

The Flowworx Admin

DOCUMENTATION · YOUR WORKSPACE

■ One menu instead of six

Everything you manage in Flowworx now lives behind a single **Flowworx** entry in the WordPress sidebar. Opening it replaces the whole admin screen with the Flowworx workspace: a dark navigation rail on the left, and whatever you are working on filling the space to the right.

Before this, Flowworx spread itself across six separate WordPress menus — Products, Courses, Accommodations, Time Slot Booking, Notifications, and a settings page tucked under Appearance. Finding anything meant remembering which of the six it had been filed under. Those menus are gone. Nothing was removed with them; every screen they held is in the new workspace, and a few have been renamed to say more plainly what they do.

The screenshot shows the Flowworx Admin interface. On the left is a dark navigation rail with a 'Flowworx' logo at the top. The rail is organized into sections: OFFERS (Products, Rooms, Calendars, Coupons, Forms, Form Submissions), SALES (Orders, Installment Payments, Subscription Management), BOOKINGS (Room Bookings, Calendar Bookings), COURSES (Lessons & Pages, Course Creator, Cohorts, User Assignments), and SETTINGS (General Settings, Header Options, Categories, Amenities, Main Pages, Room Date Blocking, Room Services, Calendar Date Blocking, Subscription Tiers, Notifications, Webhook Logs). The main area on the right displays the 'Orders' page. It has a search bar at the top right and a table below. The table has columns for checkboxes, ORDER, CUSTOMER, STATUS, ITEMS, TOTAL, PAYMENT, PLACED, and a 'Receipt' button. All orders shown are in 'PROCESSED' status.

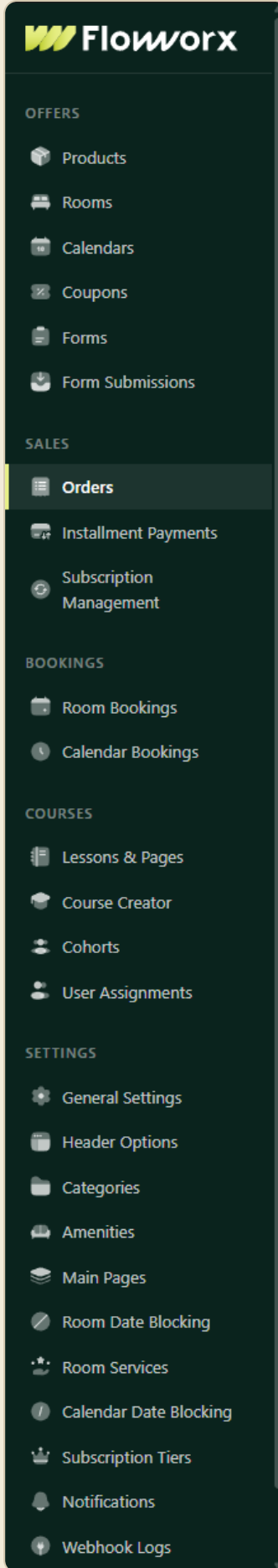
	ORDER	CUSTOMER	STATUS	ITEMS	TOTAL	PAYMENT	PLACED	
☐	#1034	Chaka Khan chakakhan@testing.com	PROCESSED	1 Digital	CHF 600.00	Bypass	Sep 8, 2026, 03:12 PM	Receipt
☐	#1033	Stephen Sanchez stephensanchez@testing.com	PROCESSED	1 Digital	CHF 200.00	Bypass	Sep 8, 2026, 03:11 PM	Receipt
☐	#1013	Noah Kahan noahkahan@testing.com	PROCESSED	1 Digital	CHF 600.00	Bypass	Sep 7, 2026, 10:37 PM	Receipt
☐	#951	Robbie Williams robbiewilliams@testing.com	PROCESSED	1 Digital	CHF 200.00	Bypass	Sep 7, 2026, 09:27 PM	Receipt
☐	#884	Bruce Banner brucebanner@testing.com	PROCESSED	1 Digital	CHF 800.00	Bypass	Sep 4, 2026, 09:35 PM	Receipt
☐	#883	Bruce Banner brucebanner@testing.com	PROCESSED	1 Digital	CHF 200.00	Bypass	Sep 4, 2026, 09:26 PM	Receipt
☐	#852	Rose Tyler rosetyler@testing.com	PROCESSED	1 Digital	CHF 200.00	Bypass	Sep 4, 2026, 03:49 PM	Receipt
☐	#826	Bruno Mars brnmars@testing.com	PROCESSED	1 Digital	CHF 80.00	Bypass	Sep 3, 2026, 10:25 PM	Receipt
☐	#825	Atlas Iris atlasiris@testing.com	PROCESSED	1 Event	CHF 75.00	Bypass	Sep 3, 2026, 09:46 PM	Receipt
☐	#824	Alicia Keys aliciakeys@testing.com	PROCESSED	1 Digital	CHF 200.00	Bypass	Sep 3, 2026, 09:16 PM	Receipt
☐	#823	Paris Rain parisrain@testing.com	PROCESSED	1 Digital	CHF 200.00	Bypass	Sep 3, 2026, 09:04 PM	Receipt
☐	#821	Bruno Mars brnmars@testing.com	PROCESSED	1 Digital	CHF 200.00	Bypass	Sep 3, 2026, 07:59 PM	Receipt
☐	#766	James May jmay@testing.com	PROCESSED	1 Digital	CHF 1,000.00	Manual	Sep 2, 2026, 09:28 PM	Receipt
☐	#664	Jeremy Clarkson jclarkson@testing.com	PROCESSED	1 Digital	CHF 1,000.00	Manual	Sep 1, 2026, 05:53 PM	Receipt
☐	#558	David Jones dave@testing.com	PROCESSED	1 Subscription	CHF 200.00	Manual	Aug 31, 2026, 06:44 PM	Receipt
☐	#523	Haley Williams haley@testing.com	PROCESSED	1 Digital	CHF 999.98	Manual	Aug 28, 2026, 03:44 PM	Receipt
☐	#522	Bruno Mars brnmars@testing.com	PROCESSED	1 Digital	CHF 2,000.00	Manual	Aug 28, 2026, 03:20 PM	Receipt
☐	#521	Russell Hitchcock russellh@testing.com	PROCESSED	1 Digital	CHF 2,000.00	Bypass	Aug 28, 2026, 03:14 PM	Receipt

The Flowworx workspace: navigation rail on the left, the screen you are working on to the right.

✦ If you have used the older Flowworx admin, the table at the end of this guide — "Where everything went" — maps every old menu item to its new home.

■ The navigation rail

The rail is grouped into five sections. The grouping follows how the business actually runs rather than how the data is stored, so the question to ask yourself is "what am I doing?" rather than "what kind of record is this?"



Five sections. Offers is what you sell, Sales is what came in, Bookings is what was reserved, Courses is what you teach, Settings is everything configured once.

Offers — what a customer can choose to buy

- **Products** — one screen for everything sellable: physical products, digital products, tickets and events, and subscriptions. A filter at the top narrows it to one kind
- **Rooms** — your accommodation units
- **Calendars** — your bookable appointment calendars
- **Coupons** — discount codes
- **Forms** — intake questionnaires, applications, assessments and quizzes
- **Form Submissions** — everything that has come back through those forms

Sales — money that has come in, and money still owed

- **Orders** — every purchase made through your site, across all product types
- **Installment Payments** — the payment-plan dashboard: what is due, overdue, paid or cancelled
- **Subscription Management** — every active, cancelled, in-notice and lapsed subscription

Bookings — what has actually been reserved

- **Room Bookings** — accommodation stays, with guest details and selected services
- **Calendar Bookings** — appointments booked through your calendars

Only the records live here. *Which* dates can be booked at all, and what can be added to a booking, are set up once and then left alone — so those screens sit in Settings.

Courses — the teaching material, and who holds access to it

- **Lessons & Pages** — every individual content page or lesson
- **Course Creator** — where you build a course out of those pages: chapters, ordering, access rules and release scheduling
- **Cohorts** — course runs. A cohort is one group of people taking a course together, starting on a given date
- **User Assignments** — which customers hold access to which courses and content, with their progress

Settings — configured once, then left alone

- **General Settings** — tax, shipping, payment modes, currency, invoice and receipt content, and every automated email
- **Header Options** — everything about your site header
- **Categories** — the categories used to group products, rooms and content, all on one screen
- **Amenities** — the descriptive tags applied to accommodations
- **Main Pages** — the platform's own system pages: order summary, profile, login, sign-up, password reset
- **Room Date Blocking** — close dates for accommodations and their services
- **Room Services** — the add-on services that can be attached to an accommodation
- **Calendar Date Blocking** — close dates and time windows on your appointment calendars
- **Subscription Tiers** — the membership ladder used to gate content
- **Notifications** — send announcements and personal messages to customers
- **Webhook Logs** — a technical record of payment events. You open this when something has already gone wrong

✦ *The rail stays in place while the rest of the page scrolls, so you can switch section from anywhere in a long list without scrolling back up.*

■ What a list screen looks like

Almost every screen in Flowworx is a list, and they are all built the same way. Learn one and you have learned all of them.

Orders

19 orders

STATUS

CONTAINS

FROM

TO

All statuses

Any item type

mm/dd/yyyy

mm/dd/yyyy

None selected

Mark as processed

Delete

☐	ORDER	CUSTOMER	STATUS	ITEMS	TOTAL	PAYMENT	PLACED	
☐	▶ #1034	Chaka Khan chakakhan@testing.com	PROCESSED	1 Digital	CHF 600.00	Bypass	Sep 8, 2026, 03:12 PM	Receipt
☐	▶ #1033	Stephen Sanchez stephensanches@testing.com	PROCESSED	1 Digital	CHF 200.00	Bypass	Sep 8, 2026, 03:11 PM	Receipt
☐	▶ #1013	Noah Kahan noahkahan@testing.com	PROCESSED	1 Digital	CHF 600.00	Bypass	Sep 7, 2026, 10:37 PM	Receipt
☐	▶ #951	Robbie Williams robbiewilliams@testing.com	PROCESSED	1 Digital	CHF 200.00	Bypass	Sep 7, 2026, 09:27 PM	Receipt
☐	▶ #884	Bruce Banner brucebanner@testing.com	PROCESSED	1 Digital	CHF 800.00	Bypass	Sep 4, 2026, 09:35 PM	Receipt
☐	▶ #883	Bruce Banner brucebanner@testing.com	PROCESSED	1 Digital	CHF 200.00	Bypass	Sep 4, 2026, 09:26 PM	Receipt
☐	▶ #852	Rose Tyler rosetyler@testing.com	PROCESSED	1 Digital	CHF 200.00	Bypass	Sep 4, 2026, 03:49 PM	Receipt
☐	▶ #826	Bruno Mars bmrs@testing.com	PROCESSED	1 Digital	CHF 80.00	Bypass	Sep 3, 2026, 10:25 PM	Receipt

Search and filters at the top, the list below, paging at the bottom.

Search

Type into the search box at the top and the list narrows as you go. What it searches depends on the screen — a customer's name and email on Orders, a code on Coupons, a title on Products.

Filters

The controls beside the search box narrow the list further: status, type, date range. On some screens these appear as a row of pills or tabs with counts beside them, and those counts tell you how many records are in each state across the *whole* table — not just the page you are looking at.

Sorting

Click a column heading to sort by it. Click it again to reverse the order. The list reloads and paging follows the new order.

Paging

Long lists are paged. The controls at the bottom move between pages, and the total tells you how many records the current search and filters actually matched.

✂ Changing the search or any filter always returns you to the first page. That is deliberate — page 4 of a different list is not a meaningful place to be.

■ Acting on records

Row actions

Each row carries its own buttons at the right-hand end — **Edit**, and whatever else that screen offers. On Orders that is **Process** and **Receipt**; on product lists it is a small **duplicate** icon.

Some rows also carry a quieter link *before* Edit, which takes you to a related list rather than acting on the row. The Forms list uses it: every form has a **Submissions** link that opens the submissions screen with that form already selected.

Selecting several at once

Every list that supports it has a checkbox at the start of each row, plus one in the header that selects everything on the current page. Selecting anything reveals the bulk actions.

Products

Search products

Search

Reorder

Add product

4 products in Physical Products

All

Digital Products

Physical Products

Tickets/Events

Subscriptions

3 selected

Set status... ▾

Trash

Delete

☐	TITLE	CATEGORIES	STATUS	MODIFIED	
☒	 Handmade Candle Set handmade-candle-set	Category 2	PUBLISH	Aug 25, 2026	 
☒	 Artisan Chocolate Box artisan-chocolate-box	Category 1	PUBLISH	Jul 27, 2026	 
☒	 Organic Tea Collection organic-tea-collection	—	PUBLISH	Apr 13, 2026	 
☐	 Test new product test-new-product	—	PUBLISH	Aug 25, 2026	 

With rows selected, the action bar offers what can be done to all of them at once.

Bulk actions differ by screen — trash, delete, restore, change status, mark as processed, activate or deactivate. Two things are true of all of them:

- **The selection is per page.** Moving to another page, or changing the search or a filter, clears it. This stops "delete 12 records" from quietly including rows you can no longer see.
- **Each record is attempted on its own.** If ten succeed and two fail, you are told exactly which two failed and why, rather than the whole action being refused.

Duplicating a record

Products, rooms, calendars and forms carry a **duplicate** button in the row. It makes a complete copy — every field, category and image reference — and always lands it as a **draft**, so a copy of a live product never appears in your shop the moment you click. The copy takes the original's title with *(copy)* appended, and Flowworx opens it straight away, since the point of duplicating is to change something.

Reordering products by hand

The Products screen has a **reorder** mode. Turning it on gives every row a grab handle you can drag, and the order you arrange is the order visitors see on your site. Arrow keys work too, once a handle has focus.

✦ *Reorder mode clears any search and shows the whole list. It has to — the position is written across every record, so reordering a filtered handful would drag those few to the front of everything else.*

■ The editor

Clicking a record's title, or its **Edit** button, opens it in the Flowworx editor.

Products / Demo Product

Demo Product

Published

Classic editor

Save changes

Permalink: <http://plugin-dev.local/digital-product/demo-product/> Edit View

✓ Linked to Demo Product.

Details

Featured Images

Add a featured image for your product. visible on the card and on the post itself. You can add multiple if you wish to have slider images instead of single static image.

+ Add images

2 images

Description

The main body shown on the public page.

Add media

Visual Code

Paragraph

B *I*

-
-

¹ ²
³
⁴
⁵
⁶
⁷
⁸
⁹
¹⁰
¹¹
¹²
¹³
¹⁴
¹⁵
¹⁶
¹⁷
¹⁸
¹⁹
²⁰
²¹
²²
²³
²⁴
²⁵
²⁶
²⁷
²⁸
²⁹
³⁰
³¹
³²
³³
³⁴
³⁵
³⁶
³⁷
³⁸
³⁹
⁴⁰
⁴¹
⁴²
⁴³
⁴⁴
⁴⁵
⁴⁶
⁴⁷
⁴⁸
⁴⁹
⁵⁰
⁵¹
⁵²
⁵³
⁵⁴
⁵⁵
⁵⁶
⁵⁷
⁵⁸
⁵⁹
⁶⁰
⁶¹
⁶²
⁶³
⁶⁴
⁶⁵
⁶⁶
⁶⁷
⁶⁸
⁶⁹
⁷⁰
⁷¹
⁷²
⁷³
⁷⁴
⁷⁵
⁷⁶
⁷⁷
⁷⁸
⁷⁹
⁸⁰
⁸¹
⁸²
⁸³
⁸⁴
⁸⁵
⁸⁶
⁸⁷
⁸⁸
⁸⁹
⁹⁰
⁹¹
⁹²
⁹³
⁹⁴
⁹⁵
⁹⁶
⁹⁷
⁹⁸
⁹⁹
¹⁰⁰

Praesent nec sem interdum, convallis nibh nec, sollicitudin metus. Etiam eu nibh finibus. lobortis arcu sed,

Price

Price *

Add a price to your product. This is the base amount the user will pay to purchase your product.

1000

CHF/EUR

Tax Override

You can override the default vat percentage amount (defined under "Settings" for products). Leave empty if you do not wish to add custom VAT amounts.

%

Visibility

The title sits at the top with the status control and save buttons beside it; the record's own fields fill the rest.

The title is the first field, at the top. A new record reads *Untitled* until you type.

The status control sits beside it — Draft, Pending review, Private, or Published. A draft is not visible to your visitors; published is.

Saving is explicit. The **Save changes** button stays disabled until you actually change something, so a greyed-out button means there is nothing to save. While a record is still a draft you get a second button, **Publish**, because those are two different intentions: keep working on it, or make it public.

The unsaved-changes bar appears at the bottom of the screen the moment you edit anything, and stays until you save. It offers the same choices as the top of the form — **Discard**, **Save changes**, and **Publish** on a draft — so you never have to scroll back up to act on a long form. Discard returns every field to the last saved version.

If you try to leave the page with unsaved changes, your browser will warn you first.

Move to trash sits on its own at the very bottom of the editor, and asks for confirmation before it does anything.

Sections inside a form

Longer forms are divided up. Two things do this, and they deliberately look different:

- **A segmented bar** across the top divides a whole screen into major areas. General Settings uses one
- **An underlined tab strip** divides a single panel — the per-product email settings, for instance

✦ If a save fails because one field is wrong, Flowworx jumps to the section holding it and marks any others with a red exclamation mark, so a mistake hidden on a panel you are not looking at still gets found.

■ **Two screens that still open the classic WordPress editor**

Lessons & Pages and **Main Pages** open in WordPress's own editor rather than the Flowworx one, in a new browser tab.

That is deliberate. What you are actually editing on those two is *page content* — the lesson itself, laid out with the block editor — with a handful of settings around it. The Flowworx editor is built for forms, and it would show the page content as one box among many, which is the wrong way round for something that is mostly a page.

Everything else about them — finding them, filtering them, duplicating them, trashing them — happens in the Flowworx list as normal. Only the editing step hands over.

■ **The Flowworx overview screen**

Clicking the **Flowworx** wordmark at the top of the rail opens an overview screen with shortcuts to each type of record, followed by a block of technical figures about the site's field configuration.

Those figures are a health check for developers, not information you need. If everything on it is green, there is nothing to do. **You can safely ignore this screen** — go straight to the section you need in the rail.

■ **What is still in the normal WordPress menus**

Flowworx did not take over WordPress. These stay where they have always been:

MENU	WHAT YOU USE IT FOR
Pages	Your website's own pages — home, about, contact, and the pages you place Flowworx elements on
Media	Your uploaded images and files
Appearance → Menus	Your site's navigation menus
Appearance → Widgets	The widgets that sit in the header's widget positions
Users	Your customer accounts and admin logins
Settings	WordPress's own settings — site title, timezone, permalinks

✦ *Your site header used to be configured under Appearance. It has moved into Flowworx → Settings → Header Options. Appearance → Menus and Widgets are unchanged.*

■ **Where everything went**

If you knew the old admin, this is the whole move in one table.

OLD LOCATION	NEW LOCATION
Products → All Physical Products	Offers → Products <i>(filter to Physical)</i>
Products → All Digital Products	Offers → Products <i>(filter to Digital)</i>
Products → All Tickets/Events	Offers → Products <i>(filter to Events)</i>
Products → All Subscriptions	Offers → Products <i>(filter to Subscriptions)</i>
Products → Coupons	Offers → Coupons
Products → Orders	Sales → Orders
Products → Installments	Sales → Installment Payments
Products → Subscription Management	Sales → Subscription Management
Products → Subscription Tiers	Settings → Subscription Tiers
Products → Payment Settings	Settings → General Settings
Products → Webhook Logs	Settings → Webhook Logs
Products → <i>(each)</i> Categories	Settings → Categories <i>(all of them, one screen)</i>
Accommodations → All Accommodations	Offers → Rooms
Accommodations → All Services	Settings → Room Services
Accommodations → Bookings	Bookings → Room Bookings
Accommodations → Date Blocking	Settings → Room Date Blocking
Time Slot Booking → Time Slot Calendar	Offers → Calendars
Time Slot Booking → Bookings	Bookings → Calendar Bookings
Time Slot Booking → Blocked Dates	Settings → Calendar Date Blocking
Courses & Pages → All Digital Content	Courses → Lessons & Pages
Courses & Pages → Course Creator	Courses → Course Creator
Courses & Pages → User Assignments	Courses → User Assignments
CW Forms → All CW Forms	Offers → Forms
CW Forms → Submissions	Offers → Form Submissions
Notifications	Settings → Notifications
CW Templates	Settings → Main Pages
Appearance → CW Plugin – Header Options	Settings → Header Options
<i>(new)</i>	Courses → Cohorts

✦ A few screens were renamed so that a pair reads as a pair. "Date Blocking" and "Blocked Dates" were two names for the same job, told apart only by which menu they sat under; they are now **Room Date Blocking** and **Calendar Date Blocking**. For the same reason "Time Slot Calendar" is now **Calendars**, and its bookings screen is **Calendar Bookings**.