SL Email Marketing

Newsletters, targeted campaigns, and group emails — built into your own site

Version 1.5.0 | WordPress Plugin User Manual

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1. Overview

SL Email Marketing is a full email marketing system built directly into WordPress — newsletters, one-off campaigns, and ad-hoc group emails, all sent from your own site with no external service required (though a custom SMTP connection is supported for better deliverability).

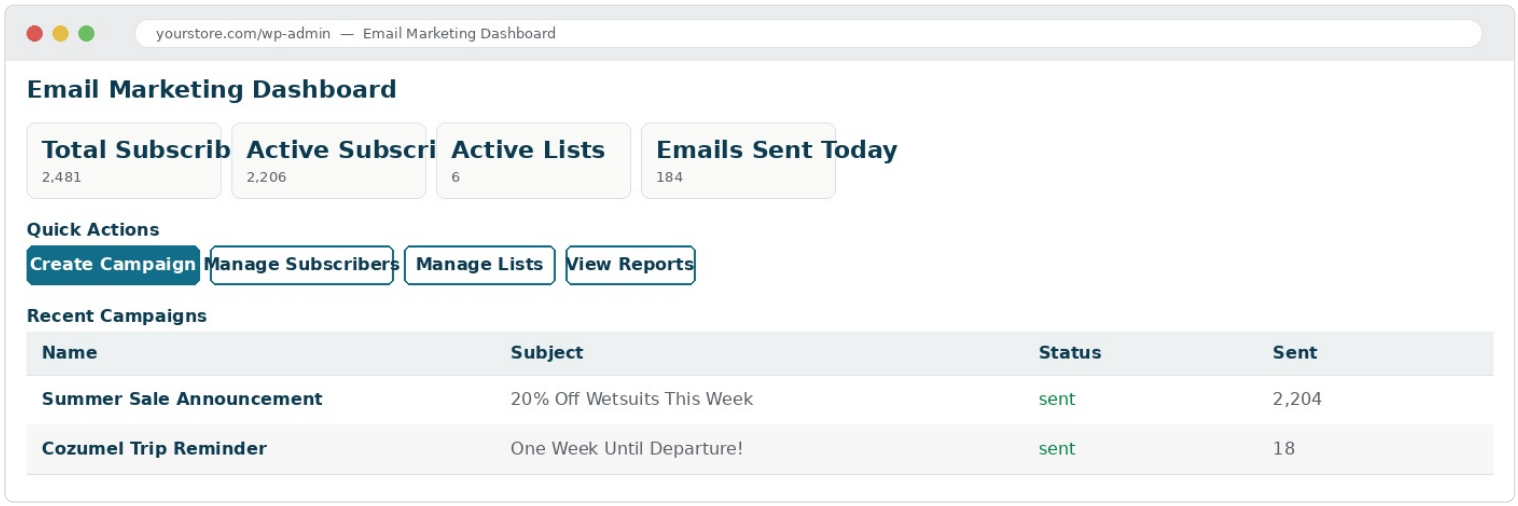
- **Campaigns** — full newsletter-style emails sent to one or more subscriber lists, with advanced audience targeting
- **Advanced audience filters** — target by certification, customer title, age, gender, rewards points, gift card expiration, store credit balance, lifetime spend, order recency, discount program, or state/region
- **Group Emailing** — send to a one-off list of raw email addresses (not necessarily subscribers) — including importing every traveler on a specific trip directly from SL Travel Booking Manager
- **Reusable Templates** — save any campaign's content as a template for future use
- **Document linking** — insert a link to (or the full text of) a published Waiver, Lease, Questionnaire, or Event from SL Waivers & Leases directly into an email
- **Tracking** — opens, clicks, bounces, and unsubscribes, with a full per-campaign report
- **Compliance** — built-in unsubscribe handling and a subscriber-facing preference center

Component	Minimum
WordPress	5.8
PHP	7.4

2. Installation

1. Go to **Plugins → Add New → Upload Plugin**, select the ZIP, and click **Install Now**, then **Activate**.
2. A new **Email Marketing** menu appears in the WordPress admin sidebar, with eight pages: Dashboard, Campaigns, Group Emailing, Templates, Lists, Subscribers, Reports, and Settings.
3. Go to **Settings → Sender** (Section 10a) and set your From Name and From Email before sending anything.
4. Before sending real volume, set up reliable, low-cost delivery: install the free **FluentSMTP** plugin and connect it to **Amazon AWS (SES)** — see Section 10b for the full explanation of why this matters and exactly how it fits together with this plugin's own Send Method setting.

3. Dashboard



Dashboard — at-a-glance stats, quick actions, and recent activity.

Go to **Email Marketing** — this loads as the first page automatically.

Stat Cards

Card	Counts
Total Subscribers	Every subscriber record regardless of status
Active Subscribers	Subscribers with a "subscribed" status specifically
Active Lists	Lists currently set to Active (Section 8)
Emails Sent Today	Queue entries actually sent since midnight, site time

Quick Actions

Four buttons jump straight to the most common tasks: Create Campaign, Manage Subscribers, Manage Lists, View Reports.

Recent Campaigns & Subscription Lists Overview

Two tables at the bottom: your most recent campaigns (with a direct Report link per row), and every subscription list with its current subscriber count and status.

4. Campaigns

Go to **Email Marketing → Campaigns → New Campaign**. This is the full newsletter-style campaign builder.

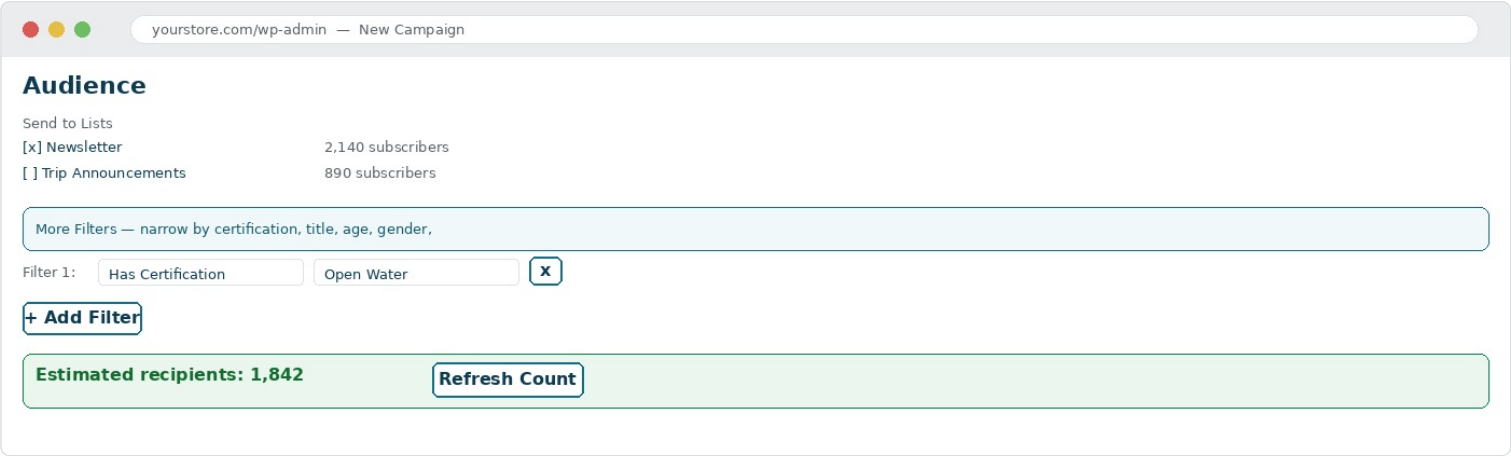
4a. Campaign Details & Content

1. Set the **Campaign Name** (internal only, never seen by recipients), **Email Subject**, and optional **Preview Text** (the snippet shown next to the subject line in most inboxes).
2. Write the **Email Content** in the rich text editor. Toolbar buttons above it: **Preview** (see it as a recipient would), **Insert Waivers/Questionnaires/Events** (4d), **Load Template** (pull in a saved template's content), and **Save as Template** (4e).
3. Use any of the available **merge tags** shown beneath the editor to personalize the email per-recipient (e.g. first name).

4b. From Settings

Override the store-wide **From Name**, **From Email**, and **Reply-To** (Section 10a) for this specific campaign only, if it should come from a different sender than usual.

4c. Audience — Lists and Advanced Filters



Audience — start from one or more lists, then narrow further with advanced filters.

1. Check one or more **lists** to send to (Section 8). If none exist yet, a link takes you straight to Lists to create one.
2. Click **More Filters** to narrow the lists you selected further, using any combination of:

Filter	What it targets
Has Certification / Does NOT Have Certification	A specific certification on file (from Titles & Certs, via POS)
Has No Certifications On File	Subscribers with nothing recorded at all
Customer Title	A specific title assigned in Titles & Certs
Age	Calculated from date of birth on file
Gender	As recorded on the customer's profile
Rewards Points	Current SL Rewards point balance (over/under/between a value)
Gift Card Expiring Soon	Holds an SL Gift Cards balance expiring within a window
Store Credit Balance	Current store credit balance
Lifetime Spend	Total historical order value
Order Recency	How long since their last order
Discount Program	Assigned to a specific POS Discount Program (Section 17, POS manual)
State / Region	Billing address state/region

3. Click **+ Add Filter** to stack more than one — all filters combine together, narrowing the audience further with each one added.
4. Click **Refresh Count** to see exactly how many recipients currently match your lists and filters combined, before sending anything.

4d. Inserting a Waiver/Lease/Questionnaire/Event Link

Click **Insert Waivers/Questionnaires/Events** to browse your published SL Waivers & Leases documents, filterable by type (All / Waivers / Leases / Questionnaires / Events). Click one, then choose how to insert it:

- **Just a Link** — a short link the reader clicks to view or sign it
- **Full Document** — the whole document's text, placed directly in the email. Even this option still adds a link at the end, since reading the text in an email doesn't actually sign it — the reader still needs to click through to complete it.

4e. Save as Template

Click **Save as Template** to save this campaign's current subject and content as a reusable template (Section 6), without affecting the campaign itself. Give it a name — find it later under Templates, or pull it into any future campaign with Load Template.

4f. Send, Test, Schedule, or Save as Draft

- **Save Draft** — saves your progress without sending
- **Send Test Email** — sends a copy to yourself to check formatting before committing
- **Schedule** — opens a picker showing your site's timezone and current time, then set a future send date/time
- **Send Now** — sends to the full matched audience immediately

5. Group Emailing

Go to **Email Marketing → Group Emailing**. Use this instead of Campaigns when you need to email people who aren't necessarily newsletter subscribers — a one-off list of specific email addresses, built manually or imported.

5a. Sending a Group Email

The builder here mirrors Campaigns (Section 4) closely — Email Details, Email Content (with Preview and Load Template), From Settings, and Send/Test/Schedule — with one key difference: **Recipients** is a Group (5b) instead of Lists and filters.

5b. Building a Group — Including Import from Trip

Go to **Group Emailing → (a group) → Edit group members**, or create a new group:

1. Set a **Group Name** and optional **Description**.
2. Add **Email Addresses** one row at a time with **+ Add Row** — email is required; first and last name are optional but recommended, since they enable personalized merge tags for this group.
3. Or click **Import from Trip** to pull in every registered traveler's email from a specific SL Travel Booking Manager trip automatically — pick the trip, and its traveler list loads for you to review and import in one action, rather than typing each address by hand.

> **When to use this over a List:** a List is for people who've actively subscribed to hear from you regularly. A Group is for a one-time or short-term audience tied to a specific event or trip — nobody in a Group is auto-subscribed to anything ongoing just by being emailed this way.

6. Templates

Go to **Email Marketing → Templates**. Every template you've saved (from Campaigns 4e or Group Emailing) is listed here, with **Edit** and **Delete** actions.

1. Click **New Template** to build one directly rather than saving from an existing campaign.
2. Set a **Template Name**, an optional **Default Subject** pre-filled whenever this template is loaded, and the **Content** itself in the rich text editor, with the same merge tags available as in Campaigns.
3. Click **Preview** to check it, then **Save Template**.

7. Lists

Go to **Email Marketing → Lists**. Lists are the ongoing subscriber groups people actively opt into — Newsletter, Trip Announcements, and so on.

1. Fill in **List Name** and an optional **Description**.
2. Set **Status**: Active or Inactive. An inactive list is hidden from public subscribe forms but its existing subscribers and history are untouched.
3. Click **Save List**.

Every existing list shows its Name, Slug, current Subscriber count, and Status, with **Edit** and **Delete** actions.

8. Subscribers

Go to **Email Marketing → Subscribers**.

Finding Subscribers

Filter by **List** and/or **Status** (Subscribed / Unsubscribed / Pending / Bounced), then click **Filter**.

Adding, Editing & Removing

- **+ Add Subscriber** — add one manually with email, name, status, and list assignments
- **Edit** (per row) — change status or check/uncheck which lists this subscriber belongs to
- **Delete Pending** — a bulk-cleanup tool for subscribers stuck in "Pending" (never confirmed) for longer than a chosen window: 30/60/90 days

Import & Export

- **↑ Import CSV** — required column: `email`. Optional: `first_name`, `last_name`, `status` (subscribed/unsubscribed/pending), and `lists` (comma-separated list names). You can also select lists to add every imported row to directly in the import form, which overrides any `lists` column in the file.
- **↓ Export CSV** — downloads your current filtered view
- **↓ CSV Template** — a blank starting file with the correct headers

9. Reports

Go to **Email Marketing → Reports** and select a campaign from the dropdown.

Campaign Summary

Subject, when it was sent (or "Not yet"), and its current status.

Stat Cards — Each With a "Show" Drill-Down

Card	Shows
Total Recipients	Everyone the campaign was sent to
Delivered	Successfully sent
Opens	Recipients who opened the email (via tracking pixel)
Clicks	Recipients who clicked at least one link
Failed / Bounced	Delivery failures
Spam	Marked as spam by the recipient's mail provider, where reported
Pending	Still queued, not yet sent

Click **Show** on any card to open a list of exactly which subscribers fall into that bucket, by name and email — with **Unsubscribe All** and **Delete All** bulk actions available right from that same drill-down (e.g. bulk-unsubscribe everyone who bounced).

Delivery Progress, Engagement Overview & Top Clicked Links

A progress view of the send as it worked through the queue, an engagement summary, and a ranked table of which links in the email got the most clicks.

10. Settings

Go to **Email Marketing → Settings**. Seven tabs across the top.

10a. Sender

Sender Information: your store-wide default From Name, From Email, and Reply-To — used on every campaign, group email, and system notification unless overridden per-campaign (Section 4b).

10b. SMTP / Delivery

> **Very Important Note — Use FluentSMTP + Amazon AWS (SES) Instead of a Paid Email Marketing Subscription:** for the actual sending of newsletters and campaigns, install the free **FluentSMTP** plugin and connect it to an **Amazon AWS** account (SES — Simple Email Service). FluentSMTP has its own built-in, step-by-step directions for connecting an Amazon AWS account, right inside its own setup screen — you don't need to configure AWS from scratch on your own. The free version of FluentSMTP is all that's needed for this. Doing it this way costs a matter of **pennies** for the same volume of email that a typical email marketing platform would charge **hundreds of dollars a month** for, since you're paying Amazon's raw sending cost directly instead of a marketing platform's markup.

- **Send Method** — Default (wp_mail) or Custom SMTP.
  - If you've set up FluentSMTP with Amazon AWS as described above, leave this on **Default (wp_mail)**. FluentSMTP works by intercepting WordPress's own `wp_mail()` function directly, so once it's configured, every email this plugin sends is automatically routed through your AWS SES connection — there's nothing further to configure here, and no need to duplicate your AWS credentials into the Custom SMTP fields below.
  - Use **Custom SMTP** instead only if you're connecting directly to a different SMTP provider without going through FluentSMTP.
- **SMTP Configuration** (shown when Custom SMTP is selected) — Host, Port, Encryption (TLS/SSL/None), Username, Password, and a **Test SMTP Connection** button to confirm it works before you rely on it.
- **Sending Limits** — Batch Size: how many emails go out per cron batch (runs every 5 minutes). Reduce this if you're hitting your host's — or your AWS SES account's — sending limits.

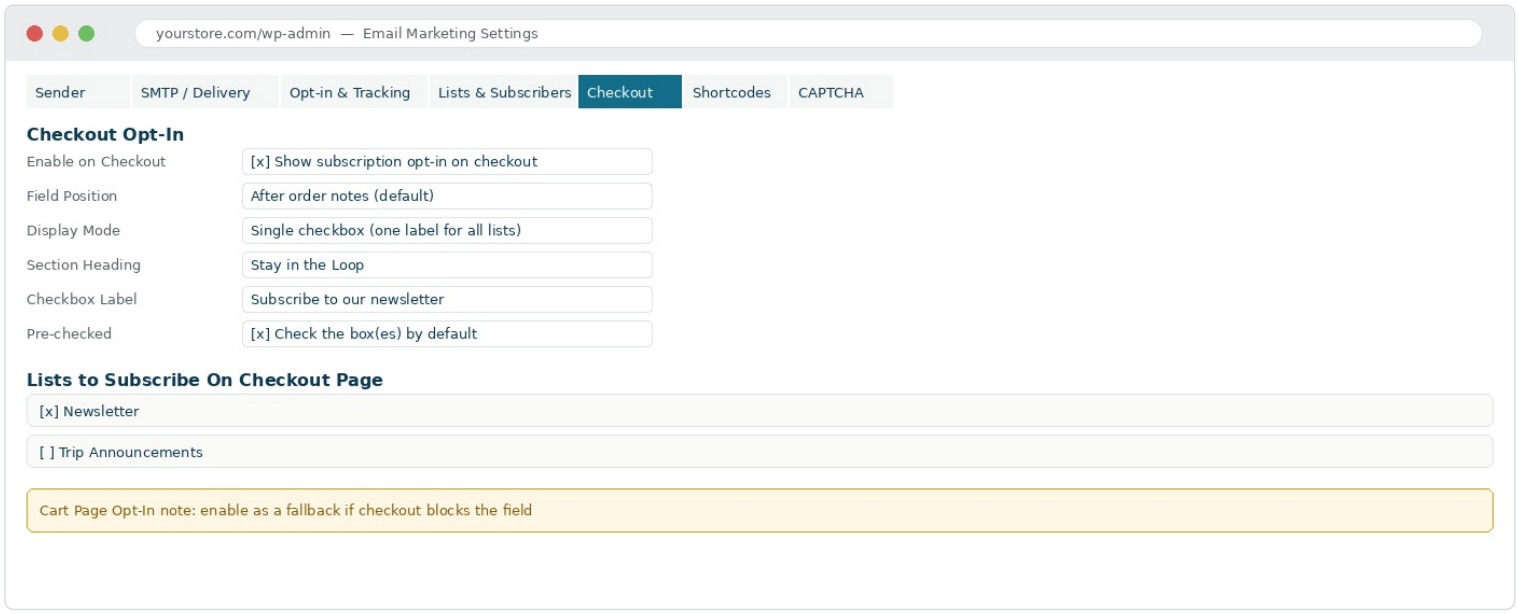
10c. Opt-in & Tracking

Subscription Settings and **Tracking** — controls for how new subscribers confirm (double opt-in behavior) and whether open/click tracking is enabled.

10d. Lists & Subscribers

Subscriber Management settings, plus a **Subscriber List Overview** summary.

10e. Checkout



Checkout — every field controlling the opt-in shown at WooCommerce checkout.

Checkout Opt-In

Field	What it controls
Enable on Checkout	Turns the whole opt-in field on or off at WooCommerce checkout
Field	Where on the checkout page it appears — After order notes (default), Before order notes, After billing form, Above Place Order button, or Below

Position	Place Order button
Display Mode	**Single checkbox** (one label covers every list at once) / **Multiple checkboxes** (each list gets its own checkbox, so the customer picks exactly which ones) / **Hidden** (auto-subscribes silently on order completion, with no checkbox shown at all)
Section Heading	An optional heading shown above the checkbox(es); leave blank for none
Checkbox Label	The text next to the checkbox in Single mode (not used in Multiple mode, since each list shows its own name instead)
Pre-checked	Whether the box starts checked by default — customers can still uncheck it before placing the order

Lists to Subscribe On Checkout Page — choose exactly which lists a checked opt-in actually subscribes the customer to; leave every list unchecked here to include all active lists by default.

A live **Preview** further down shows exactly how the field will look once you save your settings.

Cart Page Opt-In

A second, independent opt-in that shows in the Cart page's totals box rather than at Checkout.

> **Why this exists as a separate fallback:** some WordPress themes and certain hosting setups (GoDaddy Managed WooCommerce is specifically called out by the plugin itself) can block the checkout opt-in field from actually appearing — often due to checkout page caching. The Cart page isn't affected by that same caching, so enabling this here gives you a reliable fallback if you notice the checkout version isn't showing up for customers.

Field	What it controls
Show in Cart	Turns the cart-page opt-in on (off by default)
Master Checkbox Label	The label for one checkbox that toggles every list at once
Pre-checked Lists	Choose which specific lists are checked by default — check all of them to pre-check everything, select just some, or leave all unchecked so nothing is pre-selected
Lists to Show in Cart	Which lists actually appear as options here; leave all unchecked to show every active list

10f. Shortcodes

Subscribe Form Defaults

Pre-checked Lists controls which lists are checked by default anywhere the `[slem_subscribe_form]` shortcode is used, store-wide — override it for one specific instance of the form using that shortcode's own `prechecked` attribute (see the table below).

Subscribe Form Shortcode

Shortcode	What it does
`[slem_subscribe_form]`	Shows all active lists
`[slem_subscribe_form list_id="3"]`	Shows only list ID 3
`[slem_subscribe_form list_id="1,2" button_text="Sign Up"]`	Multiple lists, with custom button text
`[slem_subscribe_form show_name="false"]`	An email-only form, with no name fields
`[slem_subscribe_form prechecked="1,3"]`	Pre-checks specific lists by ID — overrides the global Subscribe Form Defaults above, for this one instance of the form
`[slem_subscribe_form prechecked=""]`	Forces no lists pre-checked on this specific form, even if the global default would otherwise pre-check something

Email Merge Tags

Tag	Inserts
`{{first_name}}`	Subscriber first name
`{{last_name}}`	Subscriber last name
`{{email}}`	Subscriber email address
`{{site_name}}`	Your website name

`{{unsubscribe_url}}`	A one-click unsubscribe link — automatically appended to the email even if you don't add this tag yourself

10g. CAPTCHA

Google reCAPTCHA v2

Protects public subscribe forms from bot/spam signups. Get your keys at google.com/recaptcha — choose **reCAPTCHA v2 → "I'm not a robot" checkbox** specifically when creating them.

1. Check **Show reCAPTCHA on the [slem_subscribe_form] shortcode** and/or **Show reCAPTCHA on the cart page subscribe button** — these are two independent toggles, so you can protect one without the other.
2. Enter your **Site Key** (the public key embedded in your page) and **Secret Key** (the private key used to verify submissions server-side — keep this one confidential).
3. Save. A status banner confirms whether CAPTCHA is genuinely active (green, both keys present) or enabled but still missing a key (yellow warning) — so it's obvious if protection isn't actually live yet.

Submission Debug Log

A separate troubleshooting tool for diagnosing subscribe-form problems — spam, blocked submissions, or a form that isn't working right.

1. Check **Enable Debug** to start logging every subscribe attempt with full detail: email, name, IP address, which lists were selected, reCAPTCHA token age, and a pass/fail breakdown of every check the submission went through, color-coded by result (Accepted / Blocked / other).
2. Review entries newest-first once you've reproduced the issue.
3. Click **Clear Log** when you're done.

> **Only enable this temporarily:** the log records real submission data (including IP addresses and names), so turn it on only while actively debugging a specific issue, then disable it again afterward.

Blocked IP Ranges — a separate, always-active list of IP prefixes to block outright, one per line (e.g. `217.181.` blocks the entire 217.181.x.x range). Any new WooCommerce account creation or subscribe-form attempt from a blocked range is rejected automatically, whether or not CAPTCHA or the debug log are turned on.

11. Troubleshooting & Quick Reference

Issue	What to check
Emails aren't sending at all	Check Settings → SMTP / Delivery (Section 10b) — Test SMTP Connection if using Custom SMTP directly; if you're using FluentSMTP with Amazon AWS, check FluentSMTP's own connection status instead, and confirm this plugin's Send Method is left on Default (wp_mail).
Emails go to spam, or you're worried about cost at scale	Set up FluentSMTP with Amazon AWS (SES) — see the note in Section 10b. This is both more reliable for deliverability and dramatically cheaper than a typical email marketing subscription once you're sending real volume.
A campaign's audience count seems wrong	Click Refresh Count (Section 4c) after changing lists or filters — the count doesn't update live as you type.
Certification/title/rewards filters return nobody	Confirm the relevant SL plugin (POS for Titles & Certs, SL Rewards, SL Gift Cards) is installed and active — these filters depend on that plugin's own data.
Import from Trip shows no travelers	Confirm SL Travel Booking Manager is active and that trip actually has registered travelers with email addresses on file.
Sending is slow for a large list	Expected — emails go out in batches on a 5-minute cron cycle (Section 10b). Increase Batch Size if your host can handle it, rather than expecting an instant send.
Checkout opt-in checkbox isn't showing	Confirm it's enabled and at least one list is selected under Settings → Checkout (Section 10e).

Send a newsletter to subscribers	Campaigns → New Campaign → pick lists → Send Now
Target a specific audience precisely	Campaigns → Audience → More Filters → Add Filter → Refresh Count
Email everyone on a specific trip	Group Emailing → new group → Import from Trip
Reuse an email you've sent before	Campaigns or Group Emailing → Load Template (save it first via Save as Template)
Link a waiver in an email	Campaign editor → Insert Waivers/Questionnaires/Events
See how a campaign performed	Reports → select campaign
Add a signup checkbox at checkout	Settings → Checkout → enable → choose lists

12. Version History

What's changed in each release of SL Email Marketing, in plain language — for reference and troubleshooting.

Version	Date	What Changed
1.5.0	—	Current version — reflected throughout this manual, including Group Emailing with Travel Booking trip import (Section 5), inserting SL Waivers & Leases documents into a campaign (Section 4d), saving a campaign as a reusable template (Section 4e), and CAPTCHA/bot-spam hardening (Section 10g).
1.0.0	—	Initial release.

About this table: this plugin's readme.txt changelog was only ever kept up to the initial release, so the specific version each later feature shipped in (1.0.1–1.4.x) can't be individually verified — only the initial release and the current version are listed. Every future update gets a dated row here going forward.