

EaseMail - IT Manager's Quick Reference Manual

Organization Account Management Guide

Version: 1.0 **Last Updated:** February 2026 **For:** IT Managers, System Administrators, Organization Administrators

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Quick Start

First 5 Minutes

1. Login as admin → app.easemail.com/login
2. Navigate to Admin → Organizations
3. Create organization (enter company name, domain)
4. Invite first users (Admin → Users → Invite)
5. Configure 2FA (Admin → Settings → Security)

Essential URLs

Function	URL
Admin Dashboard	/admin
User Management	/admin/users
Organization Settings	/admin/organizations
Usage Analytics	/admin/usage-analytics
Billing	/admin/billing-config
Activity Logs	/admin/activity-logs
System Health	/admin/system-health
API Keys	/admin/api-keys

Organization Setup

Creating Your Organization

Step 1: Basic Information

Admin → Organizations → Create Organization

Required Fields:

- └─ Name: Company legal name
- └─ Domain: Primary email domain (e.g., company.com)
- └─ Billing Email: Finance contact
- └─ Plan: Free | Pro | Enterprise
- └─ Timezone: Organization default

Step 2: Domain Verification

1. Add TXT record to DNS:

Host: _easemail-verify
Value: [provided verification code]

2. Verify domain:

Admin → Organizations → Verify Domain

3. Enable domain-based auto-provisioning (optional):

✓ Users with @company.com auto-join organization

Step 3: Configure Email Settings

Admin → Organizations → Settings → Email

SPF Record:

```
v=spf1 include:_spf.easemail.com ~all
```

DKIM Record:

```
easyemail._domainkey IN TXT "v=DKIM1; k=rsa; p=[public-key]"
```

DMARC Record:

```
_dmarc IN TXT "v=DMARC1; p=quarantine; rua=mailto:dmarc@company.com"
```

User Management

Adding Users

Method 1: Single User Invite

Admin → Users → Invite User

Email: user@company.com

Role: User | Manager | Admin | Super Admin

Team: [Optional] Select existing team

Send Welcome Email: ✓

→ User receives invitation with setup link

Method 2: Bulk Import (CSV)

Admin → Users → Import Users → Download Template

CSV Format:

```
email,first_name,last_name,role,team  
john@company.com,John,Doe,user,Sales  
jane@company.com,Jane,Smith,manager,Engineering
```

→ Upload CSV → Review → Confirm Import
→ Invitations sent automatically

Method 3: Auto-Provisioning (SSO)

Admin → Settings → SSO → Configure

Enable: ✓ Auto-create users on first SSO login
Default Role: user
Default Team: [None]

→ Users auto-created on first login via SSO

User Roles & Capabilities

Capability	User	Manager	Admin	Super Admin
Email Access	✓	✓	✓	✓
Calendar & Contacts	✓	✓	✓	✓
SMS Sending	✓	✓	✓	✓
AI Features	✓	✓	✓	✓
Email Rules	✓	✓	✓	✓
View Team Members	Own	Team	All	All
Invite Team Members	-	Team	All	All
Remove Users	-	Team	All	All
View Analytics	Own	Team	All	All
Configure Email Rules	Own	Team	All	All
Access Admin Panel	-	Limited	✓	✓
Manage Billing	-	-	-	✓
Org Settings	-	-	-	✓
API Keys	-	-	✓	✓
Security Policies	-	-	✓	✓
Export All Data	-	-	✓	✓

Managing User Status

```
# Suspend User (temporarily disable)
Admin → Users → [Select User] → Suspend Account
Reason: [Optional note]
✓ Notify user via email

# Reactivate User
Admin → Users → [Select User] → Reactivate Account

# Delete User (permanent)
Admin → Users → [Select User] → Delete Account
⚠ This will:
• Delete all user data
• Remove from all teams
• Cancel any active sessions
• Cannot be undone

Data Export: ✓ Export user data before deletion
```

Security Configuration

Two-Factor Authentication (2FA)

Policy Options:

Admin → Settings → Security → 2FA Policy

- Optional (default)
Users can enable 2FA voluntarily
- Required for Admins
All Admin/Super Admin roles must enable 2FA
- Required for All Users (recommended)
All users must enable 2FA within 7 days

Grace Period: 7 days

Enforcement Date: [Auto-set to 7 days from now]

Supported 2FA Methods:

- ✓ TOTP (Google Authenticator, Authy, 1Password)
- ✓ SMS (requires phone verification)
- ✓ Email (backup method only)
- ✓ Hardware Keys (FIDO2/WebAuthn - Enterprise only)

Recovery Codes:

- 10 single-use codes generated on 2FA setup
- Users can regenerate at Settings → Security
- Admins can reset user 2FA: Admin → Users → Reset 2FA

Password Policies

Admin → Settings → Security → Password Policy

Minimum Length: [12] characters (8-32)

Complexity Requirements:

- ✓ Require uppercase letter
- ✓ Require lowercase letter
- ✓ Require number
- ✓ Require special character (!@#\$%^&*)

Password Expiration: [90] days (0 = never)

Password History: [5] (prevent reuse)

Max Login Attempts: [5] attempts

Account Lockout Duration: [30] minutes

Apply to:

- ✓ All users
- ✓ New users only

Session Management

Admin → Settings → Security → Session Settings

Session Timeout: [60] minutes of inactivity

Range: 1-480 minutes

Recommended: 30-60 for high security, 120-240 for convenience

Remember Me:

✓ Allow "Remember Me" option on login

Duration: [7] days (1-30)

Concurrent Sessions: [3] per user

Recommended: 2-3 (desktop + mobile + tablet)

⚠ Setting to 1 may inconvenience users

Force Re-auth for Sensitive Actions:

✓ Changing password

✓ Enabling 2FA

✓ Adding payment method

✓ Deleting account

✓ Exporting data

IP Restrictions (Enterprise)

Admin → Settings → Security → IP Restrictions

Allow Login from:

○ Any IP address (default)

● Specific IP ranges only

Allowed IP Ranges:

192.168.1.0/24 (Office network)

10.0.0.0/8 (VPN)

203.0.113.45 (Remote office)

Block suspicious IPs: ✓ (recommended)

Notify admins on blocked login: ✓

Email Encryption

At-Rest Encryption (Automatic):

- All emails encrypted in database with AES-256-GCM
- Encryption keys rotated every 90 days
- Zero-knowledge architecture (Enterprise only)

In-Transit Encryption (TLS):

Admin → Settings → Email → TLS Settings

Require TLS 1.2+ for:

- ✓ Inbound email
- ✓ Outbound email
- ✓ SMTP connections

Certificate Pinning: ✓ (Enterprise)

End-to-End Encryption (Enterprise):

Admin → Settings → Email → E2E Encryption

S/MIME:

- ✓ Enable S/MIME support
- Upload Certificate: [Browse .p12 file]
Password: *****

PGP/GPG:

- ✓ Enable PGP encryption
- Public Key: [Paste or upload]
Auto-encrypt internal emails: ✓

Monitoring & Analytics

Usage Dashboard

Access: Admin → Usage Analytics

Key Metrics at a Glance:

Active Users (30 days)	247
Emails Sent (30 days)	12,543
Storage Used	145GB/500GB
API Calls (today)	8,234
Current Plan	Enterprise

Detailed Reports:

User Activity Report

Filters:

Date Range: [Last 30 days ▼]

User: [All users ▼]

Team: [All teams ▼]

Columns:

- User Name
- Last Login
- Emails Sent
- Emails Received
- AI Features Used
- Storage Used
- Status (Active/Inactive)

Export: CSV | Excel | PDF

Email Volume Report

Breakdown by:

- Day/Week/Month
- User
- Team
- Email Account
- Domain (internal vs. external)

Metrics:

- Sent
- Received
- Failed
- Bounced
- Spam filtered

Feature Adoption Report

AI Features:

- AI Compose: 1,234 uses (65% of users)
- Voice Dictation: 456 uses (23% of users)
- Email Summaries: 2,345 uses (89% of users)
- Smart Reply: 567 uses (34% of users)

Collaboration:

- Shared Mailboxes: 12 active
- Team Calendars: 8 active
- Contact Sharing: 156 shared contacts

Automation:

- Email Rules: 234 active rules
- Auto-Responses: 45 configured
- Scheduled Emails: 89 scheduled

Activity Logs

Access: Admin → Activity Logs

Log Categories:

```

# User Actions
Login, Logout, Email Sent, Email Deleted, Settings Changed,
Contact Created, Calendar Event Created, File Uploaded, etc.

# Admin Actions
User Invited, User Deleted, Role Changed, Team Created,
Settings Updated, Policy Changed, API Key Generated, etc.

# Security Events
Failed Login, 2FA Enabled, 2FA Failed, Password Changed,
Account Locked, Suspicious Activity, IP Blocked, etc.

# System Events
Sync Started, Sync Completed, Sync Failed, Webhook Received,
API Rate Limit Hit, Database Error, Integration Error, etc.

```

Searching Logs:

Filters:

Date Range: [Last 7 days ▼]
 Category: [All ▼]
 User: [All users ▼]
 Action: [All actions ▼]
 IP Address: [Optional]
 Status: Success | Failure | All

Search: "user@company.com failed login"

Results:

2026-02-01 10:23:45 USER_LOGIN_FAILED
User: john@company.com
IP: 203.0.113.45
Reason: Invalid password
Details: 3rd failed attempt

Export Logs: CSV (for compliance/audit)
 Retention: 90 days (Pro), 1 year (Enterprise)

System Health Monitoring

Access: Admin → System Health

EMAIL SYNC STATUS
Last sync: 2 minutes ago
Pending emails: 0
Failed syncs (24h): 0

✓

API HEALTH
Nylas API: Operational
Aurinko API: Operational
OpenAI API: Operational
Response time: 245ms (avg)

✓

DATABASE PERFORMANCE
Query time: 12ms (avg)
Active connections: 23/100
Slow queries (1h): 0

✓

ERROR RATES
5xx errors (1h): 0
Failed API calls (1h): 2 (0.03%)
Webhook failures (1h): 0

✓

STORAGE
Used: 145GB / 500GB (29%)
Growth rate: ~3GB/week
Projected full: 32 weeks

⚠

Configure Alerts: admin@company.com

- Email when error rate > 1%
- Email when storage > 80%
- Email when API down
- SMS alerts (Enterprise only)

Alerts & Notifications

Admin → Settings → Notifications

Alert Recipients:

- admin@company.com
- it@company.com
- Add recipient...

Alert Conditions:

- ✓ System down or degraded
- ✓ Error rate exceeds 1% (1 hour window)
- ✓ Storage exceeds 80%
- ✓ Failed login attempts > 10 (from same IP)
- ✓ User account locked
- ✓ API rate limit exceeded
- ✓ Unusual activity detected
- ✓ Billing issue (payment failed)

Notification Channels:

- Email (always enabled)
- SMS (Enterprise only)
- Slack webhook
- Microsoft Teams webhook
- PagerDuty integration

Billing & Subscriptions

Current Plan Overview

Access: Admin → Billing

CURRENT PLAN: Enterprise
Billing Period: Monthly
Next Billing Date: March 1, 2026

Current Month Usage:

- └─ Users: 247 / Unlimited
- └─ Storage: 145GB / Unlimited
- └─ Emails Sent: 12,543 / Unlimited
- └─ API Calls: 1.2M / 5M included
- └─ AI Requests: 4,567 / 10K included

Estimated Cost This Month: \$2,964.00

Base plan: \$2,470.00 (247 users × \$10/user)

Overages: \$0.00

Add-ons: \$494.00

- └─ Additional storage: \$0.00
- └─ SMS credits: \$234.00 (2,340 SMS sent)
- └─ Advanced AI features: \$260.00

Billing Contact: billing@company.com

Payment Method: •••• 1234 (Visa) Exp: 03/2027

Plan Comparison

Feature	Free	Pro	Enterprise
Users	Up to 10	Unlimited	Unlimited
Email Accounts/User	3	10	Unlimited
Storage	10GB total	100GB	Unlimited
Emails/Month	1,000	50,000	Unlimited
API Calls/Month	1,000	100,000	5M included
AI Features	Basic (100/mo)	Advanced (1K/mo)	Premium (10K/mo)
SMS	-	100 credits/mo	500 credits/mo
Support	Community	Email (24h)	Phone 24/7
SLA	-	99.5% uptime	99.9% uptime
SSO	-	-	✓ SAML/OAuth
Custom Branding	-	-	✓
Advanced Security	-	-	✓
Audit Logs	30 days	90 days	1 year
Data Export	Manual	Manual	Automated
Priority Support	-	-	✓
Dedicated Account Manager	-	-	✓
Custom Integrations	-	-	✓
Training & Onboarding	-	-	✓
Price	Free	\$12/user/mo	\$10/user/mo**

* Billed annually, add 20% for monthly billing

Changing Plans

Admin → Billing → Change Plan

Upgrade: Immediate (prorated charge)

Downgrade: End of current billing period

Enterprise → Contact Sales:

enterprise@easemail.com

+1 (555) 123-4567

Volume Discounts:

100-249 users: 10% off

250-499 users: 15% off

500+ users: 20% off + custom pricing

Managing Payment

Admin → Billing → Payment Method

Update Credit Card:

Card Number: [***** * * * * 1234]
Expiration: [MM/YY]
CVV: [***]
ZIP: [12345]

Billing Address:

Company Name: [Acme Corporation]
Street: [123 Main St]
City: [San Francisco]
State: [CA]
ZIP: [94102]
Country: [United States]

Invoice Email: billing@company.com

Additional Emails: cfo@company.com, ap@company.com

Payment Options:

- Credit Card (Visa, MC, Amex)
- ACH (US only, Enterprise)
- Wire Transfer (Enterprise, annual only)
- Purchase Order (Enterprise, negotiated terms)

Invoice History

Admin → Billing → Invoices

Invoices:

2026-02-01		\$2,964.00		Paid (Visa ***** 1234)		[Download PDF]
2026-01-01		\$2,847.00		Paid (Visa ***** 1234)		[Download PDF]
2025-12-01		\$2,705.00		Paid (Visa ***** 1234)		[Download PDF]

Export All: CSV | Excel

Auto-email invoices to: billing@company.com

Usage-Based Billing

Overage Charges (when limits exceeded):

Storage Overages:

\$0.10/GB/month over plan limit

Example: 150GB used on 100GB plan = \$5.00/month

SMS Overages:

\$0.10/SMS beyond included credits

Pro: 100 included, \$0.10 each after

Enterprise: 500 included, \$0.08 each after

AI Request Overages:

\$0.05/request beyond included

Basic: 100 included

Advanced: 1,000 included

Premium: 10,000 included

API Call Overages:

Free: \$0.01 per 1,000 calls

Pro: \$0.005 per 1,000 calls

Enterprise: \$0.002 per 1,000 calls

View Current Usage:

Admin → Billing → Usage Details

Common Tasks

Task 1: Onboard New Employee

```
# Step 1: Create User Account
Admin → Users → Invite User
Email: newuser@company.com
Role: User
Team: [Select department]
Send Welcome: ✓

# Step 2: Configure User Settings (Optional)
Admin → Users → newuser@company.com → Settings
Email Signature: [Auto-populate from template]
Default Calendar: [Team calendar]
Email Rules: [Apply department rules]

# Step 3: Grant Access to Shared Resources
Admin → Teams → [Department] → Members → Add
Select: newuser@company.com
Permissions: Standard Member

# Step 4: Monitor First Login
Admin → Activity Logs
Filter: newuser@company.com, Last 7 days
✓ Verify successful login
✓ Verify 2FA setup (if required)
```

Task 2: Offboard Departing Employee

```
# Step 1: Suspend Account (Before Last Day)
Admin → Users → employee@company.com → Suspend
Reason: Offboarding - last day [date]
Notify:  (don't notify user)
Revoke sessions: ✓
```

```
# Step 2: Export User Data (For Compliance/Handover)
Admin → Data Export → Create Export
User: employee@company.com
Include:
✓ Emails (all folders)
✓ Contacts
✓ Calendar
✓ Drafts
Format: MBOX + CSV
→ Download when ready (email notification)
```

```
# Step 3: Transfer Ownership
Admin → Users → employee@company.com
Shared Mailboxes: Transfer to [manager]
Team Ownership: Transfer to [manager]
Calendar Events: Transfer to [manager]
Email Forwarding:
✓ Forward to manager@company.com
Duration: 30 days
```

```
# Step 4: Delete Account (After 30-90 days)
Admin → Users → employee@company.com → Delete
⚠ Permanent deletion
Confirm: employee@company.com
→ Account deleted, all data removed
```

Task 3: Create Shared Mailbox

```
# Step 1: Create Shared Mailbox
Admin → Teams → Shared Mailboxes → Create
Email: support@company.com
Display Name: Customer Support
Description: Customer support inquiries
Team: Support Team

# Step 2: Add Members
Shared Mailboxes → support@company.com → Members → Add
Members:
• john@company.com (Full Access)
• jane@company.com (Full Access)
• bob@company.com (Send Only)

# Step 3: Configure Auto-Responses
Settings → Auto-Reply
Enable: ✓
Message: "Thank you for contacting support.
          We'll respond within 24 hours."
Business Hours Only: ✓ (Mon-Fri, 9am-5pm)

# Step 4: Setup Email Rules
Settings → Rules → Create Rule
Name: Tag Support Requests
Condition: Subject contains "support", "help", "issue"
Action: Add label "Support Request"
```

Task 4: Setup Single Sign-On (SSO)

```
# Step 1: Configure SSO in EaseMail
Admin → Settings → SSO → Enable

Provider: [Okta / Azure AD / Google / Custom SAML]

# For SAML 2.0:
SSO URL: https://your-idp.com/sso/saml
Entity ID: https://your-idp.com/entity
X.509 Certificate: [Paste certificate]

# EaseMail provides:
ACS URL: https://app.easemail.com/auth/sso/callback
SP Entity ID: https://app.easemail.com
Metadata URL: https://app.easemail.com/auth/sso/metadata

# Step 2: Configure Attribute Mapping
Email: email (required)
First Name: firstName
Last Name: lastName
Role: groups (map to: user, admin)
Department: department → Team

# Step 3: Test SSO
Test User: testuser@company.com
→ Click "Test SSO Connection"
→ Login via SSO
→ Verify attribute mapping
→ Verify user created correctly

# Step 4: Enable for Organization
SSO Settings:
✓ Enable SSO for login
✓ Auto-create users on first login
Default Role: User
Require SSO:  Optional |  Required
→ Save Settings

# Step 5: Migrate Existing Users
Admin → Users → Enable SSO for All Users
```

 Users will be required to login via SSO
Send notification: ✓

Task 5: Configure Email Routing Rules

Scenario: Route all billing@ emails to Finance team

Admin → Settings → Email Rules → Create Organization Rule

Name: Route Billing Emails

Priority: High

Conditions:

To: contains "billing@company.com"
OR To: contains "invoices@company.com"

Actions:

Forward to: finance-team@company.com
 Add label: "Finance - Billing"
 Mark as important
 Auto-reply

Apply to:

All users
 Specific teams: [Select]

Save & Activate

Task 6: Generate API Key for Integration

```
# Step 1: Create API Key  
Admin → API Keys → Generate New Key
```

Name: Salesforce Integration
Description: Sync contacts between Salesforce and EaseMail
Key Type: Service Account

Permissions:

- Read contacts
- Write contacts
- Read emails
- Send emails
- Manage users

Rate Limits:

Requests per minute: 100
Requests per day: 50,000

IP Whitelist (optional):

203.0.113.0/24 (Office network)
198.51.100.45 (Salesforce server)

Generate Key

→ API Key: sk_live_xxxxxxxxxxxxxxxxxx
⚠ Copy now - won't be shown again

```
# Step 2: Configure in Salesforce  
Salesforce → Setup → External Services  
URL: https://api.easemail.com/v1  
Auth: API Key (Bearer Token)  
Key: sk_live_xxxxxxxxxxxxxxxxxx
```

```
# Step 3: Monitor Usage  
Admin → API Keys → [Key] → Usage Stats  
Last 24 hours: 12,345 requests  
Error rate: 0.2%  
Avg response time: 234ms
```

Task 7: Setup Automated Data Backups

```
# Step 1: Configure Backup Schedule  
Admin → Data Export → Automated Backups
```

Schedule:

Frequency: Weekly | Monthly
Day: Sunday
Time: 02:00 AM EST

Include:

- All emails (incremental)
- Contacts
- Calendar events
- User settings
- Email rules
- Activity logs

Format: MBOX + JSON

Storage:

- EaseMail Cloud (encrypted, 90-day retention)
- AWS S3 Bucket (provide credentials)
- Google Cloud Storage
- Azure Blob Storage

Notifications:

Email when complete: backup-admin@company.com
Email on failure:

```
# Step 2: Test Backup & Restore  
Backups → [Latest] → Test Restore  
Test User: testbackup@company.com  
 Verify email restoration  
 Verify contact restoration  
 Delete test user
```

Troubleshooting

Issue 1: Users Can't Login

Symptoms:

- "Invalid credentials" error
- Account locked message
- 2FA code not working

Diagnostic Steps:

1. Check account status:

Admin → Users → Search user

Status: Active? Suspended? Deleted?

2. Review activity logs:

Admin → Activity Logs

Filter: User + "login" + Last 24 hours

Look for: Failed login attempts, account lockout

3. Verify 2FA status:

If "2FA code invalid":

Admin → Users → [User] → Reset 2FA

→ User must re-setup 2FA

4. Check password policy:

If password recently changed:

Admin → Settings → Security

Verify policy requirements met

5. IP restrictions:

Admin → Settings → Security → IP Restrictions

Verify user's IP is allowed

Solutions:

```
# Unlock account:  
Admin → Users → [User] → Unlock Account  
  
# Reset password:  
Admin → Users → [User] → Reset Password  
→ Email reset link to user  
  
# Reset 2FA:  
Admin → Users → [User] → Reset 2FA  
→ User must setup again on next login  
  
# Temporarily disable IP restrictions:  
Admin → Settings → Security → IP Restrictions  
→ Temporarily disable for troubleshooting
```

Issue 2: Emails Not Syncing

Symptoms:

- New emails not appearing
- Sent emails not showing in Sent folder
- "Sync failed" errors

Diagnostic Steps:

1. Check sync status:
Admin → System Health
Email Sync Status: Look for errors
2. Check user's email account:
Admin → Users → [User] → Email Accounts
Status: Connected? Expired? Error?
3. Review sync logs:
Admin → Activity Logs
Filter: "sync" + Last 1 hour
Look for: sync_failed, auth_expired, api_error
4. Test email provider connection:
Admin → System Health → API Health
Nylas API: Operational?
User-specific: Admin → Users → [User] → Test Connection

Solutions:

```
# Reconnect email account:  
User: Settings → Accounts → [Account] → Reconnect  
Or Admin: Admin → Users → [User] → Accounts → Reconnect

# Force manual sync:  
Admin → Users → [User] → Force Sync  
→ Syncs last 7 days of emails

# Clear sync cache:  
Admin → System → Clear User Cache  
User: user@company.com  
→ Removes cached data, forces fresh sync

# Check OAuth token:  
Admin → Users → [User] → Email Accounts → [Account]  
OAuth Status: Expired?  
→ Click "Refresh Token"

# Last resort - Remove and re-add account:  
User: Settings → Accounts → [Account] → Remove  
→ Settings → Accounts → Add Account → [Reconnect]
```

Issue 3: High Storage Usage

Symptoms:

- Approaching or exceeded storage limit
- Slow performance
- "Storage full" warnings

Diagnostic Steps:

1. Check org-wide usage:
Admin → Billing
Storage: XXX GB / YYY GB (ZZ%)
2. Identify top users:
Admin → Usage Analytics → Storage Report
Sort by: Storage Used (descending)
3. Check for large attachments:
Admin → Usage Analytics → Attachments
Filter: Size > 10 MB
4. Review retention policies:
Admin → Settings → Data Retention
Are old emails being cleaned up?

Solutions:

```
# Implement retention policy:  
Admin → Settings → Data Retention  
    Trash: Delete after 30 days  
    Deleted items: Permanent delete after 30 days  
    Old emails: Archive after 1 year  
  
# Ask top users to clean up:  
Admin → Users → [Top Users] → Email  
    Subject: "Storage Usage Notice"  
    Message: "Please delete unnecessary emails/attachments"  
  
# Upgrade plan:  
Admin → Billing → Upgrade Plan  
    Consider: Higher storage tier  
  
# Enable attachment compression (Enterprise):  
Admin → Settings → Storage → Optimize  
    ✓ Compress attachments (lossless)  
    ✓ Deduplicate identical attachments  
    Estimated savings: XX GB
```

Issue 4: API Rate Limit Exceeded

Symptoms:

- "429 Too Many Requests" errors
- Integration failing
- API calls being throttled

Diagnostic Steps:

1. Check API usage:
Admin → API Keys
View usage for each key
2. Review rate limits:
Admin → API Keys → [Key] → Rate Limits
Current: XXX requests/min
Limit: YYY requests/min
3. Identify source:
Admin → Activity Logs → API Calls
Filter: Last 1 hour, Status: 429
Look for: Which endpoint, which key
4. Check integration code:
Review integration logs
Are there unnecessary repeated calls?
Is there proper error handling/backoff?

Solutions:

```
# Increase rate limit:  
Admin → API Keys → [Key] → Edit  
Requests per minute: [Increase]  
Requests per day: [Increase]  
→ Save

# Implement caching in integration:  
Review integration code:  
- Cache frequently requested data  
- Use webhooks instead of polling  
- Implement exponential backoff on 429 errors

# Upgrade plan:  
Admin → Billing → Upgrade  
Higher plans have higher rate limits

# Create separate API keys:  
Admin → API Keys → Generate New Key  
Distribute load across multiple keys  
Different keys for different integrations
```

Issue 5: SSO Not Working

Symptoms:

- "SSO authentication failed"
- Infinite redirect loop
- Users can't login via SSO

Diagnostic Steps:

1. Test SSO connection:
Admin → Settings → SSO → Test Connection
→ Look for specific error message
2. Verify configuration:
Admin → Settings → SSO → View Configuration
Check:
 - SSO URL correct?
 - Entity ID correct?
 - Certificate valid (not expired)?
3. Check attribute mapping:
Admin → Activity Logs → SSO Events
Filter: Last 1 hour
Look for: Attribute mapping errors
4. Verify in IdP (Okta/Azure AD):
 - Is EaseMail app assigned to user?
 - Are correct attributes being sent?
 - Check IdP logs for errors

Solutions:

```
# Update SSO certificate:  
Admin → Settings → SSO → Update Certificate  
→ Paste new X.509 certificate  
→ Save  
  
# Fix attribute mapping:  
Admin → Settings → SSO → Attribute Mapping  
Verify:  
Email → email  
First Name → firstName  
Last Name → lastName  
Groups → role (mapped to user/admin)  
  
# Allow password fallback (temporary):  
Admin → Settings → SSO  
 Require SSO (temporarily disable)  
✓ Allow password login as fallback  
→ Users can login with password while fixing SSO  
  
# Clear SSO cache:  
Admin → Settings → SSO → Clear Cache  
→ Forces fresh authentication  
  
# Contact support:  
Enterprise customers: Call support  
Email: enterprise@easemail.com  
Include: SSO configuration, error messages, logs
```

Command Reference

Admin Dashboard Keyboard Shortcuts

Navigation:

g + d	Go to Dashboard
g + u	Go to Users
g + a	Go to Analytics
g + b	Go to Billing
g + s	Go to Settings
g + l	Go to Activity Logs

User Management:

n	Invite new user
/	Search users
s	Toggle user suspend/active

Tables:

j / k	Navigate rows up/down
↵	Open selected item
Esc	Close modal/dialog

Global:

?	Show keyboard shortcuts
Ctrl + K	Command palette (quick access)

API Endpoints Quick Reference

Base URL: <https://api.easemail.com/v1>

```
# Authentication
POST  /auth/token          # Get API token
POST  /auth/refresh         # Refresh token

# Users
GET   /users                # List all users
POST  /users                # Create user
GET   /users/:id             # Get user details
PATCH /users/:id             # Update user
DELETE /users/:id            # Delete user

# Organizations
GET   /organizations         # List organizations
POST  /organizations         # Create organization
GET   /organizations/:id      # Get organization
PATCH /organizations/:id      # Update organization

# Email Accounts
GET   /email-accounts        # List email accounts
POST  /email-accounts        # Connect email account
DELETE /email-accounts/:id    # Disconnect account

# Emails
GET   /emails                # List emails
GET   /emails/:id             # Get email details
POST  /emails                # Send email
DELETE /emails/:id            # Delete email

# Contacts
GET   /contacts               # List contacts
POST  /contacts               # Create contact
PATCH /contacts/:id           # Update contact
DELETE /contacts/:id          # Delete contact

# Analytics
GET   /analytics/usage         # Get usage stats
GET   /analytics/users          # Get user activity
GET   /analytics/storage         # Get storage stats

# Health
GET   /health                 # API health status
GET   /health/database          # Database status
```

CSV Import Format

Users Import (`users.csv`):

```
email,first_name,last_name,role,team,department
john@company.com,John,Doe,user,Sales,Sales West
jane@company.com,Jane,Smith,manager,Engineering,Backend
admin@company.com,Admin,User,admin,,IT
```

Contacts Import (`contacts.csv`):

```
email,first_name,last_name,company,phone,title,tags
client@example.com,John,Client,"Acme Corp",555-1234,CEO,"vip,client"
vendor@example.com,Jane,Vendor,"Vendor Co",555-5678,Sales,"vendor"
```

Email Rules Import (`rules.csv`):

```
name,condition_field,condition_operator,condition_value,action_type,action_value,
Route Support,to,contains,support@company.com,forward,support-team@company.com,hi
Tag Urgent,subject,contains,URGENT,add_label,urgent,high
Auto Reply OOO,from>equals,boss@company.com,auto_reply,"Out of office",medium
```

API Integration

Authentication

```
# Get API Key
Admin → API Keys → Generate New Key
→ Copy: sk_live_xxxxxxxxxxxxxxxxxx

# Use in requests:
curl https://api.easemail.com/v1/users \
-H "Authorization: Bearer sk_live_xxxxxxxxxxxxxxx"
```

Common Integration Examples

Example 1: Sync Users from Active Directory

```
import requests

API_KEY = "sk_live_xxxxxxxxxxxxxxxxxx"
API_URL = "https://api.easemail.com/v1"

def sync_ad_users(ad_users):
    headers = {
        "Authorization": f"Bearer {API_KEY}",
        "Content-Type": "application/json"
    }

    for ad_user in ad_users:
        data = {
            "email": ad_user['email'],
            "first_name": ad_user['first_name'],
            "last_name": ad_user['last_name'],
            "role": "user",
            "team": ad_user['department']
        }

        response = requests.post(
            f"{API_URL}/users",
            headers=headers,
            json=data
        )

        if response.status_code == 201:
            print(f"✓ Created user: {data['email']}")
        else:
            print(f"✗ Failed to create {data['email']}: {response.text}")

# Run daily via cron job
```

Example 2: Monitor Failed Logins

```

import requests
from datetime import datetime, timedelta

API_KEY = "sk_live_xxxxxxxxxxxxxxxxxx"
API_URL = "https://api.easemail.com/v1"
ALERT_THRESHOLD = 5 # Alert if > 5 failed logins in 1 hour

def check_failed_logins():
    headers = {"Authorization": f"Bearer {API_KEY}"}

    # Get activity logs from last hour
    one_hour_ago = (datetime.now() - timedelta(hours=1)).isoformat()

    response = requests.get(
        f"{API_URL}/activity-logs",
        headers=headers,
        params={
            "category": "security",
            "action": "login_failed",
            "since": one_hour_ago
        }
    )

    logs = response.json()['logs']

    # Group by IP address
    failed_by_ip = {}
    for log in logs:
        ip = log['ip_address']
        failed_by_ip[ip] = failed_by_ip.get(ip, 0) + 1

    # Alert on suspicious IPs
    for ip, count in failed_by_ip.items():
        if count >= ALERT_THRESHOLD:
            send_alert(f"⚠️ {count} failed logins from {ip} in last hour")

    # Optionally block IP
    requests.post(
        f"{API_URL}/security/block-ip",
        headers=headers,
        json={"ip": ip, "reason": "Multiple failed logins"})

```

```
)  
  
def send_alert(message):  
    # Send to Slack, email, etc.  
    print(message)  
  
# Run every 15 minutes via cron
```

Example 3: Automated Usage Reporting

```
import requests
import pandas as pd
from datetime import datetime

API_KEY = "sk_live_xxxxxxxxxxxxxxxxxx"
API_URL = "https://api.easemail.com/v1"

def generate_monthly_report():
    headers = {"Authorization": f"Bearer {API_KEY}"}

    # Get usage stats
    response = requests.get(
        f"{API_URL}/analytics/usage",
        headers=headers,
        params={"period": "last_30_days"}
    )

    usage = response.json()

    # Get user activity
    response = requests.get(
        f"{API_URL}/analytics/users",
        headers=headers
    )

    users = response.json()['users']

    # Create DataFrame
    df = pd.DataFrame(users)

    # Calculate metrics
    total_users = len(df)
    active_users = len(df[df['last_login'] >= one_month_ago])
    total_emails_sent = df['emails_sent'].sum()
    total_storage = df['storage_used_gb'].sum()

    # Generate report
    report = f"""
EaseMail Monthly Usage Report
Generated: {datetime.now().strftime('%Y-%m-%d')}"""

    return report
```

Overview:

- Total Users: {total_users}
- Active Users (30d): {active_users} ({active_users/total_users*100:.1f}%)
- Emails Sent: {total_emails_sent:,}
- Storage Used: {total_storage:.1f} GB

Top 10 Users by Email Sent:

```
{df.nlargest(10, 'emails_sent')[['email', 'emails_sent']].to_string()}
```

Top 10 Users by Storage:

```
{df.nlargest(10, 'storage_used_gb')[['email', 'storage_used_gb']].to_string()
"""
```

```
# Email report to stakeholders
send_report_email(report)
```

```
# Run on 1st of each month via cron
```

Webhooks

Configure webhooks to receive real-time events:

Admin → Settings → Webhooks → Add Endpoint

Webhook URL: <https://your-app.com/webhooks/easemail>

Secret: [Generated automatically]

Events:

- user.created
- user.deleted
- email.received
- email.sent
- email.failed
- calendar.event_created

Webhook payload example:

```
{
  "event": "user.created",
  "timestamp": "2026-02-01T12:34:56Z",
  "data": {
    "user_id": "uuid-here",
    "email": "newuser@company.com",
    "first_name": "John",
    "last_name": "Doe",
    "role": "user",
    "team": "Sales"
  },
  "signature": "sha256-signature-here"
}
```

Verify webhook signature (Python):

```
import hmac
import hashlib

def verify_webhook(payload, signature, secret):
    computed = hmac.new(
        secret.encode(),
        payload.encode(),
        hashlib.sha256
    ).hexdigest()

    return hmac.compare_digest(computed, signature)

# In your webhook handler:
if verify_webhook(request.body, request.headers['X-Signature'], WEBHOOK_SECRET):
    # Process webhook
    pass
else:
    # Reject invalid signature
    return 403
```

Support & Resources

Contact Support

Community Support (Free Plan):

- Forum: community.easemail.com
- GitHub: github.com/easemail/issues

Email Support (Pro Plan):

- support@easemail.com
- Response time: Within 24 hours (business days)

Priority Support (Enterprise Plan):

- Phone: +1 (555) 123-4567 (24/7)
- Email: enterprise@easemail.com (2-hour response)
- Dedicated Slack channel
- Assigned account manager

Documentation

- Help Center: app.easemail.com/help
- API Documentation: api.easemail.com/docs
- Developer Portal: developers.easemail.com
- Status Page: status.easemail.com
- Security: easemail.com/security

Training & Onboarding

Enterprise Customers:

- Initial onboarding session (2 hours)
- Admin training (4 hours)
- Custom training available

- Quarterly business reviews

Self-Service:

- Video tutorials: youtube.com/easemail
 - Webinars: easemail.com/webinars
 - Knowledge base: help.easemail.com
-

Appendix

Glossary

Term	Definition
2FA	Two-Factor Authentication - additional login security
API	Application Programming Interface - for integrations
AES-256-GCM	Advanced encryption standard for email security
DKIM	DomainKeys Identified Mail - email authentication
DMARC	Domain-based Message Authentication - email policy
E2E	End-to-End Encryption
IdP	Identity Provider (for SSO)
MBOX	Email archive format
OAuth	Authorization protocol for email providers
RLS	Row Level Security - database security feature
SAML	Security Assertion Markup Language (for SSO)
SPF	Sender Policy Framework - email authentication
SSO	Single Sign-On - unified authentication
TLS	Transport Layer Security - encryption protocol

Compliance & Certifications

- SOC 2 Type II (in progress)
- GDPR Compliant

- CCPA Compliant
- HIPAA Available (Enterprise with BAA)
- ISO 27001 (in progress)

Data Centers & Regions

Available Regions:

- US East (Virginia) - Primary
- US West (California)
- EU (Ireland) - GDPR
- Asia Pacific (Singapore)

Data Residency: Enterprise customers can choose data region for compliance

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For the latest version of this document, visit: <https://docs.easemail.com/it-admin-guide>

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