How to Add User Dashboard Module in Paymattic?

Global Settings · https://paymattic.com/docs/how-to-add-user-dashboard-module-in-paymattic/

In Paymattic, the **User Dashboard** feature allows users to manage their payment activities directly from their WordPress dashboard and view all the submitted information and payment history. This article will guide you on how to add and configure the User Dashboard in Paymattic.

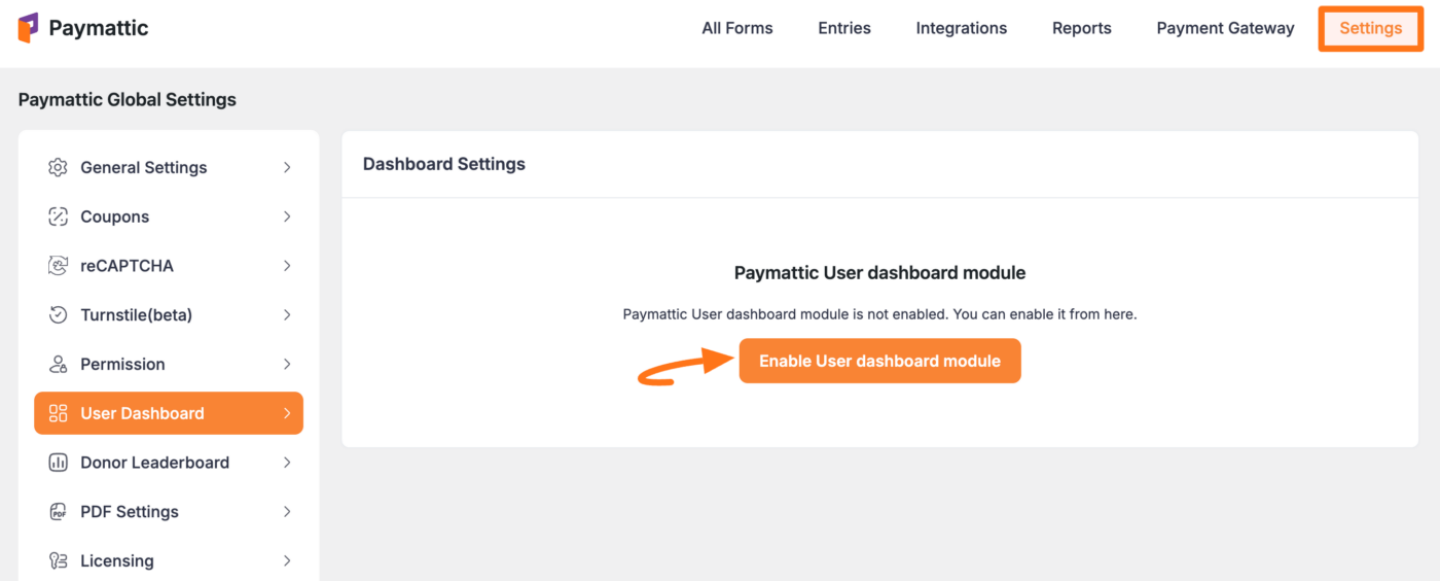
Remember, the **User Dashboard** is a premium feature and you need the Paymattic Pro Plugin to use this **Settings.**

Enable User Dashboard

To learn how to enable and set up the User Dashboard module, follow the steps with the screenshots below –

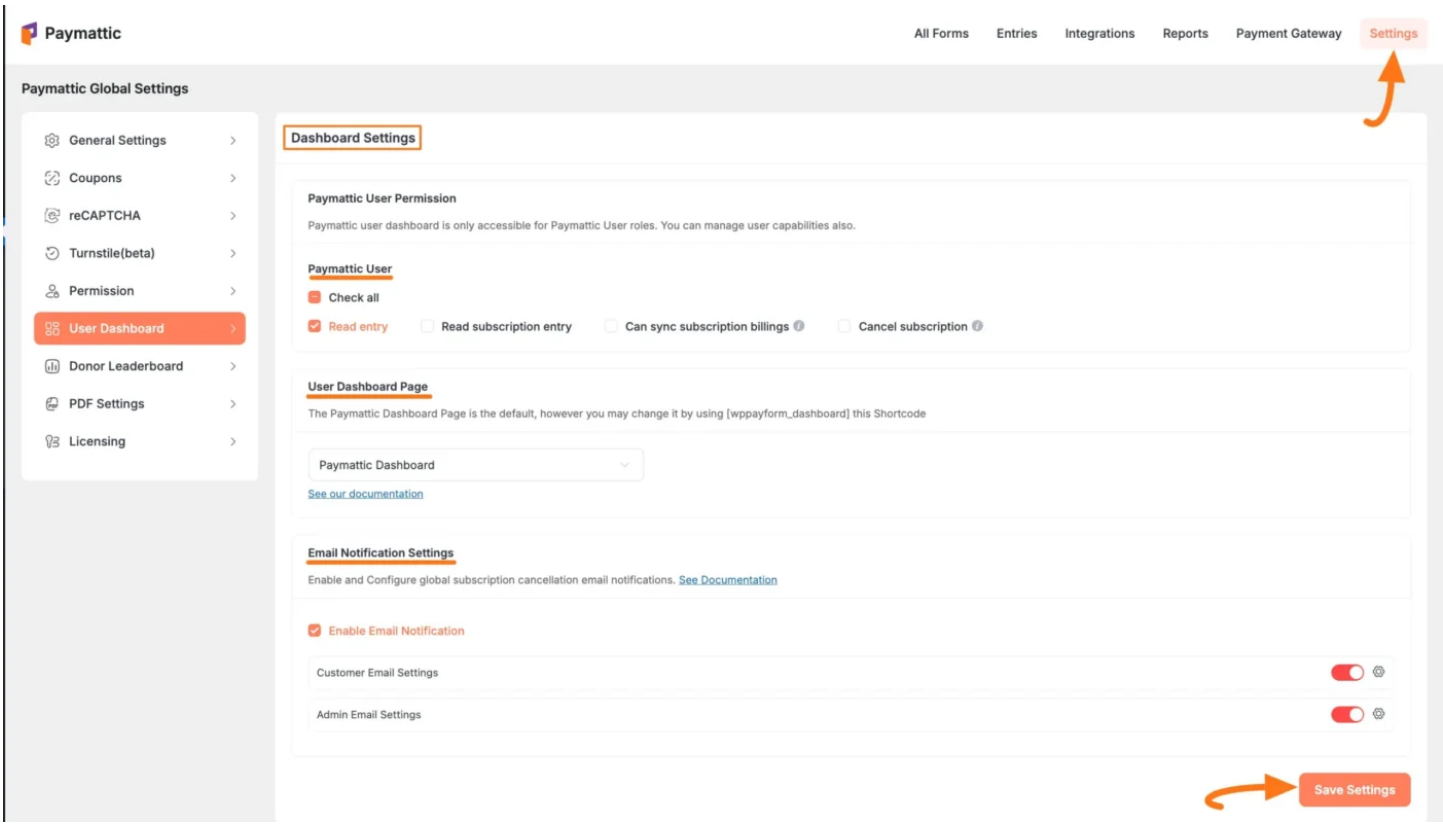
First, go to **Settings** from the **Paymattic Navbar**, open the **User Dashboard** tab from the left sidebar, and click the **Enable User Dashboard Module** button**.**

This needs to be enabled the first time you open the **User Dashboard** module.



Once you enable the module, the **Dashboard Setting**s page will appear with different settings options.

After setting up all the settings according to your needs, click the **Save Settings** button to save all your changes.



All the settings options mentioned above are briefly explained below –

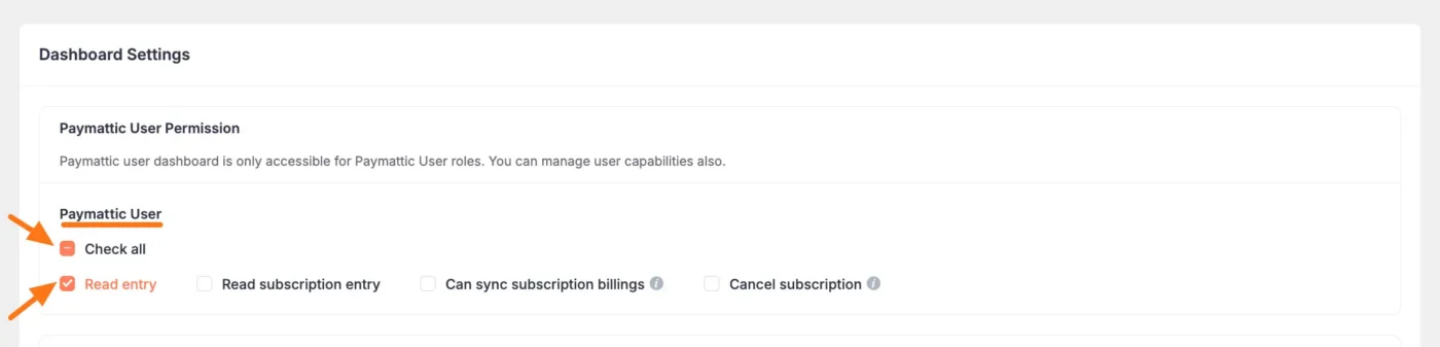
Paymattic User

The Paymattic User option allows you to choose the level of access you want to give your users.

Now, **select the roles** by clicking the **checkbox** according to your preference. For example, I selected the **Read entry** roles.

But, if you want to select all the roles at once, simply click the **Check All** button.

Remember, if you want your users to be able to cancel their subscriptions from their user dashboard, make sure to check the **"Cancel Subscription"** box.

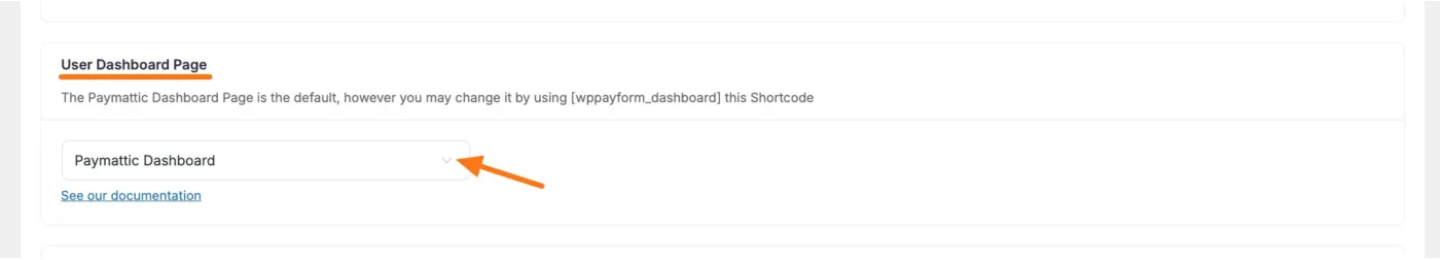


User Dashboard Page

Paymettic automatically creates a page for your users named **Paymattic Dashboard**.
Simply, select the **Payamattic Dashboard** page by clicking the dropdown arrow.

Also, if you want any custom page for your user you can select it from the Dropdown menu.

But we recommend selecting our **Paymattic Dashboard** page for your user.

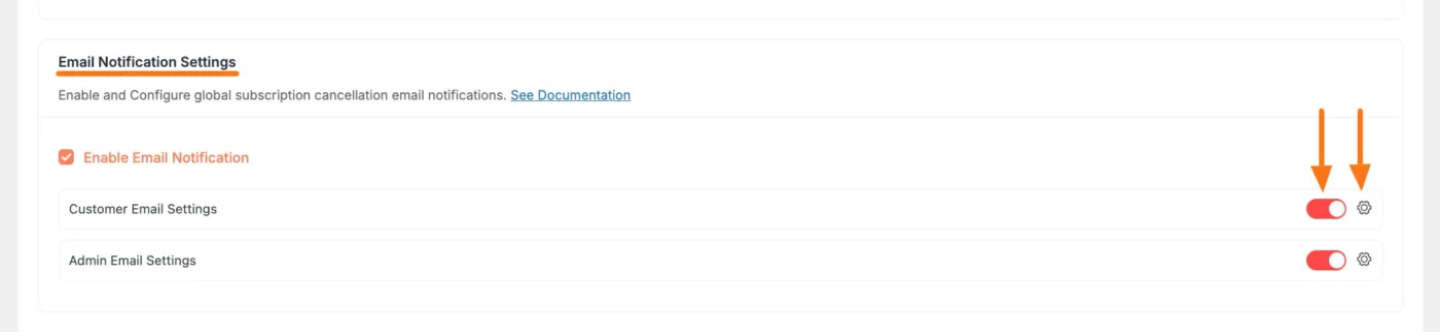


Email Notification Settings

With this setting option, you can enable **Email Notification** for Customers and Admin by clicking the **Toggle** buttons.

Then, every customer/admin will get an email notification after each subscription cancellation. Plus, click on the **Settings** icon to customize the settings if needed.

To learn about enabling email notification for Submission Cancellation in detail, read this Documentation.



Registrar in Paymattic Dashboard

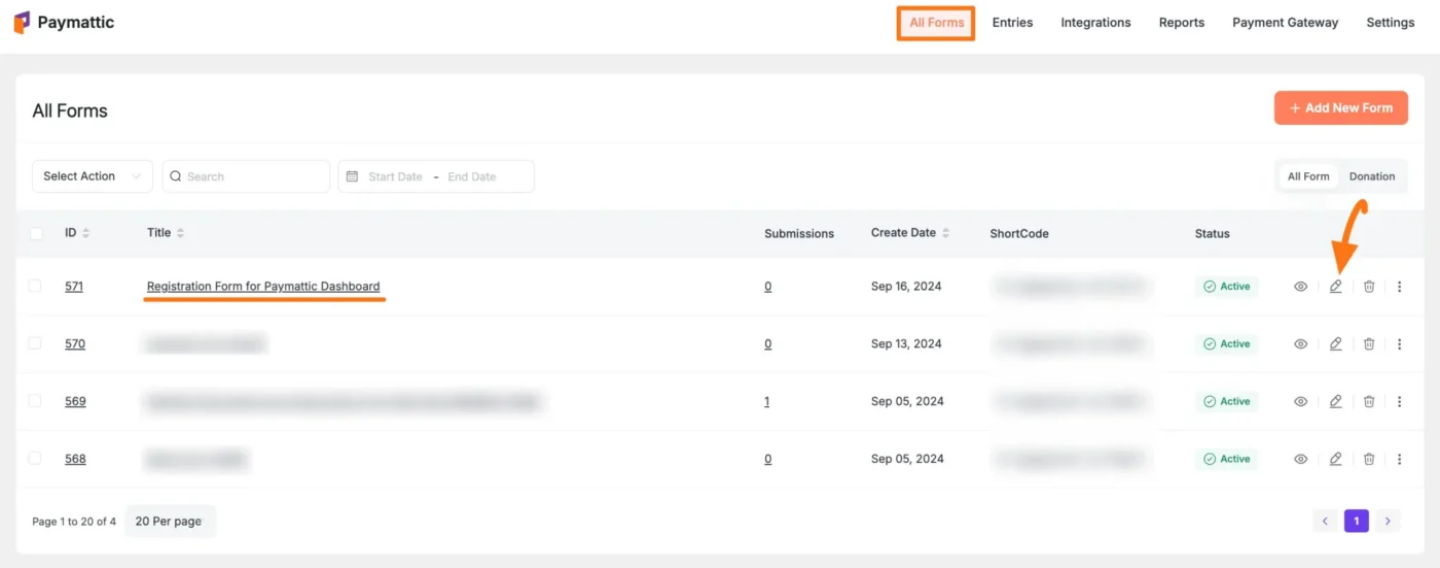
You will need a **User Registration Form** for your user to register in your Paymattic Dashboard.

Creating User Registration Form

First, go to **All Forms** from the **Paymattic Navbar,** choose any existing User Registration Form you have, and click the **Pencil/Editor** icon.

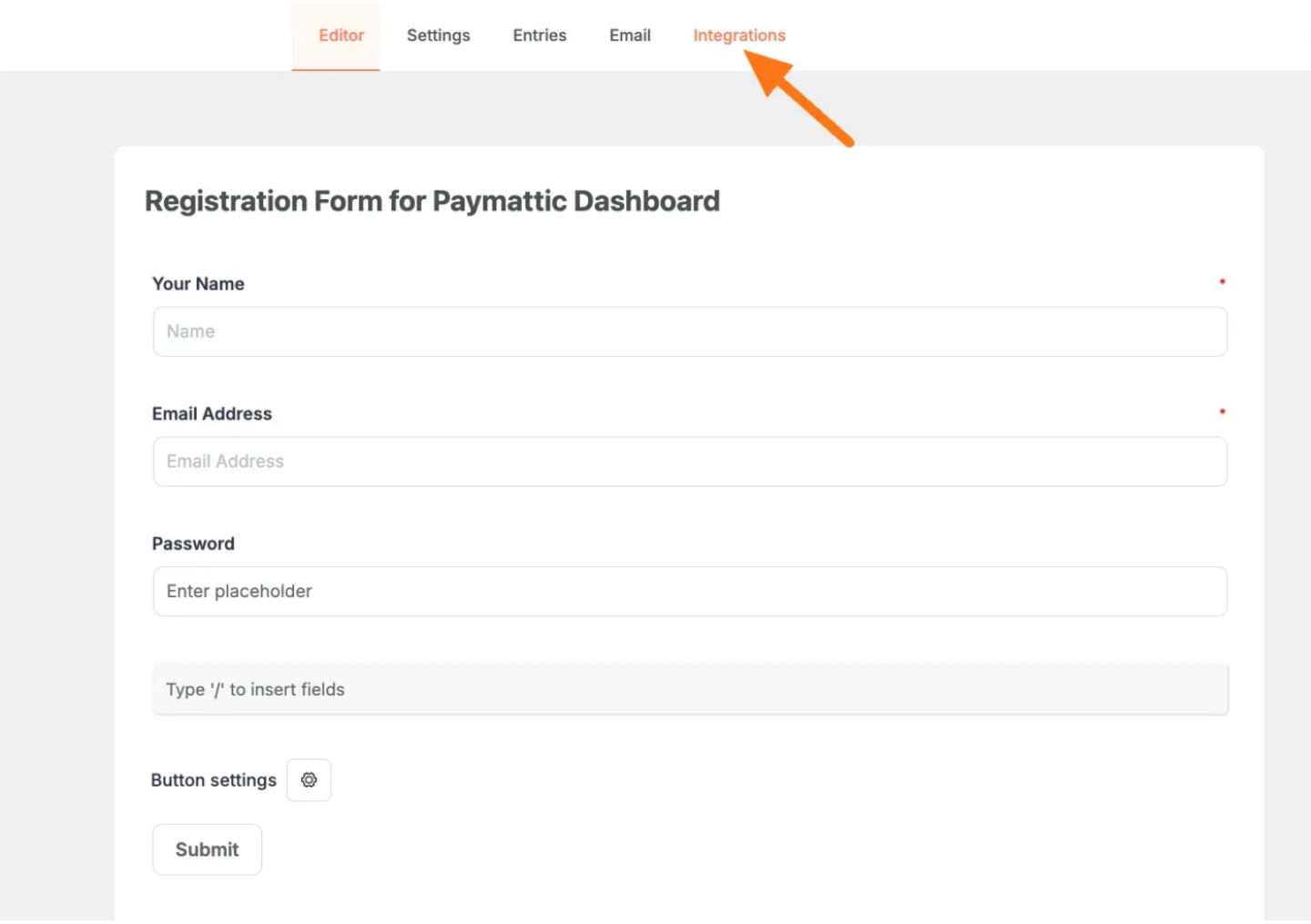
For example, I choose the **Registration Form for the Paymattic Dashboard** to show the process.

If you do not have any existing forms, read the Create a Form from Scratch or Create a Form using Templates documentation.

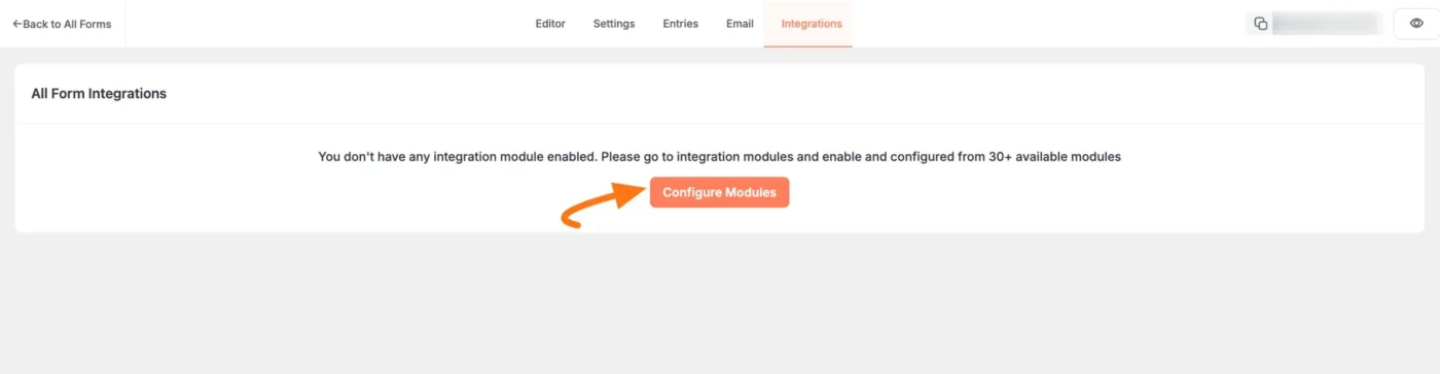


Enabling User Registration Integration

Once the **Editor** page opens, go to the **Integrations** tab.

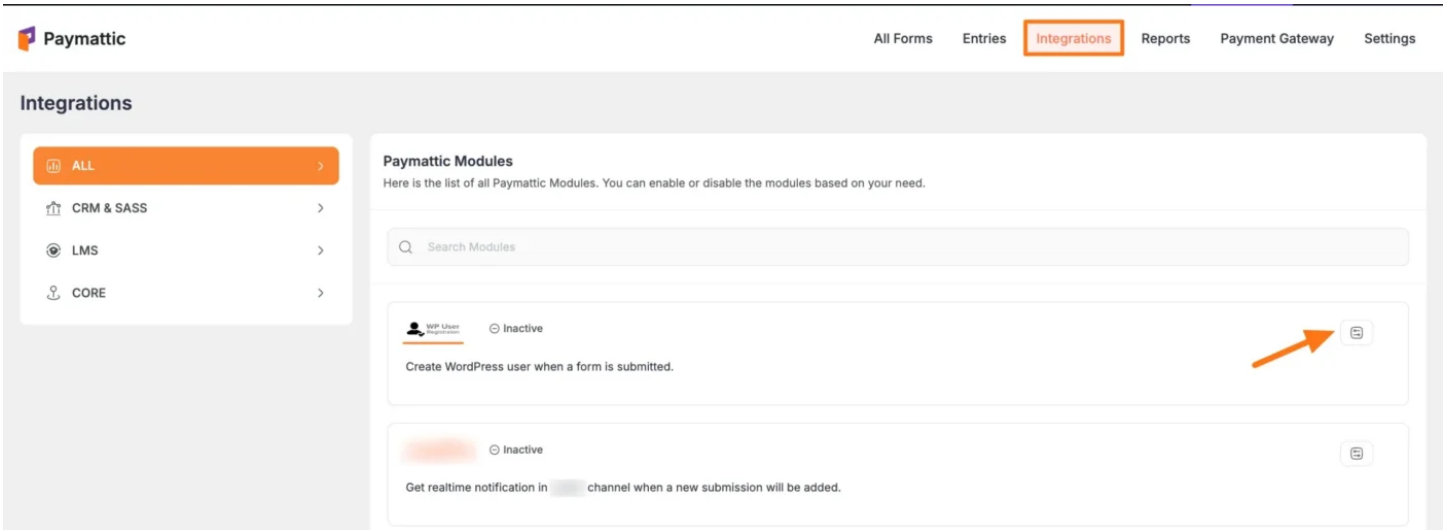


Click the **Configure Modules** button and it will redirect you to the **Integration** section from Paymattic Navbar.

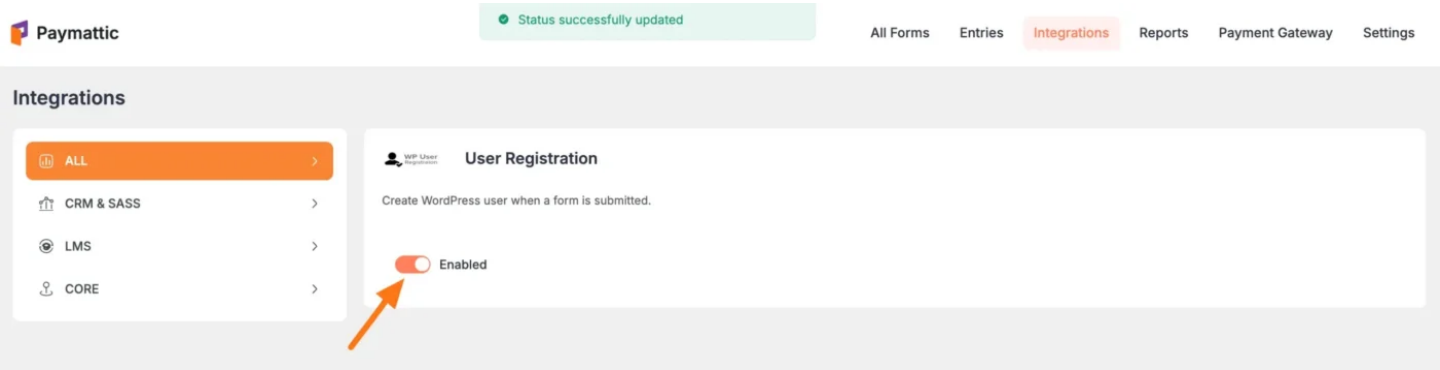


To activate the **User Registration** module, click the **Settings Icon.**

Remember, to integrate the **User Registration** feed, you need to enable the integration of the **User Registration** module**.**

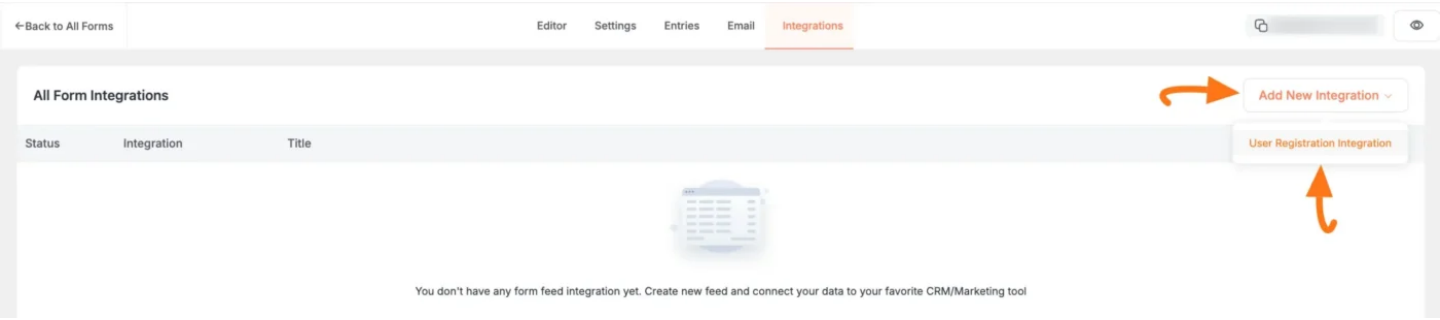


Click the **Toggle** button and the **User Registration** module will be enabled.



Adding User Registration Feed in Forms

Now, return to your chosen form’s **Editor** page, go to **Integrations**, expand the **Add New Integration** dropdown, and select the **User Registration Integration** feed.



Now, a pop-up page will appear with various settings options for configuring User Registration.

All the settings options mentioned in the screenshot below are briefly explained:

- **Name**: Here, you can set a name according to your preference for your feed.
- **Email Address:** In this field, you have to select the **Email Address**.
- **User Name**: Here, use the {input.customer_email} shortcode because your customer email will be the user name to log in to your Paymattic user dashboard field.
- **Full Name**: Here, use the {input.customer_name} shortcode
- **Password**: Here, use the {input.password} shortcode to address your password
- **Default User Role**: You can select all available user role for your user.
- **User Meta**: Here, you can add some User Meta Key and Meta Value if needed.
- **Allow the user login automatically after registration**: Enable this option and your user will be directly logged into your Paymattic User Dashboard after registration.
- **Send default WordPress welcome email to user after registration:** Here you will also get the checkbox option to give a Welcome Email Notification to your user.
- **Don’t create a user if one already exists in the database with the same email address:** If you want to disable the form submission of already existing users then just simply check this box.
- **Conditional logics**: If you have any conditions about this submission just set the conditions from the Conditional Logic option.
- **Enable this field**: If you check this option, all the actions of this feed will only run for the visitors who are in logged out state and the email that is not registered yet.

Once you set up the page, click the **Create User Registration Feed** button and the feed will be added.

Add New User Registration Integration Feed

View All

* Name

User Registration Integration Feed

Map Fields

User Registration Field	Form Field
Email Address	Email Address
User name	{input.customer *Keep empty if you want the username and user email is the same*
Full Name	{input.customer_name}
Password	{input.password} *Keep empty to be auto generated*

Default User Role

- Editor
- Author
- Contributor
- Subscriber
- Customer
- Shop manager
- Shop Accountant
- Shop Worker
- Shop Vendor
- LMS Manager
- Instructor
- Instructor's Assistant
- Student
- Tutor Instructor
- LP Instructor
- Support Supervisor
- Support Manager
- Support Agent
- Support User
- Group Leader
- Affiliate
- Affiliate
- Paymattic User

User Meta

User Meta Key	User Meta Value
User Meta Key	Select a Field or Type Custom value

+ Add More

- [x] Allow the user login automatically after registration
- [x] Send default WordPress welcome email to user after registration
- [x] Don't create a user if one already exists in the database with the same email address.

Conditional Logics

Enable conditional logic

- [x] Enable This feed

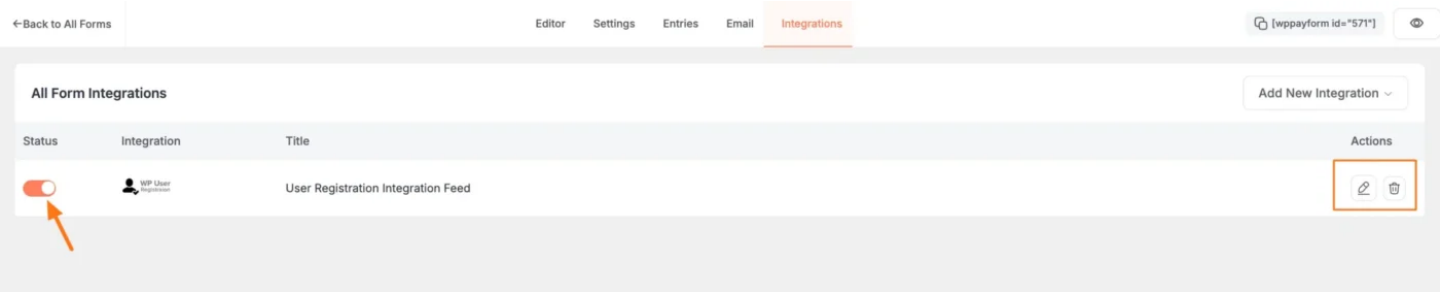
Please note that, This action will only run if the visitor is logged out state and the email is not registered yet

Please be cautious selecting transaction related fields (ex: Transaction ID), because integrations are mostly asynchronous process and transaction might not happened yet at the time of integration. As a result you might not get the selected field value!

Now you will see that your **User Registration Integration Feed** has been added here.

You can modify your user registration feed anytime by clicking the **Pencil Icon** and delete it from here by clicking the **Trash Icon**.

Also, you can disable or enable this feed anytime by clicking the **Toggl**e button if needed.

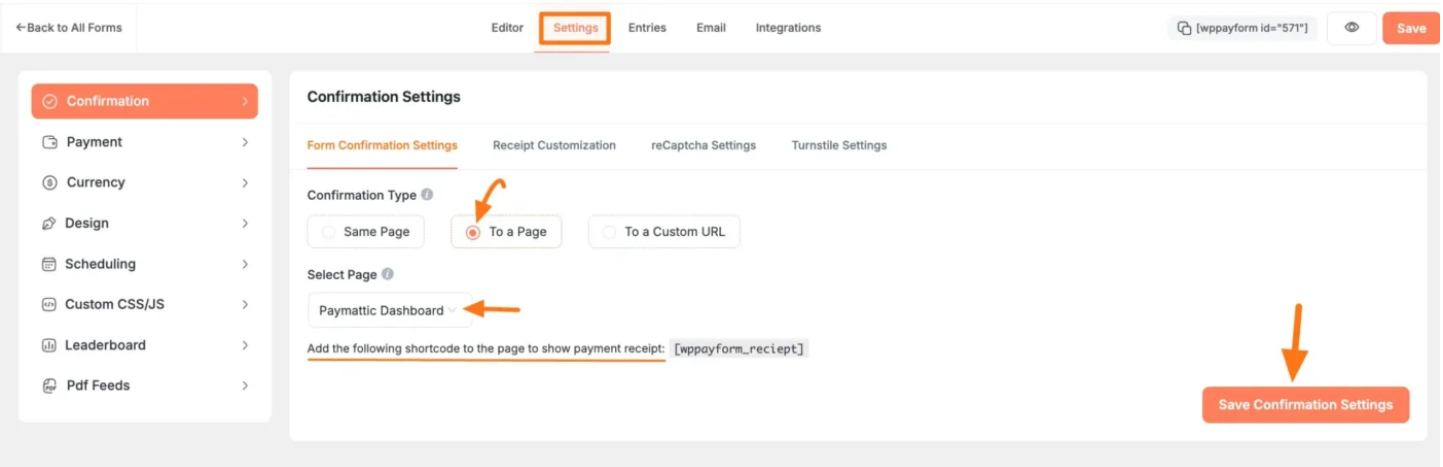


Selecting Redirection Page After Form Submission

Now go to the form's **Settings**, open the **Confirmation** tab, select the **To a Page** as the **Confirmation Type,** and select the **Paymattice Dashboard** page from the dropdown as a redirection page.

Also, to display the payment receipt to your user, you can use this **[wppayform_receipt]** shortcode to the Paymattic Dashboard page.

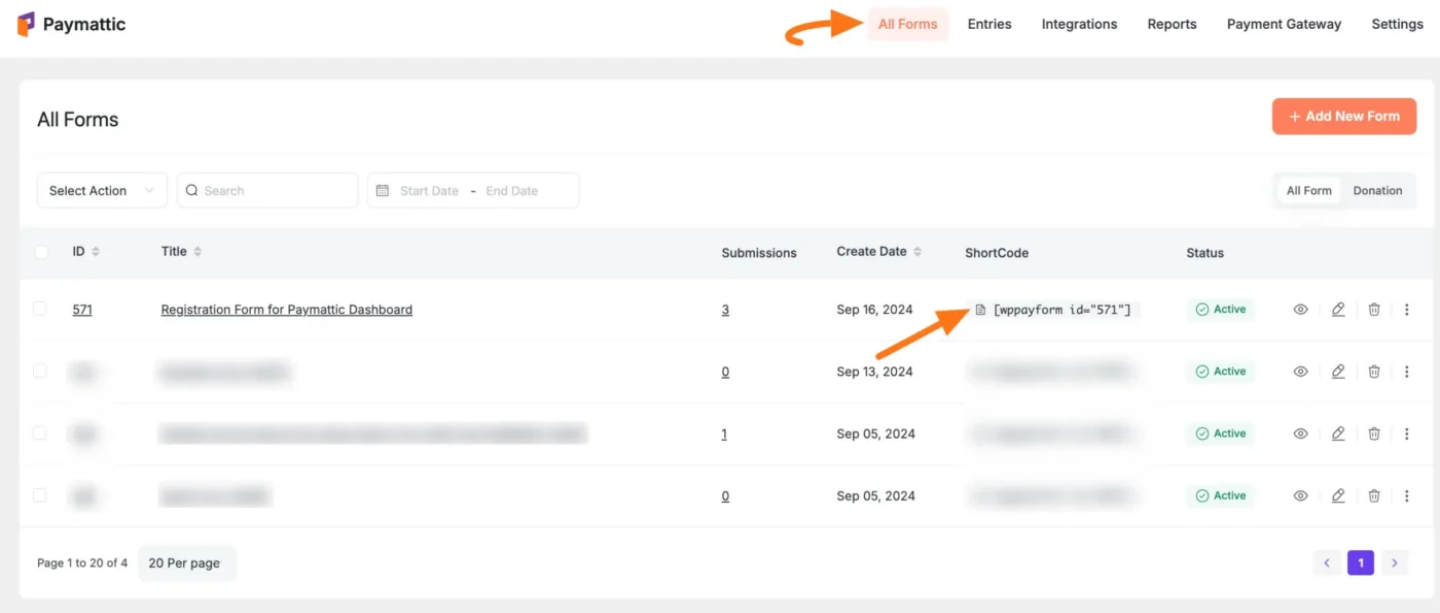
Finally, click on the **Save Confirmations Setting**s to save your changes.



Displaying User Dashboard

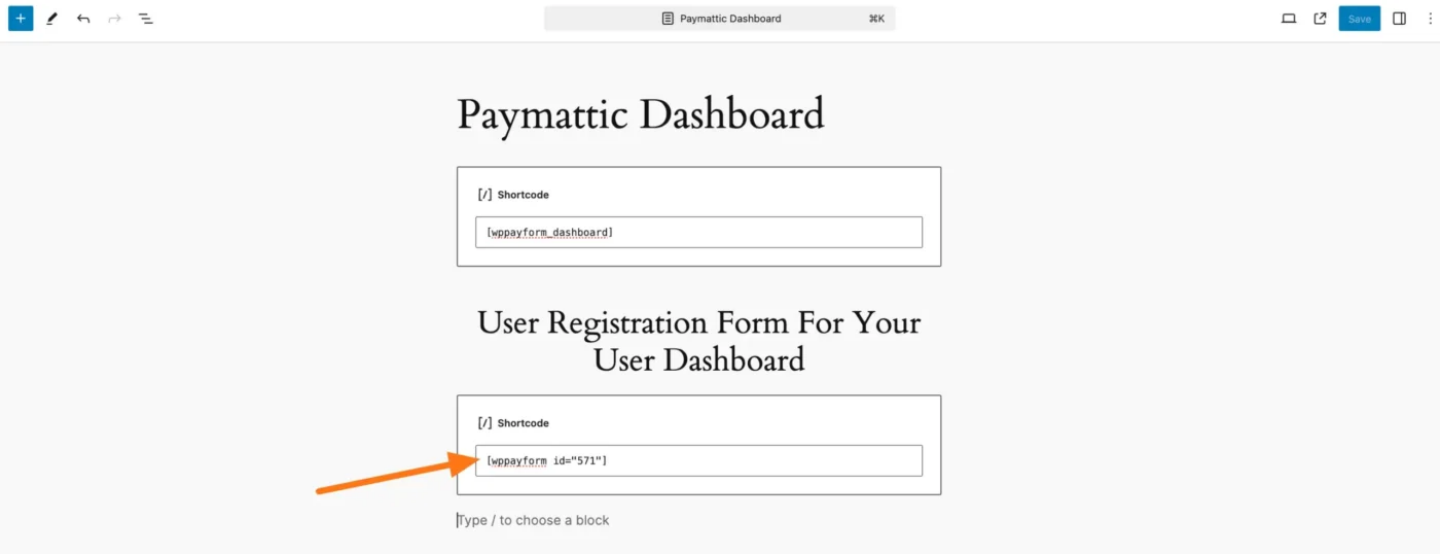
To display your **User Dashboard** through the **User Registration Form** to the front end of your desired WordPress Site, follow the steps with the screenshots below –

First, go to the **All Forms** from the **Paymattic Navbar** and copy the **Shortcode** of your **User Registration Form**.

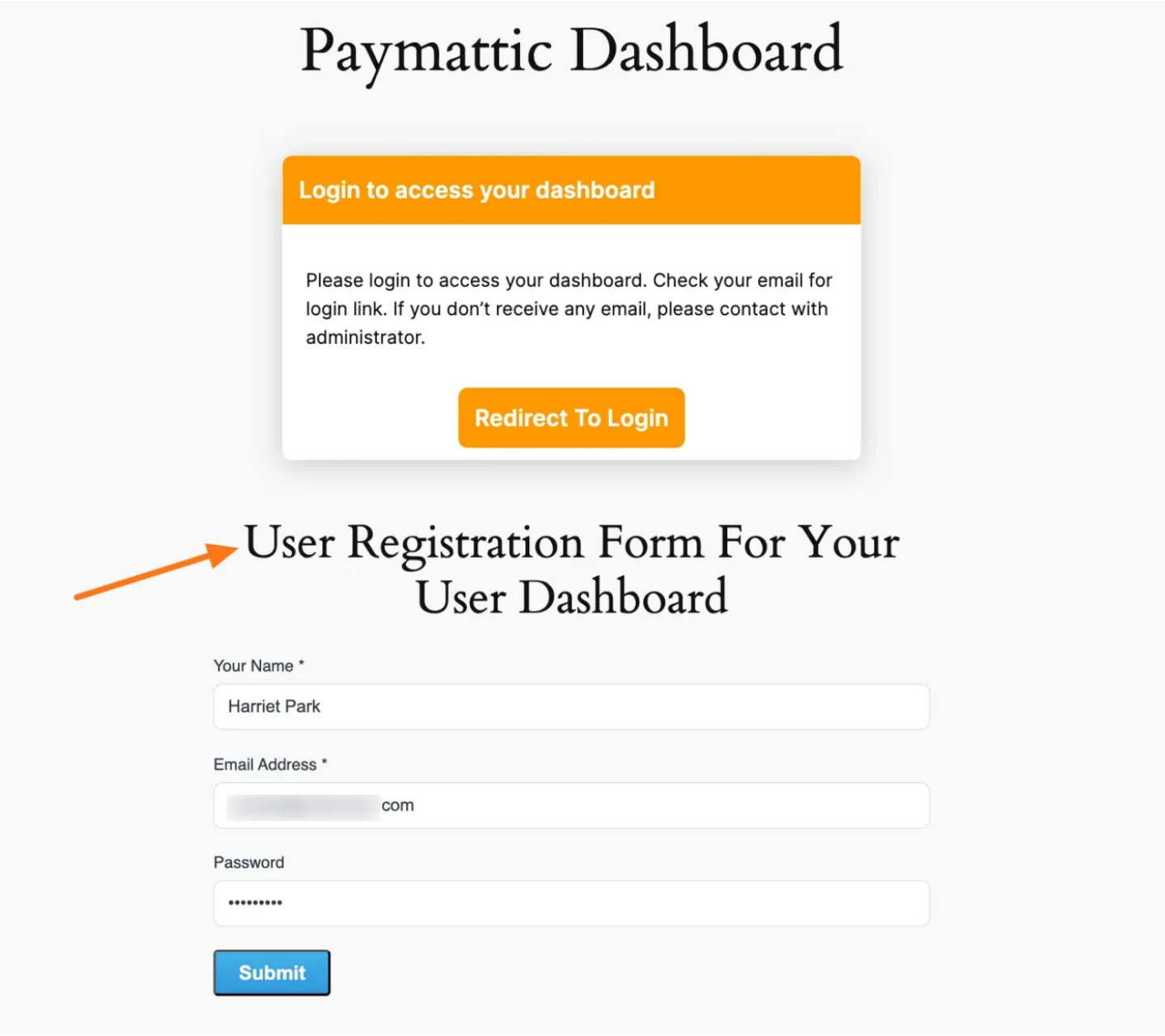


Then paste it to the page where you want to embed your **User Registration Form** and display the **User Dashboard**.

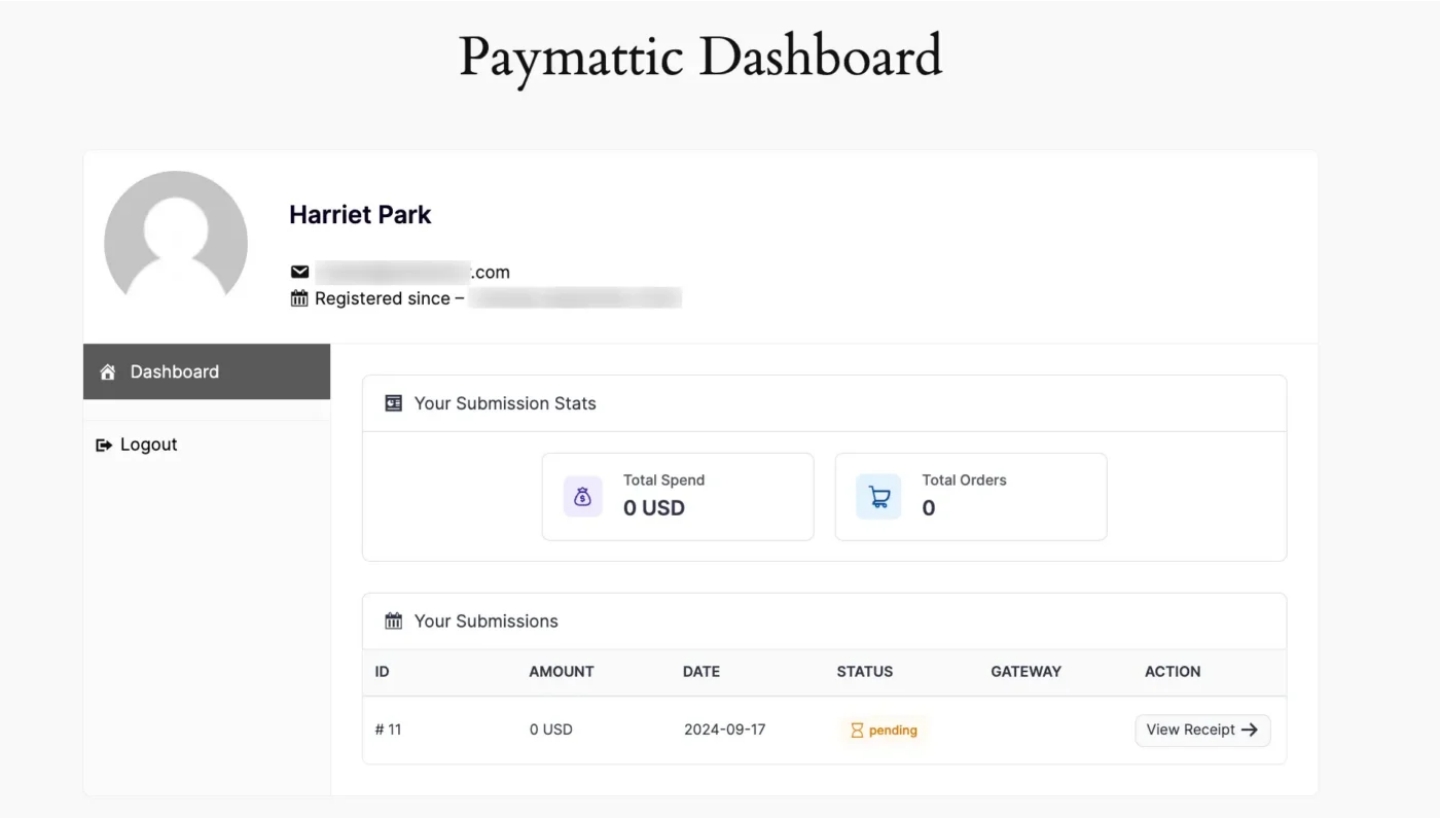
For example, I pasted the **ShortCode** to the default **Paymattic Dashboard** page to add the User Registration Form to display the User Dashboard on the front end.



Now in your front end, you will see your User Registration Form like the below screenshot. Here your user needs to fill up the form to make complete the registration.



Your user dashboard will look like the screenshot below.



Congrats! Your **User Dashboard** is ready to use now.

If you have any further questions, concerns, or suggestions, please do not hesitate to contact our @support team. Thank you.