EaseMail Organization Admin User Guide

Version 1.1 | February 12, 2026

Welcome to EaseMail! As an Organization Admin, you have elevated privileges to help manage your organization's email operations and team collaboration.

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Quick Start Guide

First Time Login

1. **Access EaseMail**
   - Go to: https://easemail.app/login
   - Enter your email address and temporary password
   - Click "Sign In"
2. **Change Your Password** ⚠️ IMPORTANT
   - After first login, change your password
   - Go to: **Settings → Security → Change Password**
   - Use a strong password (minimum 8 characters)
3. **Connect Your Email Account**
   - Navigate to: **Settings → Email Accounts**
   - Click "Connect Email Account"
   - Choose your provider (Gmail, Outlook, IMAP)
   - Follow the OAuth flow and grant permissions
4. **Explore Your Organization Dashboard**
   - Click **Organization** in the sidebar
   - Review team members and organization details

Understanding Your Role

Admin vs Owner vs Member

Capability	Owner	Admin (You)	Member
Delete Organization	✅	❌	❌
Modify Billing	✅	❌	❌
Transfer Ownership	✅	❌	❌
Add New Users	✅	✅	❌
Invite Members	✅	✅	❌
Remove Members	✅	✅	❌
Manage Roles	✅	✅	❌
View Analytics	✅	✅	❌
View Audit Logs	✅	✅	❌
Configure Settings	✅	✅	❌
Access Shared Emails	✅	✅	✅
Use AI Features	✅	✅	✅

What You Can Do as an Admin

Team Management:

- **Add new users directly** to organization (creates account + adds to org)
- Invite existing users via email invitation
- Assign roles (Admin, Member)
- Remove team members
- View member activity and audit logs

Dashboard Overview

Main Navigation

Left Sidebar:

- 🏠 **Home**: Quick access dashboard with personalized greeting
- 📧 **Inbox**: Unified email inbox
- 📅 **Calendar**: Your calendar and meetings (supports MS Teams)
- 👥 **Contacts**: Contact management
- 🏢 **Organization**: Organization dashboard (Admin access)
- ⚙️ **Settings**: Personal and organization settings

Quick Actions

- **Dashboard**: View organization metrics
- **Analytics**: Detailed reports and insights
- **Audit Logs**: Security and activity logs
- **Settings**: Organization configuration

- **Add User**: Create new user account and add to organization
- **Invite Member**: Send invitation to existing user

Managing Team Members

Two Ways to Add Team Members

EaseMail provides **two methods** for adding team members:

Method 1: Add User (Direct Creation)

Best for: Creating brand new accounts for team members who don't have EaseMail accounts yet.

How it works:

1. Creates a new EaseMail user account
2. Automatically adds them to your organization
3. Sends welcome email with temporary password
4. User can log in immediately

Steps:

1. Navigate to **Organization** dashboard
2. Click **"Add User"** button (next to "Invite Member")
3. Fill in user details:
   - **Email Address**: User's email (required)
   - **Full Name**: User's full name (required)
   - **Temporary Password**: Initial password (required)
   - **Role**: Select Admin or Member

4. Click **"Create User"**

> ⚠️ **Important Notes:**
>
> - User receives email with temporary password
> - They MUST change password on first login
> - This creates a complete EaseMail account

Method 2: Invite Member (Email Invitation)

Best for: Adding existing EaseMail users or when you want the user to set up their own account.

Steps:

1. Navigate to **Organization** dashboard
2. Click **"Invite Member"** button
3. Enter email address and select role
4. Click **"Send Invite"**
5. Member receives invitation email valid for 7 days

Comparison: Add User vs Invite Member

Feature	Add User	Invite Member
Creates Account	✅ Yes, immediately	❌ No, user creates own
Requires Password	✅ Yes, temporary	❌ No, user sets own
Immediate Access	✅ Yes, instant	❌ Pending acceptance

Feature	Add User	Invite Member
Best For	New team members	Existing EaseMail users

Managing Existing Members

Change Member Role:

1. Find the member in the Team Members list
2. Click **"Edit Role"** button
3. Select new role (Admin or Member)
4. Click **"Update Role"**

Remove a Member:

1. Find the member in the Team Members list
2. Click the **trash icon** (🗑️)
3. Confirm removal
4. Member loses access immediately

> ⚠️ **Important Notes:**
>
> - You cannot remove the organization owner
> - Removing a MEMBER role frees up one seat
> - ADMIN/OWNER roles don't count toward seat limit

Email Account Management

Connecting Email Accounts

1. Go to **Settings → Email Accounts**
2. Click **"Connect Account"** button
3. Choose your provider:
    - **Google** (Gmail, Google Workspace)
    - **Microsoft** (Outlook, Office 365)
    - **IMAP** (Yahoo, custom servers)
4. Complete OAuth authentication
5. Grant required permissions (read, send, manage, calendar)
6. Account syncs automatically

Folder Syncing

- All folders sync automatically (inbox, sent, drafts, trash, custom folders)
- Custom folders appear in sidebar under "Folders" section
- **Click folder to view messages**
- Folder counts update in real-time

> **Custom Folders:** Messages in custom folders don't appear in main inbox. Click the specific folder in the sidebar to view its contents.

Organization Settings

Accessing Organization Settings

1. Navigate to **Organization** → **[Your Org]**
2. Click **"Settings"** button (gear icon)

Integration Settings

Microsoft Teams:

- Connect MS Teams for calendar integration
- Sync Teams meetings to calendar
- Auto-refresh tokens for continuous access (every 55 minutes)
- "Join Now" buttons for active meetings

Webhooks:

- Configure webhooks for external integrations
- Subscribe to events (new email, member added, etc.)

Audit Logs (Admin/Owner Only)

Access: Organization → Audit Logs

What's Logged:

- Member additions/removals
- Role changes
- Settings modifications
- Email account connections

- Invitation sent/accepted/revoked

> ⚠️ **Note:** As an Admin, you cannot delete the organization or modify billing. Contact your owner for these actions.

Analytics & Reports

Accessing Analytics

Navigate to: **Organization** → **Analytics**

Available Reports

Email Activity Dashboard:

- **Total Emails**: Sent and received volume by date
- **Response Time**: Average time to first response
- **Email by Category**: Distribution across folders
- **Sender Analysis**: Most active senders/receivers

Team Performance:

- **Member Activity**: Individual email volumes
- **Response Rates**: Team response times
- **Peak Hours**: When team is most active

Calendar Analytics:

- **Meeting Distribution**: Types of meetings (Teams, email invites)

- **Conflict Detection**: Scheduling conflicts and overlaps
- **Meeting Duration**: Average meeting lengths

Exporting Reports

1. Navigate to desired report
2. Click **"Export"** button
3. Choose format: CSV, PDF, or JSON
4. File downloads to your computer

Best Practices

Team Management

✅ **DO:**

- Regularly review team member access (monthly)
- Use appropriate roles (don't make everyone Admin)
- Remove access for departed members **immediately**
- Use "Add User" for new team members (faster setup)
- Use "Invite Member" when user should control account setup
- Review pending invitations weekly
- Check audit logs regularly

❌ **DON'T:**

- Share admin credentials with multiple people
- Leave pending invitations open indefinitely
- Create accounts with weak temporary passwords
- Use the same temporary password for multiple users

Security

✅ **DO:**

- Use strong, unique passwords (12+ characters)
- Enable two-factor authentication (2FA)
- Review audit logs regularly (weekly)
- Report suspicious activity to security@easemail.app
- Use OAuth authentication (never share email passwords)
- Monitor team member activity in audit logs

Troubleshooting

Common Issues

Custom Folders Not Showing Messages

Symptoms:

- Custom folders visible but appear empty
- Folder shows count but no messages visible

Solutions:

1. **Click the folder in sidebar** to view contents
   - Custom folder messages don't appear in main inbox
   - Must click specific folder to view
2. Refresh the folder (click refresh button)
3. Check folder sync status (should be "Synced" green)

Email Not Syncing

Solutions:

1. Click the **Refresh** button manually
2. Check internet connection
3. Verify email account is still connected
4. Reconnect email account:
   - Disconnect the account
   - Connect again through OAuth
5. For Microsoft accounts: Token auto-refreshes every 55 minutes

Calendar Not Loading

Solutions:

1. Refresh the page
2. Ensure email account is connected
3. Check calendar permissions (reconnect if needed)
4. For Microsoft Teams calendar: Ensure Microsoft account connected

5. Try different calendar view (Day, Week, Month, Agenda)

Getting Help

Contact Support:

- **Email**: support@easemail.app
- **Documentation**: https://docs.easemail.app
- **Status Page**: https://status.easemail.app

FAQ

General Questions

Q: What's the difference between Admin and Owner?

A: Admins can manage members, add users, invite members, configure settings, and view analytics/audit logs. However, Admins **cannot** delete the organization, transfer ownership, or modify billing information.

Q: What's the difference between "Add User" and "Invite Member"?

A:

- **Add User**: Creates new EaseMail account immediately + adds to organization. You set temporary password. Best for new team members.
- **Invite Member**: Sends email invitation. User creates/uses own account. Best for existing EaseMail users.

Q: Is my email data secure?

A: **Absolutely.** EaseMail uses:

- 🔒 Enterprise-grade encryption (TLS 1.3)
- 🔐 Secure OAuth 2.0 authentication
- 🛡️ Row-level security (RLS) in database
- 💾 Encrypted data at rest

Email & Calendar

Q: Does EaseMail work with Microsoft Teams?

A: **Yes!** Connect your Microsoft account and:

- ✅ Teams meetings sync to calendar
- ✅ "Join Now" buttons appear for active meetings
- ✅ Token auto-refreshes every 55 minutes
- ✅ Conflict detection for overlapping meetings

Q: Why don't messages from custom folders show in my inbox?

A: **By design.** EaseMail syncs all folders but displays them separately. Custom folders appear in sidebar under "Folders (N)". Click on a specific folder to view its messages.

Billing & Plans

Q: What counts as a "seat"?

A: Only **MEMBER** role counts toward seat limit:

- OWNER: Does NOT count toward limit
- ADMIN: Does NOT count toward limit
- MEMBER: DOES count toward limit (each member = 1 seat)

Changelog

Version 1.1 - February 12, 2026

- ✨ Added "Add User" functionality documentation
- ✨ Added comparison: "Add User" vs "Invite Member"
- ✨ Added custom folders workflow clarification
- ✨ Added Microsoft Teams calendar integration details
- ✨ Enhanced troubleshooting section
- ✨ Added seat limit clarifications (MEMBER vs ADMIN/OWNER)
- ✨ Updated team management workflows
- ✨ Added audit logs information
- 📝 Improved FAQ section with detailed answers
- 📝 Enhanced security best practices

Version 1.0 - February 2026

- 🎉 Initial release
- Core admin functionality documentation
- Basic troubleshooting guide
- FAQ section

Version 1.1 - February 12, 2026

For the latest version, visit: https://docs.easemail.app

Questions? Contact: support@easemail.app