

Unified Email Manager Complete Customer Reference

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Audience: Site owners, administrators and agency staff.

About this reference

Unified Email Manager brings site emails, contacts, newsletters, audience selection, campaigns, sequences, event emails, cart recovery, imports and reporting into one product that uses your site's existing mail connection. This reference covers every supported setup, control and operation in release 1.0.7, including visitor confirmation, opt-out and cart restore behavior.

Use Contents or the Feature index to find a task or setting. The companion Master Technical Reference gives exact fields, calculations, interfaces, storage, permissions and error identities.

What's new in 1.0.7

Release 1.0.7 follows 1.0.6 and adds Email Manager's own block builder for templates, beside a live view of the email ([Build an email with blocks](#)); sequences drawn from top to bottom with a Yes/No check and a Yes and a No path ([Yes/No checks in a sequence](#)); emails about new blog posts sent by themselves ([Email new blog posts by themselves](#)); opens and clicks counted by Email Manager itself, off until you switch it on ([Count opens and clicks of marketing emails](#)); the way from Site Emails to WooCommerce's own email design, with a note on emails built with WooCommerce's block email editor ([Design WooCommerce's emails](#)); and one support address for every email ([One support address for every email](#)), which also corrects `{{support_email}}`: it named WooCommerce's From address in marketing emails and the WordPress administration email address in event emails. The starter texts now ask customers to write to that address instead of replying. Releases 1.0.4 to 1.0.6 kept the newsletter and cart reminder buttons styled on hosts that restyle plain buttons, let AffStackDev AI's Suite layout proposals be approved, removed a warning from the Suite's list of registration issues and a notice from WordPress's log, and gave screen readers names for the filters and form fields; nothing else in this guide changed with them. Everything else in this section came with 1.0.3 and 1.0.1.11a.

Release 1.0.3 follows the launch release 1.0.1.11a. It changes nothing in how your emails are sent. With WordPress debugging on, Email Manager's own pages no longer make WordPress log a notice when the Suite shows them. The guide built into the plugin describes the current release in the words the screens show (for example **Settings → Data & retention** and an email's **Status & pause controls**), and version numbers have three parts from this release on. Everything else in this section came with 1.0.1.11a.

Release 1.0.1.11a was the AffStackDev launch release of Unified Email Manager; WordPress showed it as version 1.0.1.11.1. It contains every change since 1.0.1.10.

Contact bookkeeping never blocks a customer. Updating contact facts on login, account changes and order events uses only a short per-recipient lock. When that recipient is busy, Email Manager schedules a follow-up refresh instead of failing the checkout, login or order-status change.

Delayed event emails run once each. Each delayed event email runs under its own lease, so overlapping queue runners share the work without failed actions. A job that was not picked up is queued again, and an hourly recovery sweep gives a new callback to a due job whose queue action failed or vanished. A send that was already claimed is never repeated (see [Create and manage event emails](#)).

Pending work is kept. The event-job history trims only finished records; pending, rescheduled, paused and running jobs are never pruned.

Cart reminders and consent. A signed-out **Save your cart reminders** request permits only the reminders for the cart it saves. It no longer gives the typed address general Marketing permission, so campaigns, sequences and

event emails cannot reach an unconfirmed address through it (see [Configure abandoned cart capture and reminders](#)).

Store credit counts as payment. In campaign audiences, minimum spend counts verified AffStackDev Store Credit redemption as payment, matching the contact directory (see [Build and inspect audiences](#)).

Quieter logs. WordPress no longer reports that Email Manager's translations were loaded too early.

Your license and updates. Each Unified Email Manager license covers one live (Production) site and one test copy of it; an installation set to Staging or Development uses the license's staging place. AffStackDev's current plans do not require a Suite license, and AffStackDev Suite needs no key of its own. Download the plugin from **My Account → Downloads** on affstackdev.com; after activation, WordPress offers new releases through protected updates.

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Product setup and lifecycle

Unified Email Manager combines site email controls, email activity and delivery reports, contacts and newsletter signup, subscriber imports, campaigns, sequence automations, event emails and abandoned-cart recovery. You can use it through its own WordPress administration or through a compatible AffStackDev Suite installation. WooCommerce adds order, product, customer and cart facilities.

Install and activate

Download the Unified Email Manager plugin ZIP from **My Account → Downloads** on affstackdev.com and install it through WordPress Plugins → Add New → Upload Plugin, or replace the existing plugin through your established deployment process. Activate it on WordPress 6.5 or later with PHP 7.4 or later. Open Email Manager → License and complete licensing as described in the license chapter. When the license is active, open the dashboard and choose the task you want to configure. Completed starter setup is read-only on later page loads. Unfinished optional setup can wait for another UEM operation to finish and be checked again on a later normal administration request; it does not send email or replay a saved campaign.

Set up your site's mail transport through its existing SMTP or API plugin. Email Manager uses that transport. Configure a supported provider connection if you want verified provider outcomes in addition to local WordPress results. For commerce features, activate WooCommerce. For newsletter signup, configure signup settings and place the supplied shortcode. For campaigns, create or select an audience and template before preparing the campaign. Each chapter explains every available setting and operation for its area.

License availability and retained information

An active license enables the product's operational features. If entitlement becomes unavailable, the administration presents licensing and retains saved work, contacts, preferences and history. Existing unsubscribe and privacy safety remain available. Resolve the license state in the license screen to restore operational access; do not recreate saved records merely because the product is locked.

Deactivate reactivate or remove

Deactivation stops scheduled product work and keeps stored data. Reactivation brings the product's modules back according to its license and each module's job state. Review campaign progress, event-job history, sequences, imports and recovery records before resuming work that was interrupted.

Ordinary uninstall retains saved product data but removes local license credentials and clears product schedules. Deleting the plugin does not free a remote license activation slot. Use the license deactivation operation while the plugin is installed when you need to release that slot.

For deliberate data removal, a site administrator can configure `UEM_REMOVE_DATA_ON_UNINSTALL` as true before uninstalling. The cleanup removes the UEM-owned settings, tables and record types selected by the uninstall routine. The technical storage inventory identifies the exact selection. It does not delete WordPress accounts, WooCommerce orders or remote provider lists. Make the decision before removing the plugin, since ordinary removal and explicit data removal have different outcomes.

Finding and using every workspace

Open Email Manager in WordPress or its Email Manager section in AffStackDev Suite. The top tasks are Dashboard, Contacts, Newsletter, Audiences, Import & Migration, Campaigns, Automations, Site Emails, Reports and Settings. On smaller screens, expand All sections. Expand All tools & settings to reach every specialist screen directly.

Complete workspace map

Task	Available workspaces and controls
Dashboard	Product summary, contact/import entry points, campaigns, site emails, activity and diagnostics.
Contacts	Stored contacts, filters, contact details and lists; related import operations.
Newsletter	Newsletter contacts, signup settings, signup records and email preferences.
Audiences	Saved audience definitions, presets, editing and membership inspection.
Import & Migration	Upload contacts, pull WordPress/WooCommerce contacts, provider API connections, installed subscriber sources and import history.
Campaigns	Campaign preparation, scheduling, sending/progress, templates and branding, sending limits.
Automations	Sequences, event emails and abandoned carts.
Site Emails	Discovery, native controls, overrides, previews, explicit tests and pause controls for supported definitions.
Reports	Email activity, delivery analytics and campaign reports.
Settings	General settings, delivery providers, diagnostics/support, licensing, pause controls, protected definitions and retention.

Site Emails is one half of the plugin. Contacts, Newsletter, Audiences, Import & Migration, Campaigns, Automations and Reports are sections of the other half, the screen titled **Marketing & Automation**; Site Emails names it for the emails Unified Email Manager owns ("managed in Marketing & Automation"). The manuals follow these tasks. Use the feature index when you need a particular field or operation. Some controls depend on an installed source plugin, WooCommerce, a selected record, current license state or a configured provider.

Interface preferences and navigation

In Settings → Interface, enable or disable Enhanced Admin UI and save. When enabled and supported by your browser, the product can move between screens and submit eligible forms without a full page load. A Working indicator and success/error messages show progress. AffStackDev Suite can also disable enhancement globally; the product then uses normal PHP pages. The same server operations are available through those pages. The template block builder needs the enhanced interface ([Build an email with blocks](#)).

Uploads and protected PHP-owned forms can still reload the page. Import/contact jobs have their own progress controls. If a batch stops because the server response is unavailable, reload the page and use Continue processing on the retained job. A batch already running may cause the progress control to wait for its saved result. Do not create another import solely because a browser progress response stopped.

The HTML editor offers formatting, links, lists, undo/redo and source editing when WordPress editor support is available. Plain text uses a text area. Optional content blocks and image selection are described in Templates & Branding; server validation still determines what can be saved.

Diagnostics and support export

Open Settings → Diagnostics & support. Overview shows versions, definition counts, active pause rules, available mail functions, transport clues and WooCommerce email states. Use Discovery after activating or updating a mail-producing plugin, choose Refresh discovery now, and return to Site Emails. Delivery tracking shows configured provider feedback. Technical details lists adapters and their availability, plus the most recent controlled mail attempt. Compare its attempt identity and time with the action being investigated. It shows whether the actual mail call was accepted, rejected or uncertain, and which part of the mail path was observed. It may report that queuing was requested; that does not establish queue completion or inbox delivery.

In Support report, choose Download diagnostic report to download the current text report. The built-in report includes environment and state summaries while excluding message bodies, customer addresses, reset tokens, provider secrets and test recipients. It is useful for explaining which adapter, pause or transport state produced the current administration view. Detailed message outcomes are in Email Activity and Delivery Analytics. The latest-attempt diagnostic is also included in the support export; a later email can replace it, so it is not a complete history.

If you cannot access an administration screen, use an account with the product's management permission. A site integration can change that permission from its default WordPress administrator capability. If the screen presents only licensing, follow the License chapter to restore operational access.

Site email discovery content and pauses

Open Site Emails to inspect messages recognized from WordPress, WooCommerce, compatible source plugins and Email Manager-owned definitions. Search by title, source, trigger, description or native ID; filter by source or state; move through pages of 20 results. Open Manage for a definition or follow its native settings link.

Understand the displayed states

Native state is the source's enabled/disabled setting. Manager pause is Email Manager's separate suppression rule. Effective state combines them: a source-disabled email stays disabled; an enabled email with a matching supported pause is paused. A source-controlled or unknown state means the adapter cannot supply a universal enabled switch.

Capability labels explain which operations the actual source supports. An observed message can appear in activity without being safely editable or pausable. WooCommerce extensions can add definitions automatically when they expose their email objects. After changing installed sources, use Diagnostics → Discovery → Refresh discovery now.

Edit WordPress core email overrides

WordPress definitions cover the administrator new-user notification, user account notification, password reset, user password-change notice, administrator password-change notice, user email-change notice and site administrator email-change notice. All except the administrator new-user notification are protected. The administrator password-change notice has no manager pause control because the source supplies no corresponding send-decision filter.

Open a definition's Content settings. Check the fields you want Email Manager to override and enter subject, message, recipient or headers. Unchecked fields retain their native values. Use `{{native_subject}}`, `{{native_message}}` and `{{native_headers}}` when wrapping the corresponding original content. A

protected message override must include `{{native_message}}` so the source's access/reset information survives. Save the override. Choose Restore original to remove it completely.

Preview shows the saved override; it cannot manufacture the original reset token or event-specific body. To send an explicit test, prepare an active subject and message without unresolved native placeholders and enter a valid test recipient. The test does not create an account or reset a password. It carries `[TEST]` and uses your configured site transport.

Edit WooCommerce and extension emails

Open the email's Content settings. Available controls come from that email's native form: enabled, subject, heading, additional content, recipient, email format, Cc, Bcc and preheader can appear where supported. Set the fields and save. You can also open the email's native WooCommerce settings. Email Manager does not edit a PHP email template from this screen.

Preserve existing `{placeholder}` tokens when revising subject, heading, additional content or preheader. If you deliberately want to remove them, select the allow-removal confirmation. Use commas or semicolons for recipient, Cc and Bcc lists, with valid addresses. Choose an email format supported by the source. If saving reports a field error, redisplay the settings before retrying because an earlier field may already have saved.

In Preview & test, supply an order ID if the source supports order context and you want an existing order as a sample. Preview renders the email without triggering an order transition. For a test, enter an explicit recipient and send. The test strips source To/Cc/Bcc recipients, adds `[TEST]` and sends without attachments. Source-specific rendering may require more context than that email exposes; follow its error message or native editor when a sample cannot render.

Design WooCommerce's emails

WooCommerce designs its own emails. With WooCommerce's email improvements on (Settings → Emails in WooCommerce), you choose the logo, the colours, the font, the alignment and the footer there and see the result in a live preview. Site Emails has a **Design WooCommerce's emails** button that opens that screen. The wording you save in Email Manager (subject, heading, additional content and the other fields above) is shown inside that design.

WooCommerce also has a block email editor, a WooCommerce feature that is switched off at the start (WooCommerce → Settings → Advanced → Features). While it is on, WooCommerce builds its own order and account emails from blocks you arrange in its editor. Such an email takes its heading and its additional content from that editor: the Heading and Additional Content fields in Email Manager are then not used, and the email's screen in Email Manager says so, with an **Edit this email in WooCommerce's editor** link. The subject you save in Email Manager still applies. Switching the block editor off again brings back the fields you saved.

Pause one definition a source or the whole manageable catalogue

In **Status & pause controls**, choose a single-definition pause or the source-level operation where available. Select indefinite, one hour, four hours, 24 hours, three days, seven days or a custom future date/time in your site timezone. Add an optional reason and save. Protected/security emails require the explicit confirmation before suppression or supported native disablement.

In Settings → **Pause controls**, choose global noncritical pause to suppress supported nonprotected definitions, or global pause including protected definitions with confirmation. Unknown outgoing mail and definitions

without pause support are outside these manager rules. Review the active rules table for scope, target, expiry, reason and protected inclusion.

Resume removes only the selected scope's rule. If the email remains paused, check a source or global rule as well. If it remains disabled, inspect the native enabled setting. Expired rules stop applying at their expiry even if cleanup runs later. Explicit tests can bypass manager pauses without deleting them.

Manager owned messages and outcome checks

Site Emails can also list newsletter confirmation, cart recovery, campaigns, sequence steps and event emails. Follow their own editing links. Event content, tests and triggers are in Automations → Event Emails. Cart settings are in Abandoned Carts. Campaigns and sequences retain their own scheduling/stop controls.

A test accepted by the local transport is an accepted send attempt. Check Email Activity for local results and Delivery Analytics for configured provider outcomes. A manager suppression is intentional and is recorded separately from failure. If an email is missing after a source change, refresh discovery; if a definition is enabled and unpaused, inspect its source trigger, activity and mail transport.

Create and manage event emails

Open Automations → Event Emails. This workspace sends one configured message after a registered user/store event. Saved emails, Create an event email and Scheduled sends are separate panels. Search saved names, subjects or trigger keys, filter by trigger, and switch between Active and Trash. Lists show 20 messages per page.

Every built in event starter

Starter	When it runs	Available recipient
New user registered	WordPress creates a user	That user, site administrator or custom address.
New order created	WooCommerce creates an order	Order customer, site administrator or custom address.
Order status changed	Order enters your selected status	Order customer, site administrator or custom address.
Post-purchase check-in	Order becomes Completed	Customer by default; starter waits three days.
Purchase questions/help	Order becomes Completed	Customer by default; starter waits five days.
Review request	Completed order without an available native review-request source	Customer by default; starter waits seven days; marketing consent required.
Product low stock	WooCommerce emits its low-stock event	Site administrator or custom address.

WooCommerce starters appear when commerce support is available. A compatible integration can register additional approved starters. Retained payment-pending, failed-payment and on-hold reminders are retired/source-owned records; they cannot be enabled or duplicated as new Email Manager sends. Use the corresponding source-owned WooCommerce email instead.

Create a message and configure every delivery field

Choose a starter. Enter a descriptive Name, Subject and Message body. Choose HTML or Plain text. The shared content editor can append text, images, buttons, product/article cards or reusable sections and apply saved branding once. New starters begin disabled.

Choose the Message purpose: Marketing/engagement requires current consent and includes unsubscribe handling; Service notification is for a necessary nonpromotional event message. Both require an active product license. Review requests always use Marketing. Changing purpose does not grant consent or change source-owned receipts/security messages.

Choose a supported Recipient rule. If you select Custom address, provide one valid custom recipient. A user or order-customer rule takes the current email from the referenced user/order. Administrator uses the site's administrator address. Select the target status for an order-status-change starter.

Set Delay to zero for immediate sending or an amount in minutes, hours or days, up to 90 days. Set optional From name and From email, or leave both blank to use the site's transport configuration. Save, review Preview & test, then enable through Delivery rules or the saved list when ready. Saved editors separate Message, Delivery rules, Preview & test and Scheduled sends.

All available event placeholders

Use the Trigger & available placeholders panel for the exact fields approved for the selected starter. Type them as `{{field_name}}` in subject or body. Unapproved placeholders are rejected.

User starters provide site name/URL, user ID, username, display name and email: `site_name`, `site_url`, `user_id`, `user_login`, `user_display_name`, `user_email`.

Order starters provide `site_name`, `site_url`, `order_id`, `order_number`, `order_status`, `order_date`, `order_total`, `order_item_names`, `customer_first_name`, `customer_last_name`, `customer_full_name`, `customer_email`, `payment_url`, `order_view_url`, `review_url`, `support_email`, `previous_order_status` and `new_order_status`. Order and review links use current order/eligible product information. A field without a current value renders empty.

Low-stock messages provide `site_name`, `site_url`, `product_id`, `product_name`, `product_sku`, `stock_quantity` and `product_url`. Stock quantity is empty when the source does not manage a quantity.

Order eligibility and review safeguards

For completed-order follow-ups, expand Order eligibility and review safeguards. Select included/excluded products or categories. No selection means no restriction for that group. When both inclusion groups have values, the same unrefunded item must satisfy both. Exclusions remove matching items; choosing a parent category includes descendants. Product rules can include variations.

The selectors show up to 200 entries plus saved selections. Enter additional comma-separated product, variation or category IDs when needed; each group retains up to 200 unique IDs. Choose Partial refunds: stop after any partial refund, or continue only while qualifying unrefunded items remain. Deleted orders, orders no longer Completed and fully refunded orders stop follow-up work.

For a review message, choose whether to skip when approved on-site reviews exist for all qualifying products. The check uses the purchaser's billing email and on-site product reviews. Standalone review Event Emails give a registered WooCommerce review source precedence and skip identifiable overlapping Email Manager review messages. If a native review definition becomes available, manage that source email in Site Emails.

Preview controlled test and scheduled sends

Save the definition, open Preview & test and refresh the sample. Without a Context object ID, the starter supplies sample values. With an ID, the preview uses that existing user, order or product. For a controlled test, enter the explicit test address and optional context ID. The test sends only to that address, carries [TEST], bypasses manager pause and marketing eligibility/frequency, and does not create an event enrollment or change the referenced object. It does not grant the real recipient marketing permission.

Open Scheduled sends for the most recent 20 jobs, or a definition's Scheduled sends for its pending work. Each row shows due time, email, object, scheduler driver, status and reason. Pending/rescheduled jobs offer Cancel and a future Reschedule date/time in the site's timezone. Native rescheduling accepts only pending, rescheduled or paused work; it cannot reopen a completed, failed or uncertain send. Delayed jobs reread the definition at send time, so current saved wording applies. Waiting sends are never dropped to make room in the job history (only finished records are trimmed, keeping the newest 500), and a waiting send whose background task failed or disappeared is queued again by an hourly check without ever sending a message twice.

Frequency-limited marketing jobs can defer within seven days. Jobs whose object disappeared, order state changed, definition was disabled/deleted, license became unavailable, recipient changed, consent failed or manager pause applied can be skipped or failed with an explicit reason. They do not automatically catch up after the original cause is removed. Deactivation cancels active event jobs. A running claim recovered after interruption, a thrown send or a nonboolean send result becomes outcome_unknown; it is held without replay. A strict false records failure. Review the recorded state before choosing an explicit new operation.

Duplicate disable trash restore and delete

Duplicate creates a separate disabled copy. Disable stops normal execution for that definition. Trash cancels pending sends and retains the message in Trash. Restore brings it back disabled. Permanent deletion requires the confirmation checkbox and removes the definition and its retained job entries. A source-owned or retired trigger cannot be duplicated or enabled.

If an event produces no message, check whether the starter was enabled when the event occurred, the exact target status, eligible unrefunded items, recipient validity, consent, pause and license. Check Scheduled sends for delayed work and Email Activity for actual mail attempts. A preview or test alone does not fire a real event starter.

Contacts filters purchase facts and contact uploads

Contacts combines imported contacts, matching WordPress accounts, WooCommerce customers/guest buyers and newsletter information by email. A row shows name/email, linked account and roles, purchases, affiliate/newsletter classification, location, last order/login/activity, current marketing reason and source labels. Importing a contact does not create an account or send an email.

Every filter and list control

Use Find a contact for a name or exact email. Expand Filter contacts to set Has an account, Paid purchaser, Repeat paid buyer, Only zero-value orders, Affiliate/partner and Recorded newsletter subscription to Any, Yes or No. Set country/state code, exact provider/source name and account role when needed.

Expand Order, login, activity and signup dates. Each date can require Recorded, Not recorded or Any, plus inclusive on/after and on/before dates. Unrecorded dates do not match a date range. Boundaries use your site's timezone. Clear filters preserves your selected sort; apply a new search or sort to return to the first page.

Sort by name, email, country, state, account, affiliate, purchaser, repeat buyer, free-only classification, last order/login/activity, signup, all orders, paid orders, free orders or spend. Choose ascending/oldest first or descending/newest first. Click sortable column headings to change direction. Choose 10, 25, 50 or 100 results per page; the product saves your valid list-size selection for your account. First/previous/numbered/next/last and Go to page controls let you navigate all results.

To reuse the selected group, enter an Audience name and choose Create audience. It saves all contacts matching those filters, rather than only the visible page, and opens audience preview. The audience remains filter-based and is checked again during sending.

Understand purchases spend and activity

Paid purchasers have positive net retained order value. Verified redeemed AffStackDev Store Credit contributes to that value alongside remaining cash. A fully refunded paid order has no remaining paid value; a genuinely zero-value order is not a paid purchase. Repeat buyer requires at least two paid orders. Imported spend can support purchaser classification but does not by itself prove repeat orders.

Current WooCommerce Processing/Completed history supplies current purchase facts, using order APIs and merged account/billing-email history. Spend sums the store's current currency. A plus sign indicates bounded or partly unknown history. Unavailable Store Credit authority can leave a credit-paid value unknown instead of classifying it as free. The row distinguishes current WooCommerce facts from imported totals.

Last login begins with recorded Email Manager activity or an imported login column. Last active is separate and can include current WooCommerce activity. Signup is account registration or available subscription/import information. Blank/Not recorded dates mean no retained fact, rather than proof that the person was inactive.

Pull contacts from this site

Open Import & Migration → Pull WordPress/WooCommerce contacts. Choose Pull contacts from this site and keep the progress page open. The job reads site users, order customers/guest billing emails and newsletter subscribers, merging matching contacts. It refreshes source and purchase facts without creating accounts or sending messages. The screen shows the last complete pull and progress through each source.

If processing stops, return to the job from Import history and choose Continue import within its 24-hour availability window. Source failures preserve progress for a retry. Completion shows new contacts, matched/updated rows, account matches and skipped rows, with links to Newsletter audience, Create audience and View contacts.

Upload and map any contact export

In Import & Migration → Upload contacts, select a UTF-8 CSV or TSV with a header row. It can contain up to 10,000 contacts, 10 MiB and 128 uniquely named columns. Comma, semicolon and tab separators are detected. Every row must have the same number of columns; split larger lists into multiple files. Provide an optional List name, or use the filename-derived label.

Choose Upload and review contacts. Check the detected email column and five-row sample. Expand Change columns and choose a file column or Not supplied for each field. Email is required. Other fields are optional and grouped as follows:

Group	Mappable information
Contact details	Email, first name, last name, full name, email/subscription status, opted-out/unsubscribed flag, bounced/blocked flag.
Location	Country, state/region, city, postal code.
Purchase/activity	All order count, verified paid order count, verified zero-value order count, total spend, last order, last login, last active, signup/created date, affiliate flag.

Use Review contacts or Update preview after changing mapping. Review shows unique valid emails, duplicate rows to merge, invalid rows to skip, and opted-out/blocked/held rows. Dates can be ISO-style date/time or a ten-digit timestamp; unsupported/future dates become unrecorded. Yes flags accept 1, true, yes or y. Map purchase counts separately when you have reliable facts.

Choose Import contacts after reviewing. Keep the progress screen open or use Continue import. Matching emails update the same contact and link its existing site account. Missing columns do not blank existing facts. Existing opt-outs, bounce/delivery restrictions and holds remain authoritative; unrestricted contacts can join the directory newsletter audience under its current eligibility policy. This is separate from the explicit consent checks used by event emails and sequences.

Cancel retry and understand retained restrictions

Cancel this import stops/removes the temporary job and staged rows; it does not undo contacts already imported. Temporary review/progress is available for 24 hours, while imported contacts remain in the list. Import history shows up to 20 recent jobs for your account. An expired job requires a new upload/site pull; matching email merge prevents ordinary duplicate identities.

An opted-out row records a recipient stop. A bounced/blocked row records delivery suppression. Archived/deleted/held status adds an administrative hold. Later ordinary imports do not clear these restrictions. A prior privacy erasure marker prevents automatic reimport. Review the displayed marketing reason and use the applicable preference/source-review workflow rather than editing an unrelated purchase filter.

The WordPress personal-data tools can export and erase the UEM contact profile. Erasure retains a keyed suppression marker to stop automatic restoration. It does not delete the source WordPress account or WooCommerce orders. Contact import and directory administration require both the product management capability and WordPress `manage_options`.

Newsletter signup consent and opt outs

Newsletter contacts combines known site contacts, imports and signup identities. Current availability is shown as Available, Opted out or Blocked, with a reason. You do not have to move imported contacts into a second list. Recorded confirmation is history; current recipient restrictions and the selected sending purpose decide eligibility.

Browse newsletter contacts and original records

Open Newsletter contacts to search by name or exact email, choose any shared contact sort/direction and select 10, 25, 50 or 100 results per page. Rows show current status, linked account, affiliate classification, location, paid/free/total orders, spend, last order/login and sources. The available/opted-out/blocked summary applies to the displayed page.

Open Signup and source records to inspect Confirmed signup records, Pending signup records or Imported source records. Sort by Date added or Record number in either direction. Original source membership detail explains retained imported status. To clear a signup record, check Confirm and choose Clear signup record and stop newsletters. This saves a stop for that address before removing the identity; it does not delete the WordPress account, contact profile or order.

Enable the signup form and complete confirmation

Open Signup form settings. Select Enable the newsletter signup form, enter the Signup statement (up to 600 characters as constrained by storage), and save. Place `[uem_newsletter_signup]` in a WordPress Shortcode block on the intended public page.

The visitor enters email and optional first name, explicitly checks consent and chooses Request confirmation. The product returns the visitor to the site with a status message. For an eligible request, UEM asks the configured mailer to send a link valid for 48 hours. The mailer can accept or queue a message before it arrives; a requested or accepted result is not proof of inbox delivery. Opening the link displays the statement; choosing Confirm my signup completes the subscription. Opening the link alone does not subscribe.

The form must be refreshed after its statement changes or it expires. Confirmation requests are normally limited to one per address/hour, 20 per IP/hour and 500 sitewide/day. If the mail call definitely rejects a request, the visitor sees a failure notice and can explicitly submit again after one minute. The IP and site limits still apply. UEM does not automatically resend. An uncertain result asks the visitor to contact the site owner before trying again and retains the normal hold. Existing, restricted, pending and throttled addresses otherwise receive a general response without revealing their subscription state. In Signup/source records, the Confirmation email column shows the saved attempt status, time and any rejected retry time; subscription confirmation is a separate state. Delivery/admin blocks need review before signup can proceed. A newer opt-out prevents an older confirmation from replacing it; request a fresh confirmation after resolving the preference. The host must provide Sodium or OpenSSL authenticated encryption for protected subscriber addresses.

Configure checkout opt in and account choices

Open Email Preferences → Checkout opt-in. Choose one Consent source: no UEM checkbox, UEM opt-in on classic/block checkout, or an existing supported integration that supplies consent. It starts off. UEM mode requires an opt-in statement of 1–500 characters and an active license. Save consent setup.

The UEM checkbox starts unchecked. Not checking it leaves an existing preference unchanged. Checking it can record new consent but does not clear an earlier opt-out. Block checkout places the optional field in Order information; that block must exist on the checkout page. The captured statement, time, source and bound recipient are retained as order evidence. This checkout choice records opt-in; it is separate from newsletter email-address confirmation. A guest's Save your cart reminders request is narrower: it permits only that saved cart's reminders and never records general Marketing permission (see [Customer capture and supported carts](#)).

In WooCommerce Account details, an authenticated customer can keep their current preference, unsubscribe or deliberately subscribe when permitted. Saving applies to the unchanged current account email; refresh if the account email changes. Recipient unsubscribe can be renewed there, while administrative/delivery suppression requires store review. Guest checkout does not renew an earlier opt-out. Existing-integration mode expects the supported consent filter to be implemented and does not create a duplicate checkbox or guess another plugin's private data.

Manage recipient preferences and stop marketing

Email Preferences offers Preference records, Manage recipient and Checkout opt-in. Records shows counts and the 15 most recent keyed recipient hashes, consent/source, suppression and UTC update. Manage recipient offers Grant consent, Suppress recipient and Restore after renewed consent. Enter the relevant email and optional source/reason. Restore requires the renewed-consent confirmation. Grant alone does not clear an existing suppression.

Recipients can use the marketing unsubscribe link to stop marketing without signing in. Newsletter preference links offer Keep current preference or Unsubscribe from all Marketing emails. A fresh signup/confirmation or supported account renewal is needed to resubscribe after a recipient stop. These stop controls remain active while the product is locked. They do not stop native order/account/security messages.

Newsletter and contact privacy export/erasure are available through WordPress personal-data tools. Erasure retains a keyed stop marker. Source accounts/orders remain owned by WordPress/WooCommerce.

Build and inspect audiences

An audience saves a reusable selection of contacts. Open Audiences → Create audience, choose Everyone/all known contacts, Paid purchasers, Repeat buyers, People with accounts, Affiliates/partners or Custom, then name and refine it. Saving an audience sends no email.

Every recipient source and rule

The advanced Recipient source choices are Contacts directory, WordPress accounts, Registered WooCommerce customers, Guest purchasers, All newsletter contacts, Everyone/site accounts/WooCommerce billing contacts/imports, and Imported subscribers from a selected original list. The imported-list source requires a valid approved source list.

Contact filters include account, paid/repeat/free-only purchase classification, affiliate, recorded newsletter subscription, location, role, source, name/email and recorded/date ranges for orders, login, activity and signup. Use the Contacts chapter for the exact meanings. Everyone scans site accounts, billing contacts and imports/signups, counting each email once in campaign review.

Advanced fields can additionally require selected account roles, minimum/maximum qualifying orders, minimum net spend (AffStackDev Store Credit spent on an order counts as payment, like cash), a purchase within a day window, inactivity since a prior purchase, another recency window, a required product ID, included/excluded purchased product IDs and included/excluded categories. ID fields accept comma-separated IDs, retaining up to 200 unique IDs per group. Day rules support up to 3,650 days; maximum count up to 1,000,000; zero disables the numeric restriction.

Product-history exclusion excludes the recipient who bought an excluded product/category. This differs from completed-order follow-up rules, where excluded items can be removed while other items still qualify. Categories include descendants through parent matching. Guests cannot match an account-role requirement. Inactivity requires an earlier purchase; it does not select someone who never purchased. Large incomplete history is excluded with an explicit reason when the rule needs full facts.

Inspect reset or remove an audience

Choose View matching contacts for up to 25 candidates at a time, with current eligibility and account status. Use First page/Next contacts. The campaign recipient review supplies the final count after all rules and restrictions. The saved audience list has 15-record pages and links to Edit and Create campaign.

The selected-audience summary exposes every active restriction, including advanced sections that are collapsed. Renaming it Everyone does not clear filters. A Store-wide notice still uses its saved selection. To deliberately remove all selection restrictions, open Edit and check On save, reset this audience to everyone/all known contacts. This changes every use of that saved audience; rebuild any affected campaign recipient review. Opt-outs and delivery/admin blocks still apply.

An audience cannot be deleted while a campaign or sequence references it. Change/remove those references first, then use the confirmed delete operation.

Templates branding and every content tool

Open Campaigns → Templates & Branding. Template library, Create/Edit template, Preview, Branding & sections and Review links are separate panels. Filter the library by category and use its 15-record pages. Starters are editable saved copies; product updates do not overwrite your wording.

Every template field and context

Enter Name, Category, Data context, Subject and optional Preheader, then write the message: under **How to write this email**, choose **Block builder** ([Build an email with blocks](#)) or **HTML editor** (its Message body and content blocks are described below). Expand Format, sender and template notes to choose HTML/Text, optional From name/email and use-case notes. Leave sender blank for the site's transport configuration. Save a changed Data context to refresh its approved placeholder list.

General is campaign-safe. Order is for order-triggered follow-ups. Cart supplies recovery context. New posts is for the emails a New posts automation sends about your blog posts. Subscription is a content context that needs an actual supported source workflow; choosing it does not create a renewal trigger. A template already referenced by a campaign/sequence must retain a context compatible with that workflow.

Categories cover General, Post-purchase, Reviews/customer photos, Customer care/education, Abandoned cart/checkout, Newsletters/announcements, Subscriptions/memberships, Win-back/re-engagement and Promotions/product launches.

Every included starter

The library includes Simple branded message; Thank you/getting started; Thank you/review request at 21 days; Later check-in/photo request around day 105; Purchase questions/help; Friendly abandoned-cart reminder; Monthly newsletter; Subscription renewal content; Win-back check-in; and Product launch announcement. The draft review/photo sequence waits 21 days then another 84 days. Day labels on content do not themselves schedule a send; configure the actual sequence/event delay.

Starter setup checks both its completion version and its saved list of accounted-for starters. Once complete, opening another administration page does not rewrite those records. AJAX navigation does not seed content. Existing edited starters and deliberately deleted starters stay as you left them. If setup is incomplete, a later normal administration request can finish the missing work while retaining earlier successful copies. If a deliberately removed template was needed by the draft recipe, UEM does not recreate it to satisfy that recipe. A

storage or validation error still needs investigation; waiting for another writer is not a guarantee that every setup error will resolve itself.

Build an email with blocks

A new template opens in the **Block builder**; the **HTML editor** is the other choice under **How to write this email**. The builder shows the email's blocks from top to bottom with a **Live view** of the email beside them (below them on a narrow screen).

- **Add a block** lists Heading, Text, Picture, Button, Products, Articles, Divider, Space, Two columns, Social links, Saved section and Plain HTML. A new block is added at the end and opens for editing.
- **Edit** opens a block where it is; the live view follows as you type. Drag a block by its handle (≡) to another place, or move it with its ↑ and ↓ buttons. **Duplicate** copies a block and **Remove** deletes it.
- **Colours, font and width** sets the page background, the email background, the text colour, the link and button colour, the font (the reader's own system font, Arial, Helvetica, Verdana, Trebuchet MS, Georgia, Times New Roman or Courier New), the email width (480 to 800 pixels) and the space around the content. A heading, a button or a divider can have its own colour.
- **Wide screen** and **Phone** show the email at both sizes.
- **Save this block as a section** keeps a block among your saved sections, for the Saved section block and for the HTML editor's content blocks.

Block	What you fill in
Heading	Words, size (large, medium or small), alignment and colour.
Text	Words. Bold, italic, underline, links and lists may be written in HTML; an empty line starts a new paragraph.
Picture	The picture's web address, or a picture from the Media Library; words for readers who cannot see it; an optional link; its width as a share of the email; alignment.
Button	Words, link, button and text colours, alignment and rounded corners.
Products, Articles	An optional heading and up to 12 products or published articles (the lists show up to 100 products and 50 articles; type the IDs of others), as cards one under the other or two side by side. A card copies the name, picture and link when you save; product cards show no price, so the product page gives the current one. Hidden, private and password-protected items are refused.
Divider	Colour, thickness and width.
Space	Height.
Two columns	The column widths (half and half, one third and two thirds, or two thirds and one third). Each column has an optional picture, heading, text and button. On a phone the columns sit one under the other.
Social links	The pages to show: Facebook, Instagram, X, YouTube, TikTok, LinkedIn, Pinterest and your website. They are shown as words, which every email program displays.
Saved section	One of your saved sections, copied in when you save.
Plain HTML	Your own HTML; scripts and style sheets are removed.

A link can be a web address, a mailto: address or a placeholder such as `{{shop_url}}`. Placeholders also work in words and are filled in when the email is sent; the live view fills them in for a sample reader and names any placeholder the template's data context does not have.

When you save, the template keeps its blocks and Email Manager turns them into the email that is sent: HTML built from tables, with the styles written into each part, so email programs show it as designed. Preview, test sends, campaigns and sequences send exactly that email. A block that is not finished stops the save, and the message names the block by its number and says what it needs (for example a picture without its address). The block builder needs the enhanced interface ([Interface preferences and navigation](#)); with it off, saving keeps a template's blocks as they are.

Switching an email built with blocks to the **HTML editor** keeps the HTML its blocks made and leaves the blocks behind. Switching an HTML email to the **Block builder** starts with its HTML in one Plain HTML block, which you can keep or replace with blocks. AffStackDev AI can build a template with blocks too; a template it writes as HTML becomes an HTML-editor template.

Every content block and reusable setting

In the HTML editor, expand Add content when saving. Up to three optional blocks are shown per save:

Block	Fields and result
Text/heading	Optional heading and text/HTML copy.
Image	Absolute HTTP(S) image URL, alternative text and optional caption; Media Library picker when available.
Button	Button label and absolute HTTP(S) link.
Product cards	Heading and up to 12 selected/additional product or variation IDs.
Article cards	Heading and up to 12 published article IDs.
Reusable section	One saved section from your library.

Initial selectors show 30 products and 20 articles; add comma-separated IDs for others. Selected products/parents must be published and visible, and articles must be published posts. Password-protected/private/hidden content is rejected. Product cards omit prices and link to the product's current page. Article cards use a short excerpt. Cards and sections become editable saved content rather than live shortcodes.

In Branding & sections, set brand name, logo URL, footer/contact details and the **Support email address** (see [One support address for every email](#)). Save a named section with its text/HTML or select a section to remove. The library holds up to 20 sections. Select Wrap this message with saved branding once on save only when you want a new wrapper; leave it unchecked for an already branded body. Blocks append once each time selected in a save. Content-library changes do not rewrite existing messages or scheduled campaign content. Composed bodies are limited to 200 KB.

One support address for every email

`{{support_email}}` is the address your emails give customers for questions. Enter it once as **Support email address** under Templates → Branding & sections; every email that uses the placeholder then names it: newsletters, sequences, cart reminders, event emails and their previews. The field shows the address in use now

and where it comes from. Left empty, Email Manager uses AffStackDev Support Desk's support email when Support Desk is active and you saved one there, then WooCommerce's Reply-to address when it is switched on, then WooCommerce's From address, then the WordPress administration email address. The From address is often a mailbox nobody reads, so entering your real support address is worth it. The starter texts ask customers to write to `{{support_email}}`, not to reply to the email; templates you already saved keep your wording.

All template personalization and previews

General/Subscription uses `{{site_name}}`, `{{first_name}}`, `{{display_name}}`, `{{account_url}}`, `{{shop_url}}`, `{{site_url}}`, `{{support_email}}`, `{{cart_url}}`, `{{checkout_url}}` and `{{unsubscribe_url}}`. Order additionally uses `{{order_number}}`, `{{order_date}}`, `{{order_status}}`, `{{order_total}}`, `{{order_items}}`, `{{order_url}}`, `{{first_product_name}}`, `{{first_product_url}}`, `{{review_url}}` and `{{google_review_block}}`. Cart adds `{{cart_items}}`. New posts adds `{{post_title}}`, `{{post_url}}`, `{{post_excerpt}}`, `{{post_image}}`, `{{post_author}}`, `{{post_date}}` and `{{post_list}}` (see [Email new blog posts by themselves](#)). Unsupported placeholders are rejected; missing context values render empty.

Review links lets you save one optional Google review URL. Product review links come from the current eligible order product. An unset Google URL omits that block. Generic template Preview uses an example name; use Sequences → Preview & test with an existing order for actual order fields. General preview does not invent an order or cart.

Confirmed template deletion is blocked while a campaign or sequence references it. Change those references first. Starter copies retain your edits and are not automatically recreated after deliberate removal.

Shared recipient attempt limits

Open Campaigns → Sending limits. Configure a maximum of 0–20 marketing attempts over 1–30 days. Zero disables this limit. Live marketing campaigns, event messages, sequences and recovery share it, so activity in one workflow can defer another. Explicit tests bypass the marketing attempt limit; service/account-purpose handling follows its own sender path.

The product reserves an attempt before handing it to the transport, so a failed/uncertain send can still consume an attempt. A deferred result supplies the next allowed time; each workflow has its own send window. Storage failure prevents a send instead of losing the limit. Review the workflow's progress to see whether it is waiting, skipped or stopped.

Create approve and run every campaign purpose

Open Campaigns → Create campaign. Enter a name, select a saved audience and General/campaign-safe template, then choose purpose:

Purpose	Recipient handling
Newsletter / marketing	Uses selected contacts and current newsletter eligibility; honors opt-outs, delivery and administrative blocks. Adds marketing preference links and uses recipient frequency limits.
Store-wide notice	Includes selected contacts with or without accounts, while honoring opt-outs and blocks. Uses marketing preference links/frequency handling.

Purpose	Recipient handling
Account / policy notice	Requires a current linked account. Marketing opt-out alone does not exclude this service notice; delivery and administrative blocks still apply. Omits marketing preference footer and recipient marketing frequency limit.

Set 1–100 recipients per batch (default 25) and a finish window of 1–30 days after scheduled start (default seven). Save draft, open Preview & test, inspect the subject/message and send to an explicit controlled mailbox if needed. Tests use example recipient details, [TEST] markers and the selected message. They do not send to your audience or change its eligibility.

Open Recipients and choose Build / rebuild recipient review — no mail. The scheduler scans sources in pages and deduplicates addresses. Refresh until ready, then inspect scanned/duplicate counts, every recipient state and exclusion reason. Results are paged 25 at a time; addresses are masked. Preparing a review sends no messages. A review retains audience rules and message content. Rebuild if you change the audience/template or wait more than 48 hours before approval.

Open Schedule. Choose a future start in the WordPress site timezone or leave it blank to start shortly. Check the recipient/message approval box and choose Schedule approved campaign. Sending uses the reviewed list and saved message, and rechecks current address, audience facts, opt-outs/blocks, pauses, license and attempt limits before each recipient. New contacts do not join an already scheduled list. For another newsletter issue, create a new campaign; accepted identities in an existing campaign are deliberately protected from another send.

Read campaign progress

Result	Meaning
pending	Waiting to be processed.
deferred	Waiting for an allowed time within the original finish window.
sending	The worker persisted its transport handoff state.
accepted	The local mail operation returned success.
skipped	Recipient/rules changed, previous acceptance/uncertainty excludes it, or an allowed time falls outside the window. Read its reason.
failed	The operation returned a definite false/error result.
unknown	The worker could not determine the send outcome, for example after interruption or a nonboolean result. It will not replay this recipient.

Results also show source reference and next eligible time. Aggregate failed count includes unknown outcomes. A missing/changed address skips that recipient. When the finish window ends, remaining work stops. Next batch is shown in site time and can be delayed by scheduler execution, shared allowance or recipient frequency. Refresh progress to see updated counts; a page being open does not drive the scheduler.

Pause cancel and continue a saved campaign

Pause holds scheduled/running work or preparation. Cancel remaining work preserves recorded results but stops unsent recipients. These controls also signal a currently running batch before its next transport check. Preparation paused mid-scan can use Resume recipient review — no mail.

For a paused sending campaign, Results offers Continue this saved campaign. Choose In 1 hour, As soon as sending limits allow, or a future custom date/time. The original list, message, accepted results and finish window remain. If failed attempts exist, Retry failed attempts is checked by default; clear it if you want only pending/deferred recipients. Recovery requeues only the failed identities selected when you submit. Accepted, skipped and uncertain identities are never replayed. Current address and restriction checks still apply to retries.

Resume must fit inside the original finish window. A plugin update or sending-limit change does not resume paused campaigns. If the window has expired, inspect old outcomes and create the appropriate new campaign/review rather than expecting old work to continue. If an internal/scheduling/storage error pauses the campaign, its last-error explanation identifies the blocked operation. Correct that cause before using continuation. Delete requires confirmation and removes the campaign and its recipient progress; retained results cannot then be used for continuation.

Configure all hourly campaign sending limits

Campaigns → Sending limits sets 1–10,000 attempts per rolling hour, default 350. One allowance is shared by newsletters, store-wide notices and account/policy campaigns, including failed/uncertain attempts. The page shows tracked attempts, remaining allowance, any cooldown and the pacing of a 25-recipient batch. Native/order/password messages, sequences and confirmation emails use other paths and can still consume your provider's allowance.

Batch spacing is at least 60 seconds, or the time needed to spread that batch size across your configured hour. A full allowance defers without trying mail. A specifically matched provider quota rejection records the attempt and waits about an hour. A one-time cooldown can also protect earlier untracked campaign attempts when rate state is initialized. Waiting work continues automatically while its window is open; paused work still requires Resume. Saving a lower/higher limit retains attempt history and cooldowns.

Set up and operate sequences

Open Sequences. Create a definition with name, trigger, optional saved audience, draft/active/paused status and one to ten steps, optionally followed by a Yes/No check with a Yes and a No path ([Yes/No checks in a sequence](#)). Built-in triggers are New WordPress user and WooCommerce order enters Completed. Each step selects a General template or a template matching that trigger's data context. Set its delay in days, including fractional days, up to 365 days per step. The first delay begins when the source enrolls; later delays begin after the prior step is processed. A 21-day first step followed by 84 days reaches the second around day 105, subject to pauses and scheduler waits.

For completed-order follow-ups, configure included/excluded products/categories, partial-refund policy, repeat interval, already-reviewed handling and review overlap policy. Mark each step Message, Review or Photo as appropriate. Set the optional Google review URL when you want that template block. These controls use eligible current order items; recipient-history exclusions in an audience serve a different purpose. Use Preview & test with an accessible real order and an explicit test mailbox to inspect actual order/product/review values before activating.

Only new matching trigger events enroll. Activating a sequence does not backfill historical orders/accounts. One sequence/source object has one durable enrollment; repeating the same source event does not create another. Current live marketing permission, optional audience rules and valid order/follow-up facts are required. A repeat window can exclude the same recipient's recent pending/completed/failed enrollment. Skipped/cancelled history does not itself count toward that interval.

Yes/No checks in a sequence

The sequence screen draws a sequence from top to bottom: its emails, then an optional check, then the emails of the check's Yes path and No path side by side. After its emails, a sequence can ask one question about the customer and go on down the Yes path or the No path; each path has up to ten emails with their own waits.

1. Under **Yes/No check (optional)**, choose what **The check asks**:

- **Bought again since the sequence started**: the customer (by account or by billing email address) has a paid order, Processing or Completed, placed after the sequence started, other than the order that started it.
- **Has bought one of these products or categories**: any paid order of the customer, the starting order included, has one of the chosen products or a product in one of the chosen categories.
- **Opened the previous email or Clicked a link in the previous email**: known only while Settings → Data & retention → Count opens and clicks is on (Count opens and clicks of marketing emails), and only for the email just before the check. A click also counts as an open; email programs that block pictures report no open. These two need an email before the check.
- **Is in this audience**: the customer belongs to the chosen audience when the check runs.

2. Set **Wait days before the check**: the check runs that long after the email before it (or after the start, when the sequence begins with the check).

3. Fill in the emails under **Yes** and **No**. On each path the first email waits after the check, and each later email after the one before it. A path may be left empty; the sequence then ends there for the customers whose answer it is.

Choose **No check: the sequence ends after its emails** to remove the check. The check sends nothing. It is answered once, when it is due, and anything it cannot confirm counts as No. The sequence's Activity names the check and its answer, puts the path in front of each email (for example "Yes path, email 1") and marks the other path's emails as not sent. Site Emails lists each email of the sequence by its path; the check has no entry there. Enrollments that started before you add or change a check keep the steps they started with. AffStackDev AI's sequence action can set the check and both paths.

Sequence activity pauses and changes

Activity shows each enrollment's source, status/reason, next step/time and individual outcomes. Accepted steps advance to the next delay. A reviewed/overlapping review step can skip and let later steps continue. Recipient/order/consent failure stops that enrollment; transport failure stops later steps. Unknown interrupted, thrown or nonboolean sends are not replayed and do not advance to a later step. Recipient-frequency deferral can wait up to seven days beyond the step's original due time, then skip that step.

Pause the definition to hold pending steps. Resume makes eligible held work active again and shifts its due times by the recorded pause duration, preserving spacing; it does not send all held steps at once. Manager-level sequence/step pauses can also hold work. Failed, skipped and finished enrollments are not restarted by Resume or saving. Status/refund changes that invalidate a completed-order follow-up skip its pending work.

Changing a sequence affects new enrollment recipes. Existing enrollments retain their saved steps/follow-up settings but load the current content of each referenced template before that step sends. A changed source email is skipped. Cancel enrollment is available only for pending/paused work and preserves history. Confirmed deletion removes the definition; its old callbacks stop safely. Subscription-context templates require an integration that supplies an enrollment source; there is no built-in subscription trigger.

Email new blog posts by themselves

Open Automations → **New posts**. A New posts automation emails an audience about your blog posts without you writing each email: one email for each new post, or a daily or weekly digest of the posts published since the last one.

1. Write the template. It needs the data context New posts. If you have none, the screen offers **Add the two example templates**: one for a single post and one for a digest, both editable under Templates. A New posts template can use `{{post_title}}`, `{{post_url}}`, `{{post_excerpt}}` (the post's excerpt, or its first words), `{{post_image}}` (the featured image, linked to the post, or nothing when there is none), `{{post_author}}`, `{{post_date}}` and `{{post_list}}` (each post of the email as a card with its title, date, excerpt and a Read more link), besides the usual placeholders. In a digest, the single-post placeholders show the newest post. Preview shows your newest posts.
2. Create the automation. Choose **Create automation**, give it a name, the audience and the template, and choose when to send: one email for each new post, with the minutes to wait after publishing so a quick correction is included (it waits at least about a minute), or a digest daily or weekly at an hour of your site's time zone (weekly: on the day you choose). You can limit it to posts in some categories.
3. Switch it on. Set the status to Active and choose **Save automation**. This is your approval: each email it sends becomes a campaign named after the post (or after the automation and the date, for a digest) whose recipient review is built and then scheduled without asking you again.

What it sends and to whom:

- Only contacts of the audience who may receive newsletters get it, with the unsubscribe and preference links, the frequency limit and the hourly sending limit of every campaign. Consent and unsubscribes are checked again right before each email.
- Only public posts without a password count. A post published before you switched the automation on, a post back-dated by more than two days, an update to a post and a post published a second time never send. A post that is no longer public or no longer in the chosen categories when its email is prepared does not send.
- A digest sends nothing when no new post was published; it sends at most ten posts, newest first.
- Each email appears under Campaigns with its recipient review, results, pause and cancel. Pause or cancel one there. Your approval covers each campaign's first recipient review; if you build a review again later, schedule that campaign yourself. Set the automation to Paused to stop new emails; posts published while it is paused are not sent later.
- A template or an audience a New posts automation uses cannot be deleted, and its template keeps the New posts context.
- Deactivating Email Manager clears the waiting emails and digests; after you activate it again, opening any administration page puts the next digest back on schedule. A post published while Email Manager was deactivated is not sent.

Bring contacts and original newsletter lists into UEM

Import offers Upload contacts, Pull site contacts, Connect provider, Installed newsletter sources and Import history. Use the [contact upload](#) for a general list. Use Installed newsletter sources or Import original list memberships when you want to keep original list IDs, membership statuses and dates. Reading/importing does not send mail. You need site-administrator and UEM management permission plus a current license to read/apply; stop/history controls follow their own access gates.

Read an installed newsletter source

Choose Installed newsletter sources → Scan installed sources. Jetpack/WordPress.com uses the site's existing Jetpack connection and the scanning administrator's subscriber access. MailPoet uses its active readable API. Choose Read subscribers for review when available. If the reader is unavailable, use a current export. The Newsletter Plugin, FluentCRM, MC4WP/Mailchimp and older MailPoet/Wysija are detected for export import; they have no direct reader in this release. WordPress.com Reader-only followers without email are not email contacts.

Processing reads bounded pages through the site's scheduler. While the import page is open, it can also continue bounded batches. Continue import submits another batch; Refresh shows current progress. Reading stops at Review. Inspect raw/valid/invalid counts and the contact preview, including source list/status and resulting eligibility. Use Previous/Next contacts and source-page controls to inspect all staged rows.

In Original list settings, choose lists to keep available; eligible lists start selected.

Archived/unassigned/nonstandard lists remain history only. Add an optional import note. Choose One-time import or, for a direct reader, Keep reading the source every 6 hours. Choose Import contacts to approve application. This merges matching email addresses, retains opt-outs/delivery restrictions and adds eligible contacts to the shared directory/newsletter list. It sends no message.

Upload original list memberships

Choose Import original list memberships. Set export type Jetpack, MailPoet or Other status-bearing CSV, original source name and optional source reference. Reuse the same name/reference for later exports of the same source. Upload a comma-separated UTF-8 .csv ≤2 MiB with ≤5,000 rows and ≤64 columns, then Read file for review. Cells are limited to 8 KiB and every nonblank row must match the header width. The general contact importer has different limits and accepts other delimiters.

Include email/email_address/e_mail and any original status/list information. Recognized columns include first_name, id/subscriber_id/email_subscription_id, list_id, list_name/list, list_status, global_status, email_marketing_consent/email_permission_status/email_subscription_status/email_marketing_status/subscription_status/email_status/status, created_at, email_date_subscribed/subscribed_at/last_subscribed_at, confirmed_at, updated_at/status_changed_at, unsubscribed_at and tracking_consent. Opt-out/block flags and archived/deleted fields are also preserved. Keep status-bearing columns from the original export. Blank/unknown status can remain newsletter available when no stop/hold exists; it does not create a strict consent grant for sequences/promotional events.

Duplicate ambiguous headings, malformed rows, excessive lists/memberships and invalid encoding stop review. Invalid email addresses count as skipped. Uploaded files are temporary and staged privately with encryption. A file is a one-time snapshot and cannot refresh itself. Review and explicitly import it as above.

Source refresh exclusions and recovery

Import history opens each source and its last complete read, mode, status, error and recent scans. Original-list audiences use selected approved source/list scopes. Linked sources refresh about every six hours when the scheduler runs; original-list use is held during refresh or error and after 24 hours without a complete fresh read. Snapshot mode uses its reviewed one-time data. A recipient omitted from a new complete snapshot is excluded from that original-list audience.

Earlier unsubscribe/archive evidence needs newer subscription/confirmation evidence before renewal. Conflicting source rows, older source data, denied tracking, erased identities, unapproved lists and delivery holds have separate exclusion reasons. Reimport does not automatically clear a delivery restriction or a current local stop. Source-status history shows observed changes and permission dates. Unknown/pending/inactive source status may be newsletter eligible when no explicit restriction exists, while strict sequence/event permission remains separate.

Resume import retries a current blocked/error scan inside its 48-hour lifetime. A failed file read needs a fresh upload. After 48 hours, stop/cancel and read a fresh source. Pause source use / cancel current scan retains completed local records but stops that source's audience permission and pending scan. Read and approve again to restore use. Scans support at most 20,000 source rows, 200 lists and 100 retained connections.

Scan progress & diagnostics shows scheduler, matching callback, last attempted/saved progress and owner-permission/worker issues. A queued callback does not mean a page has already been read. Use these fields and the displayed error when resolving a stalled import. Privacy erasure cancels affected staged scans, removes matching encrypted pages and retains a do-not-reimport marker and stop; it does not delete original provider data.

Migrate Klaviyo profiles permissions and static audiences

Choose Connect provider → Add / replace connection. Enter a private read key for the account with accounts:read, profiles:read, lists:read and segments:read, then Connect / replace credential. The adapter uses API revision 2026-07-15. It verifies account/scopes, stores the private key encrypted and does not show it again. Open a connection to Test connection, Scan source inventory or Disconnect local credential. Disconnect removes only UEM's secret and pauses remote reads; it retains local records and frozen review data.

Discover map and review

Scan source inventory discovers lists, segments and a bounded sample's custom fields. Discovery does not create marketing contacts or change their preferences. Select the lists and segment snapshots you want, then choose Ignore, Bounded custom metadata, First name if empty or Last name if empty for each custom field. Standard name values take precedence. Confirm the read-only dry-run acknowledgement and Start dry run.

The dry run reads profiles and selected memberships into encrypted frozen pages. It supports up to 100,000 profiles, discovery of 200 lists and 200 segments, selection of 100 of each and 200 custom mappings. Phone-only profiles can be retained as provider-only identities. SMS state is stored separately and never grants email permission or sends SMS. Segments become static membership snapshots; changing dynamic rules at Klaviyo does not update them in UEM.

Review all dry counts: email/SMS subscribed/unsubscribed/suppressed/unknown, no-email/invalid profiles, existing local matches, duplicate-email conflicts, local stops against imported grants, imported restrictions against local grants, mapped fields and selected memberships. No marketing data has changed yet. Choose

Import contacts to approve the frozen snapshot. Apply writes local UEM contacts, preference evidence, provider identity links and memberships in resumable batches. It does not create WordPress users/Woo orders, send email/SMS or write to Klaviyo. Apply can continue after the local provider key is disconnected because it reads the frozen review.

Control the job and read import results

Pause holds discovery, dry run or application. Resume continues its saved stage; remote stages need a connected credential. Retry current checkpoint handles error/waiting-retry state. Run next bounded batch now processes one page; Refresh progress reads state. Leaving the page does not cancel native scheduler work. Rate/temporary network errors use bounded retries; permission/credential/schema errors show their reason. Completed-with-errors retains successful records and reports unresolved rows.

Matching email addresses merge into UEM subscribers. Source profile IDs remain separate encrypted links, so multiple profiles sharing one email can produce a conflict without creating duplicate recipients. Imported subscribed does not clear a local block. Imported unsubscribe/suppression is retained, with a newer dated local grant preserved only when its newer evidence can be established. Unknown source permission creates no explicit strict marketing grant. Current stops still govern newsletter availability.

Import results shows created/matched contacts, provider-only identities, grants/stops, static memberships, conflicts/errors, mapping revision, sample local contact IDs and generated audience IDs. Each selected list/segment has a generated audience using its imported static membership. Safe-revert preview counts candidate importer-owned records; it is a preview and has no automatic rollback action. Preference changes and later local activity are retained.

Reconciliation and old source retirement

Open Reconciliation & retirement. Compare expected valid profiles, membership rows and selected audiences against processed/ready, recorded exceptions and unaccounted deltas. Balanced means the ledgers reconcile; balanced with recorded exceptions still needs its recorded errors reviewed. Download reconciliation JSON for those totals and grouped reason codes. Download migration diagnostics provides connection/scopes/revision, queue/time/state and aggregate job counts without private key or contact payloads.

The retirement checkpoint records that you reviewed reconciliation, separately reviewed/stopped old-provider sending, retained an appropriate export/evidence and understand that UEM did not modify the provider. Check all four items and Record retirement review; Clear retirement checkpoint removes that local acknowledgement. UEM never disables/deletes the provider account or its automations. Manage the original sender separately when you are ready to move sending.

Configure abandoned cart capture and reminders

Open Abandoned carts → Reminder messages. Create/select Cart-context templates with `{{cart_url}}` in their body and optional `{{cart_items}}`. Choose one to three reminders; No reminder leaves a step unused. The first uses the inactivity threshold. Later spacing is 1–43,200 minutes after the preceding actual attempt, default 1,440 minutes.

In Capture & timing, enable recovery, optionally capture signed-in customers who already have marketing permission, and optionally show the native form beside classic/block cart and checkout. Enter the required consent statement (up to 500 bytes), inactivity 1–10,080 minutes (default 60), window 1–30 days from initial capture (default seven), and minimum 1–30 days between new carts for one recipient (default seven). Save.

Recovery begins with new eligible carts; it does not backfill old abandoned sessions. Returning/changing the cart postpones the next reminder but does not reset attempts or extend expiry.

Customer capture and supported carts

Guests explicitly enter an email and check consent in Save your cart reminders. Because the form does not confirm mailbox ownership, a guest request covers only the reminders for that saved cart: it does not give the address general Marketing permission, so campaigns, sequences and event emails do not start reaching it. A prior unsubscribe or block remains effective. Typing an email into ordinary checkout is not opt-in. Signed-in form users use their current account email, and their request also records Marketing permission for that account email; automatic capture requires their existing marketing permission and cart interaction.

[uem_cart_reminder] can be placed in a Shortcode block outside another form. The browser session and consent statement are part of the one-hour form signature; an expired form needs a refresh. Exclude cart/checkout/recovery pages from full-page caching.

Recovery supports public purchasable native simple products/variations, whole quantities 1–1,000, at most 50 lines and 20 coupons. Add-ons/bundles/custom cart-item data, subscriptions, private/unavailable products and fractional quantities are rejected rather than reconstructed. Saving does not place an order or reserve stock. Request limits are one per email, 20 per IP and 500 across the site per hour.

Watch every reminder outcome and stop condition

Captured carts lists 25 records per page with account/guest/hash reference, state, due, attempt count and associated order. Open a cart for all reminder outcomes/times, expiry, reason, restore issues and restored-link order flag. Watching waits for inactivity; pending waits for the next reminder; deferred waits for the shared recipient-frequency limit; paused requires Resume; exhausted means all reminders finished. Accepted is successful local submission. A definite failed attempt still advances to the next reminder. Unknown interrupted or nonboolean sending results do not advance to the next reminder and are never replayed automatically. An uncertain cart restore also remains held.

Current permission (for a guest request, the absence of any unsubscribe or block for that address), unchanged account/email, enabled/current recipe generation, currency, available items and absence of a submitted checkout are checked before each send. Native/manager pauses, invalid templates and expired windows stop/hold as shown. A linked checkout stops reminders even with pending/failed payment. A later checkout for the same email also stops recovery conservatively, including failed/cancelled payment, without claiming recovered revenue. Emptying the cart or changing signed-in ownership cancels it. Current template edits affect pending wording; saved capture timing/steps remain the record's recipe.

Pause a watching/pending/deferred record to hold it. Resume requires its original window still open, current license/enabled settings and broad pause removed; it queues no earlier than a minute ahead. Cancel stops that record. Stop all cart recovery switches capture/sending off and invalidates old work and links; reenables creates new work without replaying old records. Changing limits/settings does not restart paused/finished records.

Restore a saved cart and complete checkout

A live reminder's protected link opens Restore your saved cart. Opening it changes nothing. The customer checks Restore available items into my current cart and chooses Restore cart. The one-use, expiring token is consumed before adding items. Existing unrelated items remain; matching quantities use the larger of saved/current quantity rather than doubling.

Current stock, product/cart rules, prices, shipping, tax and coupon rules apply. Unavailable items/invalid coupons can skip with displayed reasons; a changed store currency blocks restore. The link does not log the customer in or restore personal/payment details. A successful restore stops further reminders. Checkout association requires the matching billing email; the restored-link flag identifies that returned checkout. A used/expired/stopped link is rejected and leaves the current cart unchanged.

Preview controlled test and retained records

Preview & test requires a saved cart ID and Cart template. Preview displays current public item names without sending or usable destinations. Send controlled test requires an explicit mailbox and sends [TEST] content without usable recovery/unsubscribe/preference tokens; it creates no recovery enrollment. To exercise a real link, capture a new cart under your controlled email and let its normal reminder run.

Daily retention removes records more than 30 days after their expiry. WordPress privacy export includes saved product references/state/time/order association. Privacy erasure stops and removes matched recovery records while retaining a keyed marketing stop; UEM does not erase Woo orders/accounts through this feature.

Read every activity and reporting result

Open Reports to inspect Activity, analytics and campaign reports. Activity tracks individual mail events; a message can have several rows as it moves from generation to an attempt, local acceptance and later provider feedback. Use the correlation ID and definition to relate these rows.

Every activity status

Status	What it tells you
Generated	An email was created or an outgoing mail call was observed.
Suppressed	UEM deliberately prevented sending because a pause or recipient rule applied.
Attempted	The site attempted to send it.
Local accepted	The observed mail call or native WooCommerce result returned true.
Local failed	WordPress or its mail connection reported failure.
Local outcome unknown	The actual result was missing or uncertain, including a success-named hook without the final return value.
Provider accepted	The provider accepted processing.
Provider failed	The supported SMTP.com log bridge reported an unsent result.
Delivered	A supported provider reported delivery.
Deferred	A supported provider reported a temporary delay or soft failure.
Bounced	A supported provider reported a permanent failure.
Rejected	A supported provider refused, dropped or blocked the message.
Complaints	A supported provider reported a spam complaint.
Opened	The email was opened: counted by Email Manager (see Count opens and clicks of marketing emails) or reported by a supported provider.

Status	What it tells you
Clicked	A link in the email was clicked: counted by Email Manager or reported by a supported provider.

Local accepted alone does not establish delivery; a mail plugin may have accepted work into its own queue. A success-named WordPress hook alone is not enough to establish acceptance. UEM uses the actual return for its controlled sends, including rejection even when that hook also fires. Opens and clicks appear when Email Manager counts them for its own marketing emails or a supported provider supplies them. Provider events are totals, not unique readers; Email Manager counts at most one open and one click per link for each email it sent.

Use every date and list control

Choose Today, Last 7 days, Last 30 days, Last 90 days or Custom dates. Today follows your WordPress timezone; the other presets are rolling periods. Custom dates include the whole selected final day. Enter dates in YYYY-MM-DD order and keep the start on or before the end. An invalid custom range displays a validation result instead of a report.

On Activity, narrow the list by state, source and email definition. Each page contains up to 50 rows. Rows show the time, sending source and transport, definition, shortened recipient hash/correlation ID, provider IDs and any stored error code or permitted detail. Include Test Lab fixtures controls matching fixture records if such records exist; this package's implemented tools do not include a Test Lab screen.

Export CSV uses your current filters and dates, with a maximum of 50,000 rows per export. Its times are explicitly UTC. The export contains event identifiers and hashes instead of message bodies or plain customer email addresses. Narrow your dates or filters to split a larger export. A leading apostrophe on a formula-like cell makes that value safe to open in a spreadsheet.

Understand all report cards

The analytics cards show generated messages, attempts, suppressed messages, local acceptance, local failure and unknown local outcomes. Local failure percentage compares recorded local failures with attempts. The top-definition table helps identify which sources account for the most attempts.

Provider cards show accepted, failed, delivered, deferred, bounced, rejected, complaint, open and click events. Unavailable means no applicable recorded event count is available; it is not a confirmed zero. Existing historical events remain in reports even after you disable a provider connection.

Campaign reports show lifetime attempts, local acceptance, deliveries, opens, clicks and bounces for each campaign, with 15 campaigns per page. Opens and clicks also show how many different people they come from, for example 12 (9 people). Compare them with the campaign's own sent, skipped and failed progress. The progress counters describe its worker outcomes; the report describes observed mail events.

Diagnostics includes activity table health, tracking state, row count, the next cleanup run, latest local success/failure and unknown result, 30-day unknown outcomes and the proportion of attempts with an unknown sending source. Provider and transport panels help explain the path that reported each result.

Count opens and clicks of marketing emails

Email Manager can count, itself, who opened its marketing emails and which links they clicked, whatever mail connection your site uses. It is off at the start. Switch it on in Settings → **Data & retention** with **Count opens and**

clicks of Email Manager's marketing emails and **Save analytics settings**; it needs the local analytics ledger on the same screen.

While it is on, newsletters, sequences and cart reminders sent in HTML carry a tiny image, and their web links pass through your site before they open the page they point to. Tests, account and policy notices, emails in plain text, and the unsubscribe and preference links are never counted or changed. Each email counts as opened once however often it is viewed, each link as clicked once, and a click also counts the email as opened. A link whose address was changed on its way (for example by a forwarding service) is not followed: the visitor sees a short page with a link to your home page instead.

Treat the numbers as estimates. Some mail apps load images by themselves (Apple Mail, for example), so an email counts as opened without being read; others block images, so an open is only counted once a link is clicked.

The counts appear as Opened and Clicked in Email Activity and Delivery analytics and in Campaign reports, with the number of people. They are kept with a coded form of the address (never the address itself) for your retention period. WordPress's Export Personal Data lists a person's opens and clicks and Erase Personal Data removes them. While counting is on, WordPress's privacy policy guide (Settings → Privacy) offers a paragraph about it for your privacy policy.

Links in emails sent while counting was on keep passing through your site while Email Manager is active, also after you switch counting off (nothing more is counted then) and without a license. If you remove Email Manager, those links stop working.

Configure tracking and every deletion option

Open Settings → **Data & retention**. Enable or disable local activity tracking and choose 30, 90, 180 or 365 days. Counting opens and clicks is a separate switch on the same screen ([Count opens and clicks of marketing emails](#)). Disabling tracking keeps existing history and allows the site's mail to continue; new events are not added while it is disabled. Routine cleanup removes expired activity in batches.

Purge expired removes activity older than your current retention limit. A submission removes up to 50,000 rows, so repeat it if older rows remain. Purge all requires the confirmation checkbox and removes the complete activity ledger. These controls leave contacts, newsletter permissions, campaigns and abandoned-cart records in their own storage.

If an email has local acceptance but no delivered result, check its provider's delivery tracking and mail-plugin correlation support. If the local outcome is unknown, inspect the source and connection result before considering another send. If table health is unavailable, have your site administrator restore database access so UEM can create or update its activity table.

Configure every supported delivery tracking connection

Open Providers to review your site's mail path and configure feedback for the provider it already uses. UEM uses your existing WordPress mail connection. Sending credentials and transport configuration stay in that mail plugin.

Mail connection and compatibility panels

Mail connection shows whether `wp_mail()` is available, whether PHP mail is disabled, detected mail plugins, the recognized mail manager and the last observed PHPMailer mode/provider. Runtime information appears

after a message passes through PHPMailer and is refreshed when changed or after an hour. An API mailer can use a different path.

Mail plugin compatibility shows WP Mail SMTP, FluentSMTP and Easy WP SMTP with their configured mode, provider and correlation support. WP Mail SMTP Free and Pro support local attempts and the result WordPress reports. Pro is needed for the optional SMTP.com delivery-log bridge. FluentSMTP's recognized configuration supports local lifecycle tracking; its API connection does not have a UEM API-body correlation bridge in this release.

Provider & source coverage distinguishes a detected transport from an active feedback integration. Google/Gmail, Microsoft/Outlook, Amazon SES and Postmark recognition does not itself provide delivery/open/click results. Source coverage explains which email sources can be managed or observed, independently of the provider that sends them.

Set up SendGrid

1. Open Configure delivery tracking, choose Twilio SendGrid and select Open settings.
2. Copy the UEM Webhook URL shown on the page into your provider's Event Webhook configuration.
3. Paste that webhook's public verification key into Event Webhook public verification key.
4. Enable SendGrid correlation + signed Event Webhook ingestion and save.
5. Expand Connection status & recent feedback after authenticated events arrive to inspect verification, the last event and any error.

Use the webhook's public verification key, which is different from the API key used to send mail. UEM verifies signed batches using the exact request body. It records processed, delivered, deferred, bounce, dropped, spamreport, open and click events. WP Mail SMTP and Easy WP SMTP API connections have a public body bridge for correlation; ordinary SMTP uses provider metadata headers.

Set up Brevo

1. Choose Brevo in Configure delivery tracking.
2. Copy the displayed Webhook URL into a transactional webhook at the provider.
3. Set that webhook's Bearer authentication token to the same value entered in UEM's Webhook Bearer token field.
4. Enable Brevo correlation + authenticated transactional webhook ingestion and save.
5. Inspect Connection status & recent feedback after events arrive.

Brevo feedback includes requests/sends, delivery, deferral/soft bounce, hard bounce, spam, blocked/invalid/error events, supported open variants and clicks. WP Mail SMTP and Easy WP SMTP API connections have a correlation bridge; ordinary SMTP uses the provider custom metadata header.

Set up Mailgun

1. Choose Mailgun in Configure delivery tracking.
2. Use the displayed Webhook URL for the provider's delivery-event webhooks.
3. Enter the Webhook signing key shown by Mailgun for webhook verification.
4. Enable Mailgun correlation + signed delivery webhook ingestion and save.
5. Inspect verification and the last event/error after authenticated events arrive.

The signing key is the webhook credential. The screen uses a one-day signature age and rejects reused successful tokens. Supported feedback covers acceptance, delivery, rejection, temporary/permanent failure, complaints, opens and clicks. WP Mail SMTP and Easy WP SMTP API connections have a correlation bridge; ordinary SMTP uses Mailgun variables.

Replace retain or clear any verification credential

The current credential is hidden. Leave its input blank to keep the saved value. Enter a replacement to update it. Select Clear stored key/token to remove the saved value. A changed credential clears prior verification and recent-feedback status, which will be rebuilt from new feedback. Site configuration can also supply a constant/filter override; clearing the stored option does not remove such an override.

Enable controls turn on correlation decoration and authenticated ingestion for the selected provider. A present credential and enabled adapter are separate from verified feedback. Verified means an authenticated supported connection has supplied feedback, not that every outgoing message has a delivered result. Provider feedback is retained in the activity ledger; it does not automatically change newsletter consent or apply an opt-out for a complaint/bounce.

Use the SMTP com log bridge

Use WP Mail SMTP Pro with its SMTP.com mailer and compatible Email Logs enabled. Keep UEM local tracking enabled. The bridge records acceptance against the corresponding log and checks for delivery/unsent outcomes every five minutes, with a bounded catch-up check on eligible non-AJAX administrator activity. If that optional check cannot acquire or retain its writer lease, it waits for a later eligible request or the existing schedule; it sends no email. It reads pending records from the last seven days and processes up to 100 each run.

Delivered creates a delivery event. An unsent result creates Provider failed. Open and click tracking are not supplied by this bridge. There is no UEM SMTP.com webhook token to enter. If the compatibility panel reports the bridge unavailable, check the Pro log facility and its enabled state; local acceptance and failure can still be recorded with WP Mail SMTP Free.

Read connection status and resolve every feedback result

Expand Connection status & recent feedback for Transport/provider detected, Delivery adapter enabled, Webhook verification credential, Verified provider feedback, Last provider event and Last provider error. An undetected transport can still exist through manual/server routing. No feedback means UEM has not received the matching provider event; it does not prove failure.

Authentication errors call for matching webhook credentials and provider-side settings. Storage errors call for enabled, healthy UEM activity storage. Unknown source/correlation calls for checking the supported metadata path and original local activity. Repeated provider events are deduplicated. Unsupported event names are acknowledged without an invented status. If tracking is disabled or its table cannot accept events, supported webhook ingestion returns an error so the provider can retry after the condition is resolved.

Activate recover and update the product

Open License from Email Manager or its Suite workspace. License remains available while product access is locked. Stored contacts, content and recipient restrictions remain retained while operational features wait for current permission.

Activate or replace a license

1. Enter the complete license key from AffStackDev My Account in Complete license key.
2. Choose Production, Staging or Development for the installation.
3. Select Activate Unified Email Manager, or Replace activation credential on an active site.
4. Review the refreshed status for Product access Enabled and the server-confirmed product/plan.

The complete key is submitted during activation and is not saved. Later checks use an encrypted installation credential tied to this site's salts and URL. The server needs Sodium or compatible OpenSSL encryption; if secure storage is unavailable, the activation form is disabled until the server supports it. Keep each site's installation identity correct when cloning or moving a site.

Read every status field and recovery control

Current status shows License, Product, Plan, Product access, Last confirmed, Last attempt, Next automatic check and Credential storage. Below it are the current site, installation ID, term expiry and granted features when available. An encrypted activation confirmation pending means the saved recovery credential needs confirmation.

Check license now retries immediately. It can resolve a pending activation, confirm an existing installation or retry a pending deactivation. Use it to finish an interrupted operation before starting another activation. Another operation in progress means wait briefly for its lease to release, then retry. If credential storage fails, restore database/encryption access and use Check license now. If the site identity changed, resolve the migration and activate the correct site rather than relying on copied acceptance.

Deactivate this site requests release of this site's activation slot. Confirm the form and allow the page to reload. UEM clears the local credential after a matching server acknowledgement. If acknowledgement is interrupted, Check license now retries the same retained request. Deleting the plugin locally is not the server deactivation operation.

Automatic checks and all access holds

UEM normally validates about every 12 hours. Due checks can also run during eligible administrator pages or ordinary browsing, with a short automatic connection timeout. Purchase, account, API and sending actions do not perform these activity checks. An accepted recovered license restores operational features on the next request.

A temporary connection outage can retain the last accepted permission for up to 72 hours, bounded by the earlier applicable term/grace deadline. It does not renew expired permission. Server denial, suspension/revocation/deactivation, read-only/hard-lock/kill-switch policy, a mismatching site identity or, for an older plan that explicitly requires one, an unfulfilled Suite license holds operational access (AffStackDev's current plans do not require a Suite license). Recipient restrictions, privacy tools and unsubscribe safety remain preserved. The screen shows the latest error and next retry time.

Check for updates and configure automatic installation

The Plugin updates panel reports Waiting for token-authenticated updates, Release verification unavailable, Active license required or Protected updates ready. Protected updates require the accepted server capability, this site's active encrypted credential, trusted bundled verification keys, PHP Sodium and ZipArchive.

If you have WordPress update permission, select Check for plugin updates. It refreshes the verified offer and normal WordPress update information. Enable or disable automatic updates through WordPress → Plugins. Manual and automatic installation follow the same protected path: installation-token authorization, a temporary download grant, signed-manifest verification and exact file checks.

An available release must match this product and be newer than the installed stable version. Unsupported PHP/WordPress/Woo requirements, changed authorization, an invalid signature/archive or modified files in an installed signed release stop replacement. The current installed plugin and license data remain. Correct the reported readiness or verification condition, then check again. Installation keys and complete license keys are not exposed as public download links.

Open and download the complete references

On License, open Documentation and choose Download customer reference Markdown or Download technical reference Markdown. The same panel appears on Settings → Data & retention. The License panel remains available when operational product access is held. Your account needs the product's management permission to download a reference.

The customer reference covers all supported setup, sending, contact, newsletter, import, automation, recovery and reporting operations. The technical reference supplies exact configuration fields, event and state contracts, storage, extension interfaces, errors and recovery behavior. Use their Contents and Feature index to move directly to a capability. Word and PDF editions of the customer reference are on affstackdev.com.

Both references describe the installed Unified Email Manager release. Local AI documentation discovery points to these same installed references and release identity. Opening or downloading a manual does not send email or change product settings.

Glossary

Term	Meaning
Definition	An identified email source and its supported settings/capabilities.
Native state	The owning WordPress/WooCommerce source's enabled or disabled setting.
Manager pause	A UEM rule suppressing a deterministically controllable definition.
Protected email	An account/security definition requiring explicit pause/disable confirmation.
Entitlement	Current local permission accepted from the product licensing policy.
Contact	A known normalized email identity with retained profile and restrictions.
Newsletter record	Signup/import evidence, distinct from current contact availability.
Consent	Explicit permission evidence used by workflows that require a grant.
Suppression	A current stop or delivery/administrative restriction.
Audience	A saved source selection and current eligibility rules.
Snapshot	The reviewed retained identities/content used by a campaign or migration.
Template context	The declared General, Order, Cart or Subscription placeholder contract.
Event email	A message dispatched from a registered approved event trigger.
Sequence	A durable series of steps enrolled by an approved trigger.

Term	Meaning
Sending window	The bounded interval in which a reviewed campaign can send.
Attempt allowance	A rolling campaign or recipient cap reserved before transport.
Correlation ID	An identifier relating local mail observations and provider feedback.
Local acceptance	A success result reported by WordPress or its mail callback.
Provider feedback	Authenticated delivery/open/click or supported log evidence.
Reconciliation	Comparison of a frozen migration and its actual local results.
Retirement checkpoint	A local acknowledgement for reviewing the old source sender.
Recovery generation	A cart snapshot/link identity invalidated by relevant cart changes.
Nonce	A WordPress request token checked alongside the required permission.
Canonical reference	An installed current-version Markdown manual.

Reviewed AI administration

The current release retains the executable administration introduced in 1.0.1.8, the mail-outcome safeguards from 1.0.1.9, and the shared ownership checks used by native operations and AffStackDev AI. Writer failures now identify contention, unavailable storage or lost ownership without claiming that every loss is a timeout. The ordinary UEM screens and their owning services continue to determine what a change means. You can describe a task, have the assistant find the relevant saved records, inspect an exact proposal, approve it in the existing AffStackDev AI review interface and explicitly apply it. A conversation message or a manual does not itself grant execution permission.

The integration targets AffStackDev AI 0.1.0.12 and its reviewed-action contract. UEM remains usable through its native interface when that connector is absent. The connected user must be the current administrator on the selected site and must have both WordPress management permission and the configured UEM management capability. Operational work also requires the current whole-product license. Checking or deactivating an existing license and checking update availability remain separate license operations; an update check does not install an update.

Find, review and apply

Describe records by their title, email address or another ordinary identifier. The assistant can return a bounded list of candidates when a name is ambiguous. “Me” refers to the authenticated connected account. Selecting a candidate binds its native identity into the proposal; the assistant must not guess between similarly named records.

Inspection, previews and proposal preparation do not save content, queue work or send mail. Review the named target, current values, proposed content, recipients, schedule, protected-message confirmations and stated effects. Unmentioned saved fields are retained. An explicit submitted list replaces that list, so review the whole list when changing reminder steps, included products or audience rules.

Approval belongs to the exact prepared project. If content, the target, its relevant dependencies, the site, permissions or provider version change, prepare and review a new proposal. Once approved, apply that same project through the shared connector. The integration does not add a UEM endpoint that can create its own approval.

The following is a safe first task to review:

Prepare a disabled transactional welcome event email for newly registered WordPress users, titled Welcome note, with subject Welcome and body Welcome to our store. Do not enable it or send a test.

The proposal should identify the native WordPress user-registration trigger, the user recipient rule, the exact subject/body and the disabled state. Apply only after those details match your intention. Enabling the definition or sending a test is a separate reviewed change.

Tasks supported by the integration

Area	Work available for review or inspection
Site emails	Discover definitions; inspect editable fields; preview or test; edit supported native settings or WordPress overrides; restore an override; manage definition, source and global pauses.
Event emails	Create and edit content, trigger settings, delay, recipient and follow-up rules; enable, disable, duplicate, trash, restore or delete; preview/test; cancel or reschedule saved jobs.
Audiences and content	Create/edit/delete eligible audiences and templates; retain contact and purchase filters; compose content blocks; update branding and reusable sections. Referenced records cannot be deleted as though unused.
Campaigns	Save a draft, send a controlled test, build the saved recipient review, schedule after explicit recipient acknowledgement, pause, resume, cancel or delete. Preparing recipients does not authorize delivery.
Sequences	Save definition, trigger, audience, steps and order follow-up rules; pause/resume/delete a definition; cancel one recipient run; test an order-context template.
Consent and subscribers	Record an administrator-reviewed consent decision, suppress or explicitly renew a recipient, remove a newsletter record while retaining a stop record. AI does not infer consent.
Contact and subscriber imports	Discover supported sources, use an existing private upload reference, review its mapping and advance/cancel the native job; start or control a supported subscriber-source scan and separately approve its local import.
Provider migration	Use a connection created in the native secure form; test, disconnect, inventory, map, dry-run, apply, pause/resume/retry/advance and record retirement review using existing native stages.
Cart recovery	Edit settings and reminder templates; stop all recovery; pause/resume/cancel a saved cart; preview or test. A global stop prevents an old generation of reminders from being resumed.
Reports and settings	Read diagnostics, activity, analytics, provider status and migration reconciliation; export bounded CSV pages; update sending limits, capture/newsletter settings, analytics, provider toggles and the local interface setting.
Licensing	Validate or deactivate the saved license and check for a protected update. Native secure setup and WordPress installation controls retain their own responsibilities.

Availability depends on the actual installed owner and its prerequisites. Commerce contexts require WooCommerce and an eligible order, product or cart. Source readers require their installed connection. A queued cron or Action Scheduler job still needs a functioning scheduler. A template saved successfully is not evidence that a live transport or provider will deliver it.

Secure entry and exact proposal limits

Enter new license keys, webhook credentials and migration credentials in their native secure forms. Complete external account consent there. Upload new contact/subscriber files using the native private upload screen. The assistant then finds the actor-owned saved job and binds its stable fingerprint before mapping or applying it. Changing the staged file or mapping invalidates the old proposal. Credentials and encrypted private payloads are not returned as model-visible values.

Those human steps are prerequisites, not proof that the whole import or connection is ready. Inspect the native state again, review the intended scope and apply each required stage. Source restrictions and opt-outs remain authoritative. Importing records does not change provider sending configuration or retire the original account.

Connector requests are deliberately bounded. Parameters are limited to 16 KiB; state and results to 32 KiB; reviews to 50 rows. Lookups return at most 20 candidates per page. Long content, extensive stored definitions or unusually large reports can exceed those limits. UEM refuses an oversized exact proposal rather than silently shortening content. Split independent edits where possible; otherwise use the normal native form. Activity CSV is returned in pages, each with its own header; retain one header when combining pages in offset order.

Schedule inputs use an absolute date/time with an explicit UTC offset. The assistant should convert your intended local time using the site timezone, then show it for review. Report custom dates keep the native inclusive start/end days in the site timezone. Analytics purge reviews an exact bounded event-ID range; later event IDs are excluded. For expired-event review, the cutoff is midnight UTC minus the configured retention days, so it may retain up to one additional day compared with an immediate rolling cutoff. A range above 50,000 qualifying events must use the native retention workflow.

Understand results and interruptions

“Saved” means the owning service read back the requested stored result. “Queued” means the native scheduler accepted the reviewed transition. A successful test proves only local mail acceptance. The AI result includes fresh safe mail-attempt evidence when available; it never treats a success hook alone as delivery. Analytics summaries accept date and test-message controls. Use activity reports for state, source or definition filters; unsupported analytics filters are rejected rather than ignored. Provider acceptance, delivery, opens and clicks require their own evidence described in the reporting chapters.

When a test is definitely rejected, the rejected result is saved. Applying or reconciling that same approval again reports the rejection without another send. A separately reviewed and approved test can retry after known rejection, and later configuration work is no longer permanently blocked by that rejection. Unknown outcomes remain held. Applying the same approved operation again does not send another test or create another record. Two separately approved identical test requests remain two intentions. If a request times out after mail or another effect might have occurred, inspect/reconcile that original project. Reconciliation observes saved evidence; it does not resend, requeue, repair a partial result or contact a provider to manufacture success. An unresolved target remains held until the original outcome can be established. Do not treat an error as evidence that all earlier effects were undone.

A writer-busy, storage or lost-ownership result stops the requested operation. It can follow earlier saved work, so do not repeatedly apply the project or delete its retained records to force another attempt. Inspect and

reconcile that original project first. The AI result explicitly disables automatic retry and retains the original operation evidence. Optional startup housekeeping can wait for another request, but this does not relax approval, recipient safety or uncertain-send protections.

Consent writes use a recipient-specific lock so a running campaign configuration batch cannot prevent an opt-out. Consent is checked again when the relevant recipient lock is acquired. Granting consent alone retains an existing suppression; clearing one requires explicit reviewed evidence of renewed consent. Deleting a newsletter identity first retains the native recipient stop record and preserves stronger delivery restrictions.

Release readiness

This release is supplied as unsigned source for the established signing workflow. Its local regression checks cover mail-result handling, retained rejection and uncertainty, scoped context, dispatch diagnostics, writer ownership and repeatable starter setup. They do not establish inbox delivery or prove the cause of every production error. The developer pack contains source-backed coverage, focused local checks and an explicit remaining-acceptance list. Isolated checks exercise actual UEM PHP with WordPress, database and mail fixtures. Any focused native database checks are described separately in the developer pack. These checks do not establish the full production installation, WooCommerce/HPOS workflows, provider connectivity or inbox delivery. Complete the native acceptance gates and established signing/install process before production rollout. The full existing product instructions in this reference remain applicable.