Customer Accounts & Profile

DOCUMENTATION · CUSTOMERS

How customer accounts work

Every customer on your site has one account, and everything they do with you attaches to it — orders, bookings, appointments, course access, memberships, form submissions.

There are two ways an account comes into existence:

- **Automatically at checkout.** A customer who buys something without having an account gets one created for them, and receives an email with their login details. Nothing is required of them beyond completing the purchase.
- **By signing up.** If you have placed a registration form on your site, visitors can create an account before buying anything — which is what you want if you offer free courses, gated content, or a members area that people join before they spend money.

Either way it is the same kind of account, and a customer who signed up first and bought later keeps one profile with both in it. Returning customers are recognised at checkout and do not need to re-enter their details.

> 📌 *The forms for signing up, logging in, editing a profile and resetting a password are all part of the platform — see the Customer Registration & Login guide for how to set those pages up.*

The profile page

The customer profile is a single page on your site that acts as their account dashboard. It is built by placing the **User Profile v2** element on a page — usually a page called *My Account* or *Profile*, linked from your header.

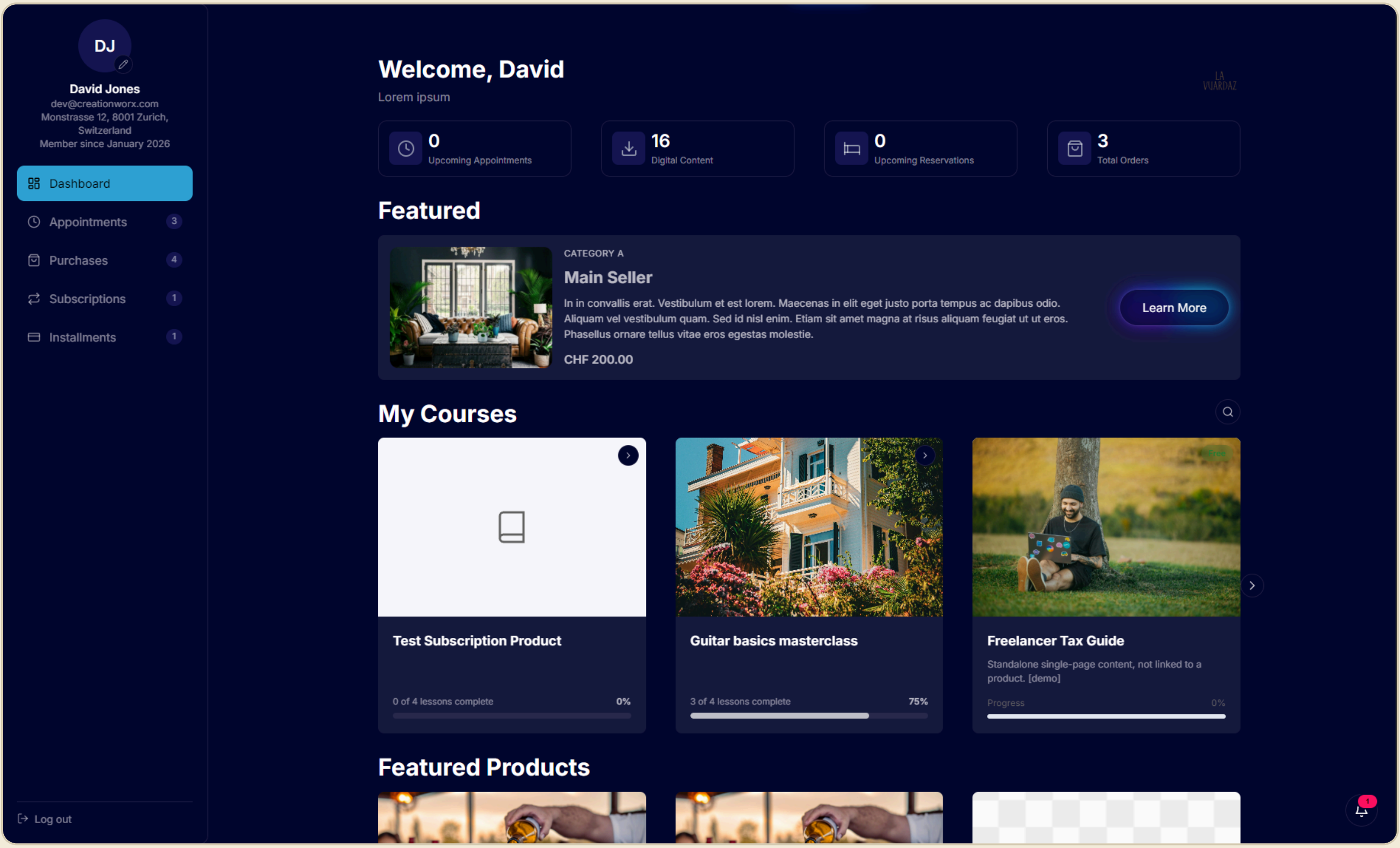
The layout is app-like rather than page-like:

- On desktop, a **sidebar** on the left lists the customer's sections, with the content beside it. The sidebar stays in place as they scroll.
- On mobile, the sidebar becomes a stack of entries. Tapping one opens that section as a full view with a back button.

Customers move between sections without page reloads, and the browser's back button works the way they expect throughout.

The dashboard

The dashboard is what a customer sees when they land on the profile. It is assembled from a few blocks, each of which you can turn on or off.



What a signed-in customer sees. Front-end, not admin.

Welcome

A greeting using the customer's first name, an optional line of text underneath, and optionally your logo shown as a circle beside it. There is also a small pen icon on the avatar that takes them to your edit-profile page, if you point it at one.

Stat cards

A row of figures summarising the customer's activity. Eight are available and you choose which to show:

- **Upcoming Appointments** — timeslot appointments still ahead of them
- **Upcoming Reservations** — accommodation bookings still ahead of them
- **Total Orders** — how many orders they have placed
- **Total Spent** — their lifetime total
- **Digital Content** — how many courses and content pages they have access to
- **Completed Lessons** — their progress across all courses
- **Submissions** — forms they have submitted
- **Upcoming (combined)** — a single count of events, accommodation and timeslots together

> 📌 *Only the first three you enable are shown on mobile; the rest appear from the sidebar breakpoint upwards. Put the ones that matter most first. Also note that "Upcoming (combined)" overlaps with the two specific upcoming stats — showing all three counts the same bookings twice, which reads as an error to a customer.*

Promoted product

One digital product, shown prominently above the rest of the dashboard, with its image, description, price and a call-to-action button. Use it for the programme you most want existing customers to buy next.

The product shown is one flagged **Featured product** in its own settings. The block hides itself automatically when there is nothing to show, or when the customer already owns the product — so it never advertises something they have already bought.

You can set your own heading and button label, and choose light or dark text depending on the background you place it against.

My Courses

A horizontal row of the courses and content pages the customer has unlocked, **most recently worked on first** — so the thing they are in the middle of is the first thing they see.

Each course can be tapped to expand its lessons, and there is a search box for customers with a large library. The block hides itself when the customer has no content.

Featured Products

A row of products flagged **Featured product** — physical, digital and events — newest first. Products the customer already owns and events that have already happened are filtered out. You set the heading, how many to show, and light or dark text.

> 📌 *Both promoted and featured blocks are driven by the same per-product "Featured product" toggle. Turning it on for a product opts it into these blocks and into the featured styling on your shop pages at the same time — see the Adding Features to Your Pages guide.*

The sections

Each section in the sidebar is loaded when the customer opens it, so a profile with years of history behind it still opens quickly. A section hides itself automatically when the customer has nothing in it — a customer who has never booked an appointment sees no Appointments entry at all.

Sections have filter chips at the top for narrowing the list down, with a count on each.

Purchases

Every order the customer has placed, as a card per item purchased — tickets, physical products, digital products, accommodation bookings, timeslots and subscriptions all appear here in a consistent format. Each card shows what was bought, when, the price, and the current status, with a download icon for the invoice or receipt.

If a purchase is on a payment plan, the card also carries the installment schedule and buttons to pay the next installment or clear the outstanding balance.

Appointments

Timeslot appointments, past and upcoming, shown on their own distinct card. For upcoming appointments the customer can:

- **Cancel** — the slot returns to availability immediately
- **Reschedule** — they pick a new slot from the live calendar and the original is released

The card updates in place, so a customer can cancel and rebook without the page reloading.

Submissions

Forms the customer has submitted or saved as drafts. They can open a submission to read back what they sent, see its status, and return to a draft to finish it.

Subscriptions

Active and past memberships — plan name, status, next billing date, and the features included. Customers can expand a subscription for details and **cancel** it themselves. Cancelling sets the membership to *in notice*: they keep access until the end of the period they have paid for, then it is removed automatically.

Installments

Every payment plan the customer holds, one card per plan, filterable by due, overdue and paid. This is the better place to send a customer juggling several plans, since they do not have to find the right order first.

Courses

Course content is reached from **My Courses** on the dashboard rather than from a sidebar entry. Opening a course shows its lessons grouped under their chapter headings, with:

- Completion status per lesson, and overall progress
- Locked lessons with the reason shown — *complete previous lesson first*, *members only*, or *coming soon* with the release date
- An **Unlock** button on chapters sold as a one-time purchase

Progress saves automatically. Customers can leave and pick up where they left off.

Notifications

Notifications reach customers through the **floating bell** rather than a profile section. It sits in the corner of every page, shows a badge with the unread count, and opens a panel where they can read messages and mark them read.

Because it is on every page, it works on the profile too — a customer does not need to go anywhere specific to see their notifications. See the Notifications guide.

What customers can do without contacting you

A well-configured profile removes a large share of routine support requests. Customers can handle all of this themselves:

- Download any invoice or receipt
- Pay an installment or clear a payment plan balance
- Cancel or reschedule an appointment
- Access their courses and track their progress
- Unlock a course chapter sold separately
- View their booking details
- Cancel their subscription
- Re-read a form they submitted, or finish one they saved as a draft
- Read notifications and announcements
- Update their own name, email, phone and address
- Reset their own password

The account pages you need alongside it

The profile shows a customer what they have. A handful of other pages let them get in, get back in, and keep their details current. Each is a builder element you place on its own page:

ELEMENT	PAGE IT MAKES	WHAT IT IS FOR
Registration	Sign up	Creating an account, with a live password strength meter and an email-availability check
Login	Log in	Signing in, with remember-me and a forgotten-password link
Reset Password	Forgot password	Requesting a reset link and setting the new password — both handled by the same element
Edit Profile	Edit profile	Updating name, email, phone and address
User Profile v2	My account	The profile described in this guide

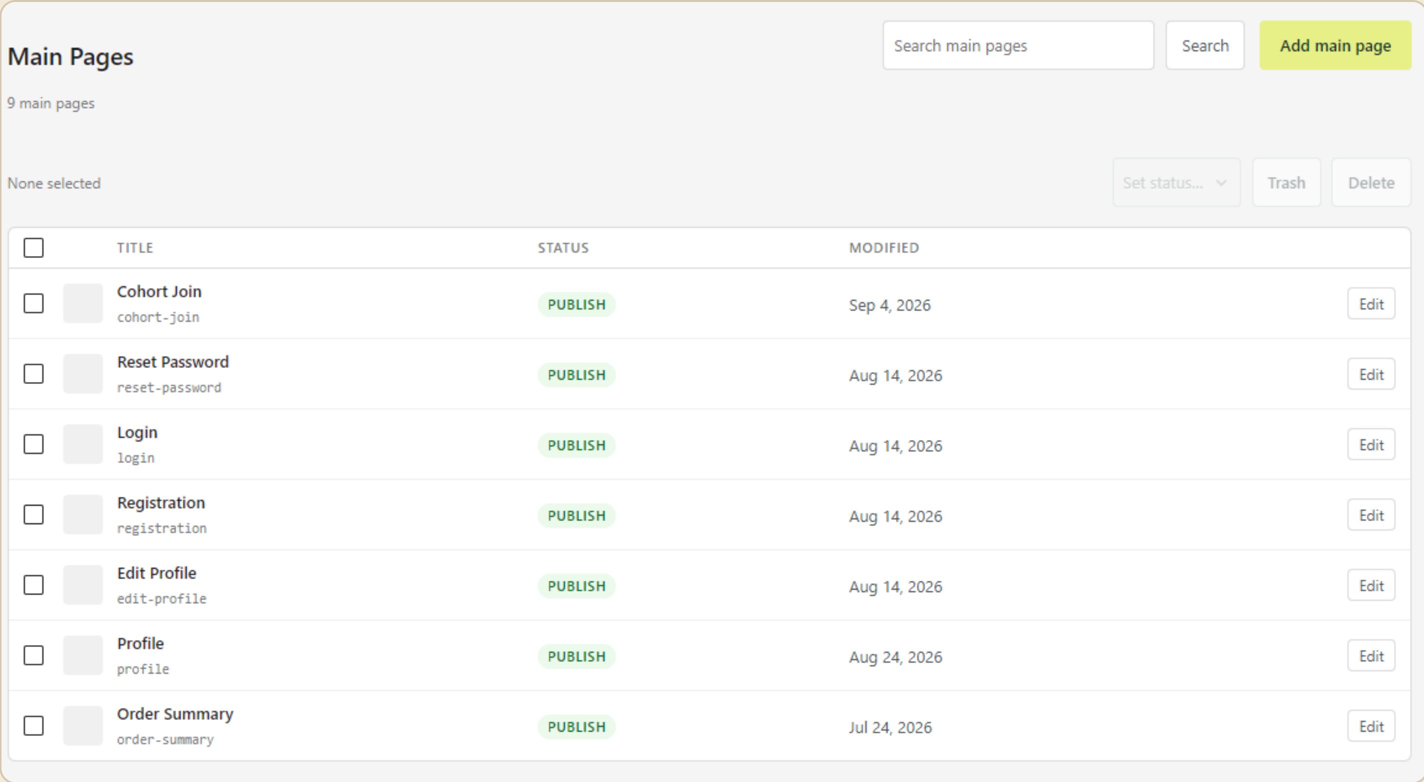
All five live under **user profile** in the builder's element list. Set them up once and link them from your header and from each other.

> 📌 *Point the profile element's **Login URL** at your own login page. Without it, a logged-out visitor who reaches the profile is sent to the standard WordPress login screen, which looks nothing like your site.*

The Customer Registration & Login guide covers each of these forms in detail.

Where these pages should live: Main Pages

These are system pages rather than content pages. They belong under **Settings → Main Pages**, not under WordPress's own Pages — that keeps them out of your normal page list and out of anything that lists your site's content, and it is where the platform expects to find the ones it needs to link to itself.



The platform's own system pages, kept out of your normal page list.

Create each as a Main Page and place the matching element on it:

MAIN PAGE	SLUG	ELEMENT ON IT
Order Summary	`order-summary` — **required, exactly this**	Order Summary
Profile	`profile`	User Profile v2
Log in	your choice	Login
Sign up	your choice	Registration
Forgot password	your choice	Reset Password
Edit profile	your choice	Edit Profile

Order Summary is not optional

The order summary is the page customers land on when they come back from paying. **Its address is built into the platform**, so it has to be a Main Page with the slug `order-summary` — no other location or slug works.

This is what the payment gateway is told to return customers to, on both success and failure, and it is where the checkout sends them after a manual-mode order.

> 📌 **If this page does not exist at that slug, every customer who pays lands on a "page not found" error.** Their order is fine — payment went through and fulfilment runs normally — but their experience is a broken page at the worst possible moment, and you will get the support email. This is the one page to verify before going live, and to check again after any tidying up of templates.

> 📌 *Do not rename it, change its slug, or move it to Pages. Placing an Order Summary element on an ordinary page does not help: the gateway is still sent to* `order-summary` *under Main Pages.*

Profile

The platform also needs to know where your profile page is, because it links customers there itself — from installment payment reminders, from course navigation, and from the emailed pay-now links.

It looks for a Main Page with the slug `profile`. Get that right and every one of those links works without further configuration.

> 📌 *If it cannot find one, it falls back to* `/user-profile/`*, which on most sites does not exist. The symptom is oddly specific: the profile works fine when customers navigate to it from your menu, but links inside emails and on lesson pages lead nowhere. If you see that, check the slug.*

The other four

Login, registration, forgot-password and edit-profile have no required slugs — nothing looks them up automatically, and you point at them yourself through the element settings and your menus. Keeping them in Main Pages alongside the others is still the tidier arrangement, and it means all your account pages live in one place.

Configuring the profile element

Open the page containing the profile in the builder and click the element. The settings worth knowing:

- **Login URL** — where logged-out visitors are sent (see the note above)
- **Edit Profile URL** — target of the pen icon on the avatar; leave empty to hide the icon
- **Welcome Subline** and **Logo** — the personal touches at the top of the dashboard
- **Sidebar Breakpoint** — the screen width at which the mobile stack becomes the desktop sidebar
- **Content Max Width** — caps how wide the content column grows on desktop and centres it beside the sidebar, so the cards do not stretch across a large monitor. Leave it on *None* for the full-width look
- **Content Padding Top** and **Content Padding Bottom** — the space above and below the content column. *Default* keeps whatever the style kit sets; the named sizes use your site's own grid spacing
- **Sections** — a switch per section: Appointments, Purchases, Submissions, Subscriptions, Installments

- **Stats** — a switch per stat card
- **Promoted Product** — the single large card above My Courses. Pick which product goes there with the **Promoted product** toggle on the product's own edit screen — that is separate from **Featured product**, which tags a product across the whole catalogue. Any product type works; if you tick several the newest wins, one the customer already owns is skipped, and with none ticked the block does not appear. A promoted product is also left out of the Featured Products grid below, so it never shows twice
- **Courses** — the My Courses rail: whether to show it, its heading, and **Card Layout**. *Expanded* lists the lessons on the card itself on desktop and keeps the compact card on mobile; *Compact* keeps the compact card everywhere, so a click always opens the course as its own page — on desktop too
- **Featured Products** — the image cards below My Courses: whether to show them, the heading, how many, and whether to fill the remaining slots with related products. Their **Text Style** is in the Settings tab alongside the other card controls
- **Logout** — whether to show a logout link, and where to send the customer afterwards

Further down the same **Settings** tab are the controls for the look of the content area:

- **Column Gap** and **Row Gap** — the spacing between cards. These use your site's own grid spacing, the same *Small / Medium / Default / Large* sizes the page builder's Grid element uses, so the profile matches the rest of the site
- **Heading Style**, **Margin Top** and **Margin Bottom** — the headings above the dashboard blocks (Promoted, My Courses, Featured Products). The style list is the same one the Headline element offers
- **Featured Products → Columns** — how many cards per row at each screen size, from Phone Portrait up to Large Screens. *Inherit* means "same as the next smaller size"
- **Featured Products → Panel Style** — picks the shape of the card. *Flowworx Default* is the house style: one photo filling the card with the text over it. Every other option turns the card into a conventional one — photo on top, text underneath — and the card and tile styles bring the theme's own background and corner radius with them, replacing the ones from the style kit
- **Promoted Product → Panel Style, Card Padding, Button Style, Title Style, Meta Style** — the same kind of controls as below, for the large promoted card. Button Style sets the card's call-to-action
- **Featured Products → Card Padding** — space around the text inside each card, in either layout
- **Featured Products → Title Style / Meta Style** — the product name and the category line above it, each with their own Margin Top and Margin Bottom
- **Courses → Columns** — how many course cards are visible across the rail at each screen size. *Default* shows one card and a peek of the next, which is what makes the rail look swipeable
- **Courses → Panel Style, Card Padding, Title Style** — the same controls as Featured Products, for the course cards. Panel Style here only changes the card's surface; its shape is the Card Layout setting in the Content tab
- **Text Style** (under Promoted Product, Featured Products and Courses) — *Light* for a dark background, *Dark* for a light one. It covers the whole block including its heading

> 📌 *Turning a section off hides it even for customers who have items in it — the switch is not the same as the automatic hide-when-empty behaviour. Turn one off only when you genuinely do not use that part of the platform.*

What you see on the admin side

There is no single "customer list" screen. You reach customers through the area relevant to what you need:

- **Sales → Orders** — search by name or email for anything they bought
- **Courses → User Assignments** — search by user to see their course access and progress

- **Sales → Subscription Management** — their memberships
- **Sales → Installment Payments** — their outstanding payments
- The booking admin screens — their accommodation and timeslot bookings

If you need to act on a customer's behalf — grant course access, cancel a booking, cancel a subscription, record a payment — the action lives in the same section.

What happens to the account at checkout

Customers never have to register before buying. Anyone can check out as a guest and the platform resolves the account afterwards. There are three outcomes, and knowing which is which saves a lot of confused support conversations.

A guest using a new email address

An account is created for them:

- The username is built from their billing name, as *firstname.lastname* — numbered if that is already taken
- A secure password is generated
- They are **logged in immediately**, landing on their profile already signed in
- They receive an email with their username and password

They can change that password at any time through your forgotten-password page. Note there is no password field on the edit-profile form — password changes go through the reset flow.

A guest using an email that already has an account

No new account is created. The order is attached to the existing account, so it joins the rest of that customer's history. But they are **not** signed in automatically — they are asked to log in to see it.

> 📌 *This is deliberate, not an oversight. Signing someone in because they typed a known email address would let anyone who knows a customer's email address reach that customer's profile, order history and purchased content simply by starting a checkout. The order still lands on the right account; only the automatic sign-in is withheld.*

A customer who is already signed in

Nothing is created, and the order attaches to the account they are signed in with — **even if they enter a different email address at checkout**. That address is used for the order's billing details and its confirmation email, but it does not create a second account and does not move the order anywhere else.

> 📌 *This is the one that produces support tickets. A customer on a shared device, or signed in under an old address, can file an order against an account they did not mean to use. If someone reports a purchase missing from their profile, check whether it landed on another account before concluding the order failed. In **Sales → Orders**, search by the email on the order and compare it with the account the order is attached to.*

Customising the email

Set your own new-account email under **Settings → General Settings → New Profile Email**. Until you do, customers get WordPress's plain default — which looks nothing like your site and is easily mistaken for spam, at exactly the moment someone has just paid you.

Customers who registered themselves chose their own password and were signed in on the spot, so they receive no such email.