

emfluence Marketing Platform — WordPress

Admin Guide

This guide walks site administrators through connecting the **emfluence Marketing Platform** plugin to your emfluence account, configuring settings, building signup forms, styling and embedding them, and embedding hosted landing pages. It covers wp-admin only—not developer setup or code changes.

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-

1. Sign in to WordPress admin

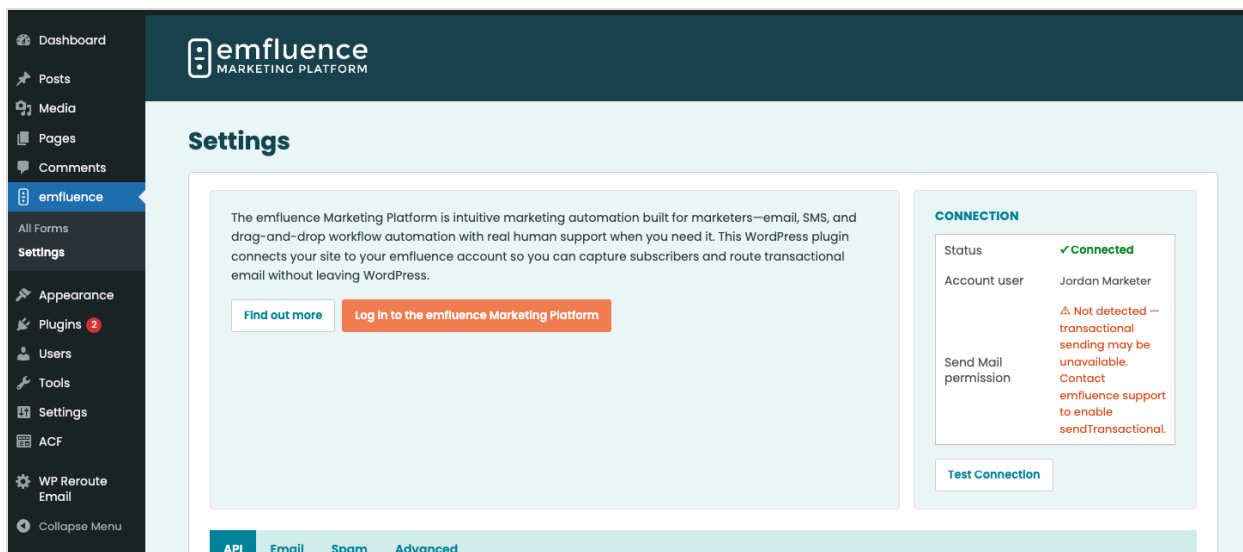
1. Open your site's WordPress login page (usually `/wp-login.php`).
2. Enter your username and password.
3. Click **Log In**.

You need an account with permission to manage plugins and settings (typically **Administrator**).

2. Open emfluence settings

After the plugin is installed and activated:

1. In the left admin menu, click **emfluence** (the domino icon).
2. On the submenu, click **Settings**.



The top of the **Settings** screen introduces the platform and shows your **Connection** status. Below that, the settings are split into four tabs:

Tab	Purpose
API	Connect your emfluence account

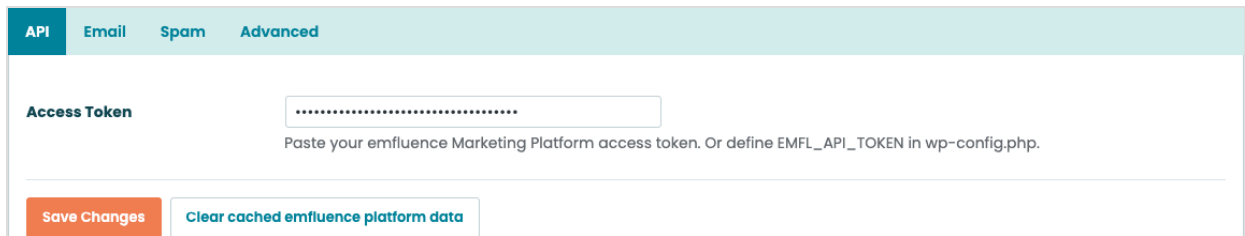
Email	Route WordPress mail through emfluence
Spam	Honeypot and captcha keys for signup forms
Advanced	Debug logging

3. Connect your API token

Your API token links WordPress to the [emfluence Marketing Platform](#). Create or copy a token from your emfluence account (API / access token settings).

Option A — Settings screen

1. Open **emfluence** → **Settings** and stay on the **API** tab.
2. Paste your token into **Access Token**.
3. Click **Save Changes**.
4. Click **Test Connection**.



The screenshot shows the 'API' settings tab in the emfluence interface. It features a text input field for the 'Access Token' with a placeholder instruction: 'Paste your emfluence Marketing Platform access token. Or define EMFL_API_TOKEN in wp-config.php.' At the bottom of the settings panel, there are two buttons: an orange 'Save Changes' button and a blue 'Clear cached emfluence platform data' button.

When the connection succeeds, the **Connection** panel shows **Connected**, your account user name, and whether **Send Mail permission** is available.

CONNECTION

Status	✓ Connected
Account user	Jordan Marketer
Send Mail permission	⚠ Not detected — transactional sending may be unavailable. Contact emfluence support to enable sendTransactional.

Test Connection

If forms or groups you just created in emfluence don't appear in WordPress yet, click **Clear cached emfluence platform data** on the **API** tab.

Option B — wp-config.php (recommended for production)

Your host or developer can define the token in `wp-config.php` instead of storing it in the database:

```
```php
define('EMFL_API_TOKEN', 'your-api-token-here');
```
```

When the constant is set, the **Access Token** field shows that `EMFL_API_TOKEN` is defined in `wp-config.php` and takes precedence. You can still use **Test Connection** to verify the link.

4. Configure transactional email

Use this when you want WordPress outbound mail (password resets, WooCommerce receipts, etc.) sent through emfluence's transactional API.

1. Open **emfluence** → **Settings**.
2. Click the **Email** tab.
3. Under **Route WordPress email**, check **Send outbound WordPress email through emfluence**.

- Under **Which emails**, choose:
 - **None** — routing off even if the checkbox above is on
 - **All outbound email**
 - **Selected emails only — route when a rule below matches** — then fill in **Recipient rules** and/or **Subject rules** (one rule per line)
- Set **From name** and **From address (verified sender)**. The address must use a verified sending domain in your emfluence account.
- Optionally set **Transactional category** and the **Options** checkboxes.
- Click **Save Changes**.
- Under **Send a test transactional email**, click **Send me a test transactional email** to confirm delivery (this bypasses routing rules).

API
Email
Spam
Advanced

Route WordPress email
☐ Send outbound WordPress email through emfluence

Which emails

☒ None
☐ All outbound email
☐ Selected emails only — route when a rule below matches

Matching messages are sent through emfluence; everything else uses your normal WordPress mail delivery (e.g. SMTP). A message is routed if any recipient rule OR any subject rule matches.

Recipient rules

example.com
user@example.com

Routes emails through the emfluence marketing platform when any "To" address matches a rule. Enter one rule per line:

- Full address — user@example.com (that address only)
- Domain — example.com (everyone @example.com)

Leave this setting blank to skip recipient matching.

Subject rules

Password Reset
[Your Site]

Routes emails through the emfluence marketing platform when the email subject contains any listed text (partial match, not case-sensitive). Enter one phrase per line, e.g. Password Reset or Order Confirmation.

Leave blank to skip subject matching and rely on recipient rules only.

From name

Emfluence Dev

From address (verified sender)

marketing@example.com

Must be a verified sending domain in your emfluence account.

Transactional category

WordPress

Options

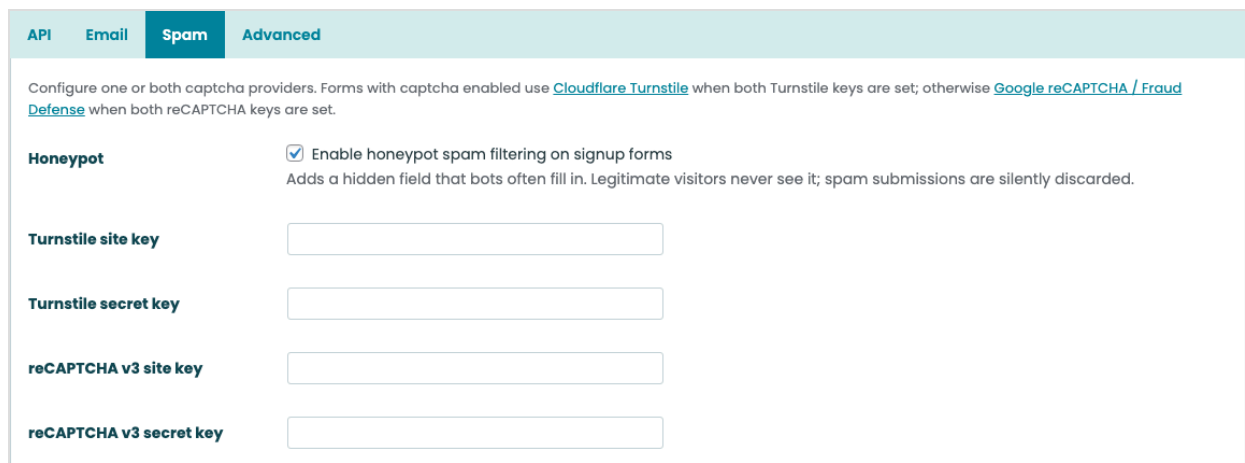
☐ Take precedence over an active SMTP plugin (e.g. WP Mail SMTP)
☐ Send even to suppressed contacts (use with care)

Note: Transactional sending requires **Send Mail permission** on your token. If the **Connection** panel shows **Not detected**, contact emfluence support to enable `sendTransactional` on your account.

5. Configure spam protection

Global spam settings apply to all signup forms (each form can also turn captcha on or off).

1. Open **emfluence** → **Settings**.
2. Click the **Spam** tab.
3. Leave **Enable honeypot spam filtering on signup forms** checked unless you have a reason to turn it off.
4. Optionally enter a **Turnstile site key** and **Turnstile secret key** for Cloudflare Turnstile (used first when both are set).
5. Or enter a **reCAPTCHA v3 site key** and **reCAPTCHA v3 secret key** as a fallback.
6. Click **Save Changes**.



The screenshot shows the 'Spam' tab selected in the settings interface. At the top, there are four tabs: 'API', 'Email', 'Spam' (active), and 'Advanced'. Below the tabs, a message states: 'Configure one or both captcha providers. Forms with captcha enabled use [Cloudflare Turnstile](#) when both Turnstile keys are set; otherwise [Google reCAPTCHA / Fraud Defense](#) when both reCAPTCHA keys are set.' The 'Honeypot' section has a checked checkbox for 'Enable honeypot spam filtering on signup forms' with a description: 'Adds a hidden field that bots often fill in. Legitimate visitors never see it; spam submissions are silently discarded.' Below this are four input fields: 'Turnstile site key', 'Turnstile secret key', 'reCAPTCHA v3 site key', and 'reCAPTCHA v3 secret key'.

Turnstile is used when both of its keys are set; otherwise reCAPTCHA v3; if neither is configured, forms still use the honeypot.

6. Manage signup forms

Signup forms are managed under **emfluence** → **All Forms**.

1. In the left admin menu, click **emfluence**, then **All Forms**.
2. Review existing forms in the list.
3. Click **Add New Form** to create a form, or click a form title to edit it.
4. To copy an existing form, hover a row and click **Duplicate**. A draft named "Original title (Copy)" opens for editing with the same fields, groups, and settings.
5. Click **Preview** on a list row (or **Preview Form** in the editor sidebar) to see the form in a new tab.

Forms

Add New Form

All (7)Published (7)

Search Forms

Bulk actions

Apply

All dates

Filter

7 items

| ☐ Title | Date |
|---|------------------------------------|
| ☐ Newsletter Signup | Published
2026/10/19 at 7:42 pm |
| ☐ Event Registration | Published
2026/10/19 at 7:41 pm |
| ☐ Contact Us | Published
2026/10/19 at 7:40 pm |

7. Build a signup form

On the form edit screen, the form builder controls what visitors see and what data is sent to emfluence.

1. Enter a **Form Title**. Leave **Display title on form** on to show it above the form fields.
2. Optionally check **Add description above form**, then enter a **Description**.
3. Under **Form fields**, drag rows to reorder. Click the pencil icon to edit labels, helper text, and **Required field**.
4. Click **Add field** to add standard contact fields or custom fields from your emfluence account.

Form Title

Newsletter Signup

☒ Display title on form

☒ Add description above form

Description

 Add Media

Visual

Code

Paragraph

B

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☰

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☰

☰

☰









Get tips, product news, and exclusive offers delivered to your inbox.

Form fields

Drag fields to reorder. Click the pencil to customize labels, helper text, and whether the field is required.

☰ First Name (firstName)

OPTIONAL





☰ Last Name (lastName)

OPTIONAL





☰ Email (email)

REQUIRED





Add field

Add submissions to groups

Newsletter Subscribers

×

Add group

Spam protection

☒ Include captcha to reduce spam submissions

Uses Cloudflare Turnstile when configured in plugin settings; otherwise Google reCAPTCHA v3. If neither is configured, no captcha is shown.

After Submit

☒ Display success message

☐ Redirect to another page

Success message

 Add Media

Visual

Code

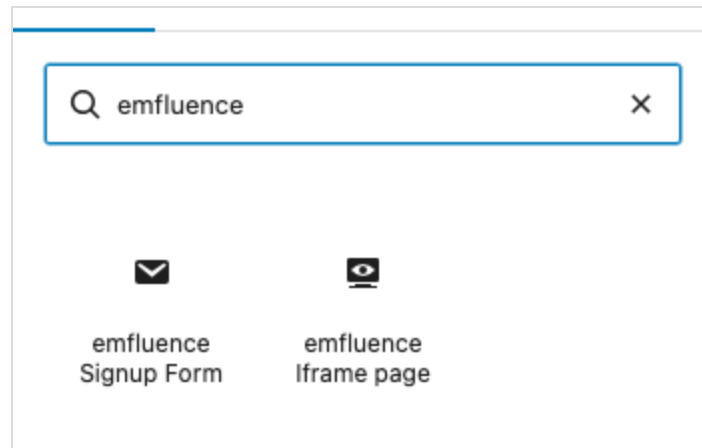
1. Under **Add submissions to groups**, click **Add group** and choose the emfluence groups new contacts should join.
2. For a **Consent checkbox**, enable **Require email confirmation before joining groups** when you need double opt-in.
3. Under **Spam protection**, leave **Include captcha to reduce spam submissions** checked when captcha keys are configured.
4. Under **After Submit**, choose **Display success message** or **Redirect to another page**, then set the message or **Redirect URL**. Also set **Submit button text**.
5. Click **Publish** (or **Update**) to save.

8. Embed a form on your site

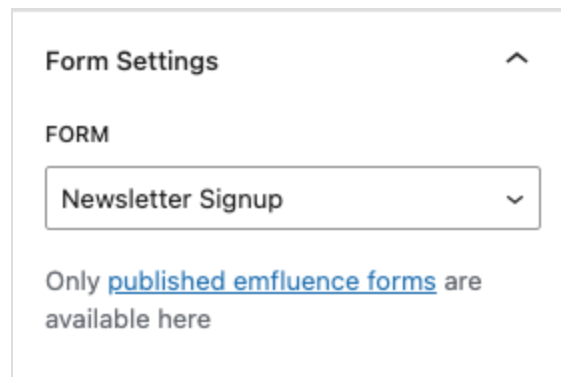
After publishing a form, add it to a page or post. The recommended method is the **emfluence Signup Form** block in the Block Editor.

Using the block

1. Edit the page or post where the form should appear.
2. Click + (**Block Insert**) in the top toolbar.
3. Search for **emfluence** and click **emfluence Signup Form**.

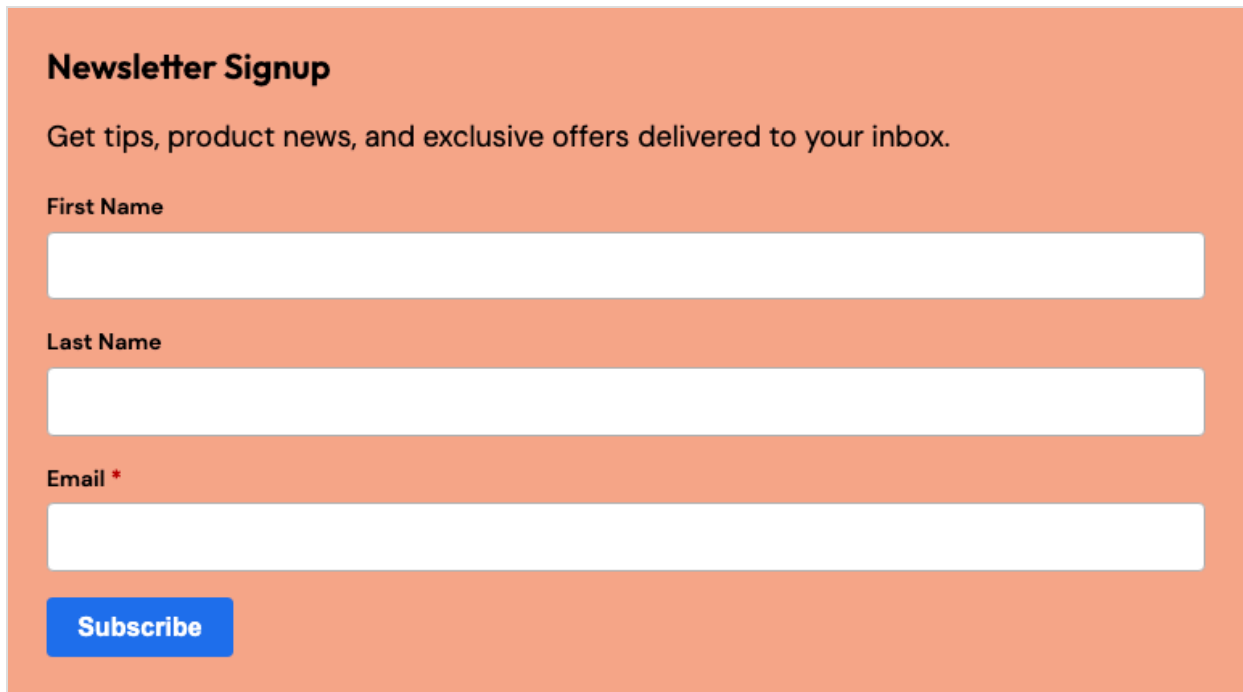


1. With the block selected, open **Settings** in the top toolbar if the sidebar is hidden.
2. Click the **Block** tab in the sidebar (not **Page**).
3. Under **Form Settings**, choose your published form from the **Form** dropdown.



1. Click **Save** (or **Publish**) on the page.

The block preview updates in the editor when a form is selected. On the front end, visitors see the live form and submissions go straight to emfluence.

A newsletter signup form with an orange background. It features the title "Newsletter Signup" in bold black text, followed by the text "Get tips, product news, and exclusive offers delivered to your inbox." Below this are three input fields: "First Name", "Last Name", and "Email *". The "Email *" field is marked with a red asterisk. At the bottom left is a blue "Subscribe" button.

Alternatives: shortcode and widget

If you cannot use the Block Editor:

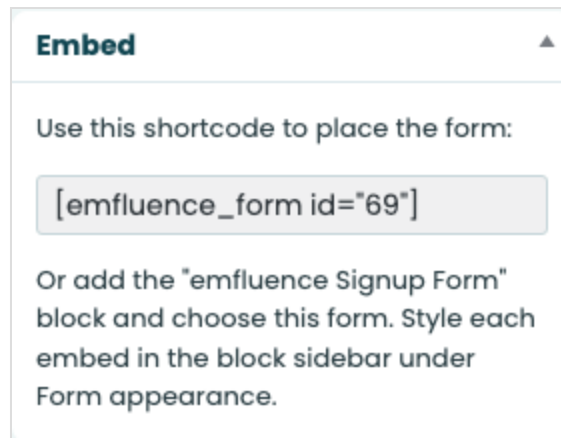
Shortcode — On the form edit screen, the **Embed** panel shows a shortcode you can paste into a Shortcode block or the classic editor:

```text

[emfluence\_form id="123"]

```

Replace `123` with your form's ID (shown in the **Embed** panel).



Classic widget — On classic themes, go to **Appearance → Widgets**, add the **emfluence Signup Form** widget, and choose your form from the dropdown.

All embed methods use the same form configuration and submit through the plugin.

9. Style an embedded form

Each **emfluence Signup Form** block can be styled to match the page it sits on. Styling applies to that embed only, so the same form can look different on different pages.

1. Select the **emfluence Signup Form** block and open the **Block** tab in the sidebar.
2. Expand **Form appearance**.
3. Under **Input fields**, set **Text color**, **Background color**, **Border color**, and **Label color**, then adjust **Border**, **Radius**, **Padding**, and font sizes.
4. Under **Submit button**, set the button's colors, border, radius, padding, and font size.
5. Click **Reset styling** at any time to return to the defaults.
6. Click **Save** on the page.

Form appearance
^

Customize styling for this embed only.

Reset styling

INPUT FIELDS

TEXT COLOR



No color selected

BACKGROUND COLOR

Custom
#FFFFFF

BORDER COLOR

Custom
#B3B3B3

LABEL COLOR



No color selected

BORDER

1
dx

Form appearance appears after you choose a form under **Form Settings**.

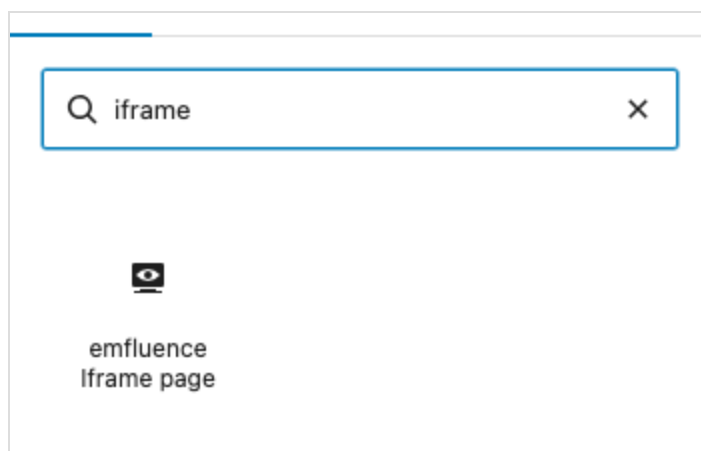
10. Embed a landing page on your site

If you build landing pages in the [emfluence Marketing Platform](#), you can embed them on your WordPress site. The plugin loads your active landing pages from emfluence once the API connection is configured (see [section 3](#)).

The recommended method is the **emfluence Iframe page** block.

Using the block

1. Edit the page or post where the landing page should appear.
2. Click + (**Block Inserter**) in the top toolbar.
3. Search for **iframe** and click **emfluence Iframe page**.



1. With the block selected, open **Settings** in the top toolbar if the sidebar is hidden.
2. Click the **Block** tab in the sidebar (not **Page**).
3. Under **Page Settings**, choose a **Landing page** from the dropdown.
4. Optionally adjust **Height (px)**, **Attempt to dynamically set the embedded page on load**, or **Open in a modal window** (with button text and CSS class when using a modal).

Page Settings
^

Landing pages are configured within the [emfluence marketing platform](#).

LANDING PAGE

emfluence Marketing Platform tra...
▼

HEIGHT (PX)

640

☒
Attempt to dynamically set the embedded page on load

Uses height messages from the hosted landing page when available.

☒
Open in a modal window

Active landing pages are loaded from your emfluence account.

1. Click **Save** (or **Publish**) on the page.

The editor shows a preview of the hosted page (or a button when **Open in a modal window** is on). On the front end, visitors see the embedded landing page from emfluence.

Alternative: shortcode

If you cannot use the Block Editor, add a **Shortcode** block and paste:

```
```text
```

```
[emfluence_page id="your-landing-page-id"]
```

```
```
```

Replace `your-landing-page-id` with the landing page ID from emfluence (the same IDs listed in the block's **Landing page** dropdown).

[/] Shortcode

[emfluence_page id="3E890BFE-122E-4841-B509-505C1207FB33"]

Quick reference

| Task | Where to go |
|------------------------------------|---|
| API connection | emfluence → Settings → API |
| Transactional mail | emfluence → Settings → Email |
| Honeypot / captcha | emfluence → Settings → Spam |
| Create or edit forms | emfluence → All Forms |
| Embed a form (recommended) | emfluence Signup Form block |
| Style an embedded form | Block sidebar → Form appearance |
| Embed a landing page (recommended) | emfluence Iframe page block |
| Form shortcode | Form edit screen → Embed panel |
| Landing page shortcode | <code>[emfluence_page id="..."]</code> in a Shortcode block |

Get help

| Resource | Link |
|------------------------------|---|
| emfluence Marketing Platform | emarketingplatform.com |
| Platform login | emailer.emfluence.com |
| API documentation | apidocs.emailer.emfluence.com/v1 |