EaseMail Admin Quick Reference Guide

Role Permissions Quick View

Feature	OWNER	ADMIN	MEMBER	VIEWER
Invite Members	☑	☑	✕	✕
Remove Members	☑	☑*	✕	✕
Change Roles	☑	☑*	✕	✕
Delete Organization	☑	✕	✕	✕
Transfer Ownership	☑	✕	✕	✕
Manage Webhooks	☑	☑	✕	✕
View Audit Logs	☑	☑	✕	✕
View Analytics	☑	☑	☑	✕

*ADMIN cannot remove/modify OWNER

Common Tasks - Step by Step

1. Invite a New Member

```
Organization → [Select Org] → Members Tab
└ Click "Invite Member"
└ Enter email
└ Select role (ADMIN/MEMBER/VIEWER)
└ Click "Send Invite"
```

Result: Email sent with 7-day expiration link

2. Change Member Role

```
Organization → [Select Org] → Members Tab
└ Find member → Click "Edit"
└ Select new role
└ Click "Update Role"
```

Logged: member_role_changed in audit logs

3. Remove Member

```
Organization → [Select Org] → Members Tab
└ Find member → Click "Remove"
└ Type "REMOVE" to confirm
└ Click "Remove"
```

Effect: Member loses access, seat freed

4. Create Webhook

```
Organization → [Select Org] → Webhooks Tab
└ Click "Create Webhook"
└ Enter name, URL (HTTPS only)
└ Click "Generate" for secret key (copy it!)
└ Select events to subscribe
└ Click "Create Webhook"
```

Test: Click "Test" button to verify

5. View Audit Logs

```
Organization → [Select Org] → Audit Logs Tab
└ Use search/filter to find specific events
└ Click "View" for details
└ Click "Export CSV" to download
```

Retention: Permanent (export monthly for archiving)

6. Check Team Activity

```
Organization → [Select Org] → Dashboard Tab
└ View Team Overview, Usage Stats
└ Check Top Active Users
└ Review Recent Activity feed
```

7. Analyze Usage Trends

```
Organization → [Select Org] → Analytics Tab
└ Select time period (7/30/60/90 days)
└ Review charts and metrics
└ Click "Export CSV" for detailed data
```

8. Transfer Ownership

```
Organization → [Select Org] → Settings ⚙
└ Click "Transfer Ownership"
└ Select new owner (existing member)
└ Type "TRANSFER" to confirm
└ Click "Transfer"
```

Warning: You become ADMIN, cannot undo

9. Upgrade Plan

```
Organization → [Select Org] → Settings ⚙
└ Click "Change Plan"
└ Select new plan
└ Confirm billing changes
```

Prorated: Charges adjusted for mid-cycle changes

Webhook Event Reference

Event	When It Fires	Use Case
member.added	New member joins	CRM sync, Slack notification
member.removed	Member removed	CRM cleanup, Access revocation
member.role_changed	Role updated	Permission sync
invite.sent	Invitation sent	Tracking, Notifications
invite.accepted	Invite accepted	Welcome automation
organization.updated	Org settings changed	Audit trail
plan.changed	Plan upgraded/downgraded	Billing sync
payment.succeeded	Payment processed	Invoice generation
payment.failed	Payment failed	Dunning emails

Webhook Payload Example

```json
{
  "event": "member.added",
  "organization_id": "org_abc123",
  "organization_name": "Acme Corporation",
  "timestamp": "2026-02-04T09:15:00Z",
  "data": {
    "member_id": "mem_xyz789",
    "email": "alice@acme.com",
    "role": "MEMBER",
    "invited_by": "sarah@acme.com",
    "joined_at": "2026-02-04T09:15:00Z"
  }
}
```

Security Checklist

Daily (High-Security Orgs)

- [ ] Review audit logs for unusual activity
- [ ] Check after-hours access
- [ ] Monitor failed webhook deliveries

Weekly (All Orgs)

- [ ] Review new member additions
- [ ] Check role changes
- [ ] Verify OWNER/ADMIN list is current

Monthly

- [ ] Export and archive audit logs
- [ ] Rotate webhook secrets (every 90 days)
- [ ] Remove inactive members
- [ ] Review seat utilization

Quarterly

- [ ] Security training for admins
- [ ] Review and update policies
- [ ] Compliance audit preparation

Troubleshooting Quick Fixes

Problem: Invitation Not Received

Fix: Check spam folder → Resend invitation → Whitelist @easemail.com

Problem: No Seats Available

Fix: Remove inactive members OR Revoke pending invites OR Upgrade plan

Problem: Webhook Failing

Fix: Test endpoint with curl → Check HTTPS → Verify server logs → Use "Test" button

Problem: Cannot Remove Member

Fix: Check if they're OWNER (you need OWNER role) → Verify your permissions

Problem: Analytics Show Zero

Fix: Switch to "Last 7 days" → Wait for team activity → Check Recent Activity feed

API Endpoints Quick Reference

Action	Method	Endpoint
List Organizations	GET	/api/organizations
Get Org Details	GET	/api/organizations/[id]
Invite Member	POST	/api/organizations/[id]/members
Remove Member	DELETE	/api/organizations/[id]/members?userId=[id]
Change Role	PATCH	/api/organizations/[id]/members/role
Resend Invite	POST	/api/organizations/[id]/invites/[id]/resend
Revoke Invite	DELETE	/api/organizations/[id]/invites/[id]
Get Dashboard	GET	/api/organizations/[id]/dashboard
Get Analytics	GET	`/api/organizations[id]/analytics?days=[7\   30\60\90]`
Get Audit Logs	GET	/api/organizations/[id]/audit-logs
Create Webhook	POST	/api/organizations/[id]/webhooks
Get Delivery Logs	GET	/api/organizations/[id]/webhooks/[id]/deliveries
Transfer Ownership	POST	/api/organizations/[id]/transfer-ownership

Plan Comparison

Feature	FREE	PRO	BUSINESS	ENTERPRISE
Price/Month	$0	$29	$99	Custom
Seats	1	5	10	50+
Email Management	☑	☑	☑	☑
AI Features	Limited	Full	Full	Full
Webhooks	✗	✗	☑	☑
Audit Logs	✗	☑	☑	☑
Priority Support	✗	☑	☑	☑
SLA	✗	✗	✗	☑
Custom Integration	✗	✗	✗	☑

Keyboard Shortcuts

Action	Shortcut
Open Search	Ctrl+K / Cmd+K
Compose Email	C
Go to Inbox	G then I
Go to Organization	G then O
Refresh Page	R
Open Help	?

Support Contacts

In-App Help: Click "Help" in sidebar
Email: support@easemail.com
Status Page: https://status.easemail.com
Response Time: < 24 hours (PRO+)

Key Terms

- **Seat:** One user slot in organization
- **Invitation:** Secure 7-day link to join
- **Role:** Permission level (OWNER/ADMIN/MEMBER/VIEWER)
- **Audit Log:** Chronological action record
- **Webhook:** Real-time event notification
- **Token:** Secure authentication string

For complete details, see the full Organization Admin Guide (230KB PDF)