Courses & Learning Programs

DOCUMENTATION · CONTENT

What this guide covers

This guide explains how to build and manage learning content in Flowworx — from creating individual content pages to orchestrating them into structured courses with access control. It covers how the pieces fit together, Course Creator (the central tool for setting all of this up), how to organise lessons into chapters, how to control who has access to what, **cohorts** — running the same course again for a new group, including courses whose sessions are live calls — the two elements every lesson page needs, and how customers experience courses on their side.

If you are setting this up for the first time, read the next section before touching anything. Almost every problem people hit with courses comes from a misunderstanding of how the four pieces relate.

How it fits together

This is the single most important thing to understand before you build anything, so it is worth being explicit.

A course is a container. Digital content pages are what go inside it.

The chain runs: **Digital product** (the sale) → **Course** (the container) → **Chapters** (optional groupings) → **Digital content pages** (the lessons, and the actual material).

A digital content page is one lesson. It is a page you build like any other — text, video, images, downloadable files. You create these first, one per lesson.

A course is the container that puts them in order. A course holds one or more digital content pages, each one becoming a lesson, arranged in the sequence you choose.

A course can contain a single content page. If you are selling one PDF guide, one recorded talk, or one video, you still create a course — a course with exactly one lesson in it. There is no separate mechanism for single-item content. The course is how content connects to a buyer, so everything goes through one.

A digital product is how the course is sold. The course itself has no price and is not something a customer can buy. To sell it, you create a digital product and then, in the course settings, choose it in the **Linked digital product** dropdown. That dropdown *is* the connection between "someone paid" and "someone gets access." Without it, nothing a customer buys grants this course.

Chapters are optional subdivisions. If a course has many lessons, you can group them into chapters and give each chapter its own access rule — free, members-only, or purchasable on its own. A course with no chapters is a flat list of lessons, which is perfectly normal.

Where each piece lives

PIECE	ADMIN LOCATION	WHAT IT IS
Digital content	Courses → Lessons & Pages	The material itself. One page per lesson.
Course	Courses → Course Creator	The container. Orders the lessons, sets access rules, links to the product.
Digital product	Offers → Products	The thing customers buy. Has the price. Holds no content.
Cohort	Courses → Cohorts	One *run* of a course: its own dates, its own product, its own roster. Optional.

Two things every content page needs

Content pages are ordinary pages, so a lesson has no navigation of its own until you add it. On each digital content page — or better, once on the template all of them use — place two builder elements:

- **Progress Button** — lets the customer mark the lesson complete. Without it, they cannot record progress, which also means sequential courses never unlock the next lesson.
- **Course Navigation** — a bar with previous / next lesson buttons and a link back to the course.

Both are covered further down in this guide. They are easy to forget, and a course without them is one a customer has to navigate through their profile after every lesson.

> 📌 *"Course Creator" is the name of the admin tool, but it is not only for multi-lesson programmes. A one-page offering goes through it too — as a course with one lesson. Think of it as the layer that connects content to access rules and to products, regardless of size.*

Content is locked by default

Digital content pages are **not accessible to anyone** just because they are published. This is deliberate: it means you cannot accidentally leave paid material open by forgetting a setting.

A customer can open a digital content page only when all of these are true:

1. **They are logged in.** Digital content is never visible to anonymous visitors — not even free content. A logged-out visitor gets a prompt to log in.

2. **The page is a lesson in at least one course.** A content page that belongs to no course is unreachable by anyone. There is no way to grant access to a loose page.

3. **They have access to that course** — either because they own it (through a purchase, a manual assignment, or auto-assignment on registration), **or** because the course is free to all registered customers, meaning its *Auto-assign on registration* toggle is on.

4. **The specific lesson is open to them** — its chapter's access rule is satisfied, its release date has passed, and any earlier lesson it depends on is complete.

If any of those fails, the customer sees a page explaining why, rather than the content.

> 📌 **Publishing a content page does not expose it.** You can safely write, publish and preview lessons before the course around them exists — nobody can reach them in the meantime.

> 📌 *The corollary catches people out: a content page you intended to be freely readable will not be readable either. If you want a page open to all registered customers, it still needs to be a lesson in a course whose auto-assign toggle is on. If you want a page open to the general public, it should be an ordinary page, not digital content.*

Step 1 — Create your digital content

Before you can build a course, you need the content that will fill it.

1. Go to **Courses → Lessons & Pages**

2. Click **Add lesson or page**, give it a name, and click **Create**

3. It opens in the WordPress editor in a new tab — build the content there: text, images, videos, embeds, downloadable files

4. Click **Update** to save

> 📌 *Lessons and pages are* ***published the moment you create one****, not saved as drafts. That is deliberate: who can read one is decided by the course it belongs to, not by its status, and a lesson left as a draft is dropped from the course sequence while still looking finished in the editor.*

Repeat this for every piece of content you want to deliver. If your offering is one guide, create one page. If it is a 10-week programme, create 10 content pages.

While you are on the template these pages use, add the **Progress Button** and **Course Navigation** elements — see *Lesson navigation and progress* below. A pre-built Yootheme template is available for you to use as a starting point, simply click the library button on the top of the yootheme sidebar and you should see a template with the name '[Flowworx] - Digital Content Template'.

> 📌 *A published content page is still unreachable until it is a lesson in a course somebody has access to. See "Content is locked by default" above.*

Step 2 — Build the course in Course Creator

Course Creator is where everything comes together — content becomes lessons, lessons are grouped into chapters, access rules are set, and the connection to the product (or not) is made.

1. Go to **Courses → Course Creator**
2. Click **Add Course**
3. Give the course a title — this is what the customer sees in their profile
4. Configure the course-level settings (described below)
5. Add lessons by selecting from your existing digital content pages
6. Organise lessons into chapters and set each chapter's access rule (see *Course chapters* below)
7. Set per-lesson rules (order, schedule)
8. Save the course

Once saved, the course is live and ready to be linked to a product or distributed any of the other ways described below.

Course-level settings

These apply to the course as a whole.

Linked digital product

This dropdown is how a course gets sold. Select the digital product whose purchase should grant access to this course. When a customer buys that product, they automatically gain access to the lessons in this course.

Nothing else creates that link. A digital product with no course selected here sells something that delivers nothing, and a course with no product selected here cannot be bought at all — even if a digital product with a matching name exists. If a customer reports paying for a course and receiving nothing, this dropdown is the first thing to check.

> 📌 *The linked product is also where you set the price, the seasonal pricing, the confirmation email, and — if you want the course paid over several months — the payment plan. All of that lives on the product, not the course. See the Digital Products and Payment Plans & Installments guides.*

A course does not need to be linked to a product. Leave this empty if:

- The course is given for free on registration
- The course is assigned manually only
- The course is gated entirely by subscription tiers, not by a one-off purchase
- Access is sold chapter by chapter rather than as a whole (see *Course chapters* below)

Conversely, a course can only be linked to one digital product. If you want one product to grant access to multiple courses, that is an architecture choice — usually it is cleaner to bundle the content into a single course.

Auto-assign on registration

A toggle that grants access to this course to every new customer who creates an account, automatically. Useful for:

- A free intro programme that everyone gets when they sign up
- An onboarding sequence
- A welcome guide

When enabled, the course is added to the new customer's profile the moment their account is created. They do not have to purchase anything. Chapters that require a one-time purchase are not granted by registration — those still have to be bought.

> 📌 *This toggle does double duty: it is also what marks a course as **free to all registered customers**. With it on, any logged-in customer can open the course's free chapters, whether or not the course was ever explicitly assigned to them. With it off, only customers with an actual access record can open anything. It is the difference between "open to members" and "granted individually" — so treat it as an access setting, not just an onboarding convenience.*

Course chapters

Chapters (also called segments) let you group a course's lessons into sections, and give each section its own access rule. This is how you sell a course in parts, mix free and paid material, or unlock deeper sections for members only — all within a single course.

In Course Creator, you add a chapter, give it a title, choose its access rule, and drag the relevant lessons into it. Lessons can be moved between chapters freely. The order of chapters and the order of lessons within them define the path the customer takes through the course.

Each chapter carries exactly one access rule:

- **Free** — any customer with access to the course can open these lessons.

- **Members** — only customers on the required subscription tier (or higher) can open these lessons.
- **One-time purchase** — these lessons are unlocked by buying the chapter for a set price, independently of the rest of the course.
- **Members or purchase** — customers on the required tier get access automatically; everyone else can unlock the chapter with a one-time purchase. Two routes to the same content.

For the two purchase options, you set the chapter's **price** directly on the chapter.

> 📌 *A course does not have to use chapters. If you leave a course as a flat list of lessons without chapters, it behaves exactly as it always did — access is controlled per lesson (free or tier-gated), with no purchasable sections. Chapters are an addition, not a requirement. Nothing about your existing courses changes unless you group their lessons into chapters.*

> 📌 *Purchase and "members or purchase" chapters need the checkout and — for the membership route — the subscription tier system to be in use. If you are not running paid content or subscriptions, keep chapters on Free or Members.*

Lessons and lesson settings

Lessons are added to a course by selecting from your existing digital content pages. Each lesson is one content page. The same content page can theoretically be used as a lesson in multiple courses, but in practice you usually have one piece of content per lesson.

Each lesson within a course has its own settings:

Order

Lessons appear in the order you set — within their chapter, and chapters in the order you arrange them. Drag to rearrange. The order matters because it controls prerequisite locking — a customer must complete lesson 1 before lesson 2 unlocks, lesson 2 before lesson 3, and so on, straight through the chapters. This is automatic; you do not configure prerequisites manually.

Tier gating (lessons without chapters)

In a course that does not use chapters, each lesson can be set to require a specific membership tier:

- **Free** — any customer with access to the course can view this lesson, regardless of subscription
- **Tier required** — only customers at the selected tier (or higher) can view this lesson

This lets you mix free and premium content within a single un-chaptered course. Where you do use chapters, the access rule lives on the chapter instead — every lesson in a "Members" chapter is gated together, which is usually cleaner than gating lesson by lesson.

> 📌 *Tier gating only works if the subscription tier system is being used. If you are not running subscriptions, leave lessons (or chapters) as Free.*

Optional

A lesson ticked **Optional** is supplementary — a session recording, the slides, extra reading. Two things change, and nothing else does:

- It **does not gate the next lesson.** A customer who skips it still reaches whatever follows.
- It **does not count toward finishing the course.** Somebody who completes everything else is finished, and on a cohort that means they are certified.

The lesson is still listed, still opens normally, and still records its own progress if it carries a Progress Button. Optional changes what is *required*, not what is *available*.

Use it whenever a course carries material you are glad people have but would never hold anyone back for. Without it, one recording nobody watched is enough to stop a customer ever completing the course — and nothing on screen explains why they are stuck at 90%.

Scheduled release

A lesson can be set to become available on a future date — useful for drip-feeding content over time, such as releasing one lesson per week.

Customers with access to the course will see the lesson listed but marked as *Coming Soon* with the release date shown. The content unlocks automatically on the date — you do not need to do anything when the day arrives.

How access to a course is granted

There are five ways a customer ends up with access to course content:

1. Purchase of the whole course

The customer buys the digital product linked to the course. On payment confirmation, access to all lessons is granted automatically. This is how most paid courses are distributed.

2. Direct chapter purchase

The customer buys a single chapter — the "One-time purchase" or "Members or purchase" kind — directly from their profile, without buying the whole course. They pay the chapter price, that chapter unlocks, and the rest of the course stays as it was. This is a real order: the customer gets a receipt and a confirmation email exactly like any other purchase.

3. Auto-assign on registration

If the course has the auto-assign toggle enabled, every new customer gets access the moment they sign up. Free and members-only chapters are included; purchase-only chapters still have to be bought.

4. Manual assignment

You grant access directly from the admin without the customer needing to purchase anything. Useful for comp access, trial access, paid-by-invoice customers, or correcting access issues.

5. Membership of a cohort

The customer is on the roster of a *run* of the course — because they bought a place in it, claimed one from a block their employer bought, joined with a code, or were added by you. Access lasts as long as their membership does. Cohorts are covered in full further down this guide.

The system tracks which way access was granted (purchase, registration, or manual). Re-purchasing upgrades a customer from registration access to purchase access — they do not lose their progress and do not get duplicate records.

Subscription-based access

Subscriptions do not "grant access to a course" the way a digital product does. Instead, subscriptions work through tier gating — at the chapter level when you use chapters, or per lesson when you do not.

How it works in practice:

- A customer needs base course access first (via free auto-assignment, manual assignment, or purchasing the linked product)
- Once they have course access, the chapters (or lessons) that match their tier become available
- Chapters set to a higher tier than they have remain locked — unless the chapter is "Members or purchase", in which case they can still unlock it with a one-time payment

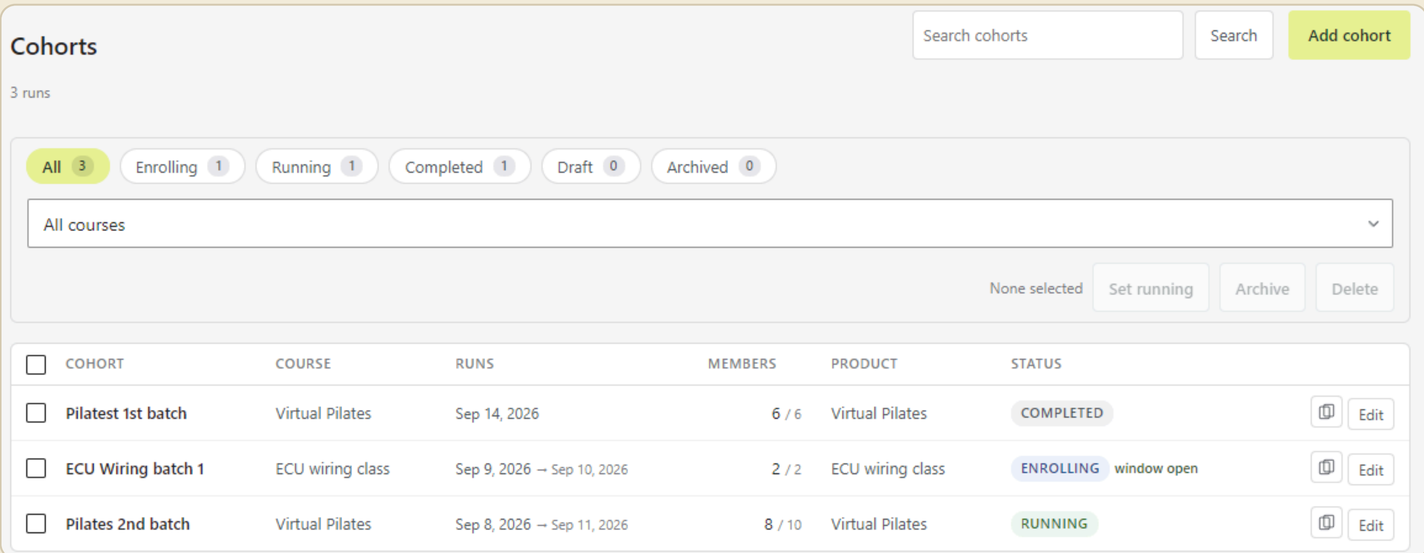
This means you can run a hybrid course: a free intro everyone gets on registration, with deeper chapters unlocked only for paying subscribers, and optionally a buy-out price for non-members who want a single chapter without subscribing.

Cohorts — running a course again for a new group

Everything above describes a course as a single thing: one set of lessons, one release schedule, one linked product. That works when a course is always-on and people join whenever they like.

It stops working the moment you want to run the same course **again**, for a new group, on new dates. A course has one schedule and one linked product, so the only way to re-run it used to be to duplicate the entire course — leaving you with "Foundation Course (January)" and "Foundation Course (April)" as two separate courses to maintain in parallel.

A **cohort** solves that. It is one *run* of a course: its own dates, its own product, its own roster of people — all pointing at a single, unduplicated course.



Each row is one run of a course, with its dates, its enrolment status and how many places are taken.

When you need a cohort, and when you do not

You do **not** need one for an evergreen course that people buy and work through at their own pace. That is the default and it stays simpler.

You **do** want one when:

- The same course runs in batches — a January intake, an April intake
- Everyone in the group should reach chapter 3 in the same week
- You want a roster: who is in this run, how far along they are, who has gone quiet
- An organisation wants to buy several places at once and hand them out
- Someone is leading the group and needs to see how it is going

The two things a cohort does

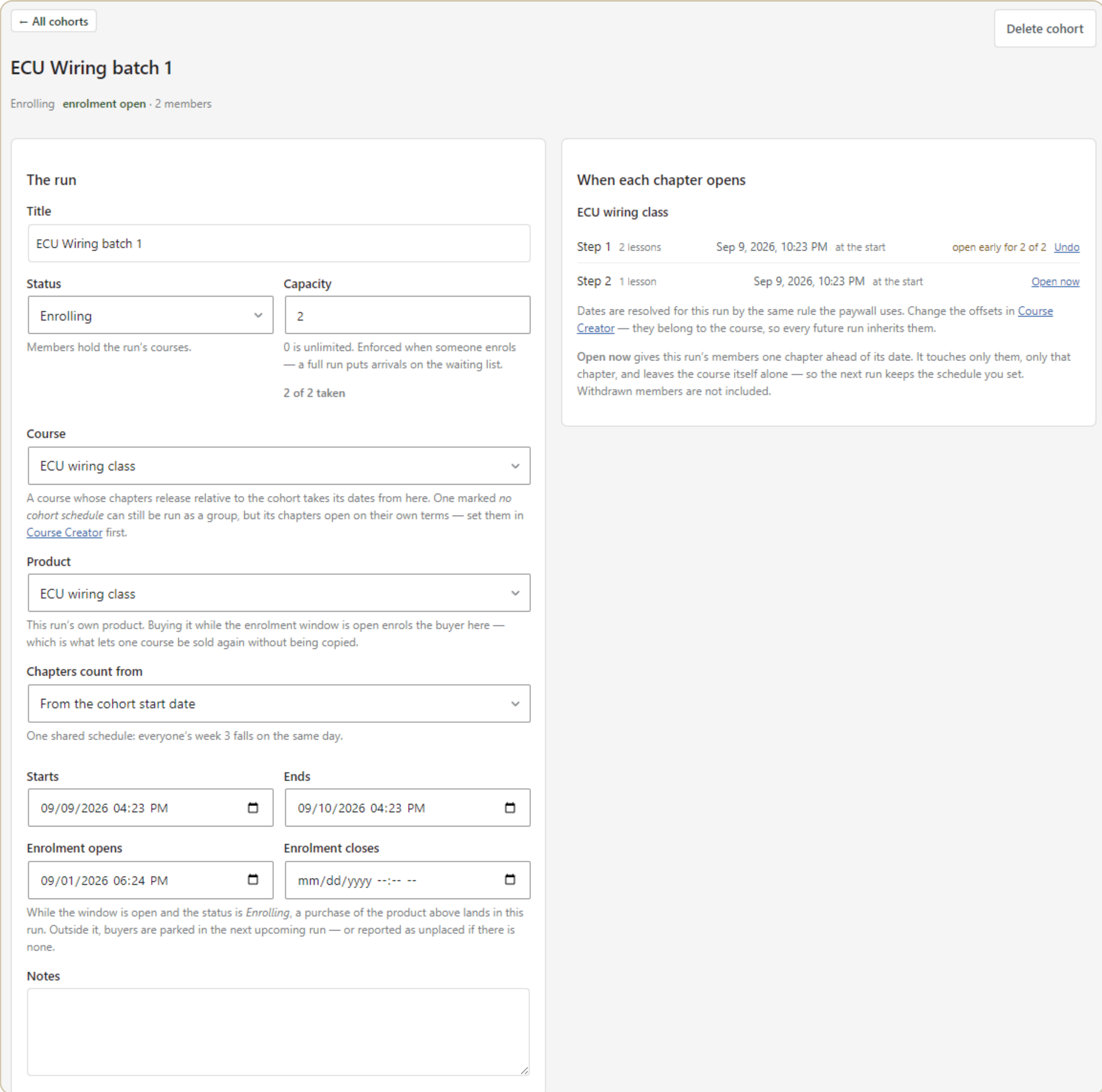
It groups people. A cohort is a roster. Even with no scheduling at all, a cohort gives you a list of who is doing this run of the course together, their progress, and their last activity.

It times the content. Chapters can be set to open *relative to the run* rather than on a fixed calendar date — "chapter 3 opens 14 days in". The same course then releases on different real dates for the January group and the April group, without either course being duplicated.

You can use the first without the second. A cohort over a normally-dated course is just a group.

Creating a cohort

1. Go to **Courses → Cohorts** and click **Add cohort**
2. Give the run a name people will recognise — *Foundation Course, January 2026* rather than *Cohort 3*
3. Attach the course or courses this run covers
4. Set the **anchor** and the dates (below)
5. Set an enrolment window and a capacity if you want them
6. Link a product if the run is being sold
7. Publish it by moving it out of **Draft**



The cohort editor, showing the schedule preview: each chapter with the real date it opens for this run.

The anchor: what the dates are counted from

Every cohort-relative chapter opens a set number of days after an **anchor**. Which anchor you choose is the most consequential setting on the screen, and it decides what kind of run you have:

ANCHOR	WHAT IT MEANS	USE IT FOR
Cohort start	Everyone counts from the run's start date. The whole group reaches chapter 3 on the same calendar day	A class with an intake date. January's group moves together
Member join	Each person counts from the day they joined	A rolling programme — an 8-week course that starts whenever you start it

> 📌 *Choose **Cohort start** if you would ever say "week three" to the group and expect everyone to know what you mean. Choose **Member join** if people arrive continuously and each is on their own clock.*

The schedule preview, and why it exists

A relative chapter stores an *offset* — "+14 days" — not a date. An offset is impossible to check by reading: nobody can tell whether "+14" is right, but everybody can tell whether "22 April" is right.

So the cohort editor resolves every chapter against this run's anchor and shows you **the actual dates**. That list is the thing to check before you publish a run.

Three ways a run can look fine and not work

The Cohorts list flags these for you, because from the outside each looks exactly like a working cohort:

- **A cohort-start run with no start date** — a full roster and nothing that can ever open, because there is nothing to count from
- **A run over a course with no relative chapters** — you have a group, not a schedule. Fine if that is what you meant, worth knowing if it is not
- **A draft run with a product attached** — customers can buy it, and buyers cannot be placed into a draft

> 📌 **A chapter set to cohort-relative release is locked for anyone who is not in a run — including someone who paid for the course outright.** That is deliberate and it is the safety rule the whole feature rests on: a relative chapter has no date without a roster to count from, so rather than guess it stays shut. If a buyer reports a course they paid for is locked, check whether they were placed in a run.

Selling places in a run

Link a digital product to the cohort and buying it places the customer on the roster automatically.

Flowworx picks the run for them: the cohort that is currently enrolling, earliest start first; failing that, the next one coming up. A late buyer is placed in the next run rather than being treated as an error.

If neither exists, the order is flagged as **unplaced** on the Cohorts screen. That is worth watching — an unplaced order is a customer who paid and has a locked course.

> 📌 *Someone who has taken a previous run **can** buy the next one, and someone already in a run can buy places for other people. Only holding a place in the specific run being bought blocks the purchase.*

Capacity and the waiting list

Set a capacity and Flowworx counts places as they are taken. When a run is full, the next arrival is **waitlisted** rather than refused: they are on the roster, visible to you, and they hold no access until a place opens.

- **A withdrawal promotes the next person automatically**, oldest first. The response names who was promoted, because a roster that changed without anyone being told reads as a bug
- **Raising the capacity does not.** That would quietly enrol eleven people and email them all, which is not a settings save. There is a **Promote** button for it
- A promoted member gets exactly what someone who walked in the front door gets — access, and the welcome email

> 📌 *Capacity is checked when the order is fulfilled, not at checkout. A run can therefore be paid into after it fills, and that customer lands on the waiting list. The Cohorts screen flags paid-but-waitlisted people specifically, because they are the ones most easily missed.*

A facilitator does not occupy a place. A run of 20 sells 20 places with the group leader on top of them.

Places bought in bulk

An organisation can buy several places at once — set the quantity at checkout and Flowworx creates a **block** of that many places, with a claim code.

- The buyer is **not** enrolled by buying. An office manager buying six places for their team is not the seventh student. They can claim one for themselves explicitly, from a button on their profile
- Each place is claimed individually with the code, so you can see who used which one and when
- A block does **not** reserve capacity against the run. Places are taken as they are claimed, so a claimant arriving at a full run joins the waiting list like anyone else

> 📌 *Because a block does not hold capacity, ten unclaimed places sold into a run with three free ones is possible. Flowworx flags it as outstanding seats on the Cohorts list so you can raise the capacity* ***before*** *the claims arrive, rather than discovering it when the claims start queueing.*

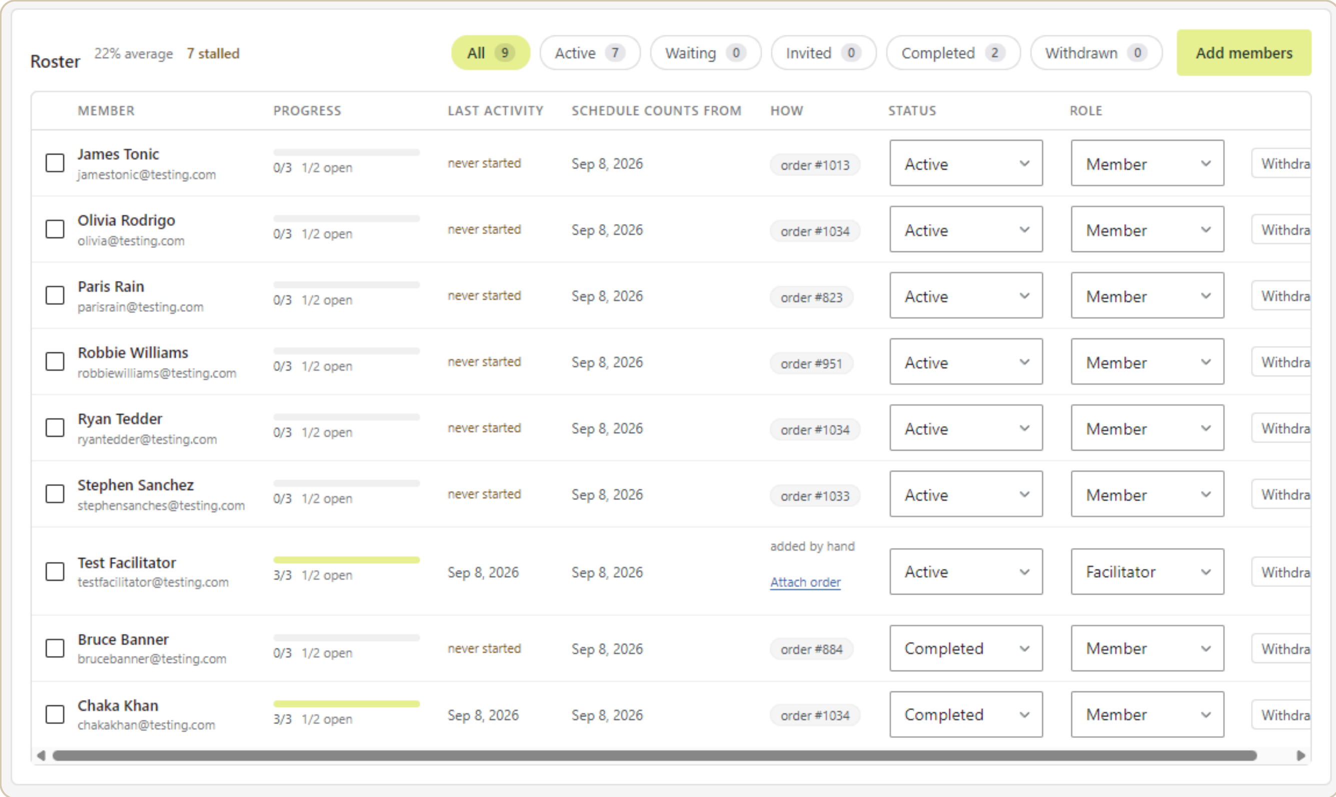
Joining with a code

A cohort can have a join code, and you can place a **Cohort Join** element (or its shortcode) on a page so people enter the code themselves. That is how you get someone into a run without selling them anything or adding them by hand.

Treat the code like a key: it hands out paid course access to whoever types it.

The roster

Open a cohort to see everyone in it.



The roster: every member with their progress, how many chapters are open to them, and when they were last active.

Each member shows:

- **Progress** — how much of the run's required material they have completed. Where you have marked sessions for the group, it also says how many of those lessons were marked rather than finished by the customer — *75% · 3 marked*
- **Chapters open** — how many are currently available *to them*, which differs per person under a member-join anchor
- **Last activity** — any touch of the material, not only a completed lesson. Someone part-way through a lesson is not inactive
- **Behind** — flagged when they hold access, have something open, have not finished, and have not touched anything for a while (14 days by default)

You can change a member's status or role, add people, and withdraw them. The counts above the list — how many are behind, the average progress — cover the **whole** roster, not just the page you are looking at.

> 📌 *Withdrawing someone from a cohort-scheduled course takes the course away, even if they paid for it: their purchase survives, but with no run there is no schedule and nothing can open. Placing them in another run restores it instantly.*

Opening a chapter early for the group

Sometimes the group is ready before the calendar is. You cannot simply edit the date — a relative chapter has no date, and changing the offset would rewrite the schedule for every other run of that course.

So the roster has an **unlock** action that opens one chapter for the run, member by member, and reports what happened to each. Withdrawn members are skipped, and the screen shows how many of the roster hold the unlock — a chapter opened for everybody looks identical to one opened for nobody unless it says so.

Marking a live session complete

A run whose chapters are live calls has a problem the rest of the course system does not: the session happens on Zoom, the lesson page is just the handout, and **nobody presses a Progress Button**. Left alone, such a run reads 0% four weeks in, flags every member as stalled, emails them all a nudge they do not deserve, and never certifies anybody.

So you record the session yourself. Two ways in, both opening the same dialog:

- From **When each chapter opens**, the chapter's **Mark done…** link — start from the session.
- From the roster, **Mark a session…** with people selected — start from the people, which is the way in for "these three were ill last week".

Everybody is ticked by default. **Untick whoever missed the call.** Before you confirm, the dialog tells you how many lessons and how many members it will change, how many of them cannot open the chapter yet, and whether it may finish the run.

Three things to know before you press it:

- **Marking does not open the chapter.** Opening is a separate rule about dates. If some of the people you ticked cannot see the chapter yet, the dialog says how many and offers to open it for them in the same click.
- **Finishing the run emails a certificate.** If the session you are marking is the last required work in the run, those members are marked completed and their certificate goes out. The confirmation names exactly who — nobody gets certified without it appearing on screen.
- **Undo removes only your marks.** A customer's own progress is never touched. Somebody who had pressed two of three buttons on a page goes back to two of three, not to nothing.

Each chapter row also shows how the run is doing with it — *9 of 12 done · 7 marked*. The second number is how you tell a group that worked through the material from one you recorded after a call.

How to build a live-session course

The shape that works:

LESSON	WHAT IT IS	WHO COMPLETES IT
1	The page with the Zoom link and anything they need in advance	**You**, after the call
2	The recording	The customer, if they want it — tick **Optional**
3, 4	Slides, extra reading	The customer, if they want it — tick **Optional**

Lesson 1 needs no Progress Button, because you mark it. Lessons 2 onward **do** need one if you want customers to be able to complete them — and they must be ticked Optional, or a member who never watched the recording can never finish the course.

Roles in a run

ROLE	WHAT IT MEANS
Member	A learner. Occupies a place, is counted against capacity, and can be certified
Facilitator	Leads the run. Sees the roster from their own profile — no admin access needed. Occupies no place and is never certified
Observer	Present on the roster without taking a place or being certified

A facilitator does not need a WordPress admin account. Being on the roster as a facilitator is itself the permission, and it grants sight of exactly that one run's roster and nothing else. What they see is read-only, and deliberately excludes email addresses and your admin notes.

Finishing a run, and certificates

A member is marked **completed** when every **required** lesson of every course attached to the run is done. Nothing partial — the whole run. Lessons ticked **Optional** do not count: a recording nobody watched cannot stop somebody being certified, which is what that setting is for.

Flowworx checks as people finish lessons, with a nightly sweep behind it to catch anything the live check cannot see (a lesson removed after everyone finished the rest, for instance). A lesson you marked complete for the group counts exactly as a lesson the customer finished themselves. You can also mark someone completed by hand from the roster.

A **certificate** is generated from that fact on demand, every time it is asked for. Nothing is stored — which means a corrected name or an updated course title is reflected the next time the certificate is produced, rather than being frozen into a stale PDF.

Facilitators and observers are never certified, and a run with no lessons certifies nobody.

> 📌 *The completion email is the one message a finished run still sends. Chapter announcements and nudges stop once a run is completed or archived — those are messages about a course in progress — but a certificate is a message about a course that is over.*

Emails a cohort can send

Three, all **off by default**, configured under **Settings → General Settings → Cohort Notifications**:

- **Welcome** — when someone is enrolled, however they got in
- **Chapter opened** — on the morning a chapter opens for them
- **Nudge** — to someone who has fallen behind

Each has its own on switch, subject and body. Two details worth knowing:

- **Turning on chapter announcements mid-run does not email everyone about chapters 1 to 5.** Only chapters that opened in the last couple of days are announced, and never one that was already open when the member joined
- **The nudge is stricter than the "behind" flag on the roster.** The flag appears early so a human can look; the email waits until the member has actually been enrolled long enough for the message to be fair

Cohort announcements

You can send a notification to everyone in one run. It behaves like a site-wide announcement, except its audience is the roster: withdrawn members stop receiving them, and members of a finished run keep the ones they were sent.

Cloning a run

Duplicating a cohort copies its settings and its courses and **never its roster** — the next run is a different group, and copying members would silently enrol last term's students. The copy lands as a draft.

This is the normal way to set up the next intake: clone the last one, change the name and the dates, publish.

Managing user access manually

Go to **Courses → User Assignments** to see who has access to what and to make manual changes.

From this panel you can:

- **Search by user** — see every course a specific customer has access to, including their progress on each, and how access was granted (Purchase / Registration / Admin / Cohort)
- **Assign access** — grant a customer access to a course without them needing to purchase anything
- **Revoke access** — remove a customer's access to a course

> 📌 *Revoking access does not delete the customer's progress data — if access is restored later, their progress on lessons they had completed is preserved.*

> 📌 **A cohort-scheduled course cannot be granted on its own here.** If the course has any chapter set to open relative to a run, granting it without naming a run would give someone a course where nothing ever opens — and every screen would agree they have it. So the dialog asks which run to place them in, and enrols them instead. See the Cohorts section above.*

How the customer experiences a course

When a customer has access to a course, it appears in their profile in the **My Courses** row on their dashboard, ordered so the course they worked on most recently comes first. Opening it shows the course itself.

- The course is shown with its lessons listed in the order you configured, grouped under their chapter headings
- Completed lessons are marked with a progress indicator
- Locked lessons display a lock icon with a brief explanation:
- *Complete previous lesson first* — locked behind prerequisite progression
- *Members* — gated behind a subscription tier the customer does not have
- *Coming soon* — scheduled for a future release date
- An overall progress bar shows how far through the course they are. Lessons you marked **Optional** are listed and can be worked through like any other, but they are not counted in the bar — so a customer can reach 100% with a recording still unwatched, which is intended

For a chapter that is unlocked by purchase, the customer sees an **Unlock — [price]** button on the chapter — but only once they have reached it. Until they have completed the lessons leading up to that chapter, it stays locked like any other not-yet-reached content, with no buy button. The option to pay appears at the moment it is actually relevant: when the chapter is the customer's next step and the only thing standing in the way is the payment.

> 📌 *Buying a chapter early does not skip the queue. Access still follows the lesson order — a purchased chapter only opens once the customer has worked through everything before it. This keeps a structured programme structured, even when sections are sold separately.*

Customers can return at any time and pick up where they left off. Progress is saved automatically. Access does not expire unless a time limit is configured.

Lesson navigation and progress

Digital content pages are ordinary pages. They do not come with a "next lesson" button, a "back to course" link, or a way to mark a lesson done — those are two builder elements you add. Add them **once to the template your digital content pages use**, and every lesson gets them.

Progress Button

A button the customer presses to mark the lesson complete. It is what drives everything progress-related: the per-lesson ticks in their profile, the course progress bar, your view of who has stalled, and — in sequential courses — the unlocking of the next lesson.

> 📌 *A course whose lessons have no Progress Button never records any progress. In a sequential course that is worse than cosmetic: lesson 2 stays locked behind "complete previous lesson first" forever, because there is no way for the customer to complete lesson 1. If customers report being stuck on the first lesson, this is why. The one exception is a lesson you mark yourself — the Zoom-link page of a live session needs no button, because you record it from the roster. Every other lesson does.*

Course Navigation

A bar with up to three buttons: **back to the course**, **previous lesson**, and **next lesson**. It lets a customer work straight through a course instead of returning to their profile after each lesson.

What you can configure:

- **Show back button** and **Show previous / next lesson buttons** — each can be turned off
- **Back / Previous / Next Button Label** — the wording
- **Prev/Next Button Text** — whether the buttons read your label, the actual lesson title, or both. Lesson titles are more informative; fixed labels are more predictable in a narrow layout. Either way the lesson title is available as the button's tooltip.
- **Profile Page URL** — leave empty and your profile page is found automatically
- **Open the course directly** — sends the back button into the course itself rather than the profile dashboard, which is nearly always what a customer mid-course wants
- **Locked Lessons** — what happens when the next lesson is not open to the customer yet:
- *Grey out* — the button is visible but disabled
- *Link anyway* — the button works, and the lesson page explains the lock
- *Skip* — jump past it to the next lesson they can actually open
- **Loop around** — the last lesson's Next returns to the first, and vice versa
- **Button Style** and **Size** — per button group

> 📌 *In a sequential course, the next lesson is locked until the current one is completed. With the default "Grey out" setting, Next therefore looks disabled until the customer presses the Progress Button — at which point it becomes active straight away, without a page reload. That is intended behaviour, but it is worth knowing so it does not read as a fault.*

> 📌 *A content page can be a lesson in more than one course, in which case "next lesson" depends on which course the customer is working through. The platform keeps track of that as they navigate, so the buttons follow the right course. Customers arriving from a bookmark get the most sensible course of the ones they are enrolled in.*

Progress tracking

The platform tracks which lessons each customer has completed. A lesson is marked complete when the customer clicks the progress button on that lesson's content page.

Progress is visible:

- **To the customer** — in their profile, as a per-lesson indicator and an overall course progress bar
- **To you** — in **Courses → User Assignments**, which shows each customer's progress percentage, completed lessons, and last activity date across all their courses

You can use this to identify customers who have stalled, see who has completed a course (potentially for issuing a certificate), or filter by inactivity for re-engagement.

Editing courses and content after launch

Both courses and content pages can be edited at any time without breaking access for existing customers:

- **Edit a content page** — the change is reflected immediately for everyone who has access
- **Add a lesson or chapter to an existing course** — it becomes available to all customers with course access (subject to the chapter's access rule and any tier or schedule settings)
- **Reorder lessons or chapters** — works as expected; existing customers see the new order on their next visit
- **Remove a lesson** — the lesson is removed from the course for everyone, including customers who already had access. Their progress on that specific lesson is no longer visible (but is retained in the database in case the lesson is restored)

> 📌 *Be considered with edits to content that customers have paid for. Adjusting wording or fixing typos is fine. Removing significant material — or changing the access rule on a chapter a customer already bought — is harder to justify and can feel like the rug being pulled.*

A note on naming

The four screens in the **Courses** section use overlapping language, so it is worth being precise about which does what:

- **Lessons & Pages** — the individual pieces of content themselves. This is where the writing happens
- **Course Creator** — the tool for building a course out of those pieces: grouping them into chapters, ordering them, and setting how each chapter unlocks
- **Cohorts** — a *run* of a course. One group of people going through it together from a start date, with chapter releases timed against that date
- **User Assignments** — who currently holds access to what, and how far through they are

In day-to-day work you will spend most of your time in **Lessons & Pages** (writing and editing the actual content) and **Course Creator** (organising it and connecting it to products). Cohorts and User Assignments are about people rather than material.

> 📌 *A course is not a post type you create. It exists only inside Course Creator, as an arrangement of Lessons & Pages. That is why there is no "Add course" button in the sidebar.*