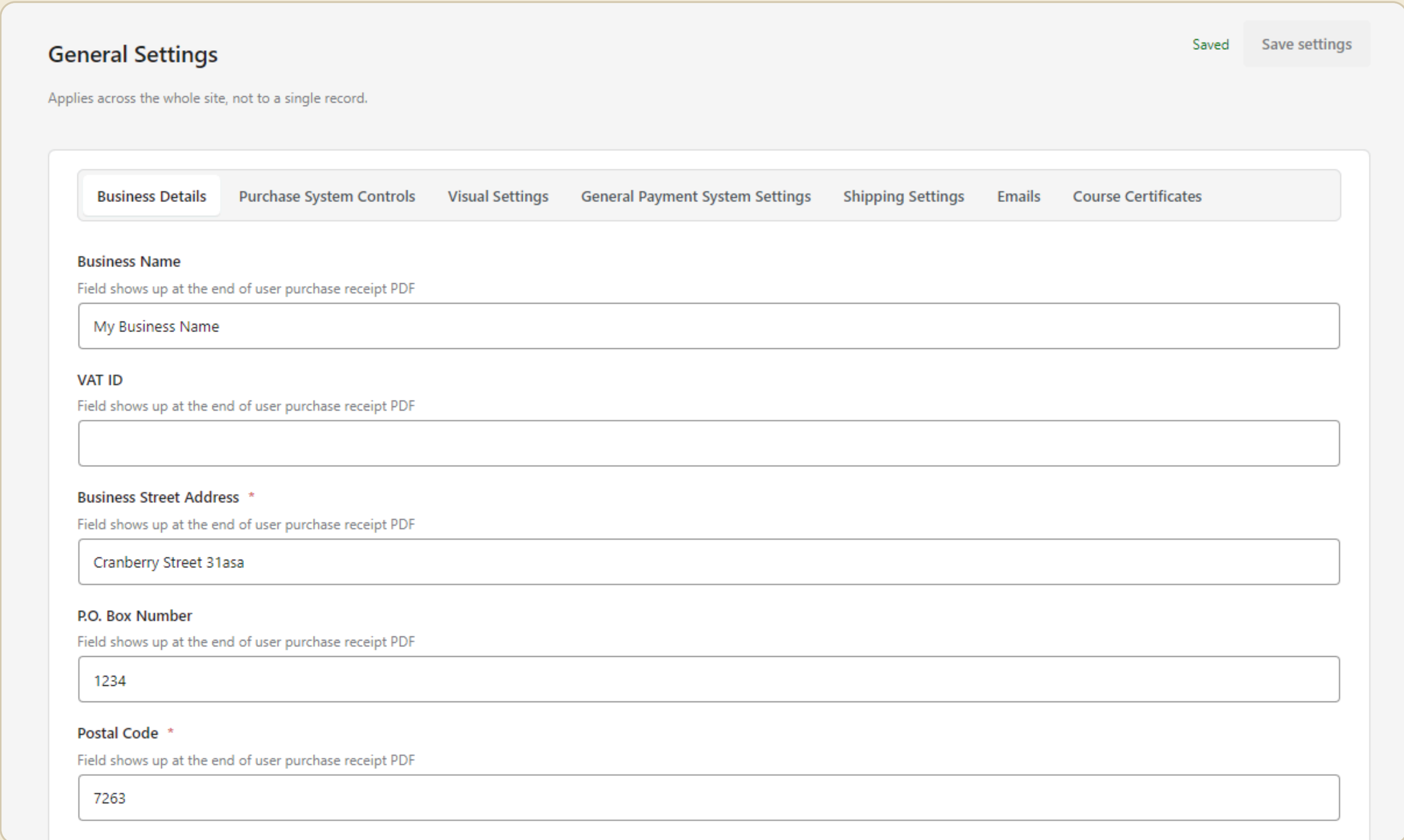
Platform Settings

DOCUMENTATION · SETUP & CONFIGURATION

Overview

This guide covers the general settings that control how your platform behaves — tax, shipping, payment handling, currency display, the documents your customers receive, and the emails sent on your behalf. Most of these are configured once during setup and rarely need to change. But they are yours to access and adjust when needed.



General Settings, divided into areas by the bar across the top.

They all live in one place: **Settings → General Settings** in the Flowworx sidebar. The screen is divided into collapsible sections and tabs — *Purchase System Controls*, *Visual Settings*, *General Payment System Settings*, *Shipping Settings*, *Emails* (with a tab per email type), and *Business Details*. Each section below names the one it belongs to.

> 📌 *Site header, menus, and page layout are configured elsewhere and are not covered here. See the Site Header and Pages & Menus guides.*

Tax settings

Your tax configuration controls how tax is calculated and displayed at checkout. The defaults are set up during onboarding based on your situation, but you can adjust them at any time.

Tax mode — sets how prices are treated across the site:

- **Inclusive** — prices shown already include tax. The tax amount is calculated backwards and shown as a line item at checkout.
- **Exclusive** — prices shown are before tax. Tax is added on top at checkout.

Tax rate — the percentage applied to taxable products. This is your standard rate.

Per-product tax override — individual products can have their own tax rate set directly on the product, in a field called *Tax Override*. If set, it overrides the global rate for that product only. This is useful if some of your products fall under a different tax category. Leave it empty to use the global rate.

> 📌 *Tax settings affect how totals appear to customers at checkout and on their PDF receipts. If you are unsure what rate applies to your business, consult your accountant — the platform applies whatever rate you configure.*

Additional fixed-rate taxes

Percentage tax is not the only kind of charge that can apply to an order. Some businesses have to add a flat fee to every sale — a levy, a duty, a fixed environmental or municipal charge.

Turn on **Additional Fixed rate taxes** and add a row per charge under **Fixed Rate Taxes**:

- **Tax name** — what the customer sees on the line, e.g. "*Recycling levy*"
- **Tax Rate (amount)** — a flat amount in your currency, not a percentage

These are added to **every order**, on top of the percentage tax, and appear as their own line at checkout and on the PDF.

> 📌 *A flat charge that should only apply to some products does not belong here — this applies to all orders without exception. If your charge is per-item or per-guest, it belongs on the product or service instead.*

Shipping

Shipping settings control the cost added to orders that contain physical products. There are no shipping charges for digital products, events, courses, or bookings.

Enable shipping

A master toggle. When disabled, no shipping fees are applied at checkout regardless of what is in the cart. Use this if your physical products do not require shipping (e.g. local pickup only) or if you handle shipping costs separately.

Shipping cost type

How shipping costs are calculated. There are two methods:

- **Cart value** — shipping cost depends on the order total. You define brackets of cart value ranges (e.g. CHF 0–50 = CHF 6.90, CHF 50–100 = CHF 4.90), and the platform applies the matching bracket automatically.
- **Weight** — shipping cost depends on the total weight of physical items in the cart, in grams. You define brackets of weight ranges (e.g. 0–500g = CHF 6.90, 500–2000g = CHF 9.90), and the platform totals the weights and applies the matching bracket.

Only one method is active at a time — choose whichever reflects how your shipping is actually priced.

Shipping breakpoints

Each bracket has:

- A **From** value (minimum cart value or weight)
- A **To** value (maximum)
- A **Shipping cost** that applies when the order falls within that range

Add as many brackets as you need to cover your full pricing structure. The platform looks up the right bracket for each order automatically — you do not need to do anything per order.

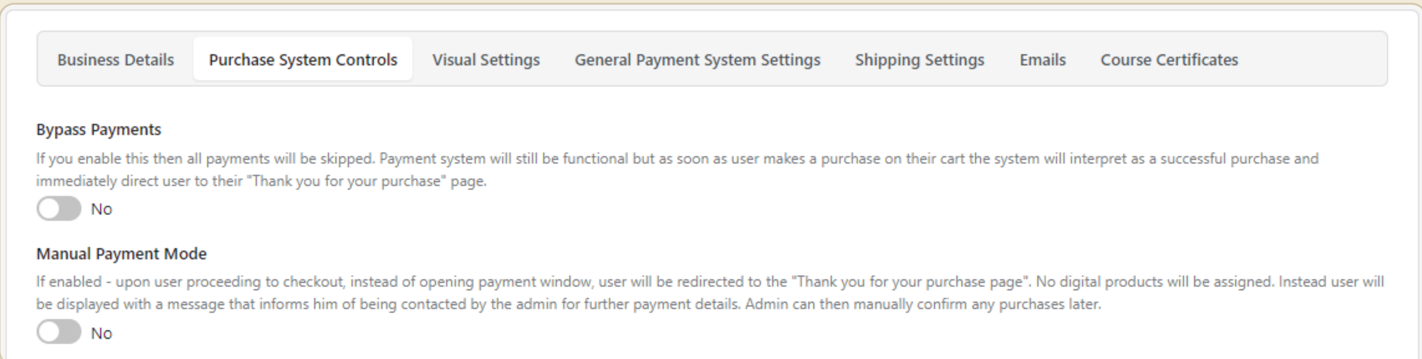
Free shipping above a threshold

An optional setting that overrides all brackets when the cart value goes above a threshold you define. For example: free shipping on all orders over CHF 100. Useful for encouraging larger orders without having to set a CHF 0 bracket manually at the top end.

> 📌 *Shipping is only calculated on the physical product subtotal — items like events, courses, or digital products in the same cart do not affect the shipping calculation.*

Payment modes

Flowworx has three ways of handling payment. **These are site-wide switches, not per-order choices** — whichever mode is active applies to every checkout on the site until you change it. Both switches sit at the top of General Settings under **Purchase System Controls**.



Both payment-mode switches sit at the top of Purchase System Controls.

Leave both off for normal card payments. Turning one on changes what happens at the end of every customer's checkout.

Standard (Payrexx)

The default, with both switches off. The customer pays by card through the Payrexx payment gateway at the end of checkout. The order is created as pending, Payrexx processes the payment, and the order is confirmed automatically when payment succeeds — access is granted, bookings are confirmed, and confirmation emails go out without you touching anything.

Manual payment

Purchase System Controls → Manual Payment Mode. Use this when you invoice customers instead of taking card payments — bank transfer being the usual case.

With manual mode on, the checkout runs exactly as normal right up to the payment step, then skips it. No payment window opens. The customer lands straight on your thank-you page, and the order is recorded as **pending**.

What follows is a three-step cycle:

1. **The customer places the order.** They receive a confirmation email with a PDF attached. Because the order is not yet paid, that PDF is an **invoice** — headed *Invoice*, with the total shown as *Amount Due*.
2. **The customer pays you** by whatever means your invoice specifies.
3. **You confirm the payment** in **Sales → Orders**. Opening the order and marking it as processed is what actually completes the purchase: only then is course access granted, are bookings confirmed, and does the customer receive their fulfilment email. Until you do, nothing is delivered.

That third step is the one to remember. In manual mode the platform cannot know that money arrived, so nothing is fulfilled until you say so. See the Managing Orders guide for exactly where to click.

Manual Payment Mode Text — a content field right below the switch. Whatever you put here is shown to the customer on the thank-you page instead of the usual payment confirmation. Use it to tell them what happens next: that an invoice is on its way, roughly when to expect access, and who to contact.

Manual mode also has its own email templates, so you can write different copy for "we have your order, here is how to pay" than for "thank you, your payment cleared". They live under the email tabs described later in this guide.

The checkout wording adapts too. The buttons change from *Continue to payment* and *Place binding order* to *Continue to order* and *Order* — so customers are not promised a payment step that never comes. This happens automatically; there is nothing to configure.

> 📌 *Put your payment details on the invoice, not only in the email.* See **Invoice custom content** below — this is where bank details or a payment QR code belong. It is the piece of the setup most easily forgotten, and without it the customer receives an invoice with no way to pay it.

Manual payment for one product only

The switch above turns manual payment on for the whole shop. If you sell online but want a handful of products invoiced — a high-value retreat, a corporate booking, anything you would rather discuss than take by card — there is a per-product version.

Edit the product and look for **Manual payment override** under *General Product Options*. Switch it on and that product alone behaves as if manual mode were active: the order is created as pending, the customer gets your manual-payment email and payment instructions, and no payment window opens. Everything else in the shop keeps taking card payments as usual.

It is an override in one direction only. It can turn manual payment **on** for a product, never off. So while the site-wide switch is on, every order is manual regardless of what any individual product says, and the per-product field does nothing.

One order is one payment, so a cart cannot be half invoiced and half paid by card. If a customer puts an invoiced product and a normally-paid product in the same basket, the checkout shows an error at the cart step and will not let them continue until they remove one. They can order the two things separately, one after the other. This is the same rule that already applies to subscriptions, which also cannot share a cart with other items.

The three-step cycle above applies unchanged to these orders: the customer pays you, then **you** confirm it in **Sales → Orders**, and only then is anything delivered. In the orders list a pending order of this kind is labelled *Awaiting manual payment*, so you can tell at a glance which pending orders are waiting on you rather than on a card payment that never completed.

> 📌 *The field appears on subscription plans too, but has no effect there. A subscription's whole purpose is recurring billing, which only the payment provider can perform — invoicing one would quietly turn it into a single payment while still granting access, so it is ignored.*

> 📌 *This needs the same groundwork as site-wide manual mode: your bank details in **Invoice custom content**, and ideally the manual-mode email templates. A single invoiced product with no payment instructions on the invoice has exactly the same problem as a whole shop of them.*

Bypass payment

Purchase System Controls → Bypass Payments. Payment is skipped and the order is treated as successfully paid immediately — fulfilment runs in full, exactly as if a card payment had cleared.

Use it for testing a checkout flow end to end, or for a site that gives everything away at no charge. It is not a way to record an invoiced sale: use manual mode for that, since bypass marks orders as paid when no money has been collected.

> 📌 **Bypass mode collects no money from anyone.** With it enabled, every customer on your live site checks out for free. It is a testing and free-site setting — check it is off before you open a shop to the public.

Checkout options

Also under **Purchase System Controls**, three settings that change what the customer fills in at checkout.

Always Show Address Fields

By default the checkout is adaptive: it asks for a shipping address only when the cart contains something that needs one, and skips fields it can work out from a logged-in customer's account. Turn this on to always ask for the full address regardless of what is in the cart — appropriate if you need billing addresses on file for every sale, including digital ones.

Display AGB Checkbox

Adds a terms-and-conditions checkbox to the checkout that the customer must tick before they can complete the purchase.

AGB Text

The wording shown beside that checkbox. Put your terms here, or a short sentence with a link to your full terms page.

> 📌 *If you are legally required to capture consent to your terms, both fields matter: the checkbox is what records the consent, and the text is what the customer consented to.*

Newsletter signup at checkout

Under the **Newsletter Options** tab you can offer a Mailchimp signup as part of the checkout — a checkbox alongside the terms one, so customers can opt in as they buy.

- **Mailchimp** — the master switch
- **Mailchimp Text** — the wording next to the checkbox
- **Mailchimp API key** — from your Mailchimp account, under *Account → Extras → API keys*
- **Mailchimp list ID** — the audience to add subscribers to, under *Audience → Settings → Audience name and defaults*
- **Mailchimp datacenter** — the short prefix in your Mailchimp API URL, e.g. `us21`

> 📌 *Only offer this if you actually have a Mailchimp audience set up. Without valid credentials the checkbox appears and collects consent that goes nowhere.*

Visual settings

Two images used by the checkout and the documents it generates, under **Visual Settings**:

- **Purchase System Logo** — the logo shown in the checkout, on emails, and on invoices and receipts. Set this during setup; a missing logo is most visible on PDFs a customer keeps.
- **Missing Product Image** — the placeholder used at checkout for any product that has no image of its own. Worth setting to something neutral and on-brand rather than leaving a broken gap.

Admin email address

This is the email address that receives:

- Order notifications
- Low stock alerts
- Admin copies of per-product emails (if configured)

It is separate from your WordPress login email. Set it to wherever you actually want operational notifications to land.

Business details

Under the **Business Details** section you fill in your business name, VAT ID, street address, P.O. box, postal code, city, and country. These are printed in the footer of every PDF the platform generates — invoices and receipts alike.

Keep these accurate. Customers see them on every document they download, and a VAT ID that is missing or wrong is a problem on a document someone files for tax.

Invoice and receipt custom content

Two content fields at the bottom of **Business Details** let you add your own block of content to the PDF, printed above the footer. They look identical but appear on different documents, and which one shows depends on whether the order has been paid:

Invoice custom content

Shown on the PDF while the order is **unpaid** — that is, when the document is an invoice.

This is where your payment details go. Bank name, IBAN, account holder, reference to quote — or a payment QR code, added as an image. If you run manual payment mode, this field is doing the most important job in your entire settings screen: it is how the customer knows where to send the money.

Content is added with the standard editor, so you can format it, add a table, or place an image such as a QR code.

> 📌 *If you use manual payment mode and leave this field empty, customers receive an invoice with a total and no payment instructions. Fill it in before you turn manual mode on.*

Receipt custom content

Shown on the PDF once the order is **paid** — that is, when the document is a receipt.

Optional. The payment is already settled, so there is nothing the customer needs to act on. Use it if you want a thank-you note, a returns policy, support contact details, or a line about your terms — otherwise leave it empty.

> 📌 *The same order produces both documents over its lifetime. Downloaded before payment it is an invoice with your Invoice content; downloaded after you confirm payment it is a receipt with your Receipt content. You do not switch anything — the platform picks based on the order status.*

Secondary currency

An optional reference price shown alongside your real prices — useful when you sell in one currency but a good share of your customers think in another. A Swiss site quoting CHF, for example, can show an approximate euro figure next to it.

Configure it under **General Payment System Settings**:

- **Enable secondary currency** — the master switch.
- **Secondary currency unit** — the label to display, e.g. `EUR`.
- **Secondary currency conversion rate** — how much one unit of your main currency is worth in the secondary one.

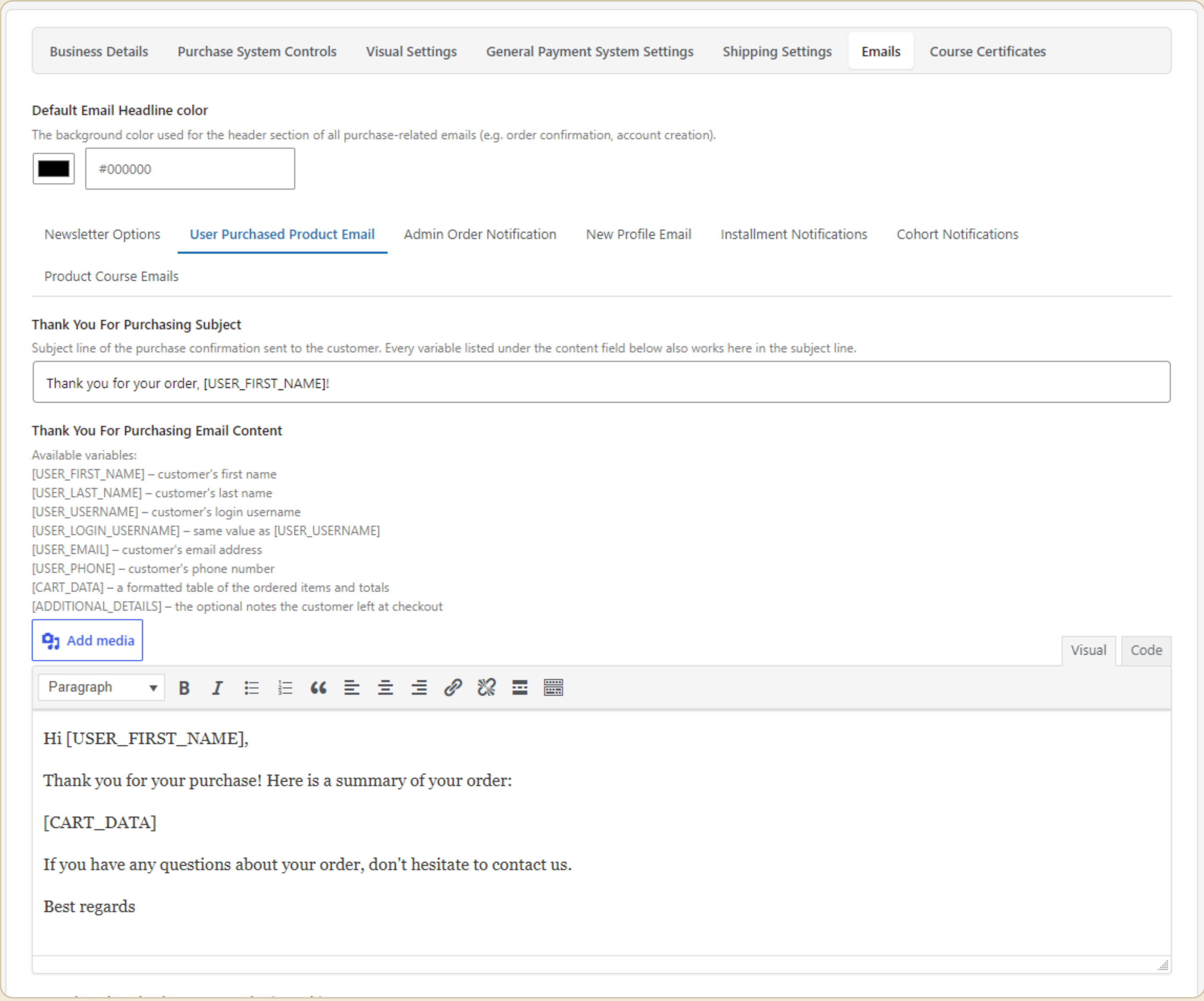
Once enabled, the secondary figure appears throughout the customer's journey: product cards, the booking modal, the cart, the checkout summary, the order summary page, and the PDF.

> 📌 **This is a display aid, not a second currency.** Nothing is calculated, charged, stored, or refunded in the secondary currency — every real amount stays in your main currency. The figure is shown as an approximation (prefixed with ≈) for exactly this reason.

> 📌 *The rate is a fixed number you type in — it does not track the market. If you rely on it, revisit it periodically, and keep it conservative enough that drift does not mislead anyone.*

Email confirmation template

A global purchase confirmation email is sent to every customer after a successful order. It includes a summary of what they purchased and a PDF attachment. You will find it under the **User Purchased Product Email** tab.



Each kind of email has its own tab, with a subject and a body.

You can customise the subject line and body content of this email. The body supports variables that are replaced automatically:

- `[USER_FIRST_NAME]` — customer's first name
- `[USER_LAST_NAME]` — customer's last name
- `[USER_USERNAME]` — the username they log in with
- `[USER_EMAIL]` — customer's email address
- `[CART_DATA]` — a formatted table showing all items in the order, quantities, prices, and the total

Manual mode versions. The same tab has a second pair of fields, *Manual Mode – Thank You For Purchasing Subject* and *...Email Content*. When manual payment mode is on, these are used instead — so the email that goes out at order time can say "here is your invoice, this is how to pay" rather than "thank you, your payment is confirmed". Leave them empty and the regular templates are used for both situations.

> 📌 *Once you confirm a manual payment, the customer gets the* ***regular*** *confirmation email — the manual version is only for the initial, unpaid order. That is the pairing to aim for: manual copy explains how to pay, regular copy confirms it arrived.*

> 📌 *Individual products can also have their own confirmation emails — these are configured on the product itself, not here. See the relevant product guide for details.*

Admin order notification

Under the **Admin Order Notification** tab you configure the email that tells *you* an order came in. It goes to the admin email address above.

- **Admin Order Notification Subject** and **Content** — sent on every order once payment is confirmed. Leave the content empty to switch the notification off entirely.
- **Manual Mode – Admin Order Notification Subject** and **Content** — used when manual payment mode is on, and sent immediately when the order is placed rather than after payment.

Available variables include `[USER_FIRST_NAME]`, `[USER_LAST_NAME]`, `[USER_EMAIL]`, `[USER_PHONE]`, and `[ORDER_ID]`.

> 📌 *In manual payment mode this is your prompt to act. It is the notification telling you an invoice has gone out and a payment is now pending your confirmation — treat it as a to-do, not a receipt.*

New account email

Under the **New Profile Email** tab: the email sent to a customer whose account was created for them automatically at checkout, giving them their login details.

- **User Profile Created For You Subject** and **Email Content**
- Variables include `[USER_FIRST_NAME]`, `[USER_LAST_NAME]`, `[USER_LOGIN_USERNAME]`, and `[USER_EMAIL]`

When configured, this replaces the default WordPress new-account email — which is worth doing, since the WordPress default looks nothing like the rest of your site.

Course reminder email

Under the **Product Course Emails** tab: an optional nudge to customers who bought a course and then stopped working through it.

- **Course Reminder Email Subject** and **Content** — variables include `[USER_FIRST_NAME]`, `[COURSE_TITLE]`, `[COURSE_LINK]`, and `[DAYS_SINCE_LAST_PROGRESS]`
- **Days to Course Reminder Email** — how many days of inactivity trigger it. Leave it at 0 or empty to disable.

Installment notification emails

If you sell events or digital products on a payment plan, a separate set of emails keeps customers on track with their installments. You will find them under an **Installment Notifications** tab in the same General Settings area, each with its own subject and body:

- **Upcoming reminder** — sent before each due date (14, 7, and 1 day ahead)
- **Overdue notice** — sent when a payment is missed, and repeated weekly until it is settled
- **Payment received** — sent each time an installment is paid
- **Plan completed** — sent once the final installment clears

Each reminder carries a direct payment link so the customer can pay in one click. The full picture — schedules, the dashboard, and what the customer sees — is in the Payment Plans & Installments guide.

> 📌 *Use `[PRODUCT_NAME]` rather than `[EVENT_NAME]` in these emails. Payment plans now cover digital products as well as events, and `[EVENT_NAME]` comes out empty on a digital-product plan. `[PRODUCT_NAME]` names whichever product the plan belongs to, so one set of copy works for both.*