

Memberships & Subscriptions

DOCUMENTATION · PRODUCTS

■ What is a subscription?

A subscription is a recurring membership plan — customers pay at a set interval (monthly, quarterly, yearly) and retain access to whatever the membership includes for as long as it is active. Billing is handled automatically by Payrex. When a subscription is cancelled or lapses, access is removed.

Subscriptions are typically used to gate content, community access, or ongoing programmes behind a membership tier.

■ How the tier system works

Before creating subscriptions, it helps to understand how membership tiers work in Flowworx.

Every subscription plan is assigned to a **tier**. Tiers have a hierarchy — higher tiers automatically include everything that lower tiers include. This means if you have a Basic and a Pro plan, a Pro subscriber has access to everything Basic subscribers have, plus whatever is exclusive to Pro.

Tiers are not just labels — they connect to WordPress roles behind the scenes, which is how the platform knows what each subscriber can and cannot access.

✦ *Tiers are managed under **Settings** → **Subscription Tiers**. Set these up before creating subscription plans, as each plan needs to be assigned to a tier.*

■ Setting up subscription tiers

Go to **Settings** → **Subscription Tiers** to create your tiers.

Subscription Tiers

Ordered by access level, lowest first. A higher tier includes everything the tiers below it grant.

Add a tier

Level

32

Name

e.g. Gold

Role slug

e.g. cw_sub_gold

Add tier

Higher means more access. Each level must be unique.

Shown wherever the tier is offered.

Becomes a WordPress role.

10	Bronze cw_sub_demo_bronze	1 plan	Apr 13, 2026, 01:48 PM	Edit	Delete
20	Silver cw_sub_demo_silver	1 plan	Apr 13, 2026, 01:48 PM	Edit	Delete
30	Gold cw_sub_demo_gold	1 plan	Apr 13, 2026, 01:48 PM	Edit	Delete
31	Diamond cw_sub_diamond	nothing uses it	Aug 14, 2026, 07:54 PM	Edit	Delete

The tier ladder. Higher tiers automatically include everything below them.

For each tier you need:

- **Name** — what this tier is called (e.g. *Basic, Pro, Founding Member*)
- **Level** — a number that sets the hierarchy. A higher number means a higher tier. Level 2 includes everything level 1 has access to.

Once tiers are in place, you can create subscription plans and assign them to the appropriate tier.

■ Creating a subscription plan

Subscription plans are managed under **Offers** → **Products** in the Flowworx sidebar.

To create a new plan:

- 1 Go to **Offers** → **Products**
- 2 Click **Add product** at the top of the list
- 3 In the dialog, choose **Subscription** as the type, name the plan (e.g. *Monthly Membership, Annual Pro Plan*), and click **Create**
- 4 Fill in the fields below
- 5 Click **Publish** when ready

✦ The type cannot be changed afterwards — a product created as one kind stays that kind. Pick carefully in the dialog.

■ The subscription fields

Price

The amount charged per billing cycle. Enter it as a number.

Billing interval

How often the customer is charged — monthly, quarterly, or yearly. This is set once and determines the recurring billing frequency through Payrexx.

Membership tier

The tier this plan belongs to. This determines what the subscriber has access to. A customer who subscribes to this plan will be assigned the corresponding membership tier automatically on payment.

Product card settings

The same card display options available on other products — pros/cons list, custom button label, and alternative button link. These control how the plan appears in a subscription card or grid on your site.

■ How the purchase works

From the customer's side:

- 1 They select a plan and complete checkout
- 2 If they were not signed in, the account is resolved at this point (see the note below)
- 3 Their first payment is processed immediately
- 4 They receive a confirmation email with a receipt
- 5 Their membership tier is activated — content and access gated to that tier becomes available straight away
- 6 The subscription appears in their profile under **Subscriptions**, showing the plan name, status, and next billing date
- 7 Subsequent payments happen automatically on the billing cycle — the customer does not need to do anything

✦ *Step 2 deserves attention for memberships specifically, because a membership is worth nothing to someone who is not signed in — the tier is what unlocks the content, and the tier lives on the account. A guest paying with a **new** email gets an account and is logged in immediately, so their membership works at once. A guest paying with an email that **already** has an account has the membership attached correctly, but is not signed in automatically, so nothing appears unlocked until they log in. If a new member reports that they have paid and still cannot see members-only content, that is the first thing to check. The three cases are set out in full in the Customer Accounts & Profile guide.*

From your side:

- 1 An order is created under **Orders** for the initial payment
- 2 The subscription record appears under **Sales → Subscription Management**
- 3 Recurring payments are handled entirely by Payrex — you receive them without any action required

■ Managing subscription content access

A subscription itself does not carry any content. What it carries is a tier — a membership level that controls what a subscriber can see and access elsewhere on the platform. The content lives in courses, pages, and sections; the subscription decides who is allowed in.

There are three places where you control what each tier can access. Most subscription-based businesses use a combination of all three.

1. Tier-gated lessons inside courses

The most common use case. When you build a course in **Courses → Course Creator**, each lesson within the course can be set to require a specific membership tier.

- A lesson set to **Free** is available to anyone who has access to the course
- A lesson set to a **specific tier** is only available to subscribers at that tier or higher

This lets you mix free preview content with subscriber-only content inside the same course. For example, lessons 1–2 free for everyone with course access, lessons 3+ requiring a Pro subscription. See the [Courses & Learning Programs](#) guide for details on building courses and setting per-lesson tiers.

✦ *For tier gating to work, the customer needs to first have access to the course itself (via purchase, registration, or manual assignment). Tier gating then controls which lessons within that course they can actually open.*

2. Tier-gated page sections (YooTheme)

The page builder includes a **Subscription Tier** visibility setting on every section, row, column, and element. This lets your site builder gate parts of a page (or entire pages) behind a tier, without needing to create separate pages per tier.

Options on each section:

- **All** — visible to everyone
- **Logged-in only** — visible to anyone with an account, regardless of subscription
- **Specific tier (Level X+)** — visible only to subscribers at that tier or higher

Use this for things like a member-only resource library, exclusive blog posts, downloadable assets in a sidebar, or simply a "Members only" section embedded on a public page. Page layout work is normally done by your site builder during setup, but it is useful to know the capability exists.

3. Login-aware menu items

Header menu links can be set to show or hide based on whether the visitor is logged in. The visibility options per link are *Always visible*, *Logged-in only*, or *Logged-out only*.

This is not strictly tier-based, but it is a useful complement — a "Members Area" link can appear automatically once someone is logged in, and a "Sign Up" link can disappear once they have an account. Tier-specific gating itself happens at the page section level (above) — the menu link gets them to the page, and the section visibility controls what they see when they arrive.

Putting it together

In a typical subscription setup, your courses contain the structured learning content (with tier-gated lessons), your member pages contain reference material and resources (with tier-gated sections), and your menu adapts to show or hide member areas (with tier-gated links). Subscribers move through all of this transparently — the platform shows them what their tier allows and hides everything else.

■ Cancellations

Customer-initiated cancellation

Customers can cancel their subscription from their profile. When they do:

- Their subscription status changes to **In notice** — they keep access until the end of the current billing period they have already paid for
- At the end of that period, their tier access is removed automatically
- No refund is issued for the current period — they simply do not get charged again

Admin-initiated cancellation

You can cancel a subscription on behalf of a customer from **Sales → Subscription Management**. Admin cancellations take effect immediately — access is removed straight away rather than at the end of the billing period.

Use this for situations where a membership needs to be terminated immediately (disputes, policy violations, or at the customer's direct request via other channels).

■ **Subscription statuses**

STATUS	WHAT IT MEANS
Active	Subscription is live, billing is running, customer has full access
In notice	Customer has cancelled — access continues until end of current period
Cancelled	Subscription has ended, access has been removed
Lapsed	Payment failed and was not recovered — access has been removed

■ **Managing subscriptions**

All subscriptions are visible under **Sales** → **Subscription Management**. You can:

Subscription Management

1 subscription

All 1

Active 1

Pending 0

In notice 0

Overdue 0

Failed 0

Cancelled 0

Plan

All plans

None selected

☐	SUBSCRIBER	PLAN	STATUS	AMOUNT	NEXT PAYMENT	CREATED	
☐	admin dev@creationworx.com	Test Subscription Product Monthly	ACTIVE	CHF 200.00/mo	—	Aug 31, 2026, 06:44 PM	Cancel Delete

Every subscription and its state, across all members.

- See the status of every subscriber
- Filter by plan, status, or date
- View the details of any subscription including billing history
- Cancel a subscription on behalf of a customer

■ **Editing or unpublishing a plan**

To update a plan's details, go to **Offers** → **Products**, click the plan, make changes, and click **Update**. Price changes affect new subscribers — existing subscribers continue on their original terms unless Payrex is updated separately.

To stop new subscriptions from being taken out, set the plan to **Draft**. Existing subscribers are unaffected.