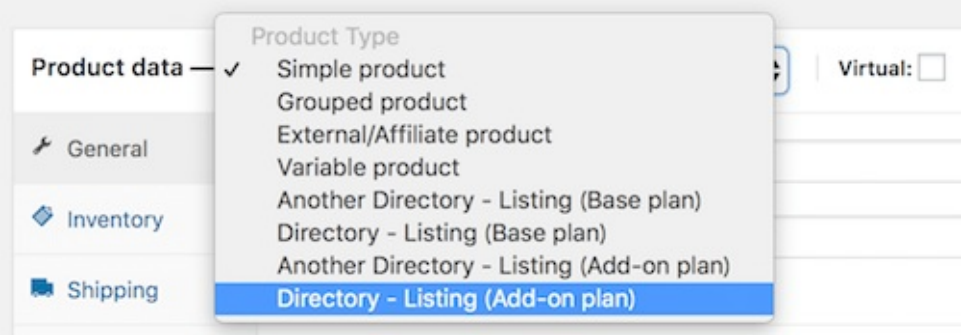
- **Plan Duration Settings**
  - **Duration in days** - Set the length of time in days the payment plan is associated with listings. If you wish to use the prorated discount feature, you should define a limited duration.
- **Field Settings**
  - **Allowed fields** - Select the fields enabled for each listing.
- **Taxonomy Term Settings**
  - **Max number of categories allowed** - Select the maximum number of categories each listing can be associated with.
  - **Max number of tags allowed** - Select the maximum number of tags each listing can be associated with.
- **Location Settings**
  - **Max number of locations allowed** - Select the maximum number of locations each listing can be associated with.
- **Photo Settings**
  - **Max number of photos allowed** - Select the maximum number of photos that can be uploaded for each listing.
- **Contact Form Settings**
  - **Enable contact form** - Whether or not to let users send messages to listing authors through a Contact Us form.
  - **Contact form recipients** - Select e-mail addresses to which messages are sent. If you have added E-mail type custom fields to listings (See Adding and Managing Fields), those fields can also be selected from here.

7. Press **Publish** to add the base payment plan as a WooCommerce product.

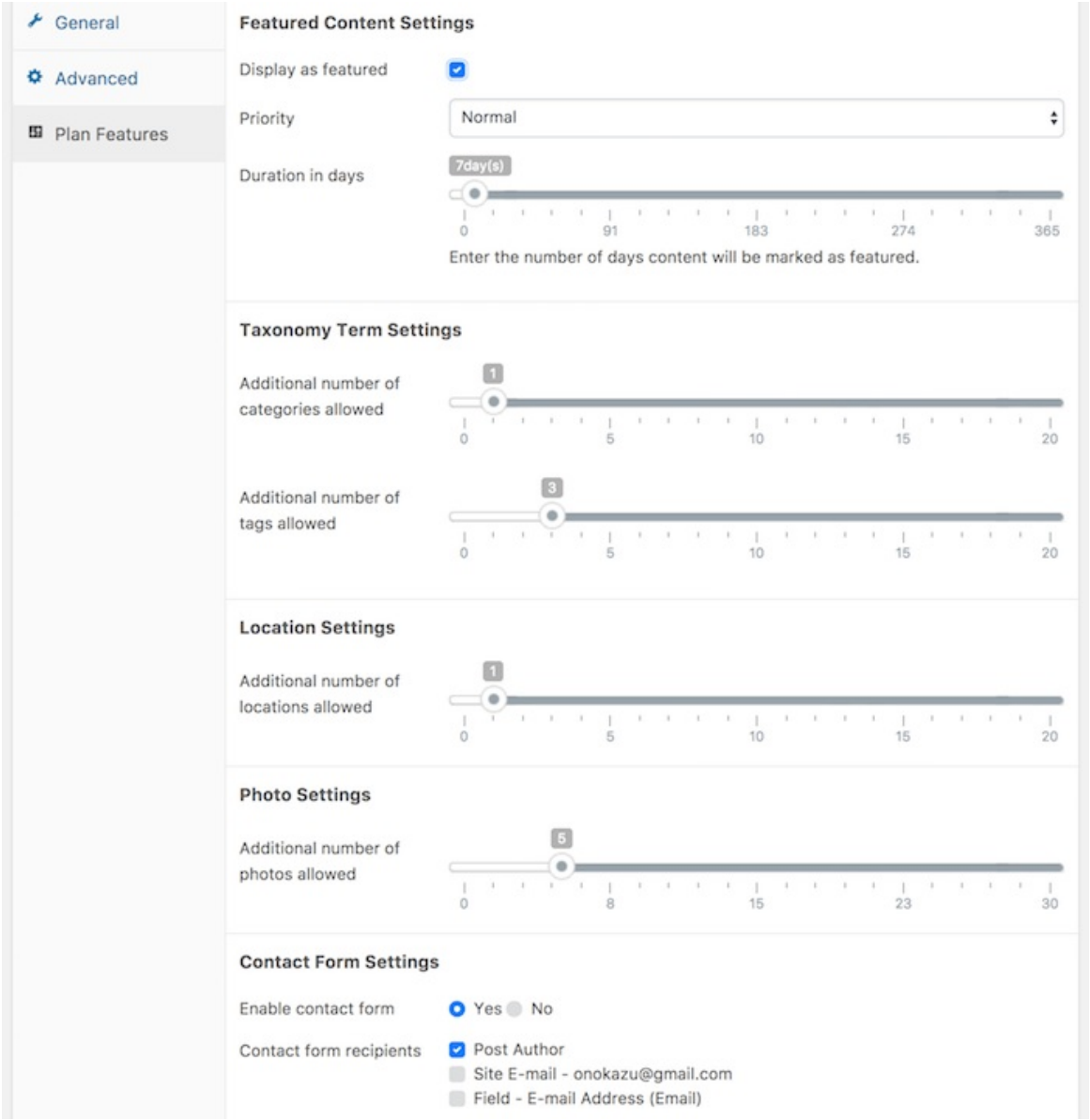
Adding an Add-on plan

Follow the steps below to define a WooCommerce product for an Add-on plan:

1. Follow the steps 1-3 for adding a Base plan described above.
2. Select the **Directory - Listing (Add-on plan)** product type from the dropdown menu in the **Product Data** panel.



3. In the **General** tab, enter the **Regular price** field and optionally the **Sale Price** field if you wish to sell the payment plan at a discounted price.
4. In the **Plan Features** tab, select or enter additional features that should be applied to listings when this add-on plan is purchased.



Most of the features available by default are similar to those available for Base plans. Below are some options available for add-on plans only.

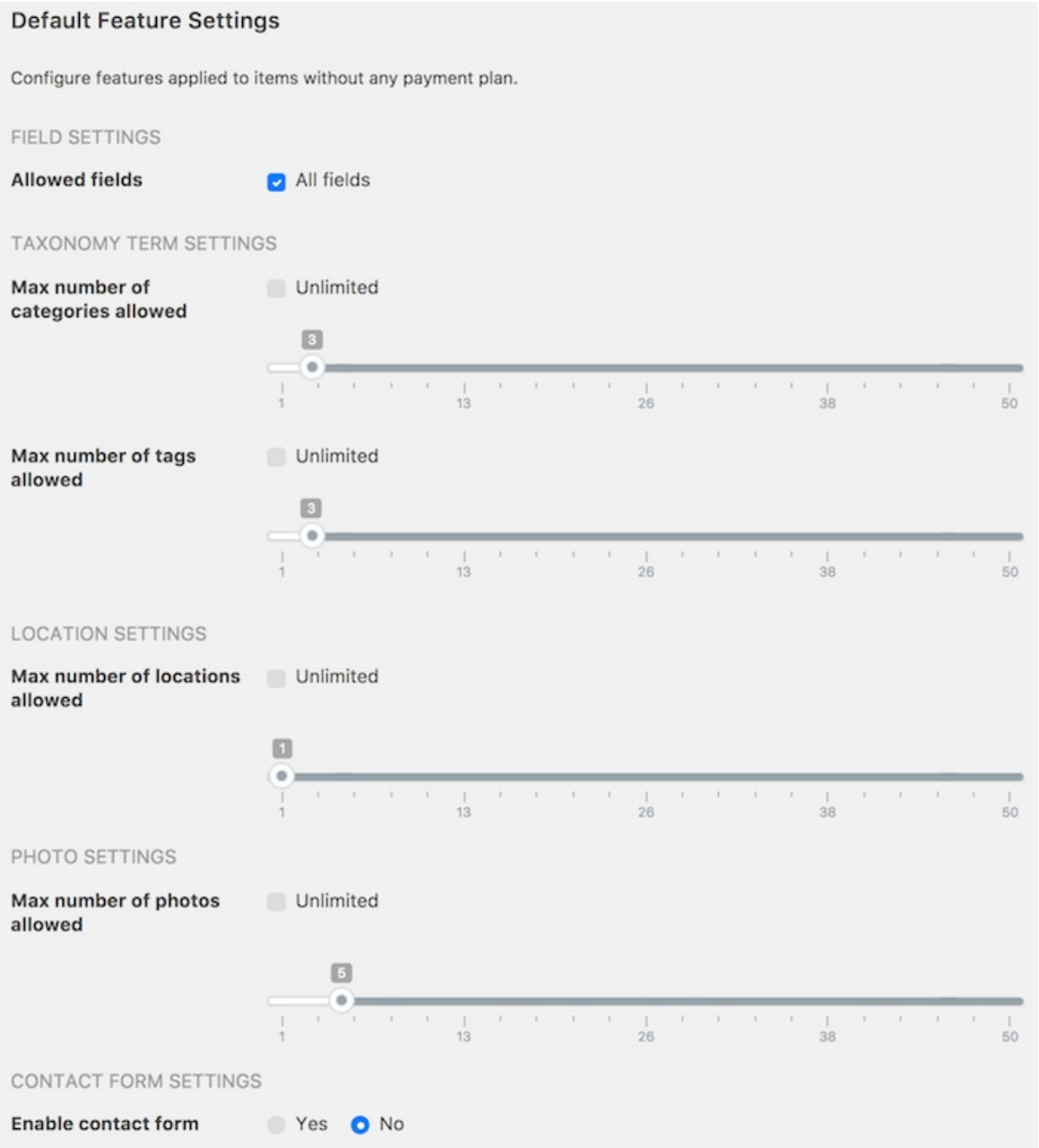
- **Featured Content Settings**
  - **Display as featured** - Whether or not to mark listings as featured. Featured listings can be displayed above other non-featured listings and/or highlighted to make them stand out or can be displayed separately for example using custom views.
  - **Priority** - When multiple featured listings are displayed and sorted by featured listings first, those with higher priority are displayed above those with lower priorities.
  - **Duration in days** - Enter the number of days listings will be marked as featured.

5. Press **Publish** to add the add-on payment plan as a WooCommerce product.

Configuring default features

Not all listings are assigned a base plan. For example, listings submitted when there were no base payment plans available, or listings submitted by guest users while guest checkout was disabled do not have any base plan associated unless purchased later or manually associated by administrators. These listings are instead applied default features which can be configured by following these steps:

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Click **Directories** in the admin sidebar.
3. Under the **All Directories** tab, click the gear icon in the row of the directory to edit.
4. Under the **Content Types** tab, click the **Edit** button in the **Listing** row.
5. Click **Payment** sub-tab under the **Edit** tab.



   The features configurable in this section are exactly the same as those configurable for base payment plans (See Adding a Base plan above for details on each setting).

6. Scroll further down the page and press **Save Changes**.

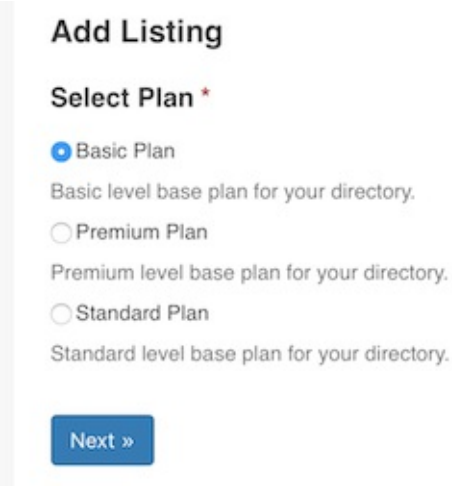
Purchasing Payment Plans

Although payment plans are setup as WooCommerce products, they may not be purchased through the WooCommerce shop page. Instead, the purchasing process is integrated with the listing submission process.

Purchasing a base plan

Let's first try purchasing a base plan from the frontend and see how it works. Make sure that you have already created at least one base plan following the instructions in Adding Payment Plans.

1. Make sure that you are already logged in to WordPress, and then go to the **Add Listing** page in the frontend. You should be presented with a select payment plan form in the first step as below:



   Choose a payment plan from the list and press **Next**.

2. Enter listing details into the listing submission form. Scroll down the page and you will see the label of the submit button now shown as **Add to cart**. Press the **Add Cart** button.

   If there are no errors, a new listing is created with its post status set to **Draft** as soon as the **Add to cart** button is pressed.

3. You are redirected to the WooCommerce shopping cart page. The process from here on is exactly the same as that of when purchasing other products in WooCommerce. Press the **Proceed to Checkout** button.

4. Fill out the **Billing Details** section and then press **Place Order**.

   As soon as the **Place Order** button is pressed, the post status of the listing is updated to **Pending**.

5. An order is created in WooCommerce.

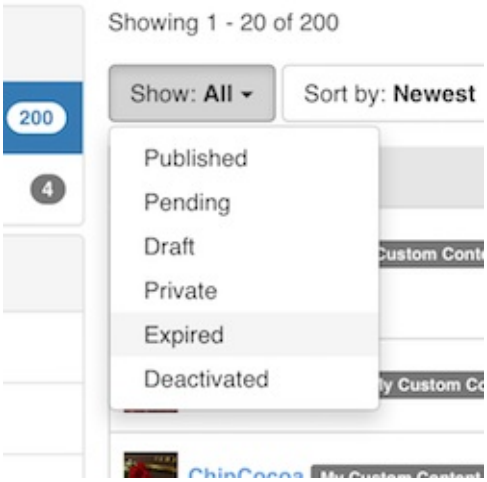
When the payment for the order is complete, the status of the order is updated to **Completed** either automatically by WooCommerce or manually by the administrator depending on the payment gateway selected during checkout.

Once the status of the order is updated to **Completed**, the post status of the listing becomes **Published** if the author of the listing has the **Publish Listings** permission. If the author of the listing does not have the **Publish Listings** permission, then the post status of the listing remains **Pending** and requires manual update of the post status by the administrator in order for the listing to be published in the frontend. For more details on permissions, see Permissions.

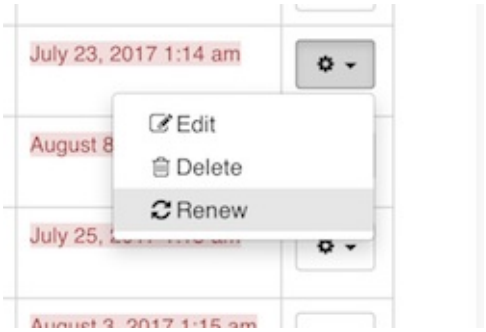
Renewing plan

Once the duration of the currently associated base plan for a listing expires, the author of the listing is given a certain amount of time for renewal (renewal grace period) which is 30 days by default. The listing author can either purchase the same base plan purchased previously for the listing or a different base plan by following these steps:

1. Go to the **Frontend Dashboard** page in the frontend.
2. Click the **Listings** link in the side panel.
3. Click the **Status: All** dropdown button and select **Expired**.



4. Go to the row of the listing you wish to renew, click the dropdown button with a gear icon and then select **Renew**.



5. Choose a plan in the select plan form and proceed to checkout.

Deactivated listings

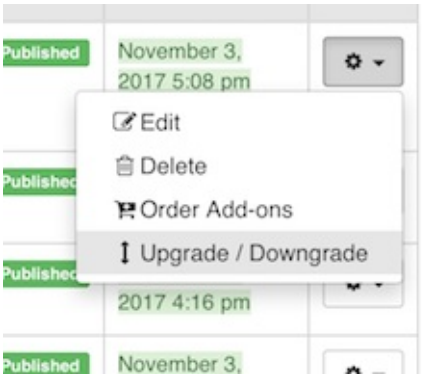
If the author of a listing fails to renew the listing within the renewal grace period, the post status of the listing is changed to **Draft** and the listing becomes hidden from the frontend. In addition, the listing is marked as deactivated. Deactivated listings can still be re-activated by submitting them again from the frontend dashboard however an additional re-activation fee may be imposed. The listings, when submitted, must also go through the same moderation process as new listings.

Switching plan

Listings with a valid base plan that are currently published can be switched to another base plan at any time from the frontend dashboard page.

1. Go to the **Frontend Dashboard** page in the frontend.
2. Click the **Listings** link in the side panel.

3. Click the **Status: All** dropdown button and select **Published**.
4. Go to the row of the listing you wish to switch plan for and click the gear icon dropdown button and then select **Upgrade / Downgrade**.



5. Choose a plan in the select plan form and proceed to checkout.

Prorated discount

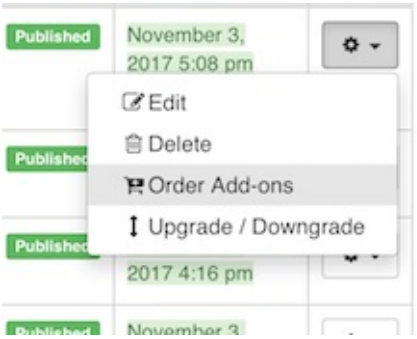
When switching to another base plan, if the current base plan had a certain duration configured at the time of purchase, then the plan purchase fee already paid for the remaining period of time will be deducted from the total amount of purchasing the new base plan (prorated discount). However, if no duration was configured for the current base plan then there will be no deduction.

Guest purchases

Guest users can purchase base plans if the Guest user role has the **Create Listings** permission (see Permissions for details on permissions) and also if the **Allow customers to place orders without an account** option is enabled in WooCommerce (**WooCommerce** -> **Settings** -> **Accounts and Privacy** -> **Guest checkout**). If not, guest users will go through the normal submission process and their listings will have no base plans assigned (default features will be applied).

Purchasing add-on plans

Add-on plans can be purchased by selecting the **Order Add-on** link in the dropdown button displayed for each listing on the frontend dashboard page. The checkout and payment process is exactly the same as ordering base plans.

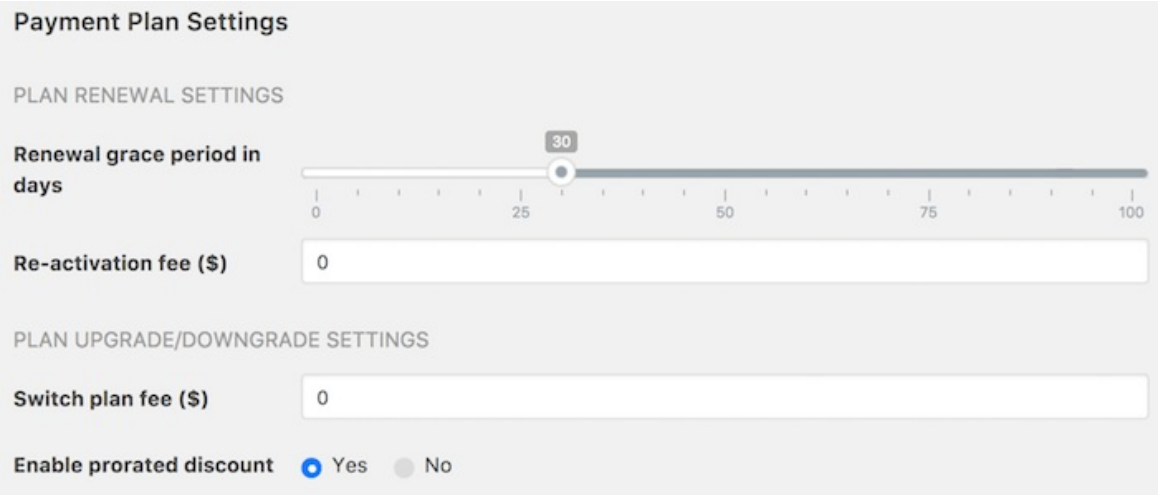


Note that listings must currently be published and also has a valid base plan associated in order to purchase add-on plans.

Configure payment settings

Follow the steps below to configure payment settings available:

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Click **Directories** in the admin sidebar.
3. Click the **Settings** tab and then the **Payment** sub-tab.



   - **Plan Selection Settings**
     - **Add "No payment plan" option** - Whether or not to add a "No payment plan" option to the payment plan selection form. When the user select this option, the user will go through the normal submission process and the listing submitted will have no base plan assigned (default features will be applied).
   - **Plan Renewal Settings** - Lets you configure options related with base plan renewals.
     - **Renewal grace period in days** - Specify the number of days listing authors are allowed to renew their listings after expiration.
     - **Re-activation fee** - Enter the amount of fee to charge listing authors for re-activating their deactivated listings.
   - **Plan Upgrade/Downgrade Settings** - Lets you configure options related with switching base plans.
     - **Switch plan fee** - Enter the amount of fee to charge listing authors for upgrading/downgrading the current base plan.
     - **Enable prorated discount** - Whether or not to deduct the fee paid for the remaining period of the current base plan from the total amount of purchasing a new base plan.
4. Scroll down the page and click **Save Changes**.

Additional notes

- If there is one or more active pending orders for a listing, then no further orders can be made for the listing.
- When a plan is purchased for a listing in a multilingual-enabled directory (see Multilingual Directory), the features provided by the purchased plan are applied automatically to all other translations of the listing.

Managing Orders

Orders are created in WooCommerce when a customer completes the checkout process. For more details on orders in WooCommerce, see https://docs.woocommerce.com/document/managing-orders/.

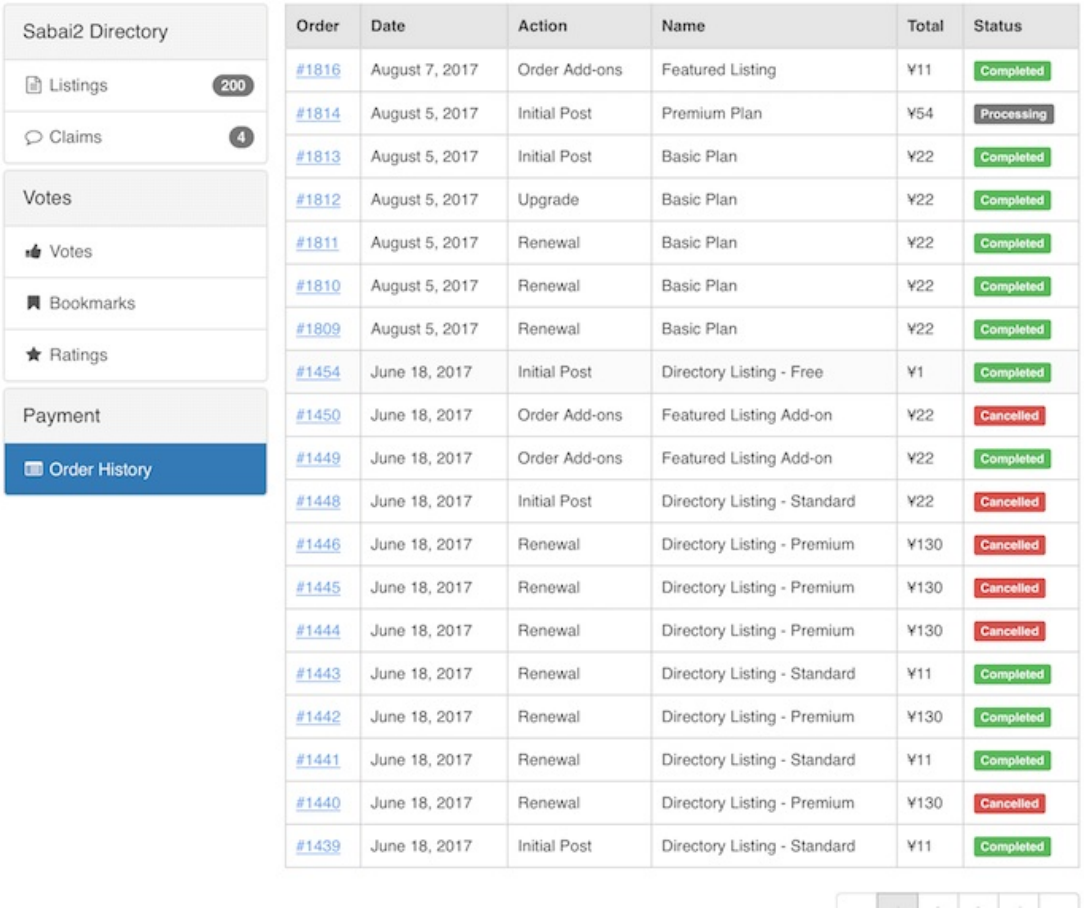
Viewing orders

There are 2 ways to view orders in Directories Pro.

- **Frontend dashboard**

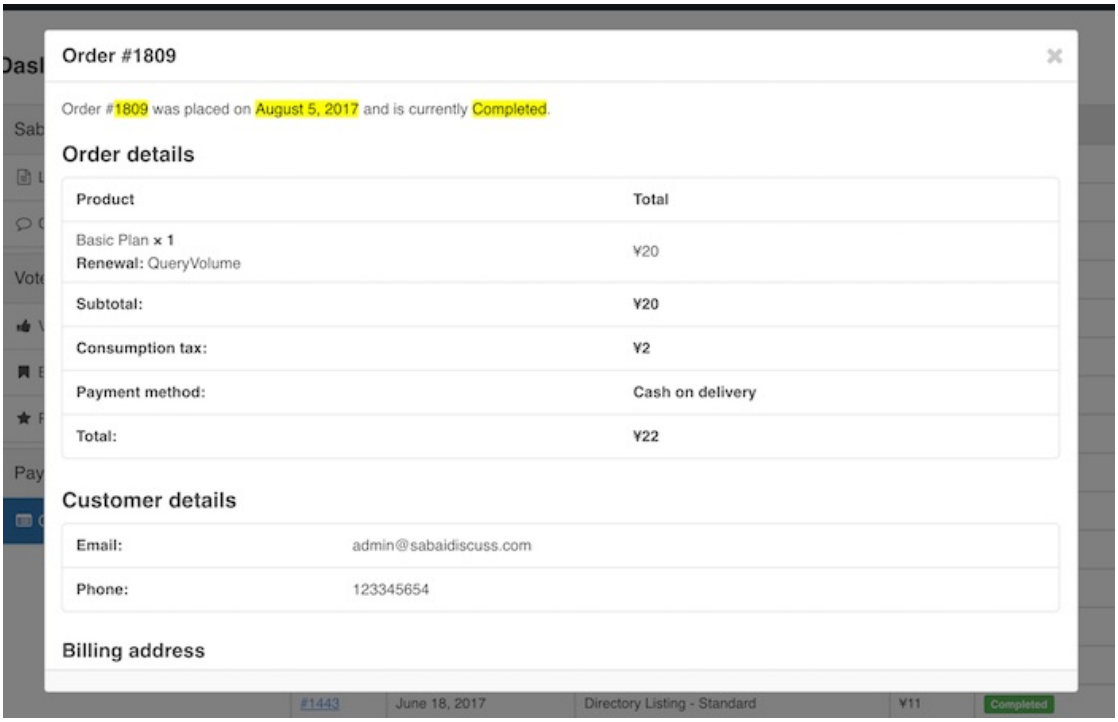
  Registered users can view their orders on the frontend dashboard page by following these steps:

  1. Go to the **Frontend Dashboard** page in the frontend.
  2. Click **Payment** -> **Order History** link in the side panel.



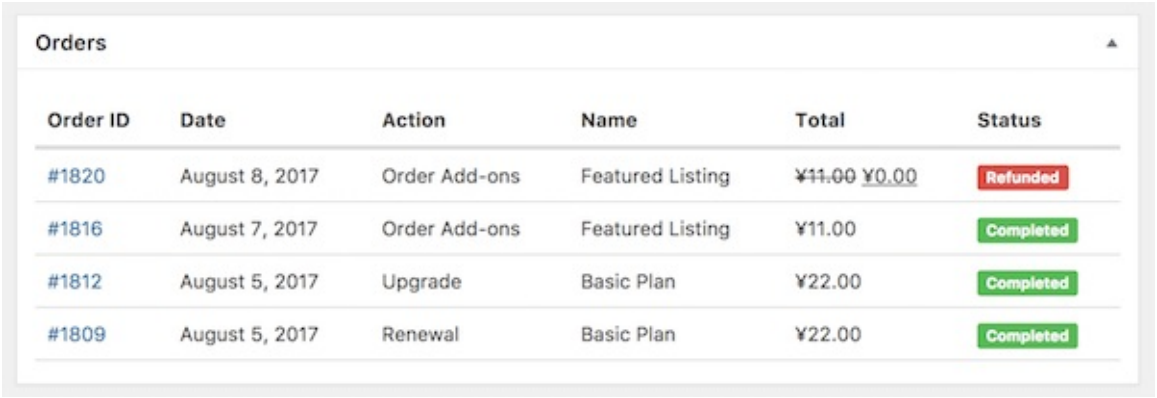
Order	Date	Action	Name	Total	Status
#1816	August 7, 2017	Order Add-ons	Featured Listing	¥11	Completed
#1814	August 5, 2017	Initial Post	Premium Plan	¥54	Processing
#1813	August 5, 2017	Initial Post	Basic Plan	¥22	Completed
#1812	August 5, 2017	Upgrade	Basic Plan	¥22	Completed
#1811	August 5, 2017	Renewal	Basic Plan	¥22	Completed
#1810	August 5, 2017	Renewal	Basic Plan	¥22	Completed
#1809	August 5, 2017	Renewal	Basic Plan	¥22	Completed
#1454	June 18, 2017	Initial Post	Directory Listing - Free	¥1	Completed
#1450	June 18, 2017	Order Add-ons	Featured Listing Add-on	¥22	Cancelled
#1449	June 18, 2017	Order Add-ons	Featured Listing Add-on	¥22	Completed
#1448	June 18, 2017	Initial Post	Directory Listing - Standard	¥22	Cancelled
#1446	June 18, 2017	Renewal	Directory Listing - Premium	¥130	Cancelled
#1445	June 18, 2017	Renewal	Directory Listing - Premium	¥130	Cancelled
#1444	June 18, 2017	Renewal	Directory Listing - Premium	¥130	Cancelled
#1443	June 18, 2017	Renewal	Directory Listing - Standard	¥11	Completed
#1442	June 18, 2017	Renewal	Directory Listing - Premium	¥130	Completed
#1441	June 18, 2017	Renewal	Directory Listing - Standard	¥11	Completed
#1440	June 18, 2017	Renewal	Directory Listing - Premium	¥130	Cancelled
#1439	June 18, 2017	Initial Post	Directory Listing - Standard	¥11	Completed

Details of each order can be viewed by clicking the Order ID.



- **Orders metabox in the backend**

  When editing a listing in the backend dashboard, a metabox labeled **Orders** can be found which contains a list of all orders for the listing.



  Clicking the order ID will take you to the order detail page of WooCommerce in the backend.

Order refunds, fails and cancellations

When the status of an order for a listing is updated to **Refunded**, **Failed**, or **Cancelled** in WooCommerce, all the features currently applied to the listing are unapplied if the order is for a **Base** plan. In addition, the post status of the listing is reverted back to the previous status that was set before the order was marked as **Completed**. The payment plan currently assigned is also unassigned and reverted back to the previous payment plan if there was any. If there was no previous payment plan, then the listing will have no payment plan associated and default features will be applied.

If the order is for an **Add-on** plan, the features that have been applied to the listing with the add-on plan are fully unapplied.

Creating Pricing Tables

Pricing tables are great for showcasing your products to visitors. Follow the steps below to create a pricing table that displays payment plans along with their features that you have setup for your directory.

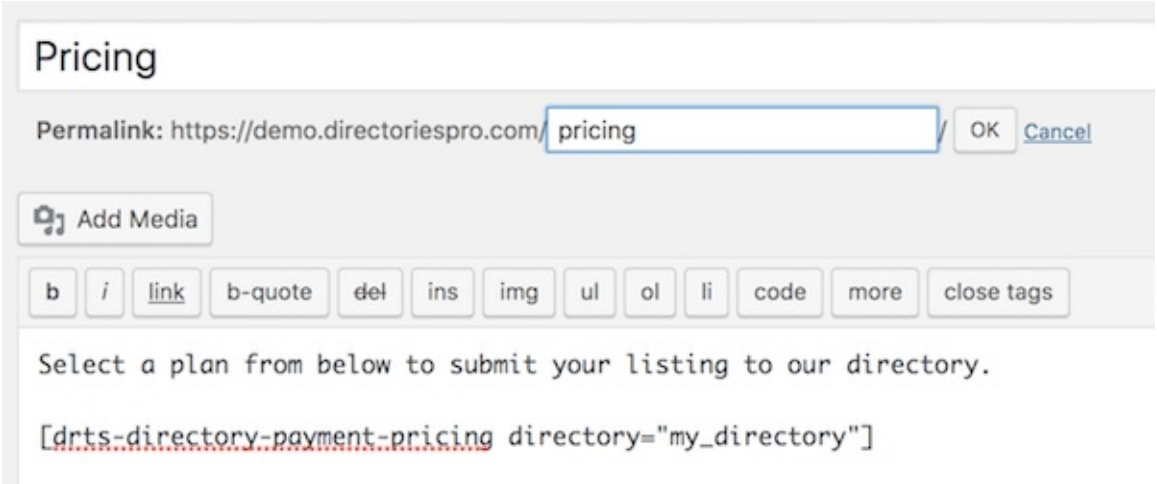
[drts-directory-payment-pricing] shortcode

The `[drts-directory-payment-pricing]` shortcode can be used to display a pricing table for your directory. The following is the list of parameters available with the shortcode:

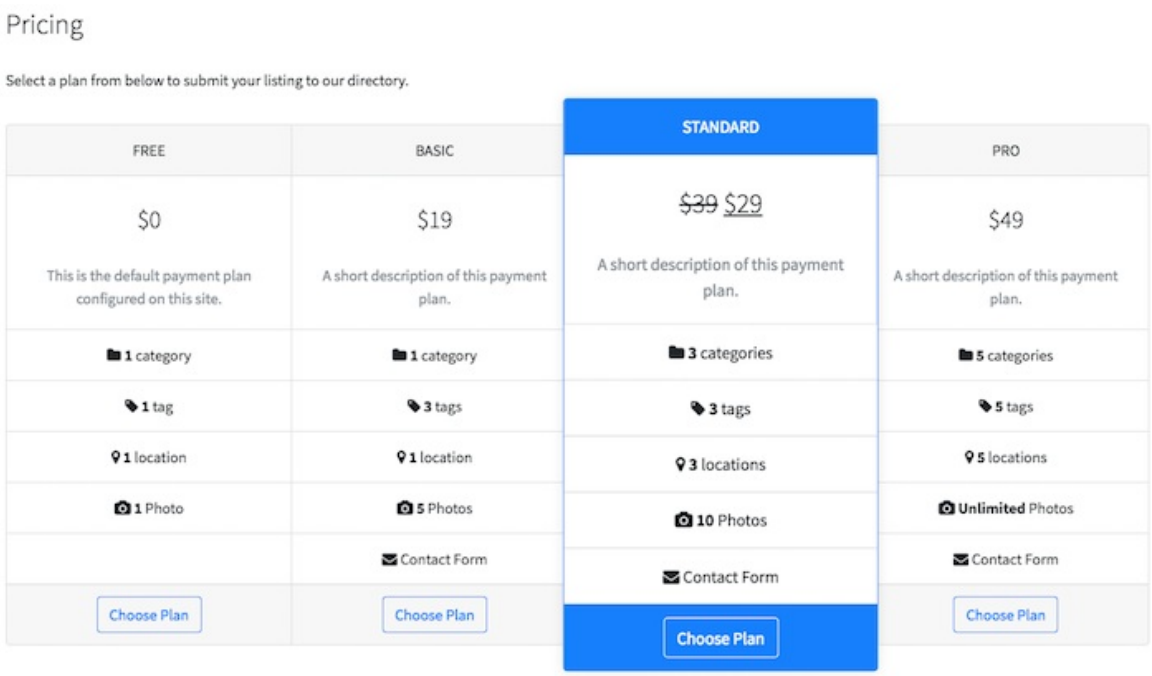
- **directory** (required) - Specify the machine-readable name of the directory for which to show the pricing table.
- **layout** - Specify the layout of the pricing table, *group* (default) or *deck*.
- **color** - Specify the name of color scheme used for the pricing table, one of *primary*, *secondary*, *success*, *warning*, *danger*, *info*, *dark*, *light*, defaults to *primary*.
- **btn_text** - Specify a custom text used for button labels, defaults to *Choose Plan*.
- **cache** - Whether or not to cache the output of the pricing table, *0* or *1*, defaults to *0* (no cache).
- **plans** - IDs of base payment plans to display separated with a comma. All base plans will be displayed if none given, defaults to none.
- **add_no_payment_plan** - Whether or not to add no payment plan option to the pricing table, *0* to prepend or *1* to append. Requires **Add "No payment plan" option** setting switched on under **Directories** -> **Settings** -> **Payment** -> **Plan Selection Settings**.
- **no_payment_plan_title** - Set the payment plan title displayed for the no payment plan option.
- **no_payment_plan_desc** - Set the payment plan description displayed for the no payment plan option.

Follow the steps below to use the shortcode and create a pricing table page for your directory:

1. Select **Pages** -> **Add New** from the side menu.
2. Enter some content about your payment plans and the `[drts-directory-payment-pricing]` shortcode.



3. Publish the page and the page should look similar to below in the frontend:


Pricing
Select a plan from below to submit your listing to our directory.
FREE
$0
This is the default payment plan configured on this site.
1 category
1 tag
1 location
1 Photo
Choose Plan
BASIC
$19
A short description of this payment plan.
1 category
3 tags
1 location
5 Photos
Contact Form
Choose Plan
STANDARD
$39 $29
A short description of this payment plan.
3 categories
3 tags
3 locations
10 Photos
Contact Form
Choose Plan
PRO
$49
A short description of this payment plan.
5 categories
5 tags
5 locations
Unlimited Photos
Contact Form
Choose Plan

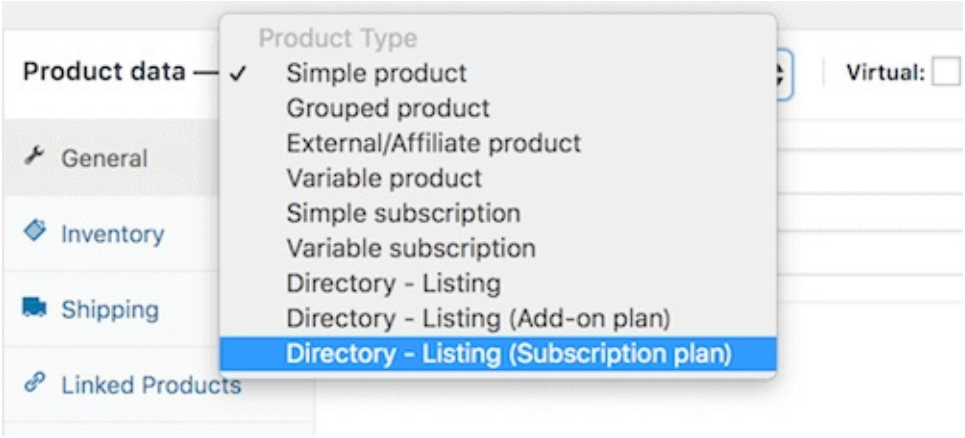
WooCommerce Subscriptions

Directories Pro is compatible with the WooCommerce Subscriptions plugin. By installing and activating the WooCommerce Subscriptions plugin, you can create subscription-based recurring payment plans (hereafter referred to as **Subscription** plans) which are basically Base payment plans with automatic billing capability. You can charge users for posting their listings on a weekly, monthly, or yearly basis.

Creating a Subscription plan

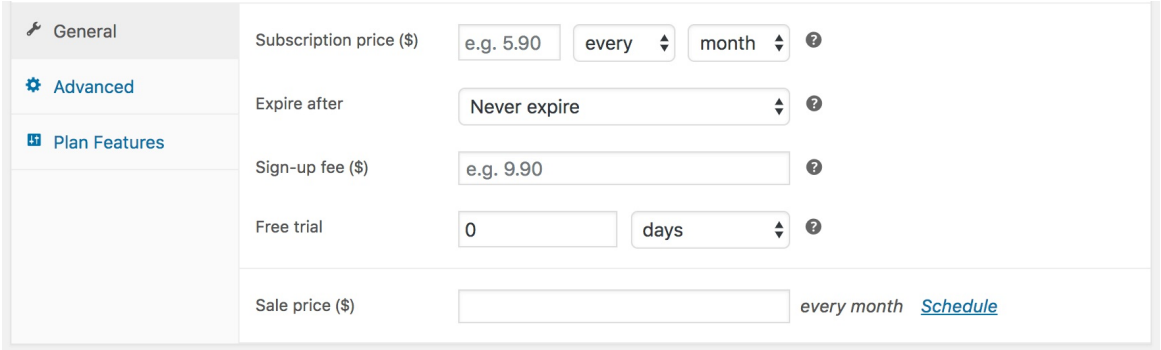
Follow the steps below to define a WooCommerce product for a Subscription plan:

1. Make sure the WooCommerce Subscriptions plugin is already installed and activated.
2. Follow the steps 1-3 for adding a Base plan.
3. Select the **Directory - Listing (Subscription plan)** product type from the dropdown menu in the **Product Data** panel.



If you do not see the subscription payment plan option in the dropdown, try clearing the cache from **Directories -> System -> Tools** using the **Clear cache** tool.

4. In the **General** tab, enter the **Subscription price** field and optionally the **Sale Price** field if you wish to sell the payment plan at a discounted price.



You can charge renewal payments using a billing period of daily, weekly, monthly or annually, and at any interval between 1 and 6 (inclusive).

The **Expire after** setting allows you to end a subscription after a predetermined amount of time. Subscription plans with this setting set to *Never expire* can renew indefinitely as long as renewal payments are successful.

You can add a **Free trial** period to the beginning of a subscription. This period is added to any length you set for the subscription. For example, if you create a subscription of $5 per month for 6 months with a 1-month free trial period, the subscription will expire after 7 months.

5. In the **Plan Features** tab, select or enter features that should be applied to listings when this subscription plan is purchased.

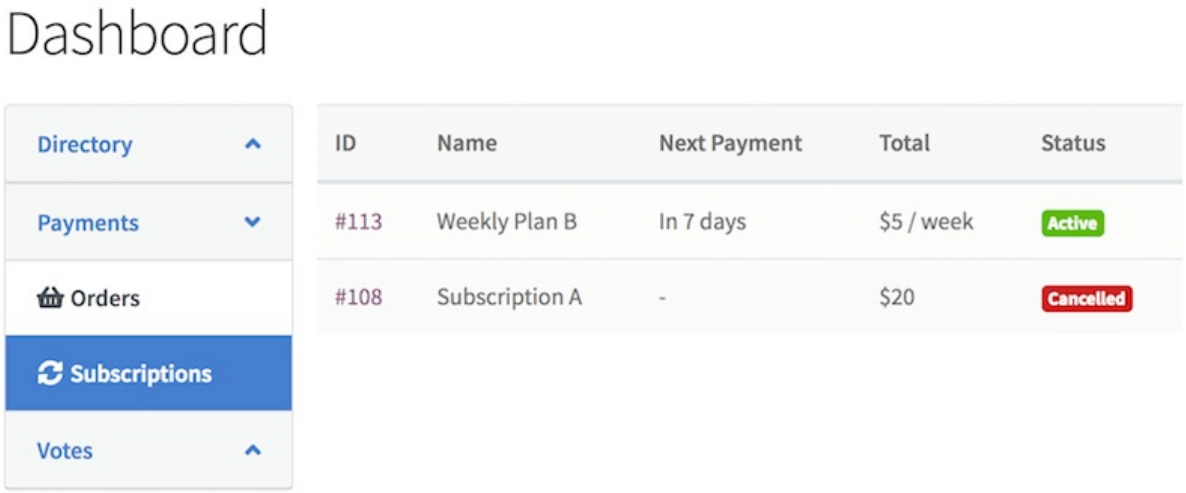
   The features that you can configure here are exactly the same as that of a Base plan. For details on each feature, see adding a Base plan.

6. Press **Publish** to add the subscription payment plan as a WooCommerce product.

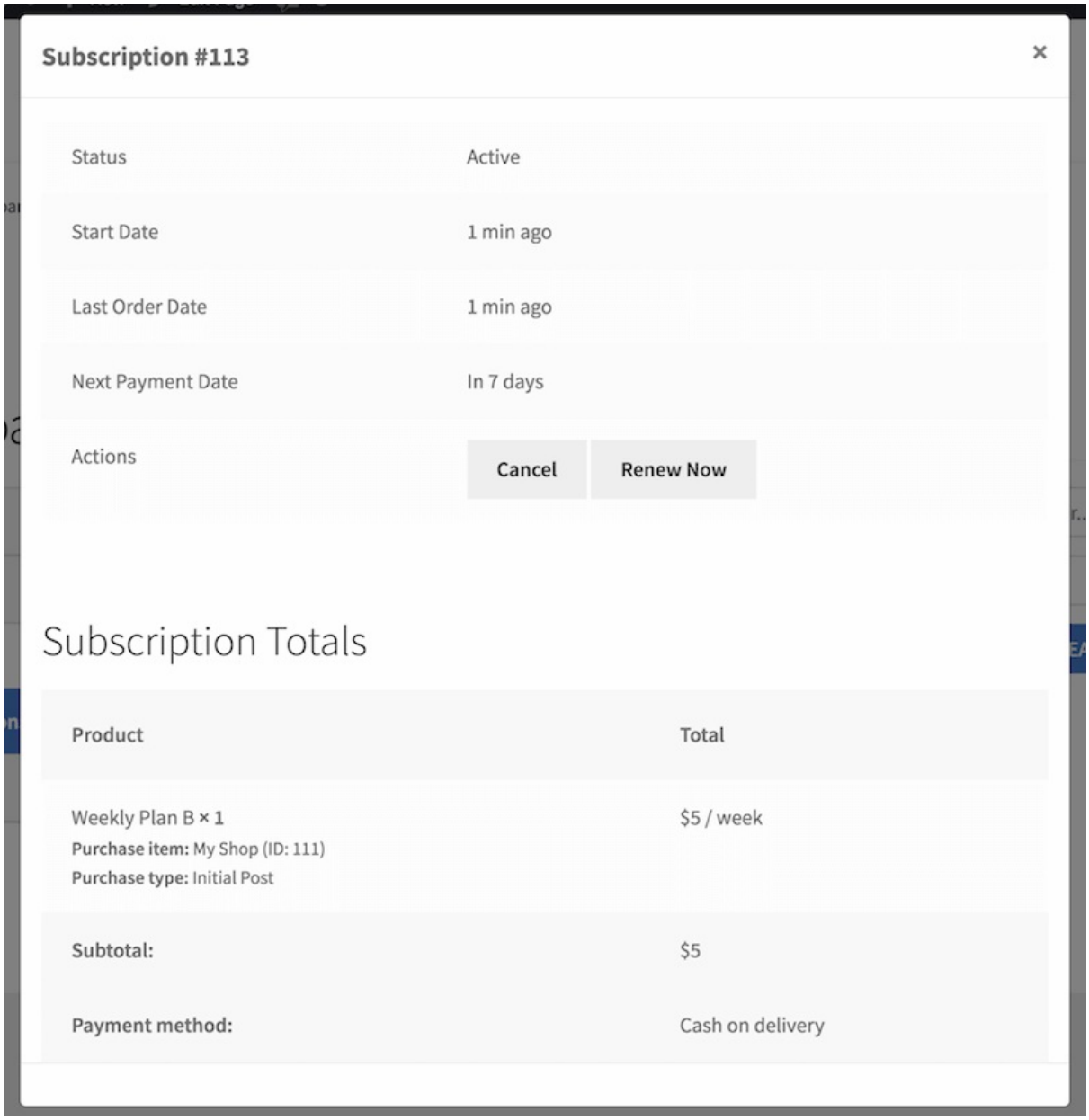
Managing Subscriptions

For details and instructions on managing subscriptions in the backend, see https://docs.woocommerce.com/document/subscriptions/store-manager-guide/#section-11.

Users who purchased subscriptions can view and manage their subscriptions on the directory dashboard page in the frontend. Click the **Subscriptions** link under **Payments** in the menu panel to view all the subscriptions.



Click the ID of a subscription to view the details of the subscription in a popup window.



You can also cancel, renew, or resubscribe the subscription by clicking on the buttons in the **Actions** section.

Localization and Multilingualization

Directories Pro comes localization-ready out of the box. There are several methods to localize the user interface into your language of choice. In addition, with the WPML plugin you can not only translate predefined UI strings but also user content and custom text strings added to your directory.

Localization

Translating with .po/.mo files

Language files included are in the Gettext format, which is the standard format used for language files in WordPress. Each plugin contains a .pot (Potable Object Template) file under the **languages** sub-folder:

- **Directories** - wp-content/plugins/directories/languages/directories.pot
- **Directories - Pro** - wp-content/plugins/directories-business/languages/directories-business.pot
- **Directories - Frontend** - wp-content/plugins/directories-frontend/languages/directories-frontend.pot
- **Directories - Payments** - wp-content/plugins/directories-payments/languages/directories-payments.pot
- **Directories - Reviews** - wp-content/plugins/directories-reviews/languages/directories-reviews.pot

Translate these files using a software like Poedit (recommended) and save the generated MO (.mo) files under **wp-content/languages/plugins**. Make sure that you append the lang code of your language to the file name. For example, if you are translating directories.pot into French, save the generated MO file as **directories-fr_FR.mo**. If you are unsure what lang code is currently used on your site, go to **Directories** -> **System** -> **System Info**, scroll down to the table labelled **Wordpress environment** and check the value displayed for **Locale** as shown below:

Note: Some phrases such as labels used for fields, displays, and filters are not translated unless you had your language files ready before activating the plugin. This is because those phrases can be edited from the backend, and it would become a problem if they are overwritten by uploading language files.

Translating with the Say What? plugin

Sometimes if you only need to translate a few number of words or phrases you may not want to create an entire translation file. This is when the Say What? plugin can help.

1. Install and activate the Say What? plugin.
2. Go to **Tools** -> **Text Changes**.
3. Create a new **Text Change** with the following settings:
    - **Original string** - Enter the word or phrase you are translating.
    - **Text domain** - Enter the name of the plugin to which the original string belongs, e.g. *directories*, *directories-pro*, *directories-payments*.
    - **Text context** - Leave it blank which should work in most cases.
    - **Replacement string** - Enter the text you want to display.
4. Press the **Add** button.

Multilingual Directory

Directories Pro is compatible with the WPML plugin. With WPML, you can have any directory content as well as custom text strings added by yourself such as form field labels displayed in multiple languages.

Installing the WPML plugin

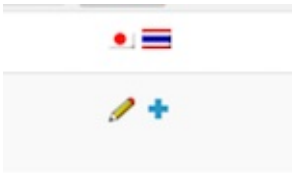
For detailed instructions on installing the WPML plugin, visit the following page: https://wpml.org/faq/install-wpml/

Other than the core WPML plugin (*WPML Multilingual CMS*), we also recommend installing the *WPML String Translation* plugin for translating custom text strings.

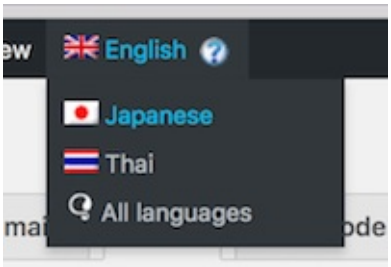
Setting up a multilingual directory

The first thing you must do to setup a multilingual directory is to create frontend pages for each language you have enabled in WPML.

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Click **Pages** -> **All Pages** from the side menu.
3. For all the pages currently set up with Directories Pro (see **Directories** -> **Settings** -> **Pages**), create a copy for the language you wish to enable by clicking the plus sign displayed under country flags.

   Important: You can not use the same slug for multiple languages. For example, if the directory index page for English is *directory*, you can not use that slug for any of the directory pages in other languages. Unfortunately that will not work in Directories Pro.
4. After creating a copy for all pages, click **Directories** in the admin sidebar, and go to **Settings** -> **Pages**.
5. Using the language switcher at the top of the page, select the language for which you have created pages in step 3.

6. Under the **Page Settings** section, assign pages by selecting pages created in step 3 and press **Save Changes**.
7. Repeat steps 3-6 for all other languages you wish to enable.

In addition, follow the steps below to enable translation of listings, categories, tags, and locations:

1. Select **WPML** -> **Translation Options** from the side menu.

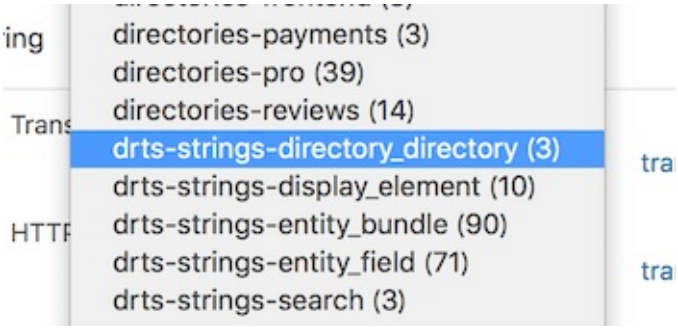
2. Scroll down to **Custom posts** and select **Translate** for **Directory - Listings** and press **Save**. Note that you do not need to select **Directory -Reviews** or **Directory - Claims**.
3. Scroll down to **Custom taxonomies** and select **Translate** for **Directory - Categories**, **Directory - Tags**, and **Directory - Locations** and press **Save**.

Now you are ready to start creating multilingual content for your directory! See the following page for details on adding translations for your content items with WPML: https://wpml.org/documentation/translating-your-contents/creating-translations-manually/

Translating custom text strings

Custom text strings such as field labels that you configured in the backend can not be translated with .po/.mo language files since those text strings do not exist as predefined phrases. However, with the *WPML String Translation* plugin, you can not only translate predefined phrases in language files but also custom text strings from the string translation page of the plugin. To view the string translation page, select **WPML** -> **String Translation** in the side menu.

When you click the domain dropdown list you may already see several domains with names starting with **drts-strings-**. These domains are the ones to which your custom text strings are or will be registered. If you do not see the domains or any strings registered, don't worry since they will get registered once you actually view or edit the strings on backend or frontend pages of your directory.



Here is the list of domains for custom text strings in Directories Pro:

- **drts-strings-directory_directory** - Contains text strings used for directory labels.
- **drts-strings-display_element** - Contains text strings used for displays and filters.
- **drts-strings-entity_bundle** - Contains content type labels such as *Listings*, *All Categories*, and *%s listings*.
- **drts-strings-entity_field** - Contains text strings used for form field labels, descriptions, and options.
- **drts-strings-search** - Contains text strings used for search form labels and placeholders.

Simply select a domain from the dropdown list and start translating the strings registered in the domain to make them multilingual.

Exporting and Importing Directories

The import/export feature of Directories Pro lets you export and import both content and settings of your directory which can then be imported back or imported into a different site.

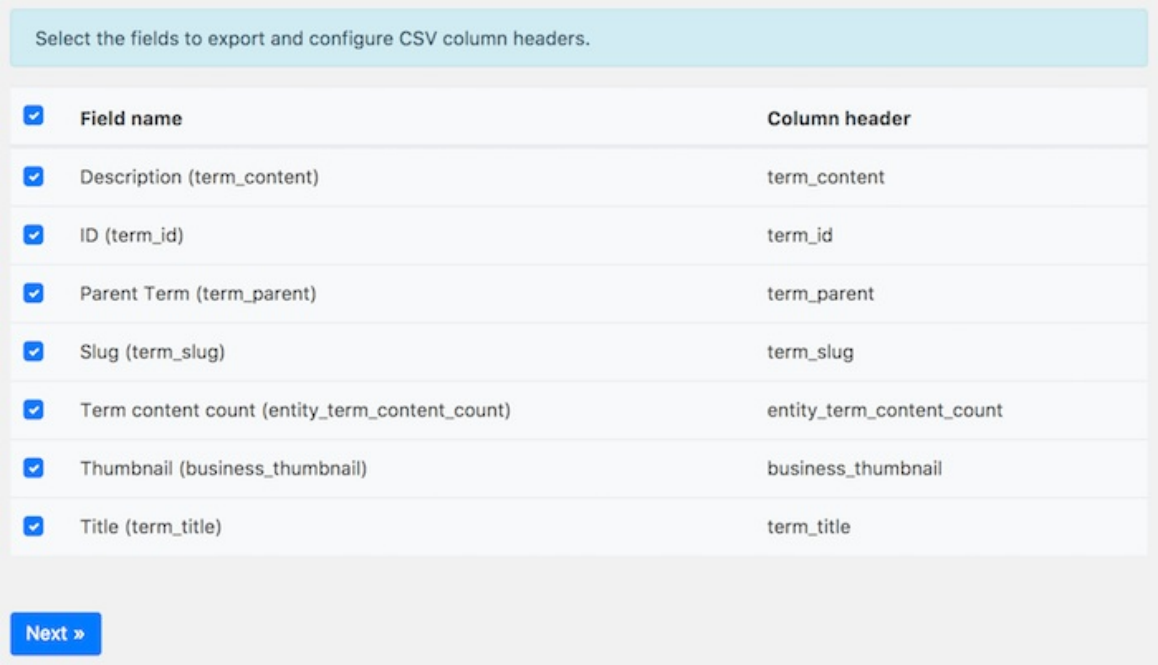
Exporting and Importing Content

Exporting Content to CSV

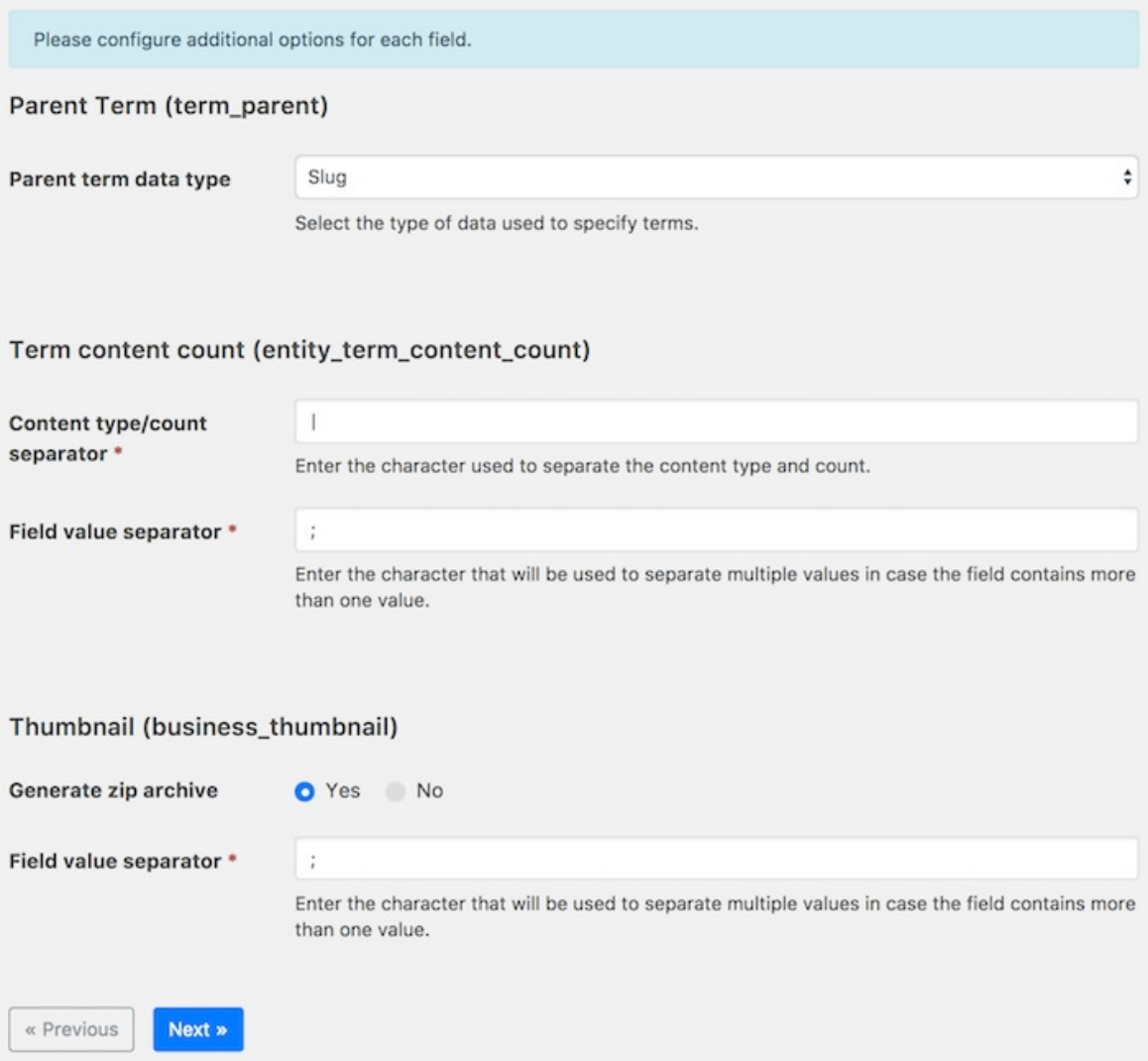
The CSV export feature lets you export any content of your directory to a CSV file in just a few number of clicks.

Follow the steps below to export your directory content to a CSV file:

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Select **All Listings** (or **Categories**, **Tags**, **Locations**, **Claims**, **Reviews** depending on the type of content to export) under your directory menu in the admin sidebar.
3. Click the **Export** button at the top of the page.
4. Select the fields to export by checking the checkboxes and then press **Next**.



5. Depending on the fields selected, additional options that need to be configured before exporting to a CSV file are displayed. For example, you can choose whether or not to export image files to a zip file if you have selected an Image type field to export in the previous step.



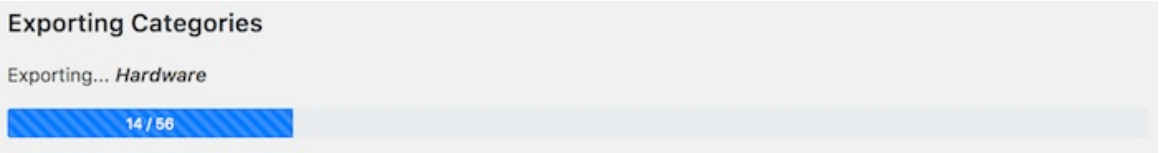
If you are unsure about these options, it is usually safe to leave them as-is.

6. Click the **Next** button to proceed to the final step:

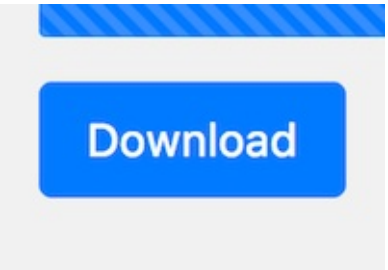
- **File name** - Enter the name of the CSV file to export. The file will be created under wp-content/uploads/drts/System/tmp if export is successful.
- **Limit to X records (0 for all records)** - Enter the number of content items to export.
- **Start from Xth record** - Specify from which content item to start exporting. For example, enter *10* to skip the first 9 records and start exporting from the 10th records in the database.

7. When you are ready, click **Export Now**.

   You will see a real-time progress of what is exported and, if any, failed.

   When the export process is complete, a blue *Download* button will show up under the progress bar which you can click to download the exported file.

   If for some reason the download button does not appear or work, you can also find the exported file under *wp-content/uploads/drts/System/tmp* if the export was successful.

Importing Content from CSV

Importing content to Directories Pro involves creating a CSV file and loading the file data into your directory using the built-in CSV importer.

Creating a CSV file

There is no fixed format for your CSV file, since the columns in your CSV file can be mapped with content fields during the import process. The only thing that is required with your CSV file is that the first row must contain labels for each column in the subsequent rows.

Note: If you need a sample CSV file, the easiest way to obtain one is to create one or more posts or taxonomy terms and then exporting them to a CSV file. See Exporting Content to CSV for details on exporting CSV files.

Here are some tips specific to the type of content to import:

- **Category / Location**
  - Associating parent terms

    Create a column that holds either the ID or the slug of the parent term to be associated with. If the parent term is not an existing term (does not exist in the database), make also sure to create a column that holds either the ID or the slug of each term so that values in that column can be used to reference parent terms.

Title	Slug	Parent Slug
USA	usa	
New York	new-york	usa

- **Listing**

- Associating taxonomy terms

  Create a column that holds either the ID or the slug of the the taxonomy term to be associated with if the term is an existing term. If the term is not an existing term (does not exist in the database), instead create a column that holds the display title of the term, then the importer will create a new taxonomy term in the database with the value of that column as the term title and associate it with the listing.

- Importing location data

  Create a column that holds the full address of each listing and map that column to the **Full Address** component of the **Location (location_address)** field. This will let the importer geocode the address (can be disabled) using Google Maps API and retrieve detailed geographic information of the location such as latitude and longitude coordinates. Make sure to set up Google Maps API in order to use the geocoding feature.

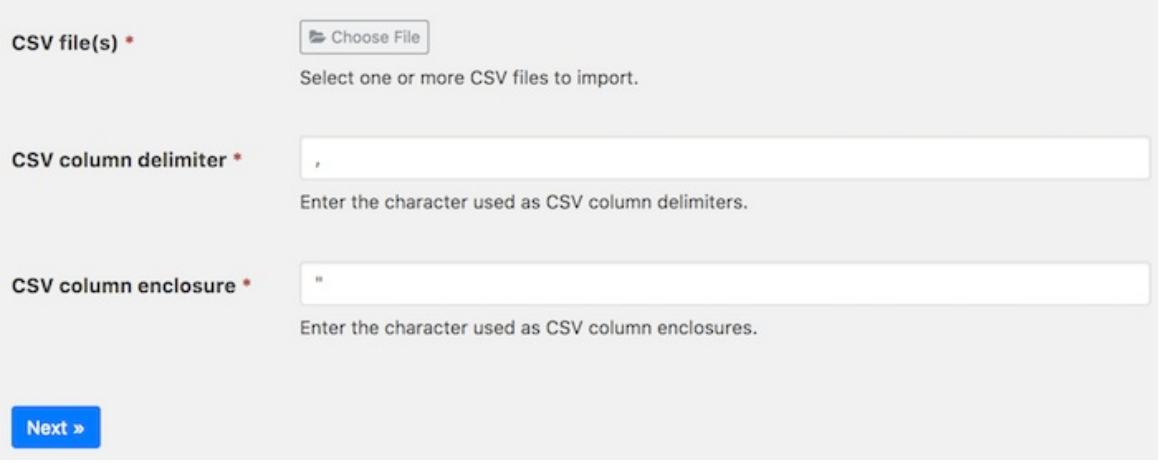
- **Claim**
  - Associating claimed listings

    Create a column that holds either the ID or the slug of the listing claimed. The listing must already exist in the database.

Importing your CSV file

Follow the steps below to import your CSV file:

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Select **All Listings** (or **Categories**, **Tags**, **Locations**, **Claims**, **Reviews** depending on the type of content to export) under your directory menu in the admin sidebar.
3. Click the **Import** button at the top of the page.



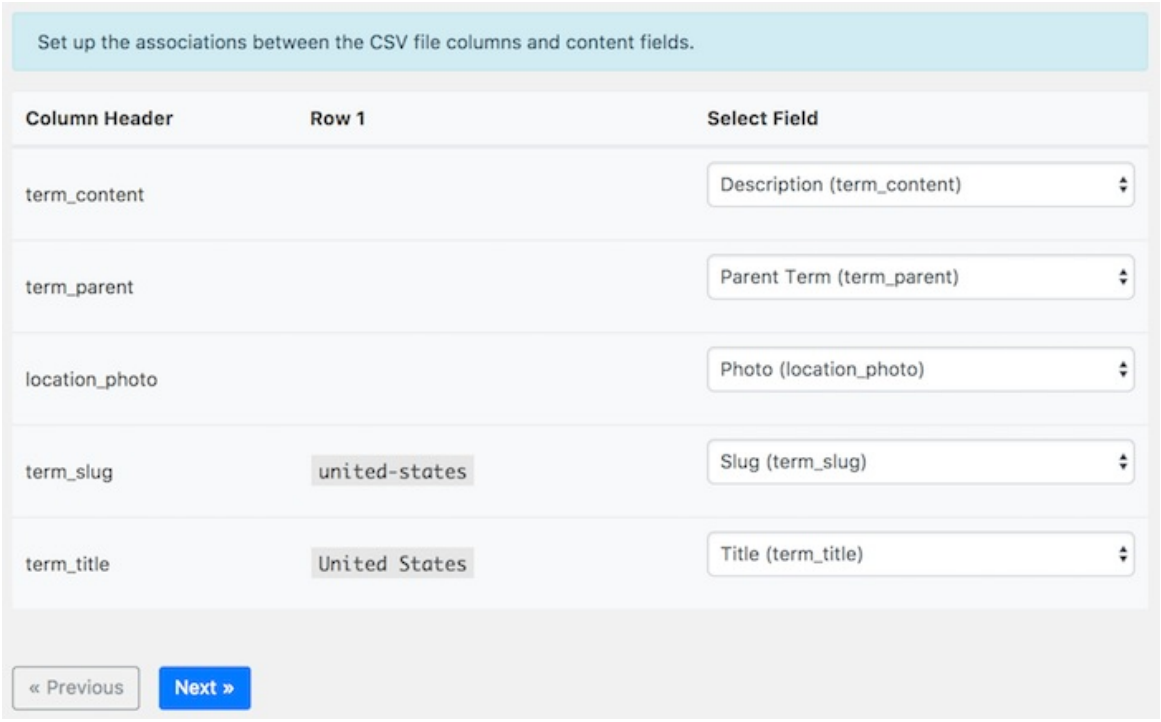
- **CSV File(s)** - Click **Choose File** and locate your CSV file. You can upload multiple CSV files by clicking the button multiple times. In that case, make sure that all the CSV files have exactly the same content (column labels) in the first row.

  Note: Depending on your server, the import process may fail or stop before importing all items if you have a very large CSV file. In that case, split the CSV file into multiple files and then upload them. Make sure that all the files have the same header columns in the first row. The importer will then process those files one by one.

- **CSV column delimiter** - Enter the character used as CSV column delimiters in your CSV file. The default value is a single comma.

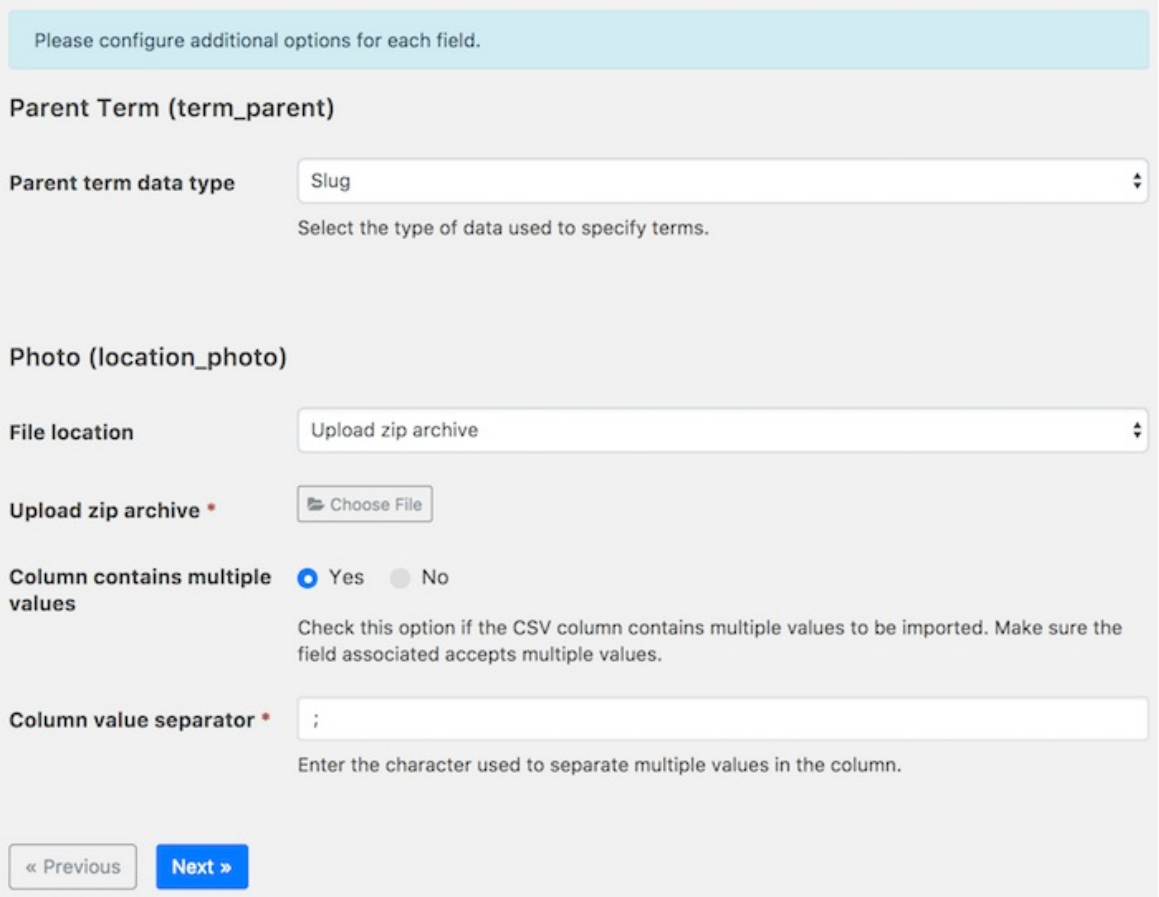
- **CSV column enclosure** - Enter the character used as CSV column enclosures in your CSV file. The default value is a double quote.

4. Click the **Next** button to go to the next step:



In this step, you will map the columns in your CSV file with fields that are defined for the content type to import. For each column header in your CSV file on the left, select a matching field on the right to be associated with.

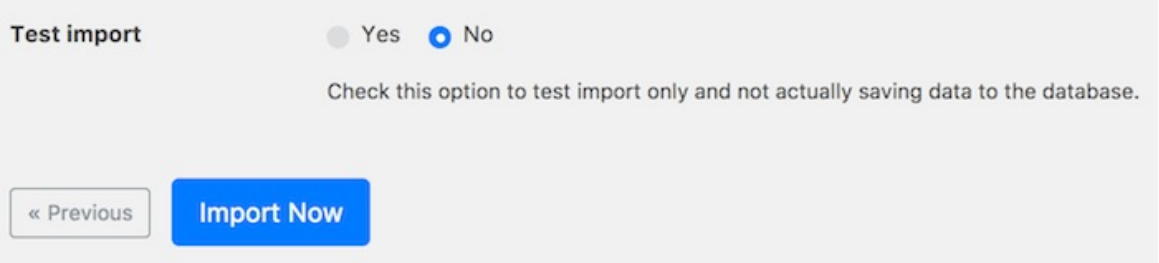
5. After associating CSV columns with content type fields, click the **Next** button to proceed on to the next step:



Some fields associated with the columns in your CSV file may have additional options that can be configured in this step. For example, if a field supports importing of multiple values, there will be an option for the field to specify the delimiter character used to separate values in the CSV column. Another example is an Image type field which lets you upload a zip file containing image files to be imported for the field.

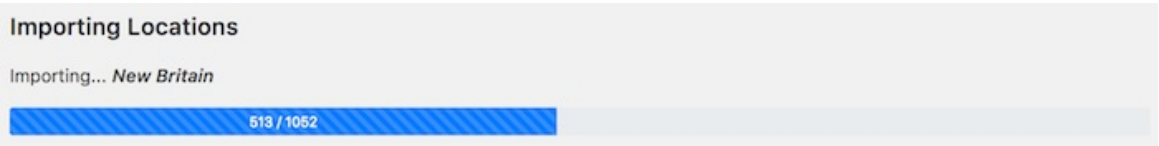
If you are unsure about these options, it is usually safe to leave them as-is.

6. Click the **Next** button to proceed to the final step:



   - **Test import** - If you are just trying to test and see how it goes without actually importing any data, select **Yes**.
7. When you are ready, click **Import Now** to import your CSV file.

   You will see a real-time progress of what is imported and, if any, failed.



Updating existing content

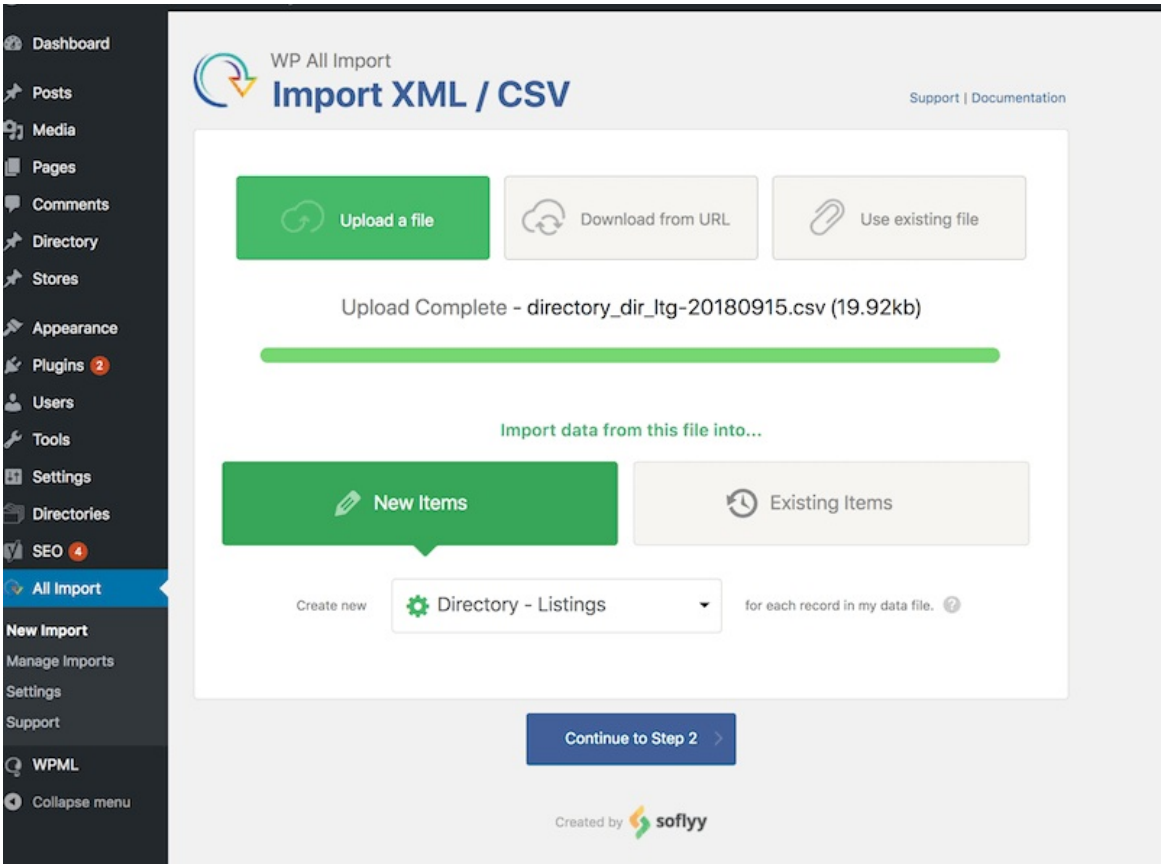
You can also update existing content through CSV import. Simply create a column in your CSV file that holds existing content item IDs and map that column with the ID field of the content type when importing.

Importing Listings with WP All Import

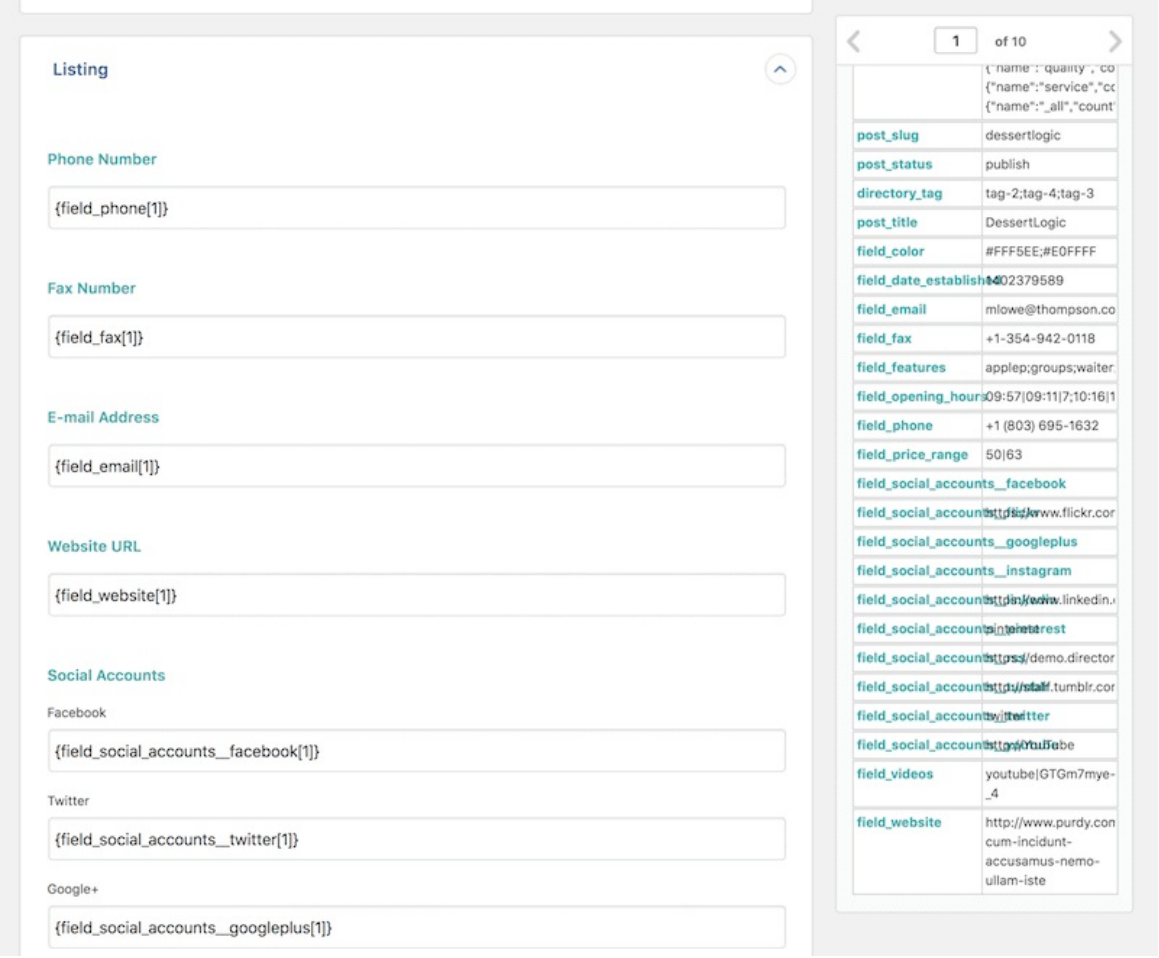
Directories Pro includes an add-on for the WP All Import plugin which lets you easily import listings from any CSV or XML file.

To import listings using WP All Import, make sure the WP All Import plugin is installed and activated and then follow the steps below :

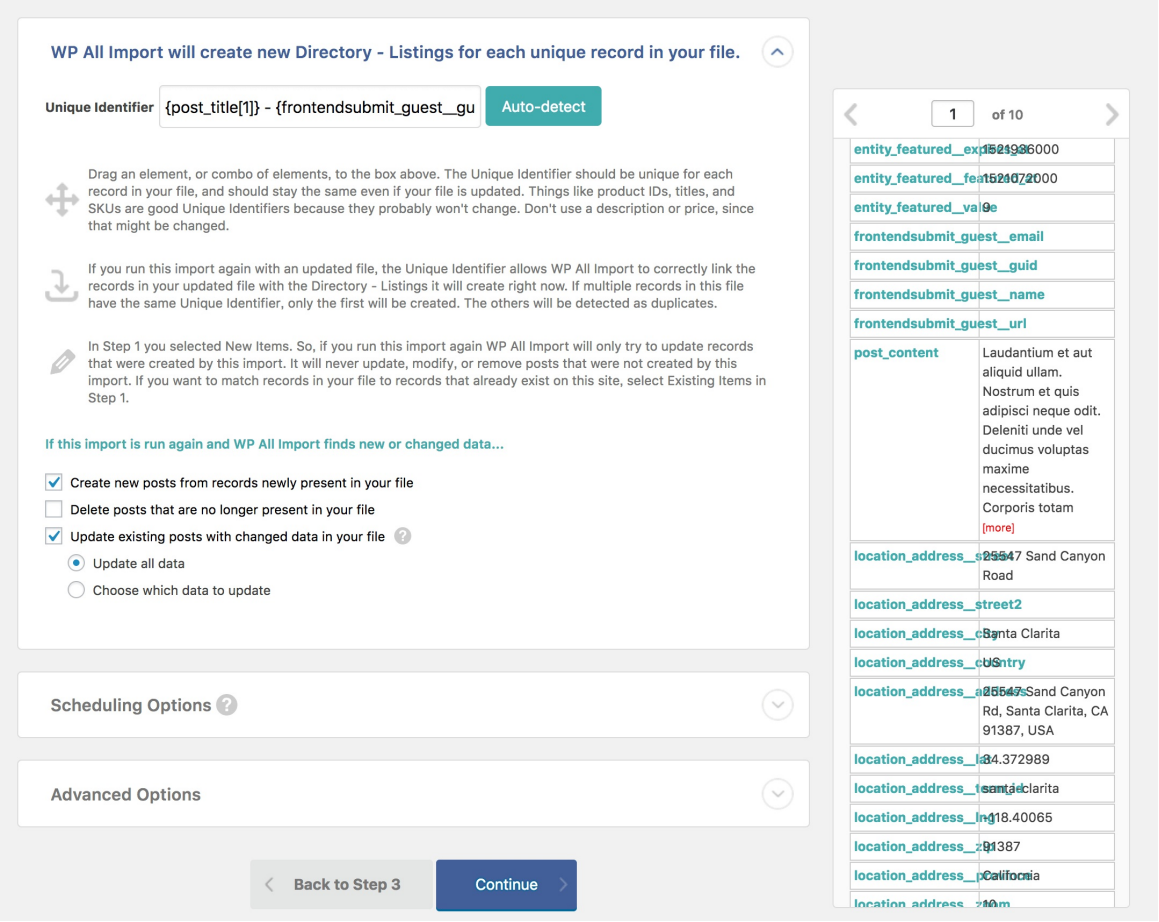
1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Select **All Import** -> **New Import** in the admin sidebar.
3. Upload a CSV/XML file or enter a URL to download the file, select your directory listings option from the dropdown and click **Continue to Step2**.



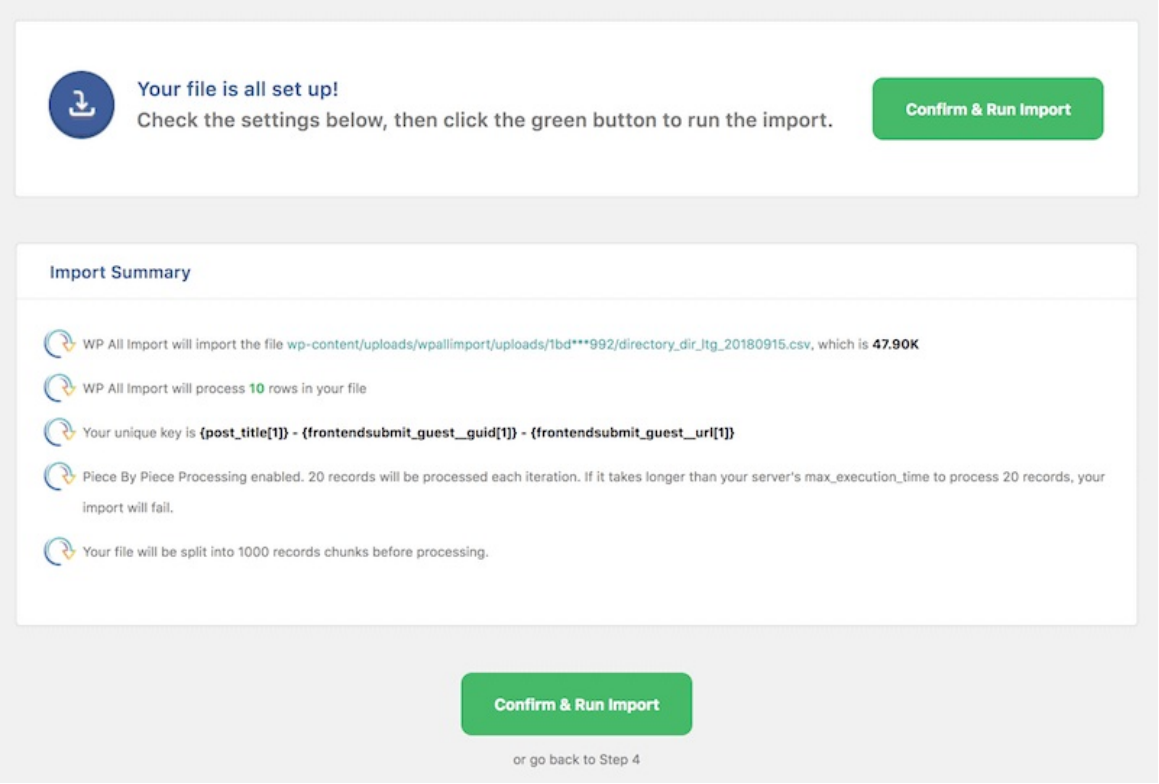
4. Configure filtering options if you need to and then click **Continue to Step3**.
5. Drag and drop the fields from your CSV or XML file into the appropriate corresponding listing fields. After filling out the fields, click **Continue to Step4**.



6. For the Unique Identifier option, click the **Auto-detect** button if you are unsure.



7. If you are happy with the import click the **Confirm and Run Import** button.

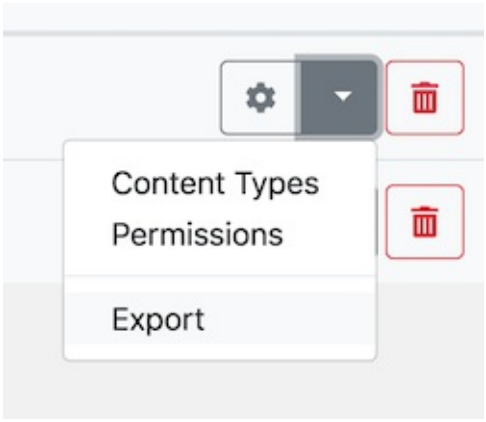


Exporting and Importing Settings

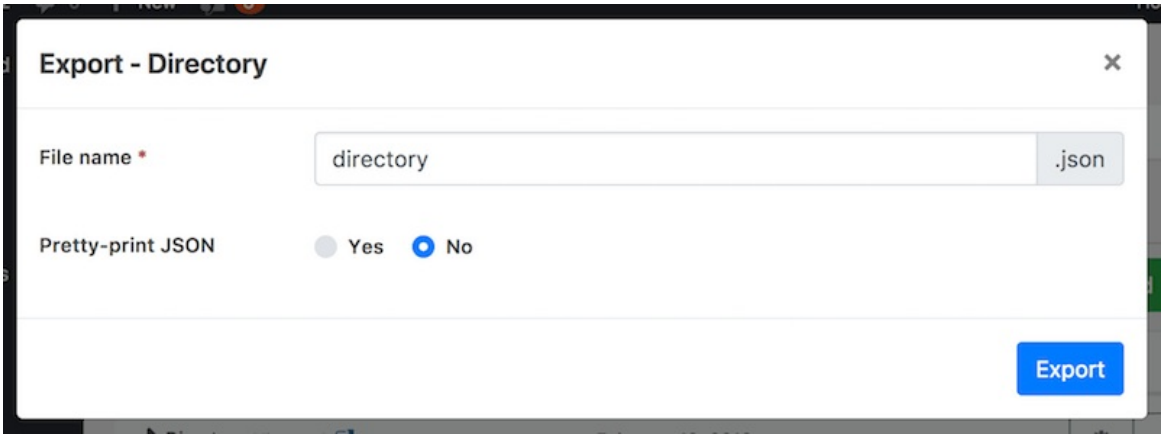
Exporting settings of a directory

You can export settings (including content type and permission settings) of your directory which can then later be imported to setup a copy of the directory without re-configuring the settings.

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Click **Directories** in the admin sidebar.
3. Under the **All Directories** tab, click the dropdown button next to the gear icon in the row of your directory and then click **Export**.



4. In the popup form, enter the file name of the JSON file that will be exported. Optionally select *Yes* for **Pretty-print JSON** to export readable JSON.



5. Click the **Export** button at the bottom of the popup window.

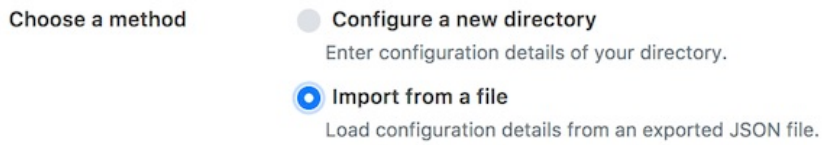
   A progress bar will show up indicating the current status of the export process.

6. When the export is complete, the exported file will be downloaded automatically by your browser. If not, you can click the **Download** button that appears at the bottom of the popup window to manually download the exported file.

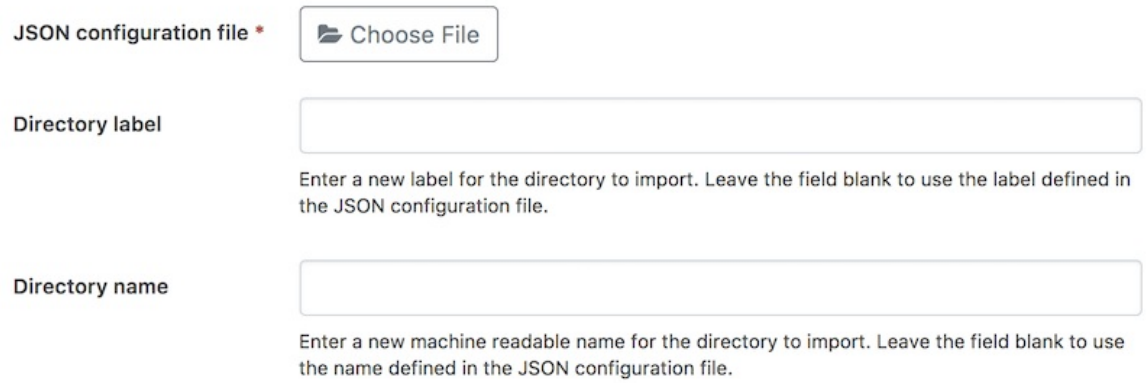
Importing settings of a directory

You can create a new directory by importing settings of a directory that have previously been exported.

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Click **Directories** in the admin sidebar.
3. Click the **Add Directory** green button under the **All Directories** tab which will open a popup window.
4. In the popup window, choose *Import from a file* for **Choose a method**.



5. Click **Choose File** and select the JSON configuration file that you exported earlier. Optionally enter **Directory label** and **Directory name** if you wish to change them from the ones set in the configuration file.



6. Click the **Add Directory** button at the bottom of the popup window. A progress bar will show up indicating the status of the directory creation process. Make sure that you do not close the window until the process is complete.

When the process is complete, the pop window closes and you will be redirected to the main administration page of the directory created.

Updating and Uninstalling

In this section we will describe how you can safely update Directories Pro to the latest version and also how to uninstall and completely remove files and data of Directories Pro from your site.

Updating Directories Pro

There are 2 ways to update Directories Pro to the latest version. One is the **Automatic Update** method via the Plugins page of WordPress admin dashboard. Another is the **Manual Update** method using an FTP software. In either method, it is strongly recommended that you take a full backup of both the files and database of your WordPress website before updating.

Important: You do *NOT* need to deactivate or delete any of the Directories Pro plugins from the Plugins page during any process.

Automatic Update

1. **Update files**

   All of our plugins can be updated from the **Plugins** page of WordPress administration dashboard just like other plugins distributed from wordpress.org. Make sure that you have a valid license key already configured to have the **update now** link appear under our plugins on the Plugins page. See Installation - Register your License Key (Purchase Code) for more details on registering your license key.

   Also when updating, we recommend updating all Directories Pro plugins to the same version at once. The best way to ensure that is to use the bulk update feature on the Plugins page.

2. **Update components**

   After updating all Directories Pro plugins, go to **Directories** -> **System** in the backend. Under the **Tools** sub-tab, click the **Reload components** button and follow the instructions shown on the popup window to update all components.

Manual Update

1. **Delete old files**

   Using your FTP software of choice, login to the FTP server of your WordPress site and delete all folders with folder names starting with **directories** (directories, directories-pro, etc.) from **wp-content/plugins**. It is important that you delete these folders first so that old files will not cause any issues with the new ones.

2. **Upload files**

   Download the latest version of the plugin by following the instructions in Installation - Download package and then unzip all the zip files included in the package (directories.zip, directories-pro.zip, etc.). With your FTP software, upload the unzipped folders (directories, directories-pro, etc.) of the plugins that are currently activated on your site to the **wp-content/plugins** folder on your server.

3. **Update components**

   See the **Update components** step for **Automatic Update** above.

Uninstalling Directories Pro

You can deactivate and delete Directories Pro plugins from the Plugins page of WordPress admin dashboard in the backend, in the same way you do so with other plugins from WordPress.org.

However, if you simply deactivate and delete any of the Directories Pro plugins from the Plugins page, you only remove the plugin and its files. In order to not only delete plugin files but also all the data associated, follow the steps below:

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Click **Directories** in the admin sidebar.
3. Click the **Settings** tab and then the **Uninstall** sub-tab.
4. Select **Yes** for the **Remove data** option under the **Uninstall Settings** section.
5. Click **Save Changes** at the bottom.

Now, when you delete the **Directories** plugin from the Plugins page of WordPress admin dashboard, not only plugins files but also all the data associated with Directories Pro will be deleted.

Additional Features and Settings

We will discuss here about some of the additional features and settings available with Directories Pro.

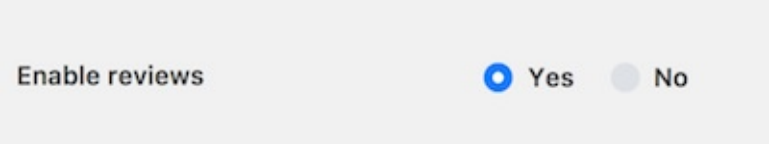
Reviews

The reviews features of Directories Pro lets users submit reviews for listings in your directory.

Enable reviews

Follow these steps to enable reviews for your directory:

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Click **Directories** in the admin sidebar.
3. Under the **All Directories** tab, click the gear icon in the row of the directory to edit.
4. Under the **Settings** tab, scroll down the page and select *Yes* for **Enable reviews**.



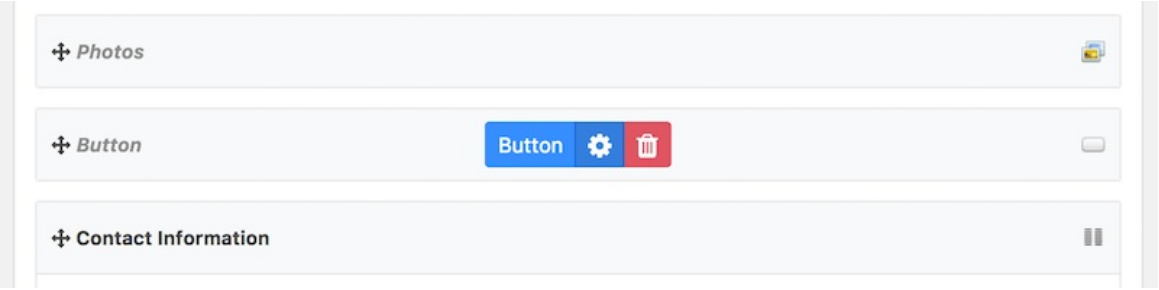
5. Scroll further down and click **Save Changes**.

Add a submit review button

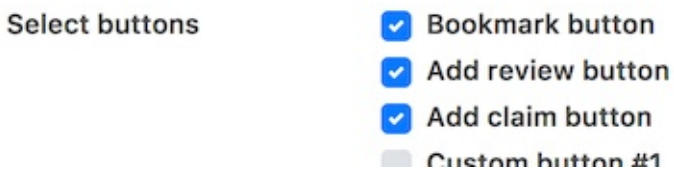
Note: If the reviews feature was enabled when you initially created your directory, then it is most likely that a submit review button is already enabled on the single listing page. In that case, you can skip this section.

In order to add a submit review button to the single listing page so that users can add reviews, you will need to edit the **Detailed** display of listings:

1. On your directory admin main page, click the **Content Types** tab.
2. Click the dropdown button in the **List** row and then click **Manage Displays**.
3. Click the **Detailed** sub-tab.
4. Locate and hover over to the second **Button** element placed under **Photos** in the display and click the gear icon.



5. In the popup window, check the *Add review button* option under **General Settings** -> **Select buttons**.



6. Click **Save Changes**.

Adding a review

Users that have the **Create Reviews** permission (see Permissions for details on permissions) in your directory can submit reviews for listings.

Follow the steps below to submit a review:

1. Login to the site with a user account that has the **Create Reviews** permission and visit the single listing page of a listing in the frontend.
2. A button labelled **Write a Review** should be visible as below:

   Click the **Add Review** button.
3. Enter **Title**, **Rating**, **Review**, and optionally upload **Photos** and press **Submit**.
4. You will be redirected to the single review page showing the review.

Displaying reviews

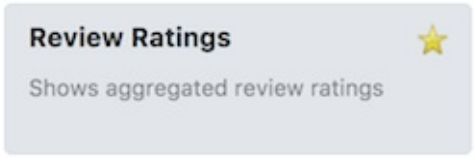
Note: If the reviews feature was enabled when you initially created your directory, then it is most likely that reviews are already being displayed on the single listing page. In that case, you can skip this section.

Now that users are able to submit reviews, you will need to edit the **Detailed** display of listings so that reviews can be displayed on the single listing page.

Make sure first that you are on the **Detailed** display editor page: **Directories** -> **All Directories** -> [Your Directory] -> **Content Types** -> **Listing** -> **Manage Displays**.

Displaying overall review ratings

1. Click the **Add Element** button at the bottom of the page.
2. In the popup window, click the **Field** tab.
3. Click the **Review Ratings** element.

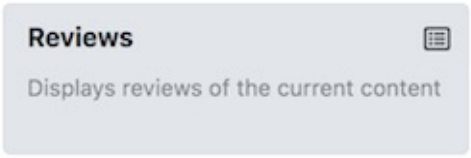


4. Select *Overall Rating* for **Display Format**.
5. Click the **Add Element** button at the bottom of the popup window.

Displaying a list of reviews

1. Click the **Add Element** button at the bottom of the page.

2. In the popup window, click the **Content** tab.
3. Click the **Reviews** element.

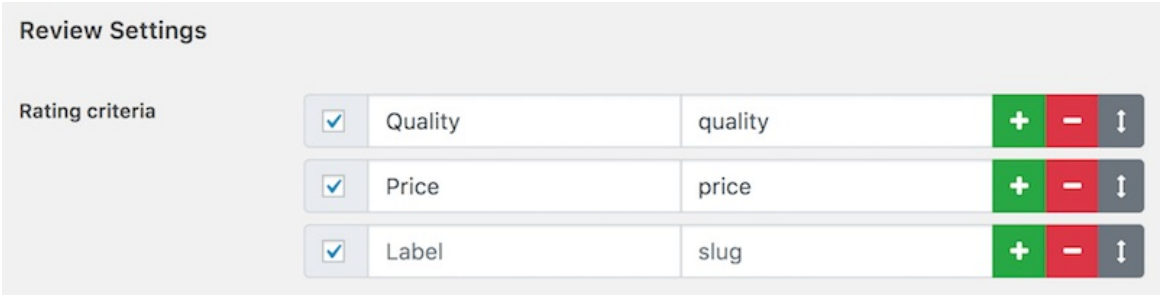


4. Select a view for **Select View**.
5. Click the **Add Element** button at the bottom of the popup window.

Custom rating criteria

By default, only a single rating field is available when submitting a review. If you wish users to be able to rate listings with more than one rating criteria, follow the steps below:

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Click **Directories** in the admin sidebar.
3. Under the **All Directories** tab, click the gear icon in the row of the directory to edit.
4. Under the **Content Types** tab, click the **Edit** button in the **Review** row.
5. Under the **Edit** tab, scroll down to the **Review Settings** section and add any number of rating criteria to **Rating criteria**. Enter a display label and a machine readable name (slug) for each option. You can also drag the options up and down to change the display order.



Note: Rating values are saved using rating criteria slugs as keys. Therefore changing the slugs of existing rating criteria will reset the values of those criteria since old values can no longer be fetched from the database.

6. Click **Save Changes**.

You should now then see multiple rating fields shown in the review submission form as below:

Rating

Quality

Price

Hospitality

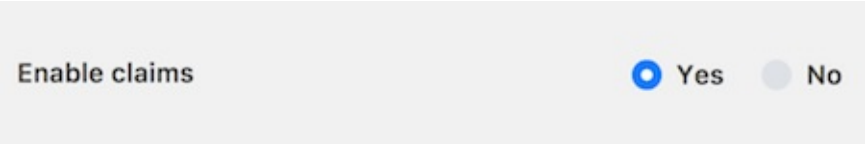
Claiming Listings

When the claiming feature is enabled, listings that currently do not have any author assigned can be claimed by registered users. If a claim for a certain listing is approved by the administrator, the user who submitted the claim becomes the author of the listing.

Enable claims

Follow these steps to enable claims for your directory:

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Click **Directories** in the admin sidebar.
3. Under the **All Directories** tab, click the gear icon in the row of the directory to edit.
4. Under the **Settings** tab, scroll down the page and select *Yes* for **Enable claims**.



5. Scroll further down and click **Save Changes**.

Claiming a listing

Users with the **Create Claims** permission (see Permissions for details on permissions) in your directory can claim listings from the single listing page.

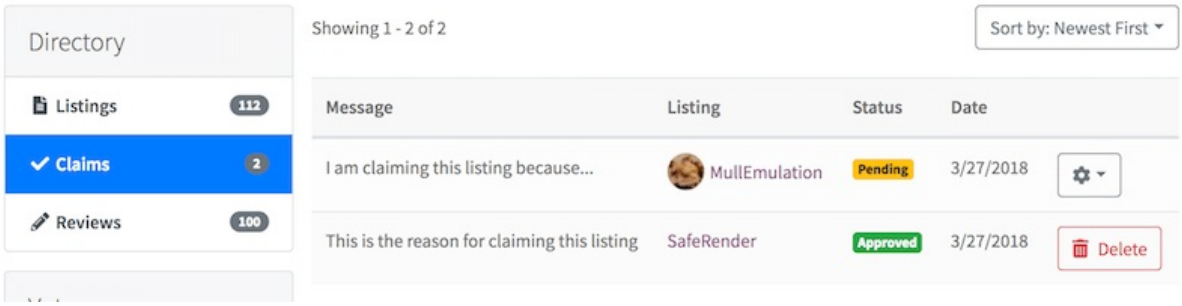
Follow the steps below to claim a listing:

1. Login to the site and visit the single listing page of a listing to claim.
2. If the listing currently has no author assigned, a button with the **Claim Listing** label should be visible similar to below:

   Click the **Claim Listing** button.
3. Enter the details for claiming the listing and press **Submit**.

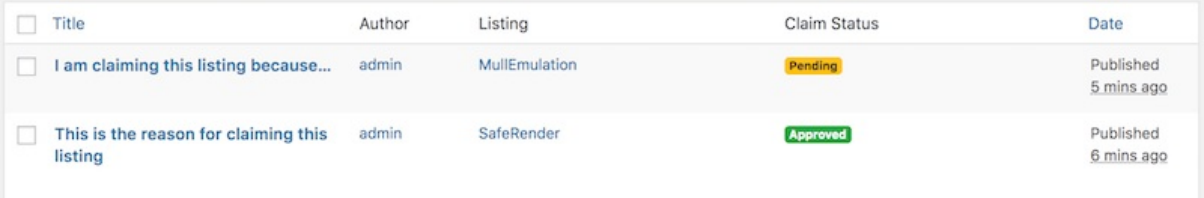
If the submission is success, a **Claim** post with its claim status set to **Pending** status is created.

Users can track their claims either in the backend or on the frontend dashboard page. Claims that are still in pending status can be edited (requires **Edit own Claims** or **Edit others Claims** permission) but not if they are once approved or rejected. Claims with any status can be deleted (requires **Delete own Claims** or **Delete others Claims** permission) at any time.

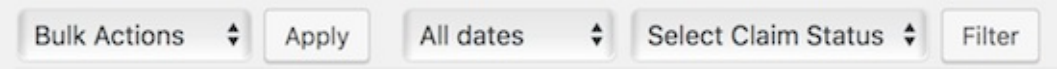


Managing claims

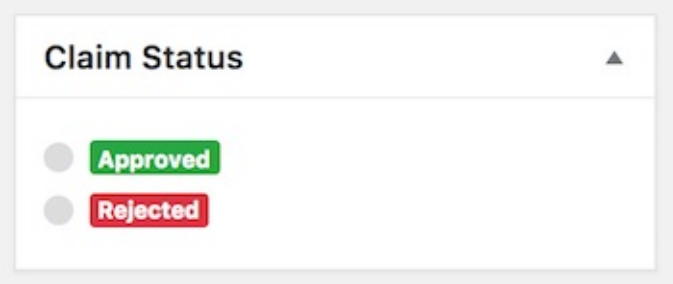
Users with the *Admin Directory* permission can view all the claims submitted in the directory by visiting the **Claims** directory administration page in the backend.



Claims can be filtered by date and/or claim status using the form above the list.



In order to approve/reject a claim, edit the claim and select either *Approved* or *Rejected* in the **Claim Status** metabox and then press **Update**.

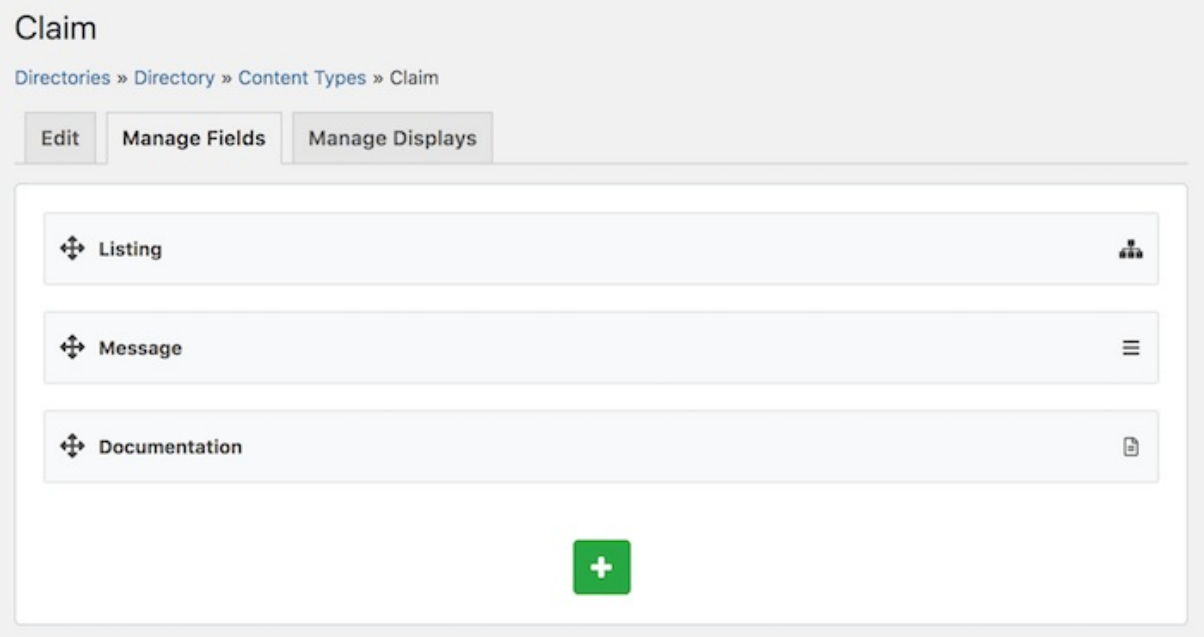


When a claim is approved, the user who submitted the claim immediately becomes the author of the listing claimed. In addition, whether a claim is approved or rejected, an e-mail is sent to the user who submitted the claim notifying of the result (see Notifications for more details on notifications).

Note: If your directory has payments enabled, claims can be approved/rejected only after the order created with the claim has been marked completed.

Adding fields to claim listing form

You can also add more fields to the claim listing form (see Adding and Managing Fields). For example, it may be useful to add a **File** type field to the claim listing form so that users are required to submit a certain document that can help directory administrators to determine the validity of the claim.



Claiming a multilingual listing

If your directory is a multilingual-enabled directory (see Multilingual Directory), then claiming a listing is equivalent to claiming all other translations (and the original listing if the listing claimed is a translated listing) of the listing at once. Once the claim is approved, the user who submitted the claim will become the author of not only the listing claimed but also its all translated listings.

Contact Us Form

A contact us form can be added to single listing pages of your directory which lets users send messages directly to listing authors. Directories Pro does not generate the form by itself, but instead provides integration with a number of popular contact form plugins for WordPress.

Creating a contact form

The first thing you need to do is to create a contact form using one of the following 3rd party contact form plugins.

Contact Form 7

The Contact Form 7 plugin is the most downloaded contact form plugin on wordpress.org.

Follow the instructions on their documentation site to create a contact form: https://contactform7.com/docs/

WPForms

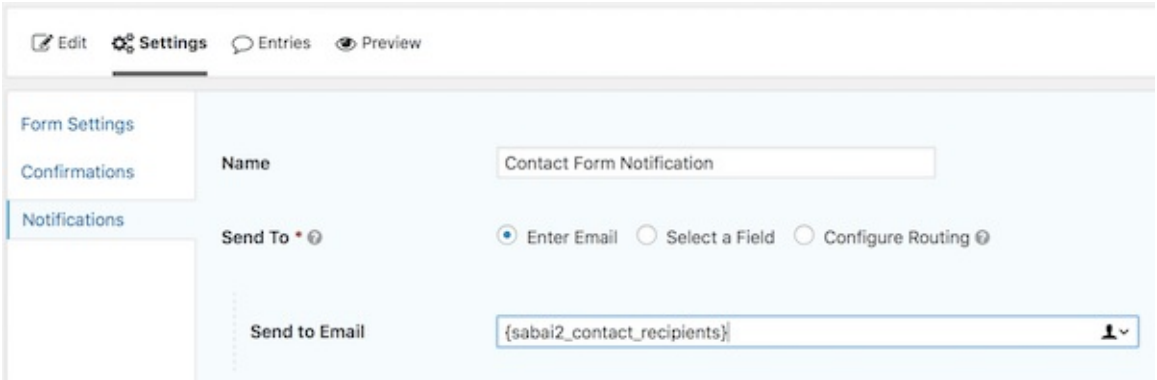
The WPForms plugin lets you build contact forms using a drag & drop online form builder.

Follow the instructions on their documentation site to create a contact form: https://wpforms.com/docs/creating-first-form/

Gravity Forms

Gravity Forms is a paid contact form plugin that has all the advanced features one can ask for.

1. Follow the instructions on their documentation site to create a contact form: https://www.gravityhelp.com/documentation/article/creating-a-form/
2. After creating a form, go to the **Settings** section of the form. Under the **Notifications** tab, create or edit a notification with the **Send To** option set to *Enter Email*, and then enter *{drts_contact_recipients}* to the **Send to Email** field.



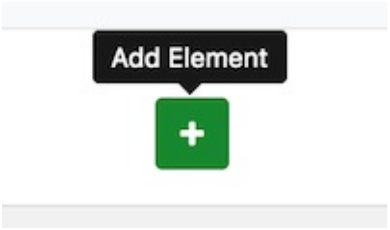
Displaying your contact form

Once you have created a contact form, you can add the form to the single listing page by following these steps:

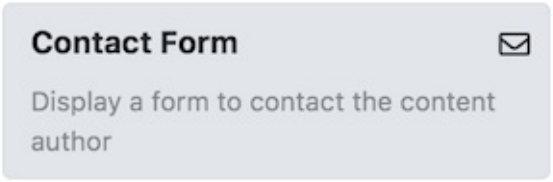
1. Login to your website if not yet logged in and go to the WordPress administration dashboard.

2. Click **Directories** in the admin sidebar.
3. Under the **All Directories** tab, click the gear icon in the row of the directory to edit.
4. Under the **Content Types** tab, click the dropdown button in the **Listing** row and then click **Manage Displays**.
5. Click the **Detailed** sub-tab.

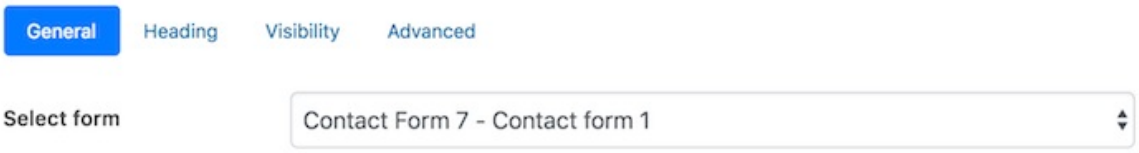
   Note: The contact form display element is supported by the Detailed display only.
6. Click the green **Add Element** button with a plus sign at the bottom of the page.



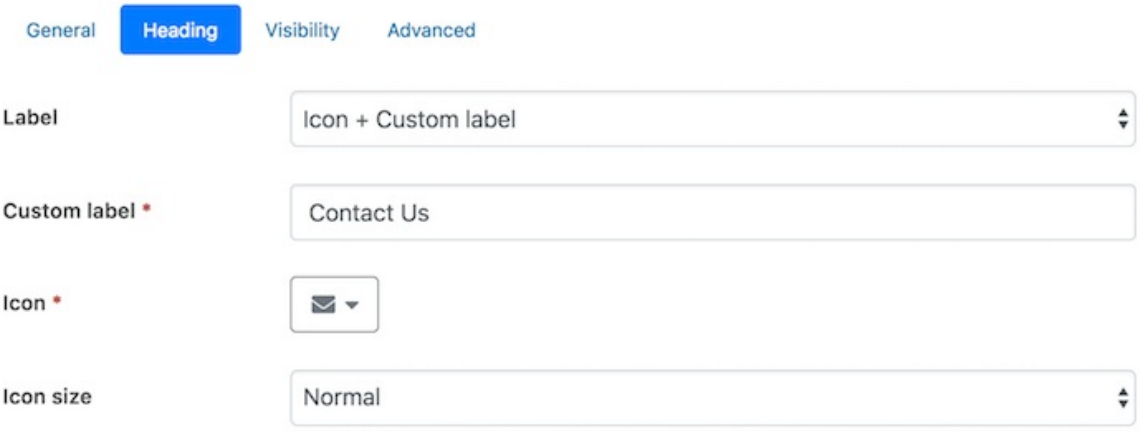
7. In the popup window, click the **Content** tab and then click the **Contact Form** element.



8. Under the **General Settings** tab, select one of your forms from the **Select form** dropdown.

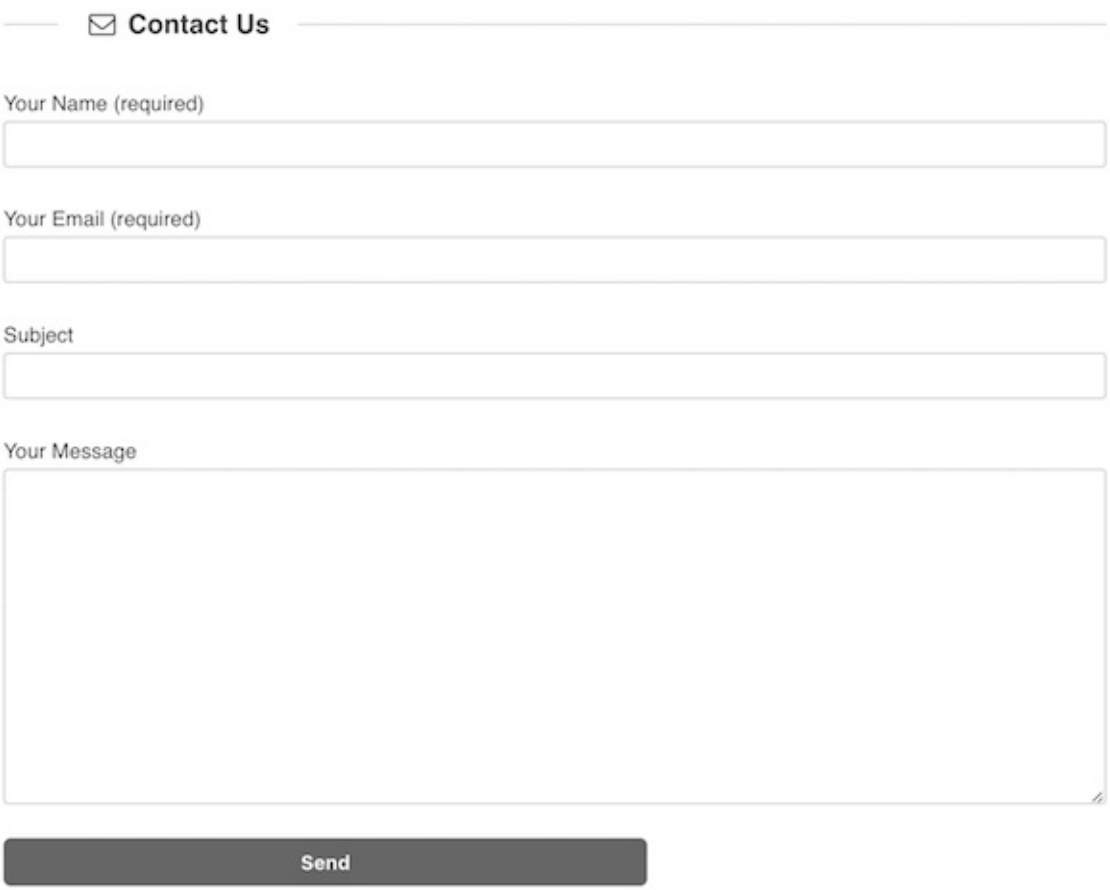


9. Optionally under the **Heading Settings** tab, select **Icon + Custom label**, enter *Contact Us* for **Custom label**. Press the button for **Icon**, enter *envelope* and select one of the icons displayed.



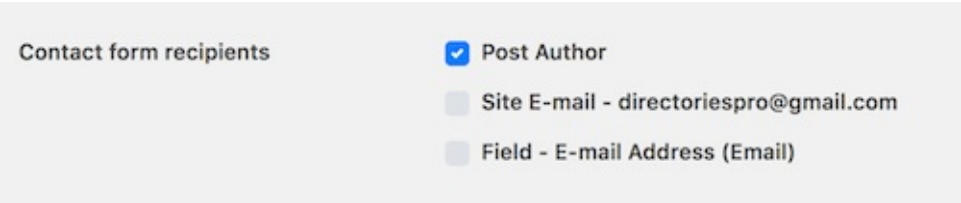
10. Click the **Add Element** button at the bottom of the popup window.

Visit the single listing page of a listing in the frontend. Below is a sample output of a contact form generated by the Contact Form 7 plugin.



Contact form recipients

By default, messages submitted through the contact form is sent to the e-mail address of the listing author. However, you can change or add more recipients by editing the **Contact form recipients** setting.



As you can see above, your site e-mail address and the e-mail address entered for custom field(s) can also be selected as the recipient.

If the payment feature is enabled in your directory, the setting can be found when you configure payment plans or configure default features.

If the payment feature is NOT enabled, then you can find the setting under **Directories** -> *Your directory* -> **Content Types** -> **Listing** -> **Edit** -> **General**.

Notifications

Directories Pro integrates with the *Better Notifications for WordPress* (hereinafter referred to as *BNFW*) plugin to send various e-mail notifications to users. Therefore in order to enable the notification feature in your directory, the BNFW plugin (https://wordpress.org/plugins/bnfw/) must first be installed and activated.

Configuring notifications

Directories Pro creates the following notifications in BNFW:

- **Directory – Listing – Pending Review** - Sent to administrators when a new listing that requires manual approval has been submitted.

If reviews are enabled in your directory:

- **Directory – Review – Pending Review** - Sent to administrators when a new review that requires manual approval has been submitted.

If payments are enabled in your directory:

- **Directory – Listing – Expiring** - Sent to the author of a listing when the payment plan associated with the listing is about to expire (defaults to 7 days before expiration).
- **Directory – Listing – Expired** - Sent to the author of a listing when the payment plan associated with the listing has expired.
- **Directory – Listing – Deactivated** - Sent to the author of a listing when the listing has been deactivated (defaults to 30 days after expiration).

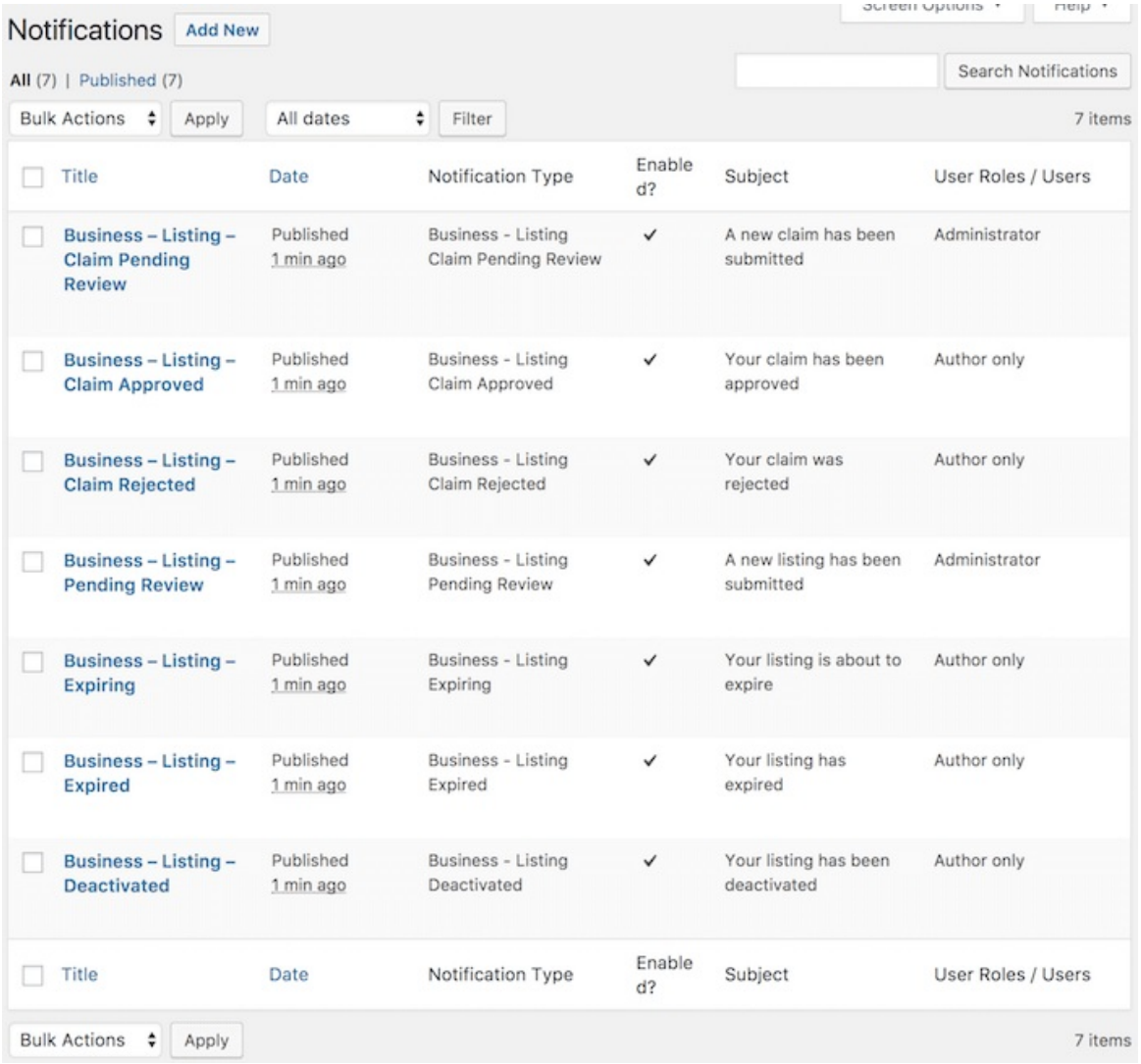
If claims are enabled in your directory:

- **Directory – Listing – Claim Pending Review** - Sent to administrators when a new claim for a listing has been submitted.
- **Directory – Listing – Claim Approved** - Sent to the user submitted a claim for a listing when the claim has been approved.
- **Directory – Listing – Claim Rejected** - Sent to the user submitted a claim for a listing when the claim has been rejected.

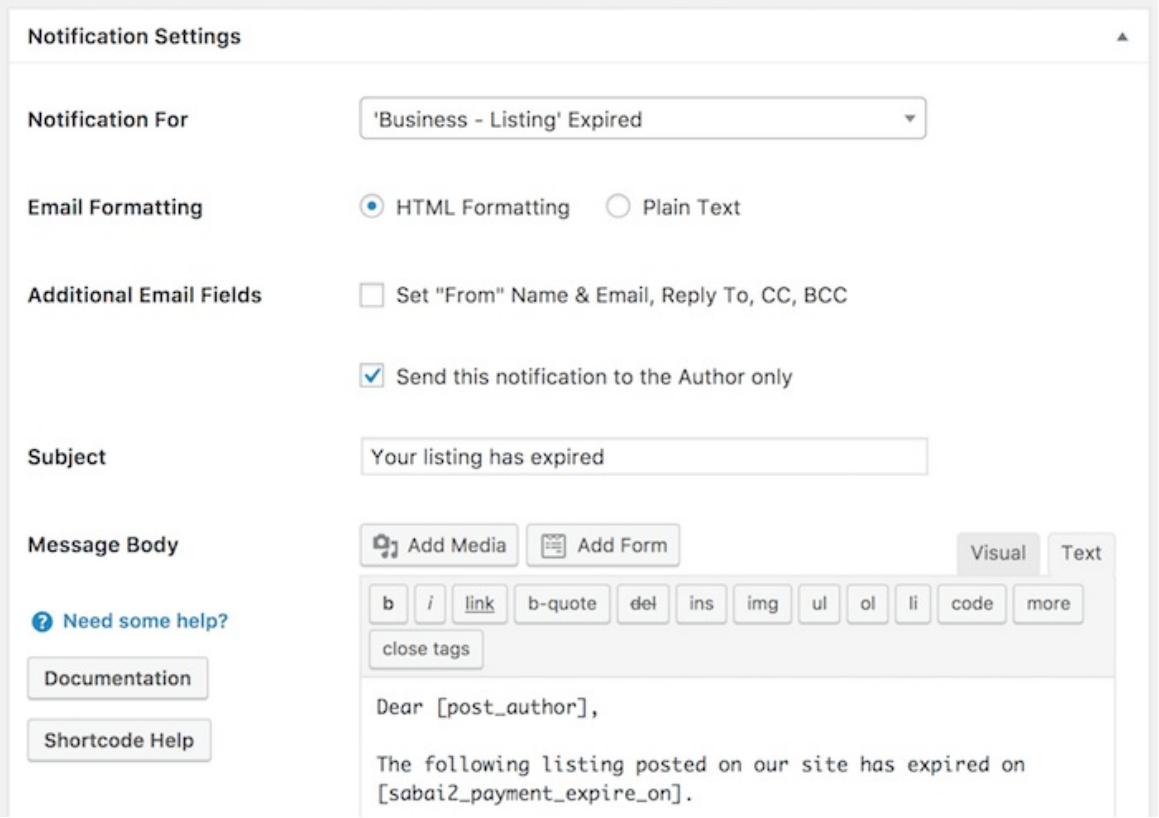
Note: If for some reason you do not see the above notifications created, try reloading all components from **Directories** -> **System** -> **Tools**.

To configure these notifications, follow the steps below:

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Select **Notifications** -> **All Notifications** from the side menu. The page should look like below:



3. Hover over to the one of the notifications above and click the **Edit** link shown in the **Title** column of the notification. Edit notification page is displayed with the following notification settings:



- **Notification for** - Select the type of notification. You do not need to change this option unless you know what you are trying to do.
- **Email Formatting** - Whether or not to send the notification e-mail in HTML (recommended) or plain text.
- **Additional Email Fields**
  - **Set "From" Name & Email, Reply To, CC, BCC** - Lets you configure additional e-mail headers.
  - **Send this notification to the Author only** - Check this option to send the notification only to the author of the content item. If this was already checked, we recommend leaving it as-is.
  - **Do not send this Notification to the User that triggered it** - Check this option if you do not want the notification e-mail to be sent for the actions that users performed for their own posts.
- **Send To** - Select user roles or individual users as recipients of the notification e-mail.
- **Subject** - Enter the subject of the notification e-mail. Notification shortcodes may be used in this field.
- **Message Body** - Enter the body part of the notification e-mail. Notification shortcodes may be used in this field.

4. Click the **Save** button in the **Save Notification** metabox shown on the side.

Notification shortcodes

You can use shortcodes for the **Subject** and **Message Body** fields when configuration a notification. Visit the following shortcode documentation page of the BNFW plugin website for the list of shortcodes that you can use for each notification type: https://betternotificationsforwp.com/documentation/notifications/shortcodes/

In addition to default shortcodes provided by the BNFW plugin, below are the list of shortcodes enabled by Directories Pro which you can use for directory listing and claim notifications.

- `[drts_entity]`

  Displays a single field or all fields of the listing.

  - **Parameters:**

    - `field` - Specify the machine readable name of a field defined for listings (e.g. `post_title`, `field_email`, `business_photos`), defaults to none. If none specified, then all fields that can be rendered in human readable format will be displayed.

    - `format` - Specify the render format of the field(s) displayed. Use `%label%` and `%value%` placeholders which are replaced with actual field labels and human readable values (e.g. `%label%: %value%`). If none specified, field label and value pair will be displayed in the following format:

      ```
      -- %label% --
      %value%
      ```

    - `separator` - Specify a string that will be used to separate values if the field has multiple values, defaults to a string specific to each field.

- `[drts_entity_admin_url]`

  Displays the URL of the listing index page in the backend.

- `[drts_payment_expire_days]`

  Displays the number of days remaining until the expiration date of the listing.

- `[drts_payment_expire_on]`

  Displays the expiration date of the listing.

- `[drts_payment_renew_grace_period]`

  Displays the number of days listings are kept published after expiration until they are deactivated.

- `[drts_dashboard_url]`

  Displays the URL of the dashboard page in the frontend.

  - **Parameters:**

    - `post_status` - Specify the post status of listings to display on the dashboard page, can be either one of `publish` / `pending` / `draft` / `expired` / `deactivated` / `expiring`, defaults to none.

The following shortcodes are available for claim/review notifications.

- `[drts_child_entity]`

  Works exactly the same as `[drts_entity]` but displays content of a claim/review.

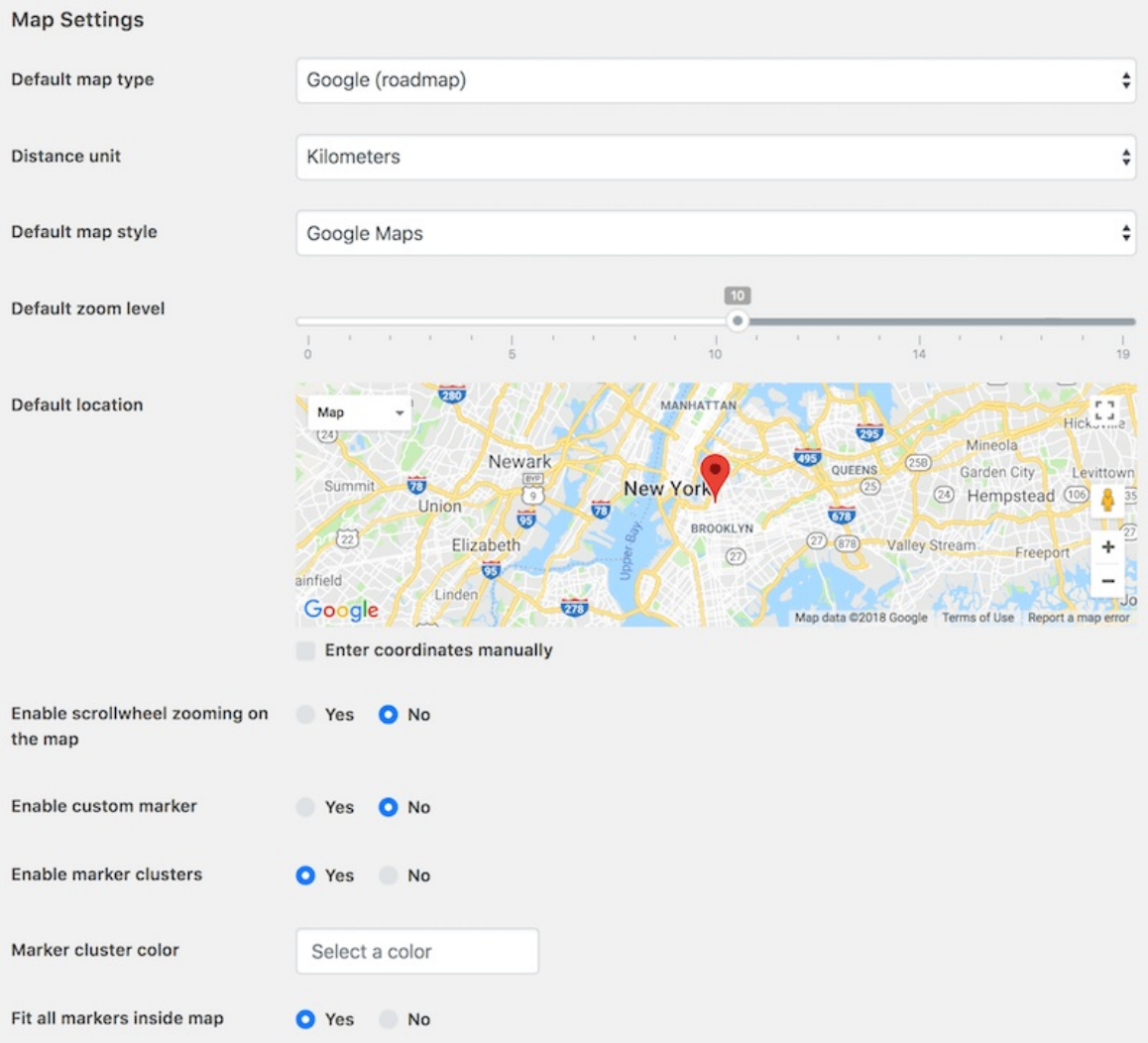
- `[drts_child_entity_admin_url]`

  Displays the URL of the claim index page in the backend.

Map Display Settings

Follow the steps below to configure common settings applied by default to all maps displayed in Directories Pro:

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Click **Directories** in the admin sidebar.
3. Click the **Settings** tab.
4. Click the **Map** sub-tab and configure the following settings available under the **Display Settings** section:



- **Default map type** - Select the default map type to use to display maps, from *Google (roadmap)*, *Google (satellite)*, *Google (hybrid)*, or *OpenStreetMap*.

  This setting is available only when *Google Maps* is selected as the map provider.

- **Default map style** - Select a custom Google Maps style to be applied by default.

  This setting is available only when *Google Maps* is selected as the map provider.

- **Distance unit** - Select *Kilometers* or *Miles*.
- **Default zoom level** - Specify the default zoom level of the map.

- **Default location** - Specify the default location displayed on the map. Click **Enter coordinates manually** to manually enter latitude and longitude coordinates.
- **Enable scrollwheel zooming on map** - Whether or not to enable zooming in/out on the map using the scrollwheel of the mouse.
- **Enable custom markers** - Whether or not to show custom styled map markers.
- **Custom marker color** - Select the color of custom map markers.
- **Custom marker icon** - Select the icon shown on custom map markers.
- **Custom marker icon color** - Select the color of icon shown on custom map markers.
- **Enable marker clusters** - Whether or not to cluster map markers and show the number of items in each cluster.
- **Marker cluster color** - Select the color of marker clusters.
- **Fit all markers inside map** - Whether or not to automatically zoom in/out the map so that all map markers fit inside the current viewport of the map.

5. Scroll down the page and click **Save Changes**.

Permissions

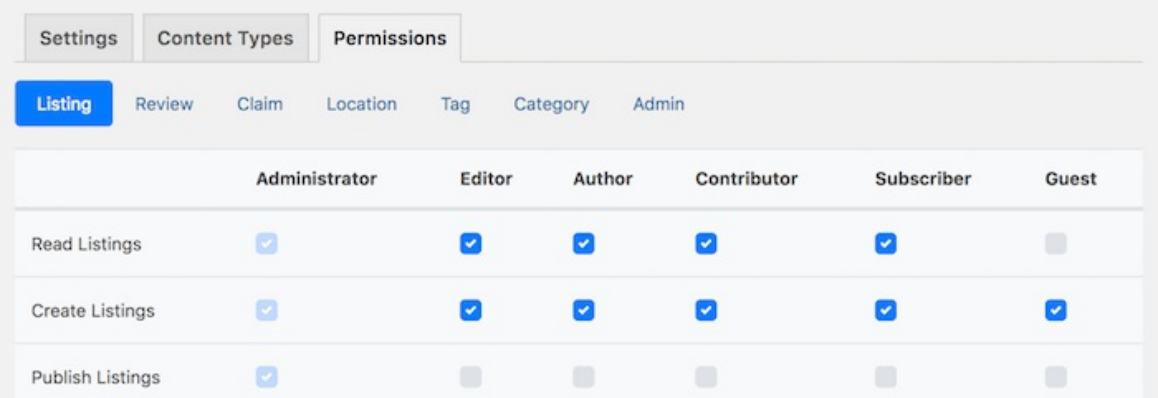
Permissions in Directories Pro define what a specific user can and cannot do in your directory and can be granted or revoked on per user role basis. In addition to regular user roles in WordPress, a virtual Guest user role is available which can be used to assign permissions to non-logged in users.

Note: If you are familiar with the WordPress capability system, permissions in Directories Pro are WordPress capabilities.

Configuring permissions

To configure permissions, follow the steps below:

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Click **Directories** in the admin sidebar.
3. Under the **All Directories** tab, click the gear icon in the row of the directory to edit.
4. Click the **Permissions** tab.



Grant or revoke permissions by checking/unchecking the checkboxes under each user role. Here are the permissions that are configurable by default:

- **Listing:**
  - **Read Listings** - Allows access to single listing pages in the frontend.
  - **Create Listings** - Allows submitting new listings.
  - **Publish Listings** - Allows new listings submitted to become published without moderation.
  - **Edit own Listings** - Allows editing own (authored) listings.
  - **Edit others Listings** - Allows editing listings authored by other users.
  - **Edit published Listings** - Allows editing listings that have already been published. Even listing authors may not edit their published listings without this permission.
  - **Delete own Listings** - Allows deleting own (authored) listings.
  - **Delete others Listings** - Allows deleting listings authored by other users.

        - **Delete published Listings** - Allows deleting listings that have already been published. Even listing authors may not delete their published listings without this permission.
        - **Rate Listings** - Allows rating listings with stars.
        - **Rate own Listings** - Allows rating own (authored) listings with stars. Requires **Rate Listings** permission.
    - **Claim:**
        - **Create Claims** - Allows claiming listings from the frontend.
        - **Edit own Claims** - Allows editing own (authored) claims.
        - **Edit others Claims** - Allows editing claims submitted by other users.
        - **Delete own Claims** - Allows deleting own (authored) claims.
        - **Delete others Claims** - Allows deleting claims submitted by other users.
    - **Review:**
        - **Read Reviews** - Allows access to single review pages in the frontend.
        - **Create Reviews** - Allows submitting new reviews from the frontend.
        - **Publish Reviews** - Allows new reviews submitted to become published without moderation.
        - **Edit own Reviews** - Allows editing own (authored) reviews.
        - **Edit others Reviews** - Allows editing reviews authored by other users.
        - **Edit published Reviews** - Allows editing reviews that have already been published. Even review authors may not edit their published reviews without this permission.
        - **Delete own Reviews** - Allows deleting own (authored) reviews.
        - **Delete others Reviews** - Allows deleting reviews authored by other users.
        - **Delete published Reviews** - Allows deleting reviews that have already been published. Even review authors may not delete their published reviews without this permission.
        - **Moderate comments** - Allows moderating comments posted for reviews.
        - **Vote up Reviews** - Allows voting reviews up.
        - **Vote up own Reviews** - Allows voting own (authored) reviews up. Requires **Vote up Reviews** permission.
        - **Vote down Reviews** - Allows voting reviews down. Requires **Vote up Reviews** permission.
    - **Category/Tag/Location:**
        - **Manage Categories/Tags/Locations** - Allows viewing the list of categories/tags/locations in the backend.
        - **Edit Categories/Tags/Locations** - Allows adding or editing categories/tags/locations in the backend.
        - **Delete Categories/Tags/Locations** - Allows deleting categories/tags/locations in the backend.
        - **Assign Categories/Tags/Locations** - Allows assigning categories/tags/locations (including creating new tags) to listings.
    - **Admin:**

    - **Admin Directory** - Allows access to the Settings, Content Types, Permissions configuration pages of the directory.
5. Scroll down the page and press **Save Changes**.

Administrators

A user is considered an administrator of Directories Pro if the user meets one of the following requirements:

- Has the **manage_directories** WordPress capability
- Has the **delete_users** WordPress capability
- Is a network administrator (if multisite enabled)

Administrators are allowed access to all pages of Directories Pro in the backend as well as are granted all permissions of all the directories created. If you wish to let other user roles to become administrators of Directories Pro, you can grant the **manage_directories** or **delete_users** WordPress capability to those user roles. Since WordPress itself does not have an interface for managing capabilities, we recommend using the Capability Manager Enhanced plugin to do so.

Limiting Backend Dashboard Access

By default, WordPress allows registered users to access the backend dashboard to manage their user profiles and content. If you prefer users without administrative privileges kept outside the backend dashboard, we recommend installing and activating the Remove Dashboard Access plugin. By using the plugin, you can limit backend dashboard access by user roles or by a capability.

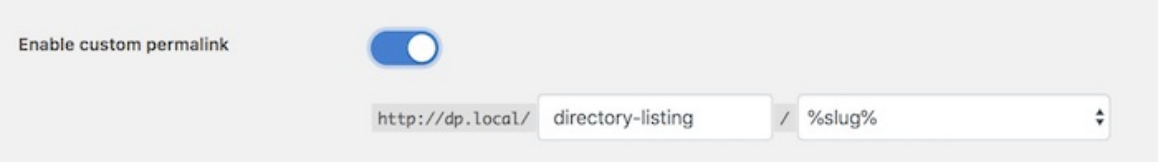
Note that users that belong to user roles that have the permission(s) to add/edit/delete posts (listings, claims, and reviews) will no longer be able to do so if they are not able to access the backend dashboard. If you wish those users to still be able to submit and manage their posts, make sure to install the *Directories - Frontend* plugin which lets you create a frontend dashboard for users to manage their content in the frontend. See Frontend Submit and Dashboard for more details.

SEO Features

Custom permalink URLs

Custom permalink URLs can be setup for listings, categories, tags, and locations. Here is how you can do so for listings:

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Click **Directories** in the admin sidebar.
3. Under the **All Directories** tab, click the gear icon in the row of the directory to edit.
4. Under the **Content Types** tab, click the **Edit** button in the **Listing** row.
5. Scroll down to the **Single Item Page Settings** section and switch on the **Enable custom permalink**.



Enter the base part of the custom permalink URL into the text field (default: **directory-listing**). Then, select one of the formats used for the rest of the URL from below:

- **%id%** - Displays the ID of the current listing. Example: `http://example.com/directory-listing/12`
- **%slug%** - Displays the slug of the current listing. Example: `http://example.com/directory-listing/company-name`
- **%directory_category% / %id%** - Displays slugs of categories associated with the current listing in hierarchical order followed by the ID of the current listing. Example: `http://example.com/directory-listing/arts/performing/12`
- **%directory_category% / %slug%** - Displays slugs of categories associated with the current listing in hierarchical order followed by the slug of the current listing. Example: `http://example.com/directory-listing/arts/performing/company-name`
- **%directory_tag% / %id%** - Displays the slug of the primary tag associated with the current listing followed by the ID of the current listing. Example: `http://example.com/directory-listing/tag1/12`
- **%directory_tag% / %slug%** - Displays the slug of the primary tag associated with the current listing followed by the slug of the current listing. Example: `http://example.com/directory-listing/tag1/company-name`
- **%location_location% / %id%** - Displays slugs of locations associated with the current listing in hierarchical order followed by the ID of the current listing. Example: `http://example.com/directory-listing/united-states/new-york/ardsley/12`
- **%location_location% / %slug%** Displays slugs of locations associated with the current listing in hierarchical order followed by the ID of the current listing. Example: `http://example.com/directory-listing/united-states/new-york/ardsley/company-name`

6. Scroll further down the page and click **Save Changes**.

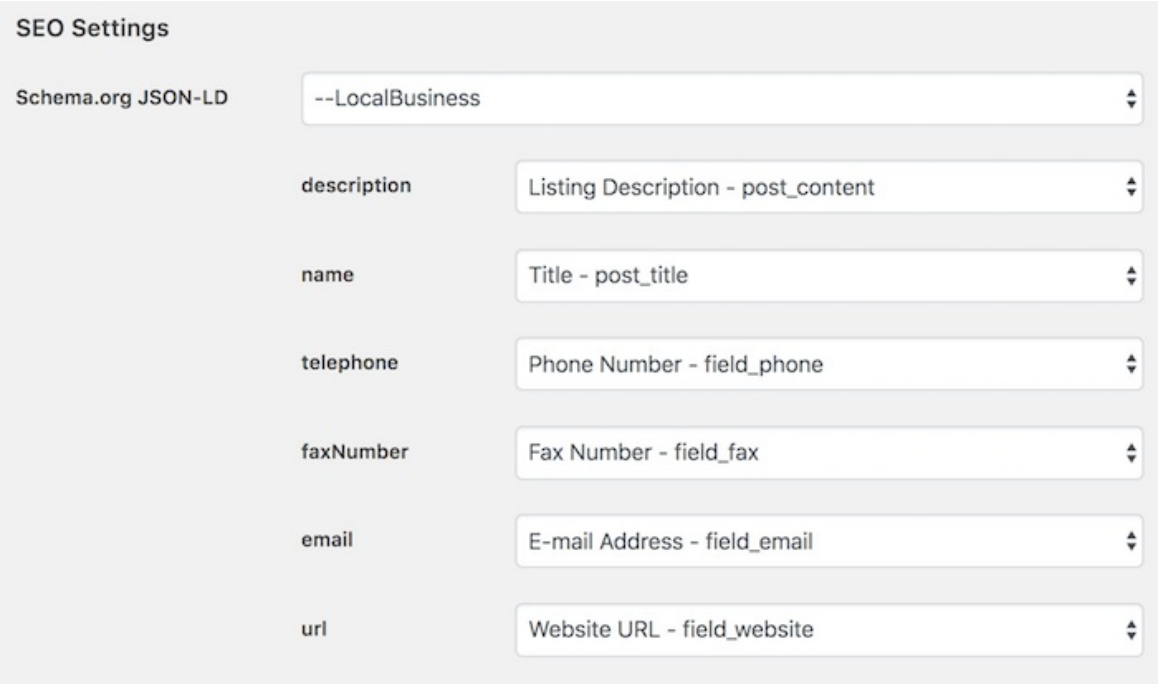
Configuring schema.org structured data

Structured data using the schema.org vocabulary is enabled by default for listings (LocalBusiness). When you visit a single listing page, an HTML fragment containing JSON-formatted structured data (JSON-LD) similar to the one below can be seen embedded in the HTML source of the page.

```
<script type="application/ld+json">
{
  "@context":"http:\/\/schema.org",
  "@type":"LocalBusiness",
  "description":"Saepe repellat praesentium vel tempora nesciunt ut expedita. Cum odit aut saepe provident. Com
modi velit aspernatur tempora. Dicta veniam impedit dolor fugit. Aut repudiandae minus molestiae laboriosam aut
. Incidunt et vel eius nulla.",
  "name":"PinotDevice",
  "telephone":"(474)715-7009",
  "faxNumber":"245.718.8680",
  "email":"yshields@gmail.com",
  "url":"http:\/\/www.deckow.com\/minus-sapiente-sed-hic-ut-ipsam",
  "sameAs":[
    "http:\/\/staff.tumblr.com\/",
    "https:\/\/www.flickr.com\/people\/flickr"
  ],
  "openingHoursSpecification":[
    {
      "@type":"OpeningHoursSpecification",
      "dayOfWeek":["Wednesday"],
      "opens":"12:58",
      "closes":"02:08"
    },
    {
      "@type":"OpeningHoursSpecification",
      "dayOfWeek":["Wednesday"],
      "opens":"15:40",
      "closes":"23:39"
    },
    {
      "@type":"OpeningHoursSpecification",
      "dayOfWeek":["Sunday"],
      "opens":"08:47",
      "closes":"01:43"
    },
    {
      "@type":"OpeningHoursSpecification",
      "dayOfWeek":["Friday"],
      "opens":"03:00",
      "closes":"10:00"
    }
  ],
  "priceRange":"$69 - $87",
  "image":"https:\/\/demo.directoriespro.com\/wp-content\/uploads\/2018\/03\/file000626266718.jpg",
  "address":{
    "@type":"PostalAddress",
    "addressCountry":"US",
    "addressLocality":"Elmhurst",
    "addressRegion":"Illinois",
    "postalCode":"60126",
    "streetAddress":"Dwight D. Eisenhower Expressway"
  },
  "geo":{
    "@type":"GeoCoordinates",
    "latitude":41.917085,
    "longitude":-87.944521
  }
}
</script>
```

You can configure what data should be included in JSON-LD by following the steps below:

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Click **Directories** in the admin sidebar.
3. Under the **All Directories** tab, click the gear icon in the row of the directory to edit.
4. Under the **Content Types** tab, click the **Edit** button in the **Listing** row.
5. Scroll down to the **SEO Settings** section. For the **Schema.org JSON-LD** setting, select a schema type that best describes your listings and map the properties of the schema type with listing fields.



6. After making changes, scroll further down the page and click **Save Changes**.

Adding Open Graph meta tags

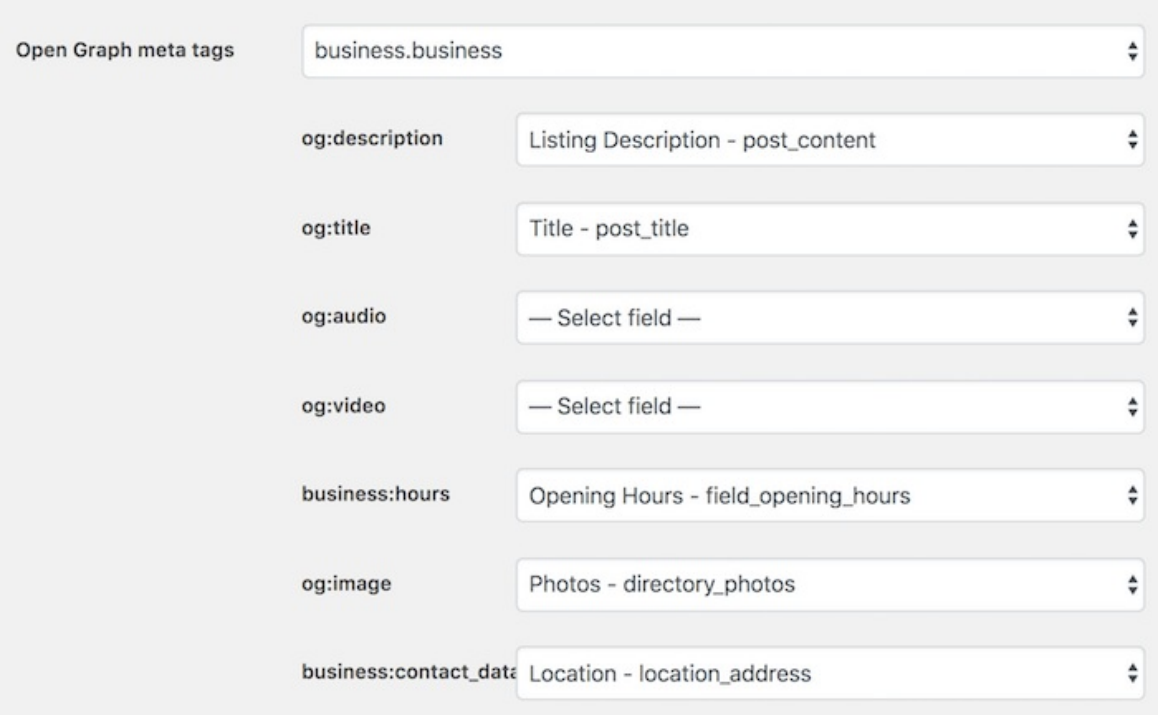
The Open Graph protocol enables any web page to become a rich object in a social graph. For example, listings can have their meta data embedded in the HTML source of the single listing page using the Open Graph protocol markup as below:

```
<meta property="og:site_name" content="Directories Pro Demo" />
<meta property="og:type" content="business.business" />
<meta property="og:url" content="https://demo.directoriespro.com/directory/listing/legumesqueue/" />
<meta property="og:title" content="LegumesQueue" />
<meta property="og:description" content="Fugiat maxime laborum aut vel unde. Omnis voluptas minus aut. Corrupti
 qui sint ipsum voluptas et sed aspernatur consectetur. Maxime adipisci et repellat quia accusantium aut.  Veri
tatis nisi sunt alias consequuntur voluptates eos magnam. Accusamus distinctio distinctio sunt facere tempore.
Quia ..." />
<meta property="business:hours:day" content="sunday" />
<meta property="business:hours:start" content="22:02" />
<meta property="business:hours:end" content="21:28" />
<meta property="business:hours:day" content="thursday" />
<meta property="business:hours:start" content="01:22" />
<meta property="business:hours:end" content="07:30" />
<meta property="business:hours:day" content="friday" />
<meta property="business:hours:start" content="16:10" />
<meta property="business:hours:end" content="19:08" />
<meta property="business:hours:day" content="sunday" />
<meta property="business:hours:start" content="12:26" />
```

```
<meta property="business:hours:end" content="23:01" />
<meta property="business:hours:day" content="saturday" />
<meta property="business:hours:start" content="09:19" />
<meta property="business:hours:end" content="18:46" />
<meta property="og:image" content="https://demo.directoriespro.com/wp-content/uploads/2017/03/DSC_6137-300x199.
jpg" />
<meta property="og:image" content="https://demo.directoriespro.com/wp-content/uploads/2017/03/file7561294493011
-300x200.jpg" />
<meta property="og:image" content="https://demo.directoriespro.com/wp-content/uploads/2017/03/file0001706961259
-300x225.jpg" />
<meta property="og:image" content="https://demo.directoriespro.com/wp-content/uploads/2017/03/file0001565782100
-300x200.jpg" />
<meta property="og:image" content="https://demo.directoriespro.com/wp-content/uploads/2017/03/file0001735386118
-300x225.jpg" />
<meta property="og:image" content="https://demo.directoriespro.com/wp-content/uploads/2017/03/file761244456443-
300x199.jpg" />
<meta property="og:image" content="https://demo.directoriespro.com/wp-content/uploads/2017/03/file4741298583098
-1-300x191.jpg" />
<meta property="business:contact_data:street_address" content="6605 North 93RD Avenue" />
<meta property="business:contact_data:locality" content="Glendale" />
<meta property="business:contact_data:region" content="AZ" />
<meta property="business:contact_data:postal_code" content="85305" />
<meta property="business:contact_data:country_name" content="US" />
```

In order to add Open Graph meta tags to single listing pages, follow these steps:

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Click **Directories** in the admin sidebar.
3. Under the **All Directories** tab, click the gear icon in the row of the directory to edit.
4. Under the **Content Types** tab, click the **Edit** button in the **Listing** row.
5. Scroll down to the **Open Graph meta tags** setting under the **SEO Settings** section.



Select the type of Open Graph object that best represents your listings from the dropdown and then select a best matching listing field for each property shown below.

Properties that you can configure change depending on the object type selected. See Open Graph Reference Documentation for the detailed information of each object type and its associated properties.

6. Scroll further down the page and click **Save Changes**.

Displaying breadcrumbs

Directories Pro is compatible with the breadcrumbs feature of **Yoast SEO** (https://wordpress.org/plugins/wordpress-seo/) and **Breadcrumb NavXT** (https://wordpress.org/plugins/breadcrumb-navxt/) plugins. If you currently have one of these plugins activated and its breadcrumbs feature enabled, then breadcrumbs should already display properly on directory pages.

See pages below for more details on the breadcrumbs feature of the plugins:

- Yoast SEO - https://kb.yoast.com/kb/implement-wordpress-seo-breadcrumbs/
- Breadcrumb NavXT - https://mtekk.us/code/breadcrumb-navxt/

Customizing Pages

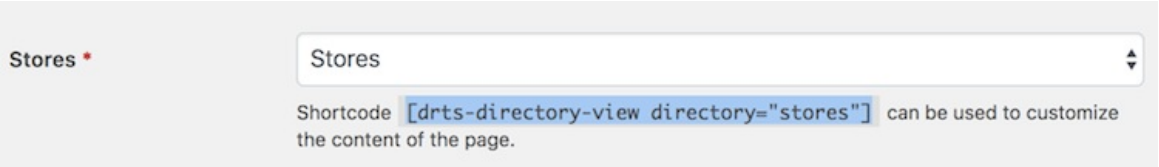
Directory pages and single post/term pages can be customized using shortcodes.

Customizing directory pages

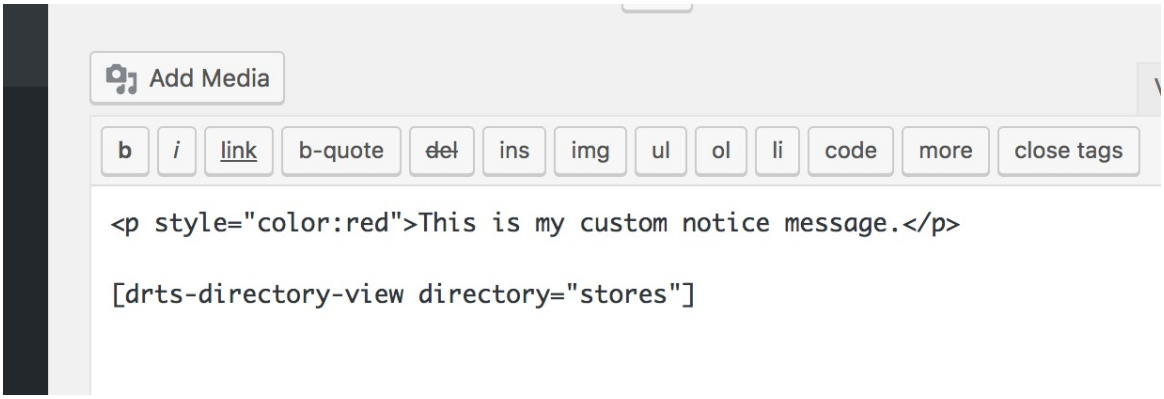
Directory pages can be customized by editing the page assigned to each directory page in **Directories** -> **Settings** -> **Pages**.

For example, here is how you can add a notice above the directory index page of your directory.

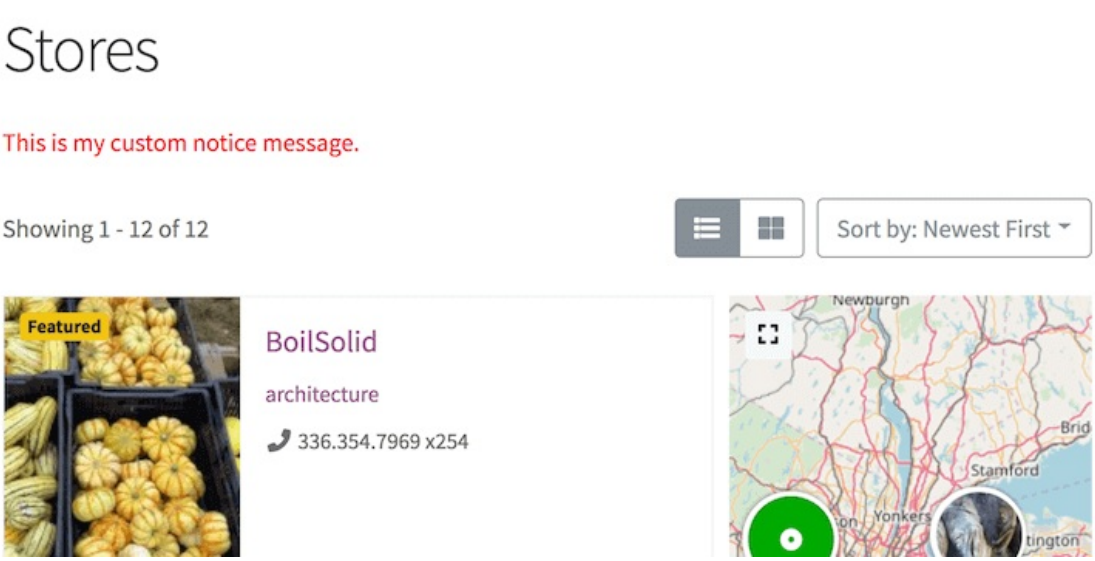
1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Click **Directories** in the admin sidebar.
3. Click the **Settings** tab and then the **Pages** sub-tab.
4. Scroll down to **Page Settings** and copy the shortcode shown under the dropdown field for your directory.



5. Click the **Edit** link next to the dropdown field to edit the page. Paste the shortcode copied in step 4 to the content section of the page and add a custom notice message above the shortcode.



6. **Update** the page, and the page will now look like below in the frontend.



Customizing single post/term pages

In order to customize single post and term pages, a separate page needs to be assigned first to each post type or taxonomy.

Here is how you can assign a page for listings:

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Click **Directories** in the admin sidebar.
3. Under the **All Directories** tab, click the gear icon in the row of the directory that you wish to configure.
4. Under the **Content Types** tab, click the **Edit** button in the **Listing** row.
5. Scroll down to **Single Item Page Settings** and select a page from the **Assign page** dropdown field.

6. Scroll further down and click **Save Changes**.

You can now edit the page to customize how a listing is rendered on the single listing page.

You can add custom content to the content section of the page, however when you do so make sure to insert the `[drts-entity]` shortcode where the listing content should be displayed.

[drts-entity] shortcode

This shortcode will display the full content of the post/term currently viewed when used without any parameter.

```
[drts-entity]
```

If you are editing the content section of the page, make sure to insert the shortcode to where the full content of the post/term currently viewed should be displayed.

You can also use the shortcode to output a single field value or a partial content rendered by a display element for the currently viewed post/term. This is useful for example when you want to use a page builder plugin to fully design how the field values and content of a post/term is displayed on the single item page.

Displaying a field value

Use the **field** parameter to display a value of a specific field of the currently viewed post/term.

```
[drts-entity field="xxx"]
```

where `xxx` represents the name of field to display. This will output a human readable text value of the specified field for the currently viewed post/term.

Note that not all field types are supported by this method.

Displaying a display element

Use the **display_element** parameter to show a display element of the **Detailed** display.

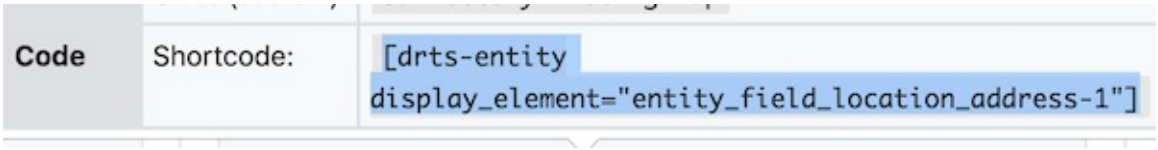
```
[drts-entity display_element="xxx"]
```

where `xxx` represents the ID of a display element.

For example, follow the steps below to get the shortcode for a display element of the Detailed display of listings.

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Click **Directories** in the admin sidebar.
3. Under the **All Directories** tab, click the gear icon in the row of the directory to edit.
4. Under the **Content Types** tab, click the dropdown button in the **Listing** row and then click **Manage Displays**. Make sure the **Detailed** display is selected.
5. Hover over to the display element that you wish to get a shortcode for and click the information button (turquoise colored button with "i").

6. Copy the shortcode displayed in the popup box.



Template Files

Customizing displays using the built-in display editor can sometimes be a tedious task for developers or designers. You may prefer writing code and have full control over how content items are rendered and styled in the frontend. This is where template files for displays come into play.

Template file types

There are 2 types of template files for customizing displays in Directories Pro:

- **Display template files**
- **Element template files**

Display template files

Display template files let you have full control over how displays are rendered. When you create a display template file for a given display (Detailed, Summary, etc.) of a certain content type, the output of each content item for the display will be generated solely from the template file. Any configurations or modifications added through the display editor are ignored. Therefore display template files are for advanced developers and not recommended unless you know what you are trying to do. If you are simply trying to customize certain parts of a display, consider using **element template files** instead.

Display template files must be saved with its file name formatted as:

```
xxxx-display_yyyy.html.php
```

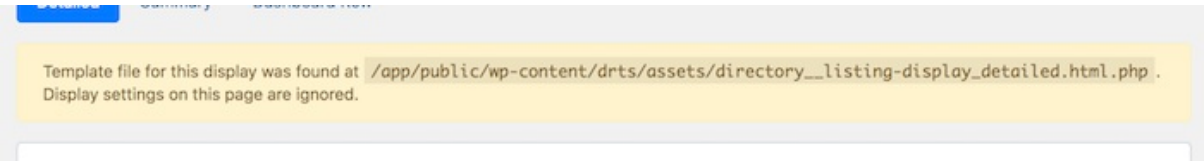
where **xxxx** is the machine readable name of a content type (e.g. directory__listing) and **yyyy** is that of a display (e.g. detailed).

To check the machine readable name of a content type, go to **Directories** -> **All Directories**, and then to the **Content Types** page (or tab) of your directory. The text strings shown in parentheses under the **Content Type** column in the table are the machine readable name of each content type. As for the machine readable name of a display, simply convert the name of the display to lower case and then change spaces to underscores.

For example, below are the names of display template files for listings:

- **Detailed** - `directory__listing-display_detailed.html.php`
- **Summary** - `directory__listing-display_summary.html.php`
- **Dashboard Row** - `directory__listing-display_dashboard_row.html.php`

Once you create a display template file for a display and place it under a valid file location, you will see a warning message similar to below appear at the top of the display editor:

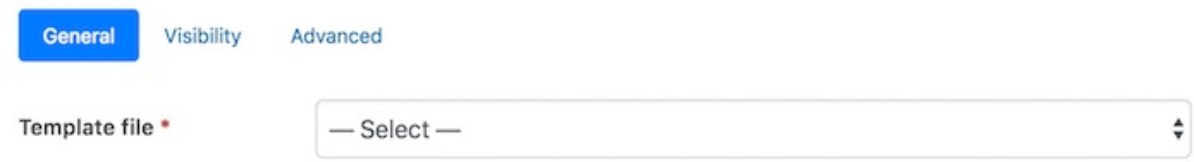


This confirms that your display template file is enabled and used to render the display, and whatever you configure on the display editor is ignored as long as the template file exists.

Element template files

Element template files are useful when you need to customize only a certain part of a display. Element template files are rendered by the **Template** element or the **Field Template** element within a display. Simply add these elements through the display editor and place them anywhere within the display just like you do with other elements.

The **Template** and **Field Template** elements both have a setting labeled **Template file** which lets you select a template file to be loaded and rendered by the element:



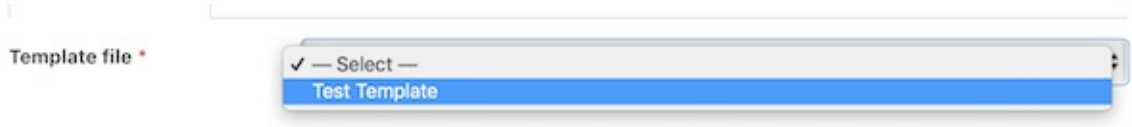
There is no template file selectable by default so you will need to create one in order to use the element.

Element template files must be saved with its file name formatted as:

```
xxxx-element_yyyy.html.php
```

where `xxxx` is the machine readable name of a content type (e.g. directory__listing) and `yyyy` can be any number of alphanumeric lowercase characters (a-z,0-9) or underscores.

For example, if there is a template file named `directory__listing-element_test_template.html.php`, then you will see an option added to the **Template file** setting as below:



As you can see, the `yyyy` part of the template file name, `test_template` in this case, is used as the label of the template file in the setting (shown as **Test Template**).

Template vs Field Template elements

The difference between the **Template** and the **Field Template** elements is that the **Field Template** element is handled as a **Field** type element. This lets you add **Field Template** elements to a **Field List** element, which allows only **Field** type elements to be contained, so that you can display your template content along with other **Field** type elements.

Another difference is that **Template** elements are handled as block-level HTML elements whereas **Field Template** elements as inline HTML elements.

Template file location

Template files can be placed under the following directory:

```
wp-content/themes/[Your_Current_Theme]/drts
```

where `[Your_Current_Theme]` is the name of the theme that is currently active on your site. You will need to manually create the `drts` folder if it does not exist under your theme directory. Make sure to clear the cache from **Directories** -> **Settings** -> **Tools** once you create the folder.

Note: If you are currently not using a child theme, it is strongly recommended that you create a child theme of the current theme first and then create the `drts` folder under that child theme. Otherwise, the `drts` folder and your template files in the folder will be removed when you update the current theme. For more details on child themes, see the following page: https://codex.wordpress.org/Child_Themes

Alternatively, you can place your template files under the following directory:

```
wp-content/drts/assets
```

You will need to manually create the directory if it does not exist and then clear the cache from **Directories** -> **Settings** -> **Tools**. You can place your template files under this directory if you wish them to be used not only by the current theme but by other themes as well.

Template files are searched in the following order:

- If the current theme is a child theme:
  1. `drts` folder of the current theme
  2. `wp-content/drts/assets`
  3. `drts` folder of the parent theme
- If your theme is not a child theme:
  1. `wp-content/drts/assets`
  2. `drts` folder of the current theme

Note: Make sure to always clear the cache from **Directories** -> **Settings** -> **Tools** when you create or remove any of the directories above.

Creating a template file

Now let's create a template file and try adding some code to it. We will create an element template file for listings which generates a list of RSS feed items of the currently viewed listing if the listing has an RSS feed URL entered for the **Social Accounts** field. We will then display the template using the **Template** element.

1. Create an empty file named `directory__listing-element_rss_feed.html.php` and place it under `wp-content/drts/assets`.
2. Copy and paste the following code to the file created in step 1:

```
<?php
$social_accounts = get_post_meta($entity->post()->ID, '_drts_field_social_accounts', true);
if (!$social_accounts || !isset($social_accounts['rss'])) return;

$rss = fetch_feed($social_accounts['rss']);
if (is_wp_error($rss)) {
    $this->LogError($rss);
    return;
}

$items = $rss->get_items(0, 5);
if (empty($items)) return;
?>
<ul>
<?php foreach ($items as $item):?>
    <li><a href="<?php echo esc_url($item->get_permalink());?>" title="<?php echo esc_attr(sprintf('Posted
%s', $item->get_date('j F Y | g:i a')));?>"><?php echo esc_html($item->get_title());?></a></li>
```

```
<?php endforeach;?>
</ul>
```

If you know PHP then you may have noticed in the code above that there is an `$entity` PHP variable that is coming from nowhere. It is a PHP object (instance of \SabaiApps\Directories\Component\Entity\Type\IEntity) representing the currently viewed content item (listing, category, tag, etc.), which is passed to the template by the system when the template is loaded.

If the current content item is a post, then you can get a WordPress post object using the `post()` method of the `$entity` object:

```
$post = $entity->post();
```

Similarly, if the current content item is a taxonomy term, you can get a WordPress taxonomy term object using the `term()` method of the `$entity` object:

```
$term = $entity->term();
```

Both methods will return `NULL` if a post or term was not found or in case of an error.

In case you need to check if the current content item is a post or a term object, you can use the `isTaxonomyTerm()` method:

```
if ($entity->isTaxonomyTerm()) {
    $term = $entity->term();
} else {
    $post = $entity->post();
}
```

Now, let's get back to the code and take a look at the following part:

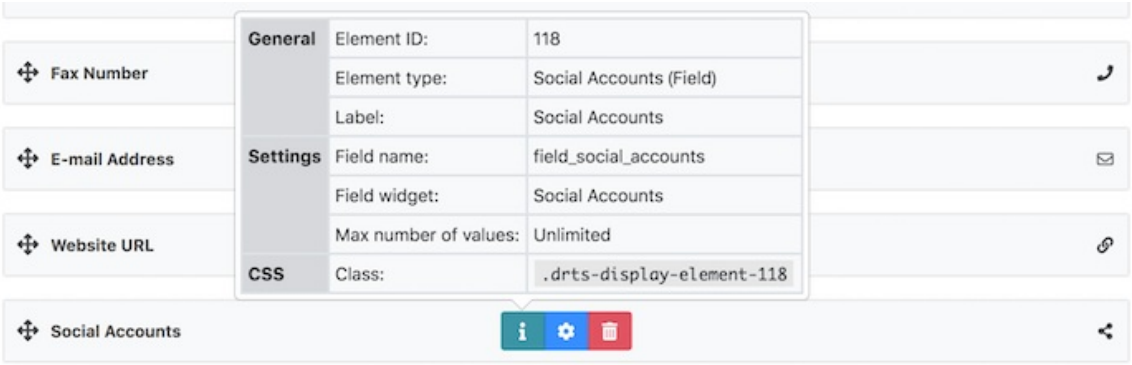
```
$social_accounts = get_post_meta($entity->post()->ID, '_drts_field_social_accounts', true);
```

Since we're creating a template file for listings, the `post()` method is used to fetch a WordPress post object. Then the WordPress `get_post_meta` function is used to get a value of the Social Accounts field entered for the listing. The meta key for fields in Directories Pro plugins takes the following format:

```
_drts_xxxx
```

where `xxxx` is the machine readable name of a field.

Note: To check the machine readable name of a field, go to the **Content Types** page (or tab) of your directory, click the dropdown button in the row of the content type to check and click **Manage Fields**. On the form editor page, hover over to the field element you are looking for and then to the bluish-green info button. A popup will be displayed showing all the meta information of the element as below:



The value of the **field name** column in the popup is the machine readable name of the field.

Getting back to the code, the following line makes sure that a value for the Social Accounts field exists and that an RSS feed URL has been entered:

```
if (!$social_accounts || !isset($social_accounts['rss'])) return;
```

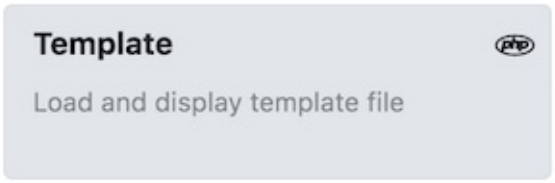
As you can see above, you can use `return` to abort the rendering of the template file and return an empty content to the current display.

The remaining part of the code simply uses the `fetch_feed()` function available in WordPress to fetch an RSS feed from a URL and then renders it as an unordered list. For more details on the `fetch_feed()` function, see the WordPress Codex

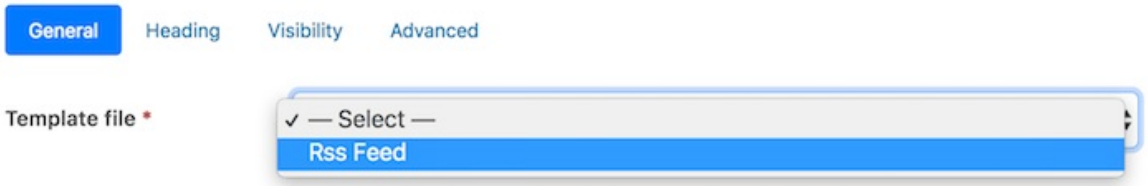
3. Save the template file.

Now the template file has been created, let's add a template element to the **Detailed** display of listings.

1. Go to the **Manage Displays** page for listings and on the **Detailed** display editor, click the green **Add Element** with a plus sign at the bottom of the page.
2. In the popup window, select the **Content** tab and click **Template**.



3. Under the **General Settings** tab, select *Rss Feed* for the **Template file** setting.



4. Under the **Heading Settings** tab, configure as follows:

- **Label** - *Custom label*
- **Custom label** - *RSS Feed*

5. Leave other settings as-is and click the **Add Element** button at the bottom of the popup window.

Now, visit the single listing page of a listing in the frontend. If the listing has a valid RSS feed URL entered for the Social Accounts field, then the RSS Feed section should look something like below:

Adding styles to your template file

Although we were able to display an RSS feed for listings, it may not look pretty because of the stylings added by your current theme. In order to resolve that issue, you can create a CSS file for your template file containing custom CSS rules that will be applied to the content rendered by your template file.

The name of the CSS file will be the same as that of the template file but with a **.css** file extension. For example the CSS file for the RSS feed template file will be:

```
directory__listing-element_rss_feed.css
```

Simply place the CSS file under the same directory where your template file resides. The system will then automatically load the CSS file when rendering the template file.

In the CSS file, you can use the following CSS class which is assigned to the parent `<div>` element of the HTML content rendered by the template file.

```
drts-display-element-template-name-yyyy
```

where `yyyy` is the same `yyyy` part used to name the template file. For example the CSS class name of our RSS feed element template file will be:

```
drts-display-element-template-name-rss_feed
```

Note: There is no CSS class name for display template files.

Let's try adding some custom CSS styles to RSS feed items rendered by the template.

Note: Some themes may render RSS feed items perfectly fine without adding any custom CSS rules, and the following is for illustration purposes only.

1. Create an empty file named `directory__listing-element_rss_feed.css` and place it under `wp-content/drts/assets`.
2. Copy and paste the following CSS rules to the file created in step 1:

```
.drts .drts-display-element-template-name-rss_feed ul {
  list-style-type: none;
}
.drts .drts-display-element-template-name-rss_feed li {
  padding: 0.5em 0;
  margin: 0;
  border: 0;
  border-bottom: 1px dashed #ccc;
}
.drts .drts-display-element-template-name-rss_feed li:last-child {
  border-bottom: 0;
}
.drts .drts-display-element-template-name-rss_feed li:before {
  content: '\f15c';
  font-family: 'Font Awesome 5 Free - drts';
  float: left;
  margin-right: 0.5em;
}
```

   Note: The `.drts` CSS class selector was added to ensure the custom styles override the CSS rules defined by the current theme.

3. Save the CSS file.

Reload the single listing page in the frontend. The RSS feed section should now look similar to below:

Additional methods and helpers

$entity object methods

Below are some of the additional methods that can be called through the `$entity` object.

- `string getTitle()`

  Returns the title of the content item.

- `object getAuthor()`

Returns a user identity object representing the author of the content item.

- `string getBundleType()`

  Returns the content type name of the content item.

- `string getSlug()`

  Returns the slug of the content item.

- `int getTimestamp()`

  Returns the timestamp value of the date the content item was created.

- `int getId()`

  Returns the ID of the content item.

- `array getFieldValues()`

  Returns all the field values of the content item.

- `array getFieldValue(string $fieldname)`

  Returns values of a specific field. This is equivalent with `get_post_meta($entity->getId(), $fieldName)` (or `get_term_meta($entity->getId(), $fieldName)` for terms) and `$entity->$fieldName`.

- `mixed getSingleFieldValue(string $fieldName)`

  Returns a single value of a specific field. This is equivalent with `get_post_meta($entity->getId(), $fieldName, true)` (or `get_term_meta($entity->getId(), $fieldName, true)` for terms) and `$entity->$fieldName[0]`.

- `string getContent()`

  Returns the full content value of the content item.

Helper methods

Here are some helper methods that may be useful to use in your template file. These methods are called through the `$this` variable which is a template object available by default within template files.

- `$this->Entity_PermalinkUrl(object $entity, string $fragment = '', string $lang = null)`

  Returns the permalink URL of the content item (`$entity`) passed to the method.

  - `$fragment` - # part in the URL to append to the URL.
  - `$lang` - Pass in language code to get the URL of the content item for a specific language in a multilingual directory.

- `$this->Entity_Image(object $entity, string $size = 'medium')`

  Returns the URL of an image file associated with the content item (`$entity`) passed to the method. The URL of the first image file will be returned if the content item has multiple images.

  - `$size` - One of *thumbnail*, *medium*, *large*, *full*.
  - `$fieldName` - Machine readable name of an Image type field. Use this parameter to get the URL of an image from a custom field.

- `$this->Summarize(string $text, int $length = 0, string $trimmarker = '...')`

  Returns a summarized version (without HTML or line breaks) of the text content passed to the method.

- `$text` - Original text value.
- `$length` - Length of summarized text in characters.
- `$trimmarker` - String added to the end of the summarized text.

Example:

```
<?php if ($content = $entity->getContent):?>
<p><?php echo $this->Summarize($content, 100);?></p>
<?php endif;?>
```

- `$this->UserIedntityHtml(object $identity, string $format, bool $thumbnailOnly = false)`

  Returns an HTML fragment representing the user identity passed to the method.

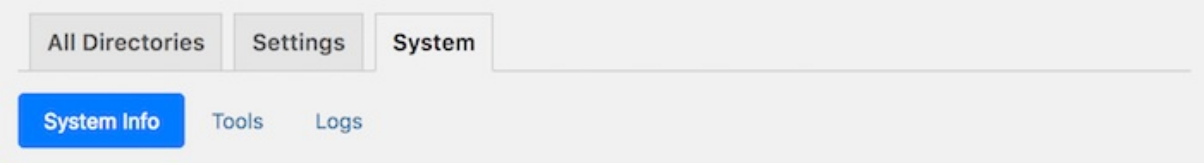
  - `$identity` - User identity object.
  - `$format` - One of *link*, *link_thumb_s*, *link_thumb*, *thumb_s*, *thumb*.
    - *link* - User name with a link.
    - *link_thumb_s* - User name and small icon with a link.
    - *link_thumb* - User name and thumbnail with a link.
    - *thumb_s* - Small icon image.
    - *thumb* - Thumbnail image.
  - `$thumbnailOnly` - Whether or not to return thumbnail image only. This parameter is valid only when `$format` is *link_thumb_s* or *link_thumb*.

    Example:

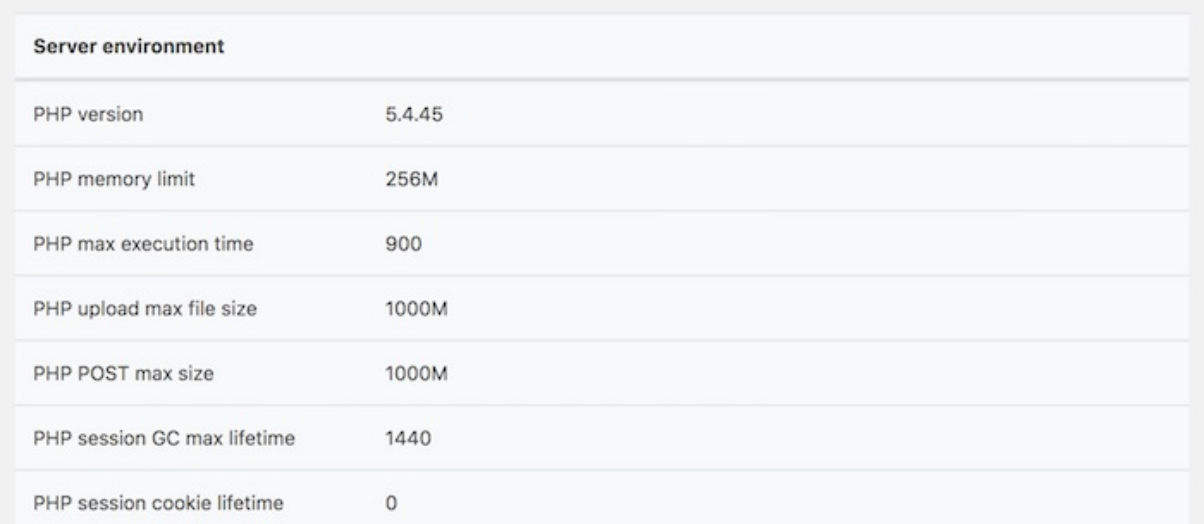
    ```
    <?php if ($identity = $entity->getAuthor()):?>
    <?php   echo $this->UserIdentityHtml($identity, 'link_thumb_s');?>
    <?php endif;?>
    ```

System Info, Tools, and Logs

The System section of Directories Pro provides useful information and tools which will help you with day-to-day maintenance of your directories and debugging errors. Go to **Directories** -> **System** in the backend to view the section.



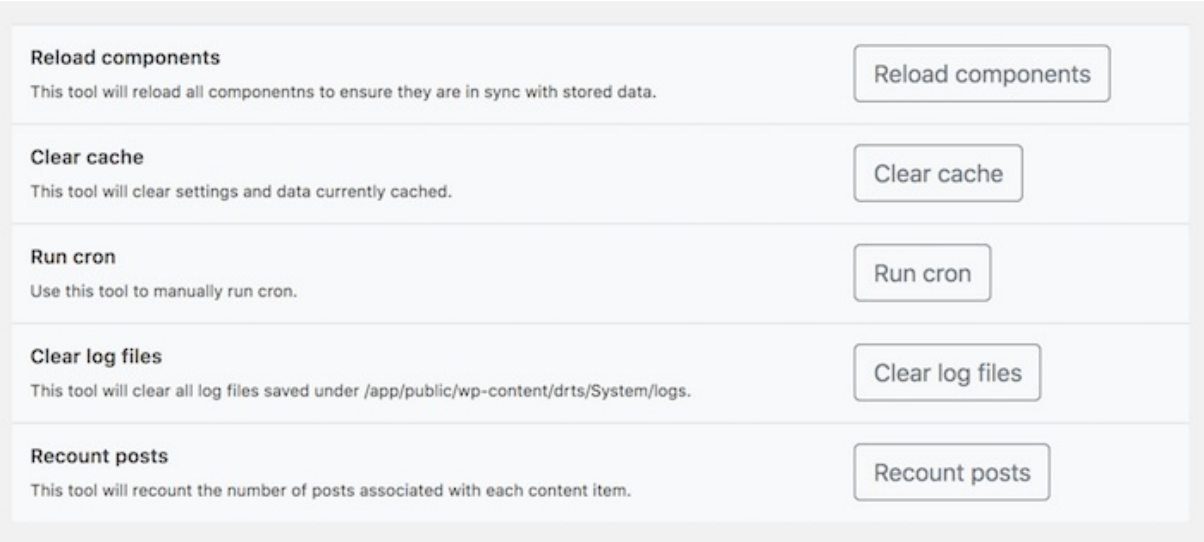
System Info



Server environment	
PHP version	5.4.45
PHP memory limit	256M
PHP max execution time	900
PHP upload max file size	1000M
PHP POST max size	1000M
PHP session GC max lifetime	1440
PHP session cookie lifetime	0

The system info section lets you view the system information of your server, WordPress, and the current status of Directories Pro components.

Tools



- **Reload components**

  This tool will reload all components to ensure they are in sync with stored data. Make sure to run this tool after updating one or more of Directories Pro plugins.

- **Clear cache**

  This tool will clear settings and content currently cached. This tool will also let you reload content field and taxonomy term cache. Use this tool if you find old or inconsistent data being displayed for your directory.

- **Run cron**

  Use this tool to manually run cron. This tool will force run all cron tasks currently registered by Directories Pro.

- **Clear log files**

  This tool will clear all log files saved under /wp-content/drts/System/logs.

- **Recount posts**

  This tool will recount the number of posts associated with each content item. If you find inconsistencies with the number of posts for taxonomy terms and/or the number of reviews for listings, run this tool.

  Usually, you will also want to clear taxonomy and/or field cache using the **Clear cache** tool *after* running this tool

- **Load geolocation data**

  This tool will load geolocation data (lat/lng coordinates and timezone) of each content item if currently empty. Use this tool if one or more listings in your directories do not have any geolocation data assigned.

Logs

- **Error log**

  Any error occurred while running Directories Pro will logged to an error log file saved as /wp-content/drts/System/logs/error.log. Errors are always logged even when the debug mode of WordPress is turned off.

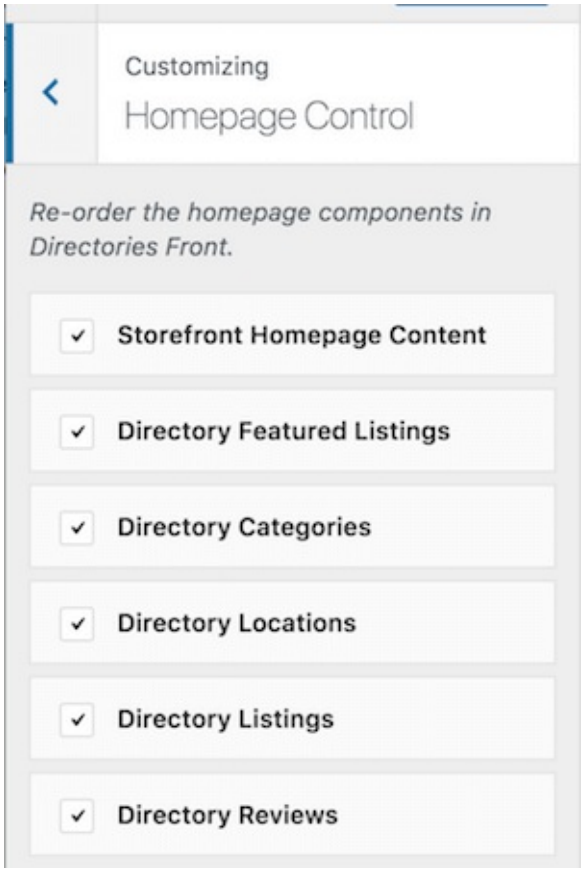
- **Debug log**

  Debug level messages useful for debugging or testing Directories Pro are logged to /wp-content/drts/System/logs/debug.log when the debug mode of WordPress is turned on.

For details on WordPress debug mode, see https://codex.wordpress.org/Debugging_in_WordPress

Homepage Control

Homepage Control is a free lightweight plugin that allows you to manage homepage components. Homepage components can display various types of content from your site similar to widgets but can only be enabled on the homepage of your site. By using homepage controls included with Directories Pro, you can easily create a nice landing page for your directory with just a few number of clicks through WordPress Customizer (Appearance -> Customize) without writing any code (including shortcodes) or using 3rd party page builders.



Note: In order for the feature to work, your theme must be calling the *homepage* action hook where homepage controls will be displayed. This does mean that as long as the *homepage* action hook is called properly, homepage controls can be displayed anywhere.

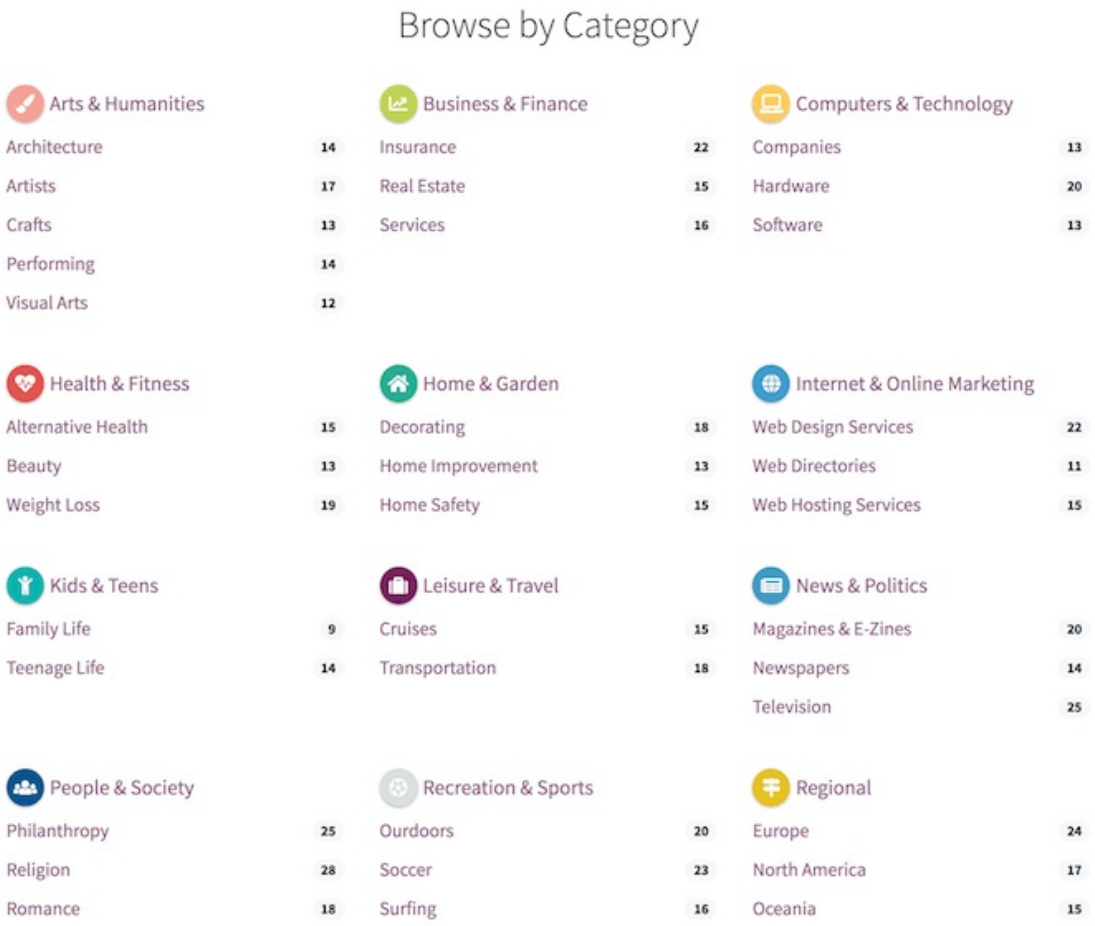
For more information and instructions on how to use Homepage Control, see https://docs.woocommerce.com/documentation/plugins/homepage-control/.

Directories Pro homepage controls

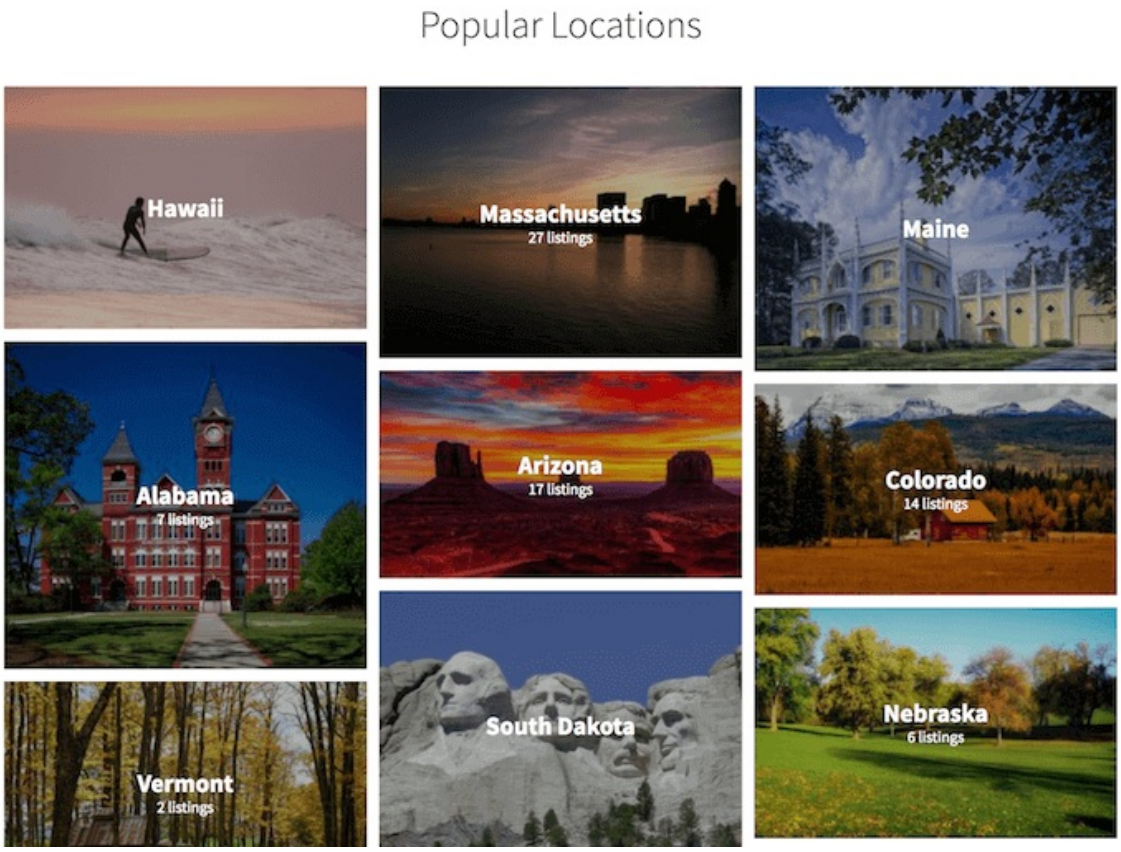
The following homepage controls are available with Directories Pro:

- **Directory Featured Listings** - Shows featured listings in auto playing photo slider.

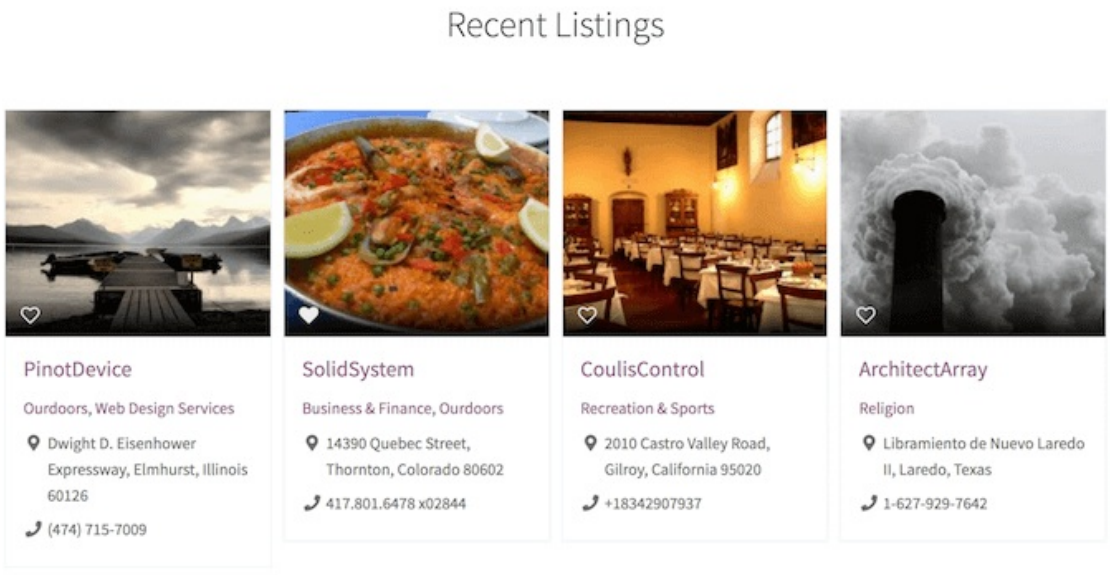
- **Directory Categories** - Shows categories in grid view.



- **Directory Locations** - Shows locations with photos in masonry view.



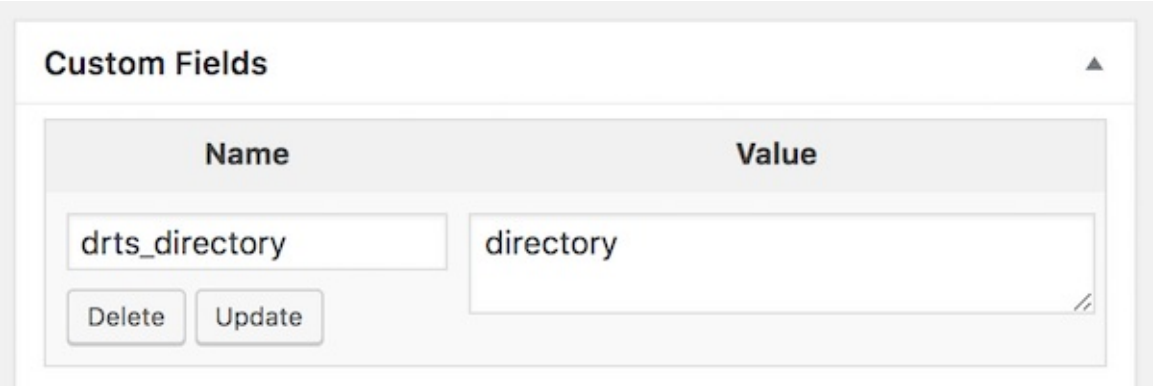
- **Directory Listings** - Shows 4 latest listings in grid view.



- **Directory Reviews** - Shows 6 latest listing reviews in masonry view.

Specifying a directory

By default, Directories Pro homepage controls will display content from the first directory found on your site. If there are multiple directories on your site and wish to specify the directory from which to fetch content, you can add a custom field to the page with the field name set to **drts_directory** and the machine name of your directory as the field value.

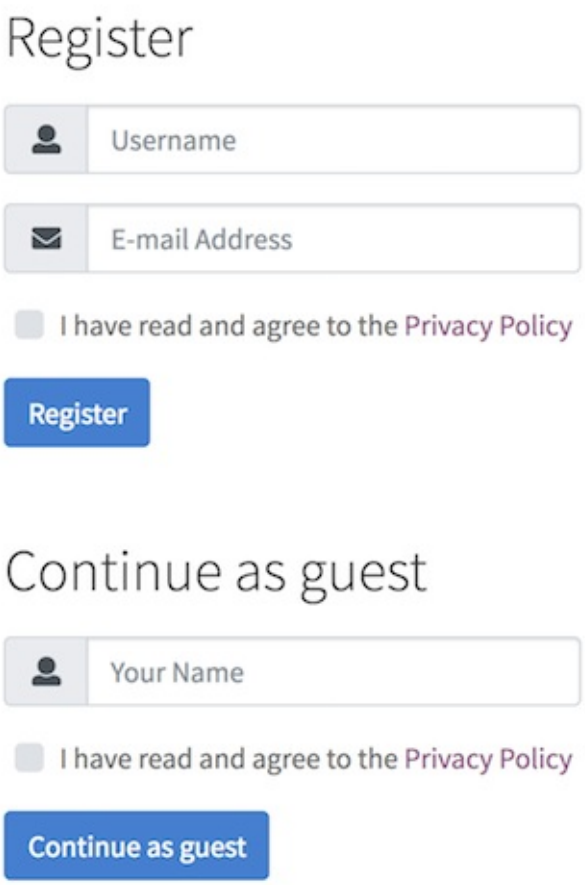


GDPR Compliance

Here we'll be outlining some tips to help you comply with the General Data Protection Regulation (GDPR) privacy law, which takes effect on May 25, 2018.

Adding privacy policy consent checkbox

As of version 4.9.6, WordPress includes a tool to generate a privacy policy page for your site. If you are using the custom login form or the guest post feature (see User Login/Registration and Guest Posts), you can add a privacy policy consent checkbox next to the login form and/or the guest post form with a link to your privacy policy page as shown below.



In order to enable the privacy policy consent checkbox, follow the steps below.

1. Login to your website if not yet logged in and go to the WordPress administration dashboard.
2. Click **Directories** in the admin sidebar.
3. Click the **Settings** tab and then the **Frontend Submit** sub-tab.
4. Under **Guest Post Settings**, toggle the **Add a privacy policy consent checkbox** switch.
5. Under **User Login/Registration Settings**, toggle the **Add a privacy policy consent checkbox** switch if you have the **Show user registration form** option enabled.

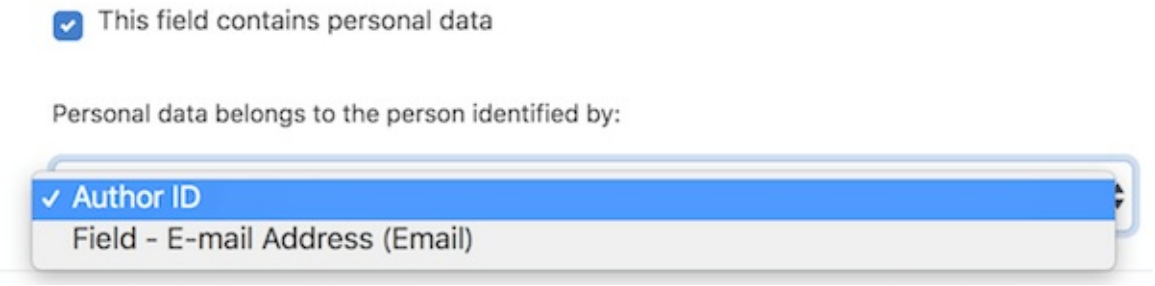
6. Scroll down the page and press **Save Changes**.

Personal data export/erasure

If your directory content contains personal data, you can tell Directories Pro which fields are used to store those data in your directory. This allows you to export and/or delete personal data through the personal data export/erasure tool of WordPress in the backend.

When you add or edit a field for a certain content type (see Adding and Managing Fields for details), you will see a setting labelled **Personal data** as shown below.

If the field contains or will contain personal data, check the **This field contains personal data** checkbox in the setting. Then, select how the owner of the personal data stored in the field can be identified.



If the personal data contained in the field belongs to the author of the content, select *Author ID*. If the content type of the field has one or more e-mail address fields, you can select from one of them if the personal data contained in the field belongs to a user that can be identified by the e-mail address entered for that e-mail field.

Cookies

Guest author cookie

If a user submits a listing or review on your site as guest, a cookie will be saved in the user's browser. This cookie includes no personal data and simply indicates the IDs of all the listings/reviews that the user have authored. It expires after 100 days.

List layout cookie

Whenever a user switch the layout of the List view on the directory page from row layout to grid layout and vice versa using the layout switch button, a cookie is saved in the user's browser. This cookie includes no personal data and simply stores the name of the layout that has been selected last. This is so that the selected layout is kept selected even when you navigate to another page. The cookie is deleted when you close the browser.

FAQ

- **Help, I have a blank page!**

  Please enable the debug mode of WordPress and see if any error message appears.

  To enable the debug mode, change the following line in wp-config.php:

  ```
  define('WP_DEBUG', false);
  ```

  to

  ```
  define('WP_DEBUG', true);
  define('WP_DEBUG_DISPLAY', true);
  ```

  Make sure to add the lines to wp-config.php above where it says:

  ```
  /* That's all, stop editing! Happy blogging. */
  ```

- **Is there a shortcode for displaying a single listing?**

  Yes, the shortcode for displaying a single listing is:

  ```
  [drts-directory-listing]
  ```

  The following is the list of parameters available with the shortcode:

  - **directory** (required) - Machine name of the directory the search form is for.
  - **name** (required) - Slug or ID of the listing to display.

  Example:

  ```
  [drts-directory-listing directory="my_directory" name="my-business-slug"]
  ```

- **Is it possible to edit the layout of the single listing page with a page builder plugin such as Elementor, Visual Composer, Divi Builder?**

  Yes, since these page builders work with the content section of a page, you will first need to create a new WordPress page that will be used as the container for displaying the content of a listing.

  The page must be a direct child page of the directory index page of your directory and the slug of the page must be `listing`. For example, if the URL of the directory index page of your directory is `https://www.example.com/directory`, then the URL of the page to create must be `https://www.example.com/directory/listing`.

  You can then edit the content section of the page with your page builder of choice. Place the `[drts-directory-listing]` shortcode anywhere within the content section using the page builder. When a listing is displayed, the actual content of the listing will be shown where you placed the shortcode.

- **How can I enable Post Thumbnails (Featured Images) for listings?**

  Simply go to Directories -> [Your Directory] -> Content Types -> Listing -> Edit and toggle the **Enable post thumbnail** option.

You can also enable the **Auto post thumbnail** option so that the first image of the default image field will be used to generate a post thumbnail. Note that this feature works with frontend submissions only.