



PINXS Mail Manager

Full Installation and Detailed User Instructions for WordPress

A complete guide to installing the plugin, activating your licence, configuring sending, building subscription forms, managing subscribers, creating campaigns, using AI content tools, sending broadcasts and reviewing statistics.



Campaigns

Create welcome emails, follow-ups, broadcast messages and scheduled sequences.

Subscribers

Manage active, suspended, imported and campaign-linked subscribers.

AI Content

Generate draft email content with OpenAI, DeepSeek or OpenRouter.

Tracking

Review opens, clicks, performance and campaign engagement.

Guide note: This guide is written for WordPress administrators using PINXS Mail Manager v1.0.28. Menu labels may vary slightly if your site has been customised, but the workflow remains the same.



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1. What PINXS Mail Manager does

PINXS Mail Manager is a WordPress email marketing and autoresponder plugin. It is designed to let a site owner collect subscribers, build campaign sequences, send one-off broadcast emails, create custom subscription forms, manage subscriber records and track campaign performance from inside wp-admin.

The plugin also includes AI-assisted content generation. This is optional: you can write all email content manually, or you can connect an AI provider and use the assistant to draft welcome messages, follow-up emails, promotional messages and newsletters.

Email campaigns Create named campaigns with descriptions, active/inactive status and message sequences.	Double opt-in Use confirmation workflows to help prove subscriber intent before sending.	Custom forms Create form templates and publish them with shortcodes on pages or posts.	Subscriber database Store names, email addresses, phone/address fields, status and campaign memberships.
Broadcasts Send one-off emails to a selected subscriber group or campaign audience.	AI drafts Use provider API keys to generate draft content from a topic and message type.	Tracking Track sent messages, opens, clicks and campaign events.	WooCommerce Optionally add paying customers to a selected customer campaign.

Important before using email marketing

Compliance: Only send emails to people who have given proper consent or who have a valid customer relationship with your site. Email marketing rules vary by country and industry. You are responsible for making sure your use of the plugin complies with applicable privacy, spam and marketing laws.



2. Installation and first setup

Install PINXS Mail Manager in the same way as a normal premium WordPress plugin. Use a staging site first if the site is already live and business-critical.

Installation steps

1. Log in to your WordPress admin dashboard as an administrator.
2. Go to Plugins > Add New > Upload Plugin.
3. Choose the PINXS Mail Manager zip file supplied by Plugin Nexus.
4. Click Install Now.
5. When WordPress confirms the upload has installed successfully, click Activate Plugin.
6. After activation, open the new PINXS Mail Manager menu in wp-admin.
7. Review Settings first before creating campaigns or sending any emails.

Recommended first-run order

Step	Area	Purpose
1	Settings	Configure From name, From email, sending method and test email address.
2	Licence	Activate your Plugin Nexus licence so updates can be delivered correctly.
3	SMTP or mail provider	Confirm WordPress can send reliable HTML email before importing subscribers.
4	Email logo	Optional: add a PNG or JPG logo for branded email headers.
5	Forms & Subscribers	Create the form template and test a subscription with your own address.
6	Campaigns	Create a small test campaign and send tests before adding real subscribers.

Backup: A fresh install creates the plugin database tables automatically. If you are migrating from another site, back up your WordPress database before importing or testing large subscriber lists.



3. Licence activation and updates

Premium Plugin Nexus products use licence activation for updates and support access. The exact licence screen may appear under the Plugin Nexus / Licence area or inside the PINXS Mail Manager admin menu depending on the build installed on your site.

1. Open the licence page for PINXS Mail Manager in wp-admin.
2. Copy your licence key from your Plugin Nexus account or purchase email.
3. Paste the licence key into the licence field.
4. Click Activate or Save Licence.
5. Confirm that the licence status shows as active or valid.
6. Return to Dashboard > Updates or Plugins when a new version is available.

Safe update practice

- Back up the site files and database before updating on a live business site.
- Do not install a new copy under a different folder name. WordPress should update the existing plugin instead of creating a duplicate active plugin.
- After updating, check the plugin version, send a test email and open the main admin pages.
- Avoid running two versions of the plugin at the same time.

4. Main settings

The main Settings page is the first place to configure the plugin. It controls the sender identity, email method, SMTP details, test email address, logo settings, AI provider keys and WooCommerce integration.

Email settings

Setting	What it does	Recommended use
From Name	The name displayed in the From field of outgoing emails.	Use your business or website name, for example Plugin Nexus.
From Email Address	The email address used as the sender.	Use a domain-based address such as support@yourdomain.com rather than a free mailbox.
Admin Email Address	Used by the [admin-email] placeholder in campaign content.	Use your support or admin contact address.
Test Email Address	Destination for test sends and diagnostics.	Use an address you can check immediately, including Outlook/Gmail if you test compatibility.
Email Sending Method	Choose WordPress Mail, SMTP or Email Provider API.	SMTP is usually more reliable than basic wp_mail on shared hosting.

Email sending methods

Method	Description	When to use
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WordPress Mail	Uses WordPress wp_mail and the server mail configuration.	Good for quick testing, but not always best for real marketing volume.
SMTP	Sends through an SMTP mailbox or transactional email service.	Recommended for better deliverability, authentication and error reporting.
Email Provider API	Designed for provider API key sending where supported by the build.	Use when your email service supports API-based sending and you have the correct key.

SMTP fields

- SMTP Host: the mail server hostname, such as smtp.yourprovider.com.
- SMTP Port: commonly 587 for TLS or 465 for SSL. Use the value supplied by your email provider.
- SMTP Encryption: choose TLS, SSL or none. Secure TLS/SSL is strongly preferred.
- SMTP Username: usually your full email address or provider username.
- SMTP Password: your SMTP password or app-specific password. Do not use your main account password where an app password is required.

Deliverability: Use the Test Email and Test SMTP Connection buttons before adding a live campaign. A campaign can look correct but still fail if SMTP authentication, DNS, SPF, DKIM or DMARC is not configured correctly.

Email logo settings

Field	Purpose	Advice
Website Logo	Selects the logo used by the [website-logo] placeholder and optional automatic email header.	Use PNG or JPG for best email-client compatibility. SVG may not show in Outlook.
Logo Size	Sets the display width of the logo in outgoing emails.	Start with 150px or 250px wide, then send a test to check mobile and desktop email clients.
Logo Position	Controls placement relative to the email headline.	Centre is usually the safest option for simple branded emails.
Add Logo to Emails	Automatically inserts the logo at the top of all email messages.	Enable once you have confirmed the logo renders correctly in major email clients.

AI settings

AI settings are optional. If you do not enter an API key, you can still create templates and campaigns manually. If you do connect AI, the plugin can help draft content from a message type and topic.

AI provider	Field required	Notes
OpenAI	OpenAI API Key	Use this when your account is configured for OpenAI API usage.
DeepSeek	DeepSeek API Key	Alternative provider option for AI-generated email drafts.
OpenRouter	OpenRouter API Key	Routes requests through OpenRouter-supported models.



AI review: AI-generated content should be reviewed before sending. Always check factual accuracy, tone, links, claims, personalisation placeholders and compliance wording.

5. WooCommerce customer auto-subscribe

PINXS Mail Manager includes an optional WooCommerce integration. This can automatically add paying customers to a selected campaign after successful payment or order completion. It is disabled by default and should only be enabled after testing.

WooCommerce settings

Option	What it does	Safe usage
Enable customer auto-subscribe	Turns on automatic customer enrolment after successful payment/order completion.	Leave disabled until the destination campaign is tested.
Default customer campaign	Selects the active Mail Manager campaign used as the global customer campaign.	Create a specific customer-only campaign, such as Post-purchase onboarding.
Behaviour safeguards	Prevents duplicates, restarts and re-adding previously unsubscribed customers.	These safeguards are enforced to reduce spam-like behaviour.
Product-specific campaigns	Adds Mail Manager options to WooCommerce product edit screens.	Use carefully. Do not add customers to too many campaigns from one purchase.

Recommended customer campaign

- Use one short onboarding or product-support sequence rather than a general marketing list.
- Make the first email helpful, for example with download instructions, support links or setup tips.
- Do not restart the sequence for returning customers already in the campaign.
- Respect unsubscribe status. Do not manually re-add someone who has opted out unless they request it.



6. Forms and subscribers

The Forms & Subscribers area is used to create form templates, review subscribers, manage status, import/export subscriber data and assign people to campaigns.

Forms & Subscribers tabs

Tab	Purpose	Main actions
Templates	Create and manage subscription form templates.	Add fields, choose required fields, control field order and copy shortcodes.
Subscribers	View and manage subscriber records.	Search, filter, suspend, activate, review campaign badges and remove records.
Import/Export	Move subscriber data in or out by CSV.	Import CSV files, map campaigns and export filtered subscriber lists.

Creating a form template

1. Go to PINXS Mail Manager > Forms & Subscribers.
2. Open the Templates tab.
3. Click the option to add a new template or edit an existing template.
4. Enter a clear template name, such as Newsletter Signup or Product Updates Signup.
5. Add the fields you want to show. Email is required for subscriptions; name and other fields are optional unless you mark them required.
6. Use clear field labels that visitors understand.
7. Set custom fields only when you genuinely need them. More fields usually reduce sign-up rates.
8. Save the template.
9. Copy the shortcode shown for the form/campaign and place it on a WordPress page, post or block area.

Available field types

Field type	Example use	Advice
Text	First name, last name, company name.	Good for short values.
Textarea	Message, interests, extra notes.	Use sparingly on public sign-up forms.
Number	Quantity, customer ID or numeric field.	Only use when a number is needed.
URL	Website or profile link.	Validate links and avoid collecting unnecessary personal data.
Email	Subscriber email address.	Required for all subscription workflows.

Publishing a form

The plugin supports shortcode-based forms. Place the shortcode into a Shortcode block, classic editor area, widget area or page builder shortcode element.

```
[hoh_campaign_form id="campaign_id"]
```

- Replace campaign_id with the actual campaign ID supplied by the plugin.



- Place the form on a page that explains what the visitor is subscribing to.
- Test the form using your own email address before promoting the page.
- Check confirmation, welcome message and unsubscribe links before collecting real subscribers.

Subscriber status and campaign badges

Subscriber records can exist globally and can also be linked to one or more campaigns. The plugin displays campaign badges and status controls so you can see which list or sequence a subscriber belongs to.

Status	Meaning	Use
Active	The subscriber is allowed to receive emails for the relevant campaign.	Normal state for confirmed subscribers.
Suspended	The subscriber is paused and should not receive campaign messages.	Use when there is a temporary issue or manual pause.
Unsubscribed	The subscriber has opted out from a campaign or list.	Respect this status. Do not re-add without permission.

Searching, filtering and bulk actions

- Use the search field to find subscribers by name or email address.
- Use campaign filters to display only subscribers connected to a particular campaign.
- Use bulk actions for careful administration, such as assigning, suspending or deleting multiple records.
- Export a backup CSV before making large bulk changes.

Importing and exporting subscribers by CSV

CSV import/export is useful when moving from another email tool or maintaining a backup of subscriber records. Always test with a small CSV before importing a large file.

CSV columns

The plugin expects email as the required field. Optional fields include first_name, last_name, phone, address, country and status. A typical CSV header is:

```
email,first_name,last_name,phone,address,country,status
```

Import checklist

- Use UTF-8 CSV where possible.
- Keep the header row in the file.
- Remove duplicates before import if you are merging from several sources.
- Check that the status values are sensible, for example active or suspended.
- Select the campaign mapping carefully if the import screen asks which campaign should receive the subscribers.
- Do not import purchased lists. Only import contacts with a valid consent or customer relationship.



Export checklist

- Use export before major edits, updates or migrations.
- Store exported files securely because they contain personal data.
- Delete old exports from shared computers and downloads folders when they are no longer needed.
- Filter by campaign if you only need a specific list.



7. Creating campaigns

A campaign is a container for subscribers and messages. It can be a newsletter list, a product update list, a lead magnet delivery sequence, a customer onboarding sequence or a promotional campaign.

Campaign creation steps

1. Go to PINXS Mail Manager > Campaigns.
2. Click Add New Campaign.
3. Enter a clear campaign name, such as Newsletter, New Customer Onboarding or Free Download Follow-up.
4. Add a short internal description so other administrators understand the purpose of the campaign.
5. Select or link the appropriate form template if the screen offers this option.
6. Choose whether the campaign should be active.
7. Save the campaign.
8. Open the campaign messages area to add the welcome email and any follow-up messages.

Campaign planning table

Campaign type	Typical first email	Typical follow-ups
Newsletter	Thanks for subscribing and what to expect.	Weekly/monthly updates or selected news.
Lead magnet	Download link and helpful introduction.	How to use the free resource, then product/service introduction.
Customer onboarding	Purchase confirmation support or setup guidance.	Tips, documentation links, support details, renewal/update reminders.
Promotion	Offer announcement and value explanation.	Reminder, case study, final call before offer ends.
Best practice: Keep each campaign focused. A subscriber should understand why they are receiving the email and how it relates to the form, purchase or action they completed.		

Campaign messages

Campaign messages form the autoresponder sequence. Each message can have its own subject, body content, delay and send time. The first message is commonly immediate or very short delay, while follow-up messages are scheduled later.

Adding a message

1. Open PINXS Mail Manager > Campaigns.
2. Find the campaign you want to edit.
3. Open the messages or edit sequence option for that campaign.
4. Click Add Message or New Message.



5. Enter a subject line that clearly describes the email.
6. Write the email body manually or use the AI assistant to draft a starting version.
7. Add personalisation placeholders only where they make sense.
8. Set the delay in days and/or hours.
9. Set a specific send time if needed, such as 09:00.
10. Save the message and send a test email before activating for real subscribers.

Scheduling options

Option	Description	Example
Immediate first message	Send shortly after subscription or confirmation.	Welcome email or download link.
Days delay	Wait full day periods before sending.	Send follow-up 2 days after signup.
Hours delay	Wait a precise number of hours.	Send reminder 12 hours after signup.
Specific send time	Send at a chosen time of day.	Schedule non-urgent emails for 09:00.

Testing messages

- Send each individual message to the test email address.
- Check subject lines, logo display, paragraphs, buttons and links.
- Confirm placeholders resolve correctly and do not show as raw codes by mistake.
- Check mobile and desktop email clients if the campaign is important.
- Test unsubscribe links before adding real subscribers.

8. Broadcast email

Broadcast Email is used for one-off emails rather than automated sequences. Examples include a product announcement, maintenance notice, special offer, newsletter update or important customer message.

Sending a broadcast

1. Go to PINXS Mail Manager > Broadcast Email or Campaigns > Broadcast Email.
2. Choose the intended audience or campaign where available.
3. Enter the subject line.
4. Write the message content or generate a draft using AI.
5. Add any required links, images or calls to action.
6. Send a test to yourself first.
7. Review the received test email carefully.
8. Send the broadcast only when you are confident the audience, subject and content are correct.

Warning: Broadcasts can reach many people at once. Do not send a live broadcast until the test email has been reviewed and links have been clicked in the received email.



9. Email templates and placeholders

The Email Templates area lets you manage reusable email layouts or content structures. Templates help keep newsletters, welcome messages and promotional emails consistent across campaigns.

Using templates

- Create templates for common message types: welcome, follow-up, promotion and newsletter.
- Keep template structure simple so it renders well in email clients.
- Use headings, short paragraphs and clear buttons/links rather than complex page-builder layouts.
- Keep brand logo and colours consistent with the website.
- Send tests to multiple email clients after major template changes.

Personalisation placeholders

Placeholder	Replaced with	Example use
[first-name]	Subscriber first name.	Hi [first-name], thanks for joining.
[last-name]	Subscriber last name.	Useful for formal communication where appropriate.
[full-name]	First and last name combined.	Use sparingly; first name is often more natural.
[email]	Subscriber email address.	Confirmation or account-related information.
[admin-email]	The admin email configured in settings.	Support contact or reply instructions.
[website-logo]	The selected website logo.	Branding at the top of an email template.

Testing: Send yourself a test with a sample subscriber record before using placeholders in live campaigns. Raw placeholders in a live email look unprofessional and can reduce trust.

10. AI content assistant workflow

The AI content assistant can speed up the first draft of an email. It should be treated as a drafting tool rather than an automatic publisher. The administrator remains responsible for the final message.

Supported message types

Message type	Best for	Review focus
Welcome email	Greeting new subscribers or customers.	Make sure expectations and next steps are clear.
Follow-up email	Checking in after signup, purchase or download.	Keep helpful and relevant; avoid over-emailing.
Promotional email	Offer or product announcement.	Check claims, prices, dates, exclusions and links.
Newsletter	General update or curated content.	Check structure, headings, summaries and factual accuracy.



Generating an AI draft

1. Configure an AI provider and API key under Settings.
2. Open the campaign message, template or broadcast editor where AI generation is available.
3. Choose the message type, such as welcome, follow-up, promotional or newsletter.
4. Enter a clear topic or instruction. Include the product, audience, offer and desired tone.
5. Generate the draft.
6. Read the generated content fully before saving.
7. Edit the draft to match your brand voice and actual offer.
8. Check all placeholders, facts, links and calls to action.
9. Send a test email and review the received version.

Prompt examples

Goal	Example prompt
Welcome new subscribers	Write a friendly British English welcome email for people joining the Plugin Nexus newsletter. Explain they will receive WordPress plugin updates, tips and occasional offers.
Customer onboarding	Write a helpful first email for customers who purchased a WordPress plugin. Include support, documentation and setup guidance. Keep it concise and professional.
Promotion	Draft a promotional email for a limited launch offer on a WordPress plugin. Make it clear, helpful and not too pushy.
AI caution: Never rely on AI to create legal, financial, health or compliance statements without human review. Check that every statement is true for your product and business.	



11. Statistics, tracking and reports

PINXS Mail Manager tracks important campaign events including sends, opens and link clicks. These reports help you understand whether subscribers are engaging with your emails.

Tracked events

Metric	Meaning	How to use it
Sent	The message was sent or attempted by the queue/sending system.	Compare with subscriber count and failures.
Opened	The open tracking pixel was loaded by an email client.	Use as a rough engagement signal; not all clients load images.
Clicked	A tracked link was clicked.	Usually a stronger engagement signal than opens.
Open rate	Percentage of sent emails that registered an open.	Useful for subject line and audience health trends.
Click-through rate	Percentage of sent/opened emails that resulted in clicks.	Useful for measuring call-to-action performance.
Tracking note: Open tracking is not perfect. Some email clients block images, and privacy features can hide or inflate open data. Treat opens as a trend, not an exact count.		

Using reports

1. Go to PINXS Mail Manager > Email Statistics.
2. Choose a date range if available.
3. Filter by campaign if you want campaign-specific results.
4. Review sent, open and click metrics.
5. Look for messages with unusually low opens, high clicks or poor performance.
6. Export CSV data if you need to archive or analyse the results externally.

Improving results from report data

- Low opens: review subject lines, sender name and list quality.
- High opens but low clicks: review the offer, link placement and call to action.
- High unsubscribes: reduce frequency, improve relevance and check whether people expected the emails.
- Delivery problems: check SMTP logs, DNS authentication, bounces and spam complaints.

12. Queue processing, cron and deliverability

The plugin uses queue processing to send scheduled emails in batches instead of trying to send everything at once. This is safer for hosting resources and helps large campaigns process more reliably.



Queue behaviour

Feature	Description
5-minute interval checks	The plugin checks for pending scheduled messages at regular intervals.
Batch sending	Up to 50 messages can be processed per run.
Retry handling	Failed messages may be retried up to a limited number of attempts.
Scheduled time order	Messages are processed according to their scheduled send time.
Error logging	Failures are logged to support troubleshooting.

Cron requirements

WordPress scheduled tasks rely on wp-cron or a real server cron. On low-traffic sites, wp-cron may not run exactly on time. If timely email sending matters, configure a real server cron job through your host.

- Ask your host how to run wp-cron.php every 5 or 10 minutes.
- Disable default wp-cron only if you have a real cron replacing it.
- Check that scheduled messages are leaving the queue after a test subscription.
- Avoid very large imports and immediate sends on weak shared hosting.

Deliverability essentials

- Use a domain email address matching your website domain where possible.
- Configure SPF, DKIM and DMARC for the sending domain.
- Use SMTP or a reputable transactional/email service for reliable sending.
- Avoid spammy subject lines, excessive capital letters and misleading claims.
- Include a clear unsubscribe option in marketing emails.
- Keep lists clean by removing invalid or unengaged addresses where appropriate.

13. Unsubscribe, consent and responsible sending

The plugin includes one-click unsubscribe features and campaign-specific unsubscribe handling. These tools are important for trust, compliance and reducing spam complaints.

Unsubscribe workflow

- Outgoing emails should include an unsubscribe link or unsubscribe section.
- When a subscriber unsubscribes, their campaign status should be updated so future messages stop.
- Do not manually re-add unsubscribed users unless they explicitly ask to resubscribe.
- Keep unsubscribe pages clear and easy to use.
- Test unsubscribe links in your test campaign before going live.



Consent checklist

Question	Why it matters
Did the person sign up, purchase or request these emails?	Confirms a valid reason to email them.
Does the form explain what they will receive?	Reduces complaints and unsubscribes.
Can they unsubscribe easily?	Improves trust and helps meet email marketing expectations.
Is imported data from a legitimate source?	Avoids spam, complaints and account suspension.
Are you storing exports securely?	Subscriber data is personal data and should be protected.

14. Troubleshooting

Most issues fall into a few areas: email sending, SMTP authentication, cron processing, missing API keys, incorrect campaign status, invalid subscriber data or email client rendering differences.

Common issues and fixes

Issue	Likely cause	Fix
Test email does not arrive	SMTP or wp_mail not configured, spam filtering, wrong test address.	Check SMTP settings, spam folder, logs and DNS authentication.
SMTP test fails	Incorrect host, port, encryption, username or password.	Copy settings directly from your email provider and try an app password if required.
AI generation does not work	Missing/invalid API key or provider mismatch.	Select the correct AI provider and confirm the API key is active.
Placeholders show in emails	Subscriber field missing or placeholder typed incorrectly.	Use supported placeholders exactly and test with a complete subscriber record.
Campaign messages do not send	Campaign inactive, subscriber suspended, queue/cron not running.	Check campaign status, subscriber status and cron processing.
Logo missing in Outlook	Unsupported SVG or remote image blocking.	Use JPG or PNG and send a test to Outlook.
Links not tracking	Tracking not enabled or links added in unsupported format.	Send a test and confirm links are normal clickable URLs.
Open rate seems wrong	Email client privacy/image blocking.	Use clicks and long-term trends rather than open count alone.

Maintenance checklist

- Send a monthly test email to confirm SMTP and branding still work.
- Back up before plugin updates and before large imports.
- Export subscribers periodically for secure backup if this matches your data policy.
- Review unsubscribes and complaints to keep campaigns relevant.
- Check campaign performance and remove outdated messages or expired offers.
- Keep WordPress, PHP, WooCommerce and the plugin updated.
- Review API keys if an AI or email provider stops responding.



Quick-start example: create a simple newsletter signup

1. Install and activate PINXS Mail Manager.
2. Go to Settings and configure From Name, From Email, Test Email and SMTP.
3. Send a test email and confirm it arrives.
4. Create a campaign called Newsletter.
5. Create a simple form template with email and optional first name.
6. Copy the campaign form shortcode and paste it on a Newsletter Signup page.
7. Create a welcome message with a short delay or immediate send.
8. Send the welcome message to your test address.
9. Submit the public form yourself and confirm the subscriber appears in the admin list.
10. Confirm the welcome email, unsubscribe link and tracking behave correctly.
11. Only then publish or promote the signup page.

Final safety reminders

Final reminder: PINXS Mail Manager is a powerful email tool. A small mistake can send the wrong message to many people, so use test addresses, small test lists and backups before running important campaigns.

- Test before sending live emails.
- Keep lists permission-based.
- Use SMTP or a proper email sending provider.
- Review AI-generated content manually.
- Respect unsubscribe requests.
- Keep exported subscriber files secure.

Support

For Plugin Nexus product support, use the support route supplied with your purchase or visit Plugin Nexus. Include your plugin version, WordPress version, PHP version, sending method, a description of the problem and screenshots where helpful.

General download and usage disclaimer

Before installing any software, plugin or theme, you should take sensible precautions. Download files only from the official source, keep a backup of your website, and test updates in a staging environment where possible.



You are responsible for checking that any downloaded file is suitable for your own system and use case. Scan downloaded files with your own security tools and, where possible, test in a safe environment before installing on a production website.

Plugin Nexus provides software and documentation in good faith, but cannot be responsible for problems caused by incompatible hosting, third-party plugins, incorrect configuration, email provider restrictions, custom code, user error, local system security issues or unsupported modifications.

Always maintain your own backups and make sure you understand the impact of sending email campaigns to subscribers or customers before using live campaign features.