

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

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:

```
easemail._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_XXXXXXXXXXXXXXXXXXXX

⚠ 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_XXXXXXXXXXXXXXXXXXXX

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 000,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_XXXXXXXXXXXXXXXXXXXX

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

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"X 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_XXXXXXXXXXXXXXXXXXXX"
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')}
    """
```

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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