

Flowworx — Platform Overview & Orientation

DOCUMENTATION · [START HERE](#)

■ What is Flowworx?

Flowworx is a system built on top of WordPress that lets you sell and manage your entire offering from one place. Instead of using separate tools for courses, bookings, ticket sales, memberships, and customer management — everything runs through a single platform with one checkout, one customer account system, and one place to manage it all.

Your customers experience this as a clean, connected website where they can purchase, book, and manage everything under one account. You experience it as one admin workspace where all your orders, bookings, and customers are visible together.

■ What Flowworx is built on

It helps to understand three things that make up the platform, because you will hear these terms occasionally:

WordPress

WordPress is the foundation everything runs on. It is the world's most widely used website system. Your site's pages, menus, and content all live here. When you log in to manage your site, you are logging into WordPress.

Flowworx plugin

The Flowworx plugin is what adds all the sales and booking functionality to WordPress. It adds the checkout system, the customer profiles, the booking calendars, the course system — everything specific to running your business. WordPress on its own is just a website; the Flowworx plugin is what turns it into your business platform.

The page builder

The page builder (YooTheme Pro) is what controls how your website looks. It lets you design pages visually — adding sections, images, text, and Flowworx elements like booking buttons and product displays — without writing any code. Think of it as the visual layer on top of everything else.

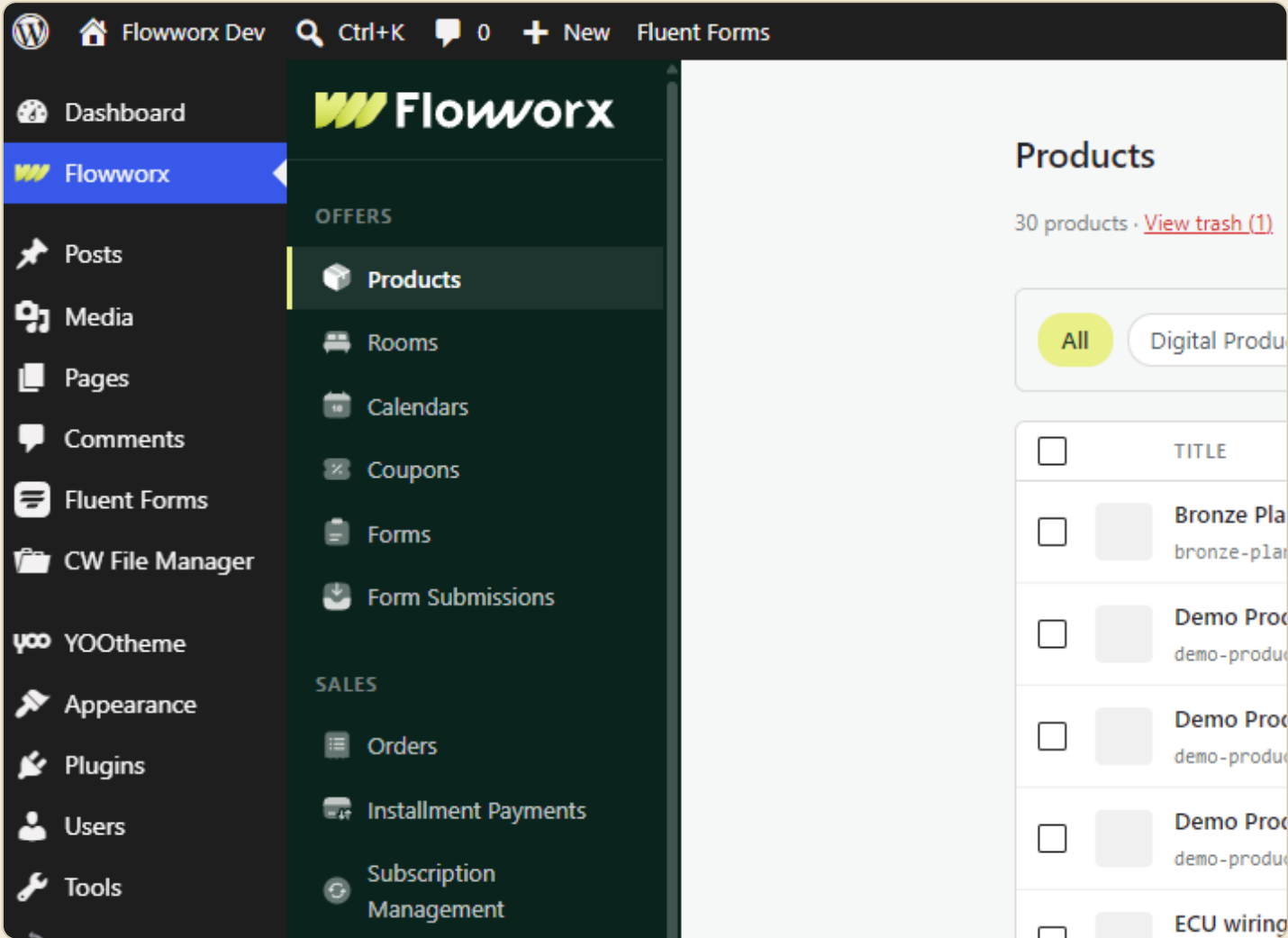
You do not need to understand how these work technically. What matters is knowing that they exist and what role each plays, so when you are in the admin area you understand which area you are in.

■ Logging in

Your admin area is accessed at:

✦ Replace `yoursite.com` with your actual website address. Creationworx will have provided you with your login credentials.

Once logged in, you will see the WordPress dashboard. The left-hand sidebar is WordPress's own navigation. One entry in it — **Flowworx** — opens everything this documentation is about.



The Flowworx entry in the WordPress sidebar. Everything you manage is behind it.

■ **Your workspace**

Clicking **Flowworx** opens the Flowworx workspace: a navigation rail on the left grouped into five sections, and whatever you are working on filling the space beside it.

SECTION	WHAT LIVES THERE
Offers	What a customer can choose to buy — products, rooms, calendars, coupons, forms
Sales	Money that has come in and money still owed — orders, installment payments, subscriptions
Bookings	What has actually been reserved — room stays and appointments
Courses	What you teach and who holds access — lessons, courses, cohorts, assignments
Settings	Everything configured once and then left alone

★ The next guide, **The Flowworx Admin**, covers the workspace in full: how every list screen works, bulk actions, duplicating records, the editor, and a table mapping every screen from the older admin to its new home. Read it before the feature guides — they all assume it.

Two things stay in WordPress's own menus rather than moving into Flowworx: your website's **Pages**, and **Appearance** → **Menus** for your site navigation. Everything else you touch day to day is in the Flowworx workspace.

■ The key concepts behind the platform

Before diving into any specific feature, it helps to understand a few ideas that run through the whole system.

Everything connects through one checkout

No matter what a customer is purchasing — a course, a room booking, an event ticket, a membership — they always go through the same cart and checkout. A customer can add a course, an event ticket, and a room booking in a single session and pay for all of it at once.

This means you have one order per customer session, not separate orders scattered across different systems.

Customers have one account for everything

Accounts come about one of two ways. Either the customer buys something and an account is created for them automatically — no separate registration step — or they sign up first through a registration form, which is what you want if you offer free content or a members area people join before spending money. Either way it is the same kind of account, and everything they subsequently do attaches to it.

From their profile they can see their purchase history, access their courses, view their bookings and appointments, manage their membership, pay off a payment plan, and download their receipts — all in one place. Sign-up, login, password reset and edit-profile are all part of the platform too, as pages you place on your site.

See the Customer Accounts & Profile and Customer Registration & Login guides.

Orders track everything

Every completed transaction creates an order record. An order might contain a room booking, two event tickets, and a digital product — all from one checkout. You see the full picture in one place rather than having to check multiple systems.

Orders move through a simple lifecycle:

- **Pending** — customer has started the process but payment is not yet confirmed
- **Confirmed** — payment was successful, the order is active
- **Processed** — everything has been fulfilled (access granted, booking confirmed, etc.)

Products and bookings are different things

A product is something you sell — a course, a digital download, an event ticket, a subscription. A booking is a reservation with a time and date — an accommodation stay or an appointment. Both go through the same checkout, but they are managed in different sections of the workspace:

- **Products** → **Offers** → **Products**, one screen covering physical products, digital products, tickets/events and subscriptions
- **Accommodation bookings** → **Bookings** → **Room Bookings**
- **Appointment bookings** → **Bookings** → **Calendar Bookings**

The thing being sold and the record of it being sold are kept apart throughout. You set up an accommodation under **Offers**; you look at who is staying in it under **Bookings**.

Courses have three layers

Teaching content is built up in stages, and the three screens under **Courses** correspond to them:

- **Lessons & Pages** — the individual pieces of content
- **Course Creator** — how those pieces are grouped into chapters, in what order, and what unlocks each one
- **Cohorts** — a *run* of a course: one group of people going through it together from a given start date, with the chapter release timed against that date

User Assignments then shows the result: who currently holds access to what. A customer can reach a course by buying it, by holding a membership tier, by being placed in a cohort, or by being granted access manually.

■ What has been set up for you

Some parts of the platform are configured once during setup by Creationworx and do not need to be touched again under normal circumstances:

- **Payment processing** — your Payrex payment connection, so customers can pay by card
- **Tax settings** — default tax configuration is in place. You have access to the tax settings and can adjust them if your situation changes, but they are set up to work from day one without any action required
- **Email templates** — a base confirmation email is configured. Additional per-product emails can be set up by you as needed — these are covered in the relevant product guides
- **Site design** — the visual layout and styling of your pages
- **Main Pages** — the platform's own system pages, such as the order summary customers return to after paying, and the customer profile. These live under **Settings** → **Main Pages** and are covered in the Customer Accounts & Profile guide

These settings exist in the system and are accessible to you, but do not need to be touched under normal circumstances. If something needs to change at the foundation level, contact Creationworx.

■ What you manage day to day

Everything else is yours to manage:

- Creating and updating your products, accommodations, services, events, and courses
- Viewing and managing orders, accommodation bookings, and appointments
- Running course cohorts and seeing who has access to what
- Blocking dates when you or specific accommodations are unavailable

- Sending notifications to customers
- Creating discount codes
- Viewing form submissions

■ How to read this documentation

The guides are numbered in the order they are worth reading, not in order of importance:

- **01–03** orient you: what the platform is, how the admin workspace works, and what the platform-wide settings do
- **04–12** cover the things you sell and the tools around them: products, events, memberships, courses, bookings, appointments, forms, coupons
- **13–15** cover what comes back in: orders, customer accounts, notifications
- **16–21** cover the website itself: placing features on pages, menus, payment plans, the page builder, the header, and registration

You do not need to read them in order. But **The Flowworx Admin** (02) is assumed by every guide after it, so start with that one.