EaseMail Organization Admin Guide

Complete User Manual for Organization Administrators

Version: 1.0
Last Updated: February 2026
For: Organization Owners and Administrators

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1. Introduction

What is EaseMail?

EaseMail is a comprehensive email management platform that helps organizations streamline their email communications through AI-powered features, smart organization, and seamless integration with existing email providers (Gmail, Outlook, IMAP).

Who is this Guide For?

This guide is designed for **Organization Administrators** - users who have been granted OWNER or ADMIN roles within an organization. These roles come with special permissions to manage team members, configure settings, monitor usage, and integrate third-party services.

What You'll Learn

By the end of this guide, you will be able to:

- Create and configure organizations
- Invite and manage team members
- Assign appropriate roles and permissions
- Monitor team activity and usage
- Set up webhooks for automation
- Review audit logs for security and compliance
- Analyze team performance with built-in analytics

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2. Getting Started

2.1 Accessing Organization Management

Step 1: Log into your EaseMail account at `https://easemail-terminal.vercel.app`

Step 2: After login, you'll see the application sidebar on the left with the following sections:

- Inbox
- Starred
- Sent
- Snoozed
- Archive
- Trash
- Help (bottom section)
- Settings (bottom section)
- Admin (bottom section)

Step 3: Navigate to the top navigation bar. You'll see:

- Home
- Inbox
- Calendar
- Contacts
- **Organization** ← Click here

Step 4: You're now in the Organization management area.

2.2 Organization List View

When you first access the Organization section, you'll see:

Page Layout:

```
┌─────────────────────────────────────────────────────┐
│  Organizations                   [+ New Organization] │
├─────────────────────────────────────────────────────┤
│  Search organizations...         [Filter by Role ▼]   │
│                                   [Filter by Plan ▼]    │
├─────────────────────────────────────────────────────┤
│  Card View:                                           │
│  ┌─────────────────────────────┐                    │
│  │ Acme Corporation            │                    │
│  │ Plan: BUSINESS              │                    │
│  │ Seats: 8 / 10               │                    │
│  │ Your Role: OWNER            │                    │
│  │              [View Details] │                    │
│  └─────────────────────────────┘                    │
└─────────────────────────────────────────────────────┘
```

Key Information Displayed:

- **Organization Name**: The name of each organization
- **Plan**: FREE, PRO, BUSINESS, or ENTERPRISE
- **Seats**: Current usage vs. total seats (e.g., "8 / 10")
- **Your Role**: OWNER, ADMIN, MEMBER, or VIEWER
- **Actions**: "View Details" button to access org management

2.3 Creating Your First Organization

Prerequisites:

- Active EaseMail account
- Completed onboarding process

Step-by-Step Instructions:

Step 1: Click the **"+ New Organization"** button (top-right corner)

Step 2: A dialog box will appear:

```
┌─────────────────────────────────┐
│  Create New Organization        │
├─────────────────────────────────┤
│  Organization Name *            │
│  [                         ]    │
│  (minimum 2 characters)         │
│                                 │
│  [ Cancel ]       [ Create ]   │
└─────────────────────────────────┘
```

Step 3: Enter your organization name

- **Example:** "Acme Corporation"
- **Requirements:**
    - Minimum 2 characters
    - No special validation (can include spaces, numbers, special characters)

Step 4: Click **"Create"**

Step 5: The system will:

- Create the organization
- Assign you as OWNER
- Set default plan to FREE (1 seat)
- Redirect you to the organization management page

Result:
You now have a new organization and full administrative control!

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3. Understanding Roles & Permissions

3.1 Role Hierarchy

EaseMail uses a four-tier role system:

OWNER (Highest Level)

Permissions:
✅ All ADMIN permissions (see below)
✅ Delete organization permanently
✅ Transfer ownership to another member
✅ Modify organization settings (name, plan)
✅ View and export all data

Restrictions:
❌ Cannot remove themselves if they're the only owner
❌ Cannot be removed by ADMINs

Use Case: Founders, CEO, Primary account holder

ADMIN (Management Level)

Permissions:
✅ Invite new members
✅ Remove members (except OWNER)
✅ Change member roles (except OWNER role)
✅ Resend or revoke invitations
✅ Access audit logs
✅ Create and manage webhooks
✅ View dashboard and analytics
✅ Export analytics data

Restrictions:
❌ Cannot delete the organization
❌ Cannot transfer ownership
❌ Cannot modify OWNER role
❌ Cannot change plan or billing (OWNER only)

Use Case: Team leads, Department heads, IT administrators

MEMBER (Standard User Level)

Permissions:
✅ View organization dashboard
✅ View analytics (read-only)
✅ Use all email features within the organization
✅ See list of team members

Restrictions:
❌ Cannot invite or remove members
❌ Cannot change roles
❌ Cannot access audit logs
❌ Cannot manage webhooks
❌ Cannot modify settings

Use Case: Regular employees, Contributors

VIEWER (Read-Only Level)

Permissions:
✅ View organization dashboard (limited)
✅ See organization name and basic info

Restrictions:
❌ Cannot view detailed analytics
❌ Cannot view member list details
❌ Cannot perform any actions
❌ Read-only access only

Use Case: External auditors, Observers, Contractors with limited access

---

3.2 Role Comparison Table

Feature	OWNER	ADMIN	MEMBER	VIEWER
View Dashboard	✅	✅	✅	✅ (Limited)
View Analytics	✅	✅	✅ (Read-only)	❌
View Members	✅	✅	✅	❌
Invite Members	✅	✅	❌	❌
Remove Members	✅	✅ (except OWNER)	❌	❌
Change Roles	✅	✅ (except OWNER)	❌	❌
Audit Logs	✅	✅	❌	❌
Webhooks	✅	✅	❌	❌
Org Settings	✅	❌	❌	❌
Delete Org	✅	❌	❌	❌
Transfer Ownership	✅	❌	❌	❌

3.3 Best Practices for Role Assignment

For OWNER Role:

- Assign to only 1-2 trusted individuals (founders, executives)
- Should be long-term stable members
- Have backup OWNER in case primary is unavailable
- Never assign to contractors or temporary staff

For ADMIN Role:

- Assign to team leads who need to manage members
- IT staff who handle technical integration
- Department heads who oversee their teams
- Limit to essential personnel (typically 2-5 people)

For MEMBER Role:

- Default role for most employees
- All regular users who need email management
- Can always be promoted to ADMIN later

For VIEWER Role:

- External consultants who need visibility only
- Temporary observers
- Auditors during review periods
- Board members who want oversight without control

---

4. Organization Management

4.1 Viewing Organization Details

Step 1: From the Organizations list, click **"View Details"** on any organization

Step 2: You'll land on the Organization Management page with multiple tabs:

- **Members** (default view)
- **Dashboard**

- **Analytics**
- **Audit Logs** (OWNER/ADMIN only)
- **Webhooks** (OWNER/ADMIN only)

Page Layout:

```
┌──────────────────────────────────────────────────────────────┐
│  ← Back to Organizations                                     │
│                                                              │
│  Acme Corporation                           [Settings ⚙️] │
│  Plan: BUSINESS  •  Seats: 8 / 10  •  Created: Jan 15, 2026 │
│                                                              │
│  [ Members ] [ Dashboard ] [ Analytics ] [ Audit Logs ]      │
│  [ Webhooks ]                                                │
├──────────────────────────────────────────────────────────────┤
│  (Tab content appears here)                                  │
└──────────────────────────────────────────────────────────────┘
```

4.2 Updating Organization Settings

Requirements: OWNER role

Step 1: Click the **Settings ⚙️** button (top-right)

Step 2: Settings dialog appears:

```
┌──────────────────────────────────────────┐
│  Organization Settings                   │
├──────────────────────────────────────────┤
│  Organization Name                       │
│  [ Acme Corporation            ]         │
│                                          │
│  Current Plan: BUSINESS                  │
│  Total Seats: 10                         │
│  Seats Used: 8                           │
│  Available: 2                            │
│                                          │
│  Created: January 15, 2026               │
│                                          │
│  [ Cancel ]           [ Save Changes ]   │
│                                          │
│  ────────── Danger Zone ──────────       │
│                                          │
│  [ Transfer Ownership ]                  │
│  [ Delete Organization ]                 │
└──────────────────────────────────────────┘
```

Step 3: To change the organization name:

- Click in the "Organization Name" field
- Type new name (minimum 2 characters)
- Click **"Save Changes"**

Example:

```
Before: Acme Corporation
After: Acme Corp International
```

Step 4: Confirmation message appears:

> ☑ "Organization updated successfully!"

4.3 Transferring Ownership

Requirements:

- OWNER role
- At least 2 members in the organization

⚠️ **WARNING:** This action is permanent. You will be demoted to ADMIN and the new owner will have full control.

Step-by-Step Instructions:

Step 1: Click **Settings ⚙️** → **"Transfer Ownership"**

Step 2: A confirmation dialog appears:

```
┌──────────────────────────────────────────┐
│  ⚠️ Transfer Organization Ownership      │
├──────────────────────────────────────────┤
│  You are about to transfer ownership     │
│  of "Acme Corporation"                   │
│                                          │
│  Select New Owner:                       │
│  [ john.smith@acme.com         ▼ ]       │
│                                          │
│  Current Role: ADMIN                     │
│  New Role: OWNER                         │
│                                          │
│  Your Role After Transfer: ADMIN         │
│                                          │
│  This action:                            │
│  ✓ Grants full control to new owner      │
│  ✓ Demotes you to ADMIN                  │
│  ✓ Creates audit log entry               │
│  ✓ Cannot be undone (new owner must      │
│    transfer back if needed)              │
│                                          │
│  Type "TRANSFER" to confirm:             │
│  [                               ]       │
│                                          │
│  [ Cancel ]           [ Transfer ]       │
└──────────────────────────────────────────┘
```

Step 3: Select the new owner from dropdown (shows all current members except yourself)

Step 4: Type **"TRANSFER"** in the confirmation field (case-sensitive)

Step 5: Click **"Transfer"**

Result:

- New owner receives OWNER role
- Your role changes to ADMIN
- Audit log records: "transfer_ownership" event
- Email notification sent to new owner (if configured)

Example Scenario:

```
Before Transfer:
- sarah@acme.com (You) → OWNER
- john@acme.com → ADMIN

After Transfer:
- john@acme.com → OWNER
- sarah@acme.com (You) → ADMIN
```

4.4 Deleting an Organization

Requirements: OWNER role

⚠️ **CRITICAL WARNING:**

- This action is **PERMANENT** and **IRREVERSIBLE**
- All data will be deleted including:
  - All member access
  - All billing information
  - All usage history
  - All audit logs
  - All webhooks

- All organization data

Step-by-Step Instructions:

Step 1: Click **Settings** ⚙️ → **"Delete Organization"** (in Danger Zone)

Step 2: Final warning dialog appears:

```
┌─────────────────────────────────────────┐
│ 🚨 Delete Organization                    │
├─────────────────────────────────────────┤
│ You are about to PERMANENTLY DELETE:    │
│                                         │
│ Organization: Acme Corporation          │
│ Members: 8                              │
│ Plan: BUSINESS                          │
│                                         │
│ THIS WILL DELETE:                       │
│ ❌ All member access (8 members)         │
│ ❌ All billing records                    │
│ ❌ All usage history                      │
│ ❌ All audit logs                         │
│ ❌ All webhooks and integrations          │
│ ❌ All organization data                  │
│                                         │
│ ⚠️ THIS CANNOT BE UNDONE                  │
│                                         │
│ Type the organization name to confirm:  │
│ [                              ]        │
│                                         │
│ [ Cancel ]          [ Delete ]          │
└─────────────────────────────────────────┘
```

Step 3: Type the **exact organization name** to confirm (e.g., "Acme Corporation")

Step 4: Click **"Delete"**

Step 5: Confirmation message appears:

> ☑️ "Organization deleted successfully"

Step 6: You're redirected to the Organizations list

Result: The organization and all associated data are permanently removed from the system.

---

5. Member Management

5.1 Viewing Current Members

Requirements: OWNER or ADMIN role

Step 1: Navigate to Organization → Click "View Details" → **Members** tab (default)

Page Layout:

```
┌─────────────────────────────────────────────────────────────┐
│ Members (8)                              [+ Invite Member]  │
├─────────────────────────────────────────────────────────────┤
│ Current Members                                             │
│ ┌─────────────────────────────────────────────────────────┐ │
│ │ Email                    Role      Joined      Actions  │ │
│ ├─────────────────────────────────────────────────────────┤ │
│ │ sarah@acme.com          OWNER    Jan 15  [•••]          │ │
│ │ john@acme.com           ADMIN    Jan 16  [Edit][Remove]│ │
│ │ alice@acme.com          MEMBER   Jan 18  [Edit][Remove]│ │
│ │ bob@acme.com            MEMBER   Jan 20  [Edit][Remove]│ │
│ └─────────────────────────────────────────────────────────┘ │
│                                                               │
│ Pending Invitations (2)                                     │
│ ┌─────────────────────────────────────────────────────────┐ │
│ │ Email              Role   Sent      Expires   Actions   │ │
│ ├─────────────────────────────────────────────────────────┤ │
│ │ carol@acme.com    MEMBER Feb 1  Feb 8  [Resend][Revoke]│ │
│ │ dave@acme.com     ADMIN  Feb 2  Feb 9  [Resend][Revoke]│ │
│ └─────────────────────────────────────────────────────────┘ │
└─────────────────────────────────────────────────────────────┘
```

Information Displayed:

- **Email**: Member's email address
- **Role**: Current role (OWNER, ADMIN, MEMBER, VIEWER)
- **Joined**: Date they joined the organization
- **Actions**: Available actions based on your permissions

5.2 Inviting New Members

Requirements: OWNER or ADMIN role

Prerequisites:

- Available seats (Seats Used < Total Seats)
- Valid email address
- No pending invitation for the same email

Step-by-Step Instructions:

Step 1: Click **"+ Invite Member"** button

Step 2: Invitation dialog appears:

```
┌─────────────────────────────────────────┐
│ Invite New Member                       │
├─────────────────────────────────────────┤
│ Email Address *                         │
│ [ carol@acme.com              ]         │
│                                         │
│ Role *                                  │
│ [ MEMBER                      ▼ ]      │
│   (Options: ADMIN, MEMBER, VIEWER)     │
│                                         │
│ Seats Available: 2 / 10                 │
│                                         │
│ [ Cancel ]          [ Send Invite ]    │
└─────────────────────────────────────────┘
```

Step 3: Enter the email address

- **Example:** `carol@acme.com`
- **Validation:** Must be valid email format

Step 4: Select role from dropdown

- **ADMIN**: If they need management permissions
- **MEMBER**: For regular users (recommended default)
- **VIEWER**: For read-only access

Step 5: Click **"Send Invite"**

What Happens Next:

1. **System Actions:**
    - Generates secure token (32-byte hex)
    - Sets expiration to 7 days from now
    - Creates invitation record in database
    - Decrements available seats
2. **Email Sent:**
    - Recipient receives beautifully designed invitation email
    - Email includes:

- Organization name
- Your name (inviter)
- Assigned role
- "Accept Invitation" button with unique link
- Expiration date (7 days)

3. **Confirmation:**

> ☑ "Invitation sent successfully to carol@acme.com"

4. **Invitation appears in "Pending Invitations" section**

Example Invitation Email:

```
Subject: You're Invited to Join Acme Corporation on EaseMail

━━━━━━━━━━━━━━━━━━━━━━━━━━━━━━━━━━
     You're Invited!
━━━━━━━━━━━━━━━━━━━━━━━━━━━━━━━━━━

Hi Carol,

Sarah Johnson has invited you to join Acme Corporation
on EaseMail.

You've been invited as a: MEMBER

[Accept Invitation]

This invitation will expire on February 8, 2026.

━━━━━━━━━━━━━━━━━━━━━━━━━━━━━━━━━━
EaseMail - Making email management easy
```

5.3 Invitation Acceptance Flow (Recipient's Experience)

For New Users:

Step 1: Recipient clicks "Accept Invitation" in email

Step 2: Redirected to invitation acceptance page:

```
┌─────────────────────────────────────────┐
│  📧 Organization Invitation              │
├─────────────────────────────────────────┤
│  You've been invited to join:           │
│                                         │
│  Acme Corporation                       │
│                                         │
│  By: Sarah Johnson                      │
│  Role: MEMBER                           │
│                                         │
│  To accept this invitation, you need    │
│  to sign up for an EaseMail account.    │
│                                         │
│  [ Sign Up to Accept ]                  │
│                                         │
│  Already have an account?               │
│  [ Log In ]                             │
└─────────────────────────────────────────┘
```

Step 3: User clicks "Sign Up to Accept"

Step 4: Completes registration with the invited email address

Step 5: After onboarding, automatically added to organization

Result: User is now a member with assigned role

For Existing Users:

Step 1: Recipient clicks "Accept Invitation" in email

Step 2: If logged in, sees acceptance confirmation:

```
┌─────────────────────────────────────────┐
│  📧 Organization Invitation              │
├─────────────────────────────────────────┤
│  You've been invited to join:           │
│                                         │
│  Acme Corporation                       │
│                                         │
│  By: Sarah Johnson                      │
│  Role: MEMBER                           │
│  Expires: February 8, 2026              │
│                                         │
│  Your email: carol@acme.com             │
│                                         │
│  [ Accept Invitation ]  [ Decline ]     │
└─────────────────────────────────────────┘
```

Step 3: User clicks "Accept Invitation"

Step 4: System validates:

- Invitation hasn't expired
- Email matches logged-in user
- Organization has available seats

Step 5: Success message:

> ☑ "Welcome to Acme Corporation!"

Step 6: User redirected to organization dashboard

Result: User is now a member with assigned role

5.4 Managing Pending Invitations

5.4.1 Resending Invitations

Use Case: Recipient didn't receive email or invitation expired

Step 1: In "Pending Invitations" section, locate the invitation

Step 2: Click **"Resend"** button

Step 3: Confirmation dialog:

```
┌─────────────────────────────────────────┐
│  Resend Invitation                      │
├─────────────────────────────────────────┤
│  Resend invitation to:                  │
│  carol@acme.com                         │
│                                         │
│  This will:                             │
│  ✓ Send a new invitation email           │
│  ✓ Extend expiration by 7 days           │
│  ✓ Keep the same role assignment         │
│                                         │
│  [ Cancel ]           [ Resend ]        │
└─────────────────────────────────────────┘
```

Step 4: Click **"Resend"**

Result:

- New invitation email sent

- Expiration date extended to 7 days from now
- Same invitation token (not regenerated)
- Confirmation: ☑ "Invitation resent successfully"

5.4.2 Revoking Invitations

Use Case: Changed mind about inviting someone, wrong email, role no longer needed

Step 1: In "Pending Invitations" section, locate the invitation

Step 2: Click **"Revoke"** button

Step 3: Confirmation dialog:

```
┌─────────────────────────────────────┐
│  ⚠ Revoke Invitation                 │
├─────────────────────────────────────┤
│  Revoke invitation for:             │
│  carol@acme.com                     │
│                                     │
│  This will:                         │
│  ✓ Cancel the invitation             │
│  ✓ Invalidate the invitation link    │
│  ✓ Free up 1 seat                    │
│  ✓ Remove from pending list          │
│                                     │
│  Note: You can send a new invitation│
│  to this email later if needed.     │
│                                     │
│  [ Cancel ]           [ Revoke ]    │
└─────────────────────────────────────┘
```

Step 4: Click **"Revoke"**

Result:

- Invitation deleted from database
- Invitation link no longer works
- Seat becomes available again
- Removed from pending invitations list
- Confirmation: ☑ "Invitation revoked successfully"

5.5 Changing Member Roles

Requirements: OWNER or ADMIN role

Restrictions:

- Cannot change OWNER role (use Transfer Ownership instead)
- ADMINs cannot modify OWNER's role

Step 1: In "Current Members" section, find the member

Step 2: Click **"Edit"** button next to their name

Step 3: Role change dialog appears:

```
┌─────────────────────────────────────┐
│  Change Member Role                 │
├─────────────────────────────────────┤
│  Member: alice@acme.com             │
│  Current Role: MEMBER               │
│                                     │
│  New Role:                          │
│  [ ADMIN                      ▼ ]     │
│    (Options: ADMIN, MEMBER, VIEWER)   │
│                                     │
│  Role Permissions:                  │
│  ADMIN:                             │
│  ✓ Manage members                     │
│  ✓ Access audit logs                  │
│  ✓ Configure webhooks                 │
│  ✓ View analytics                     │
│                                     │
│  [ Cancel ]           [ Update Role ]│
└─────────────────────────────────────┘
```

Step 4: Select new role from dropdown

Step 5: Review the permissions description

Step 6: Click **"Update Role"**

Result:

- Role updated in database
- Member's permissions change immediately
- Audit log records "member_role_changed" event
- Confirmation: ☑ "Role updated successfully for alice@acme.com"

Example Scenarios:

Scenario 1: Promoting Member to Admin

```
Before: alice@acme.com → MEMBER
Action: Change role to ADMIN
After: alice@acme.com → ADMIN

Alice can now:
- Invite new members
- Remove members
- Access audit logs
- Manage webhooks
```

Scenario 2: Demoting Admin to Member

```
Before: john@acme.com → ADMIN
Action: Change role to MEMBER
After: john@acme.com → MEMBER

John can no longer:
- Invite or remove members
- Access audit logs
- Manage webhooks
But still has full email features
```

Scenario 3: Restricting to Viewer

```
Before: bob@acme.com → MEMBER
Action: Change role to VIEWER
After: bob@acme.com → VIEWER

Bob can now only:
- View basic dashboard
- Read-only access
- Cannot perform actions
```

5.6 Removing Members

Requirements: OWNER or ADMIN role

Restrictions:

- Cannot remove the only OWNER
- ADMINs cannot remove OWNER
- Cannot remove yourself if you're the sole OWNER

Step 1: In "Current Members" section, find the member

Step 2: Click **"Remove"** button

Step 3: Confirmation dialog appears:

```
┌──────────────────────────────────────┐
│  ⚠ Remove Member                      │
├──────────────────────────────────────┤
│  Remove from organization:            │
│  bob@acme.com                         │
│  Role: MEMBER                         │
│  Joined: January 20, 2026             │
│                                       │
│  This will:                           │
│  ✓ Revoke all organization access      │
│  ✓ Remove from team                    │
│  ✓ Free up 1 seat                      │
│  ✓ Create audit log entry              │
│                                       │
│  Note: This does not delete their     │
│  EaseMail account, only removes them  │
│  from this organization.              │
│                                       │
│  Type "REMOVE" to confirm:            │
│  [                              ]     │
│                                       │
│  [ Cancel ]          [ Remove ]       │
└──────────────────────────────────────┘
```

Step 4: Type **"REMOVE"** in confirmation field (case-sensitive)

Step 5: Click **"Remove"**

Result:

- Member removed from organization
- Seat freed up (Seats Used decrements by 1)
- Member loses access to organization
- Audit log records "member_removed" event
- Member's personal EaseMail account remains active
- Confirmation: ☑ "Member removed successfully"

Example:

```
Before Removal:
- Organization: Acme Corporation
- Seats: 8 / 10
- Members: [sarah, john, alice, bob, carol, dave, eve, frank]

Remove Action:
- Target: bob@acme.com

After Removal:
- Organization: Acme Corporation
- Seats: 7 / 10
- Members: [sarah, john, alice, carol, dave, eve, frank]
- bob@acme.com: No longer has access

Bob's Experience:
- Can still log into EaseMail
- "Acme Corporation" no longer in his organization list
- Cannot access any Acme org resources
```

5.7 Seat Management Best Practices

Understanding Seats:

- Seats = Maximum number of members allowed
- Each plan has different seat limits:
  - FREE: 1 seat
  - PRO: 5 seats
  - BUSINESS: 10 seats
  - ENTERPRISE: 50+ seats (custom)

Monitoring Seat Usage:

```
Current Status: 8 / 10 seats used
Available: 2 seats
```

What Happens When Seats Are Full:

- Cannot send new invitations
- Error message: "No available seats. Please upgrade your plan or remove a member."
- Pending invitations count toward seat limit

How to Free Up Seats:

1. **Remove inactive members**
   - Review member list
   - Identify members who haven't logged in recently
   - Remove members who left the company
2. **Revoke pending invitations**
   - Check pending invitations
   - Revoke invitations that won't be accepted
   - Each revoked invite frees 1 seat
3. **Upgrade plan**
   - Navigate to Billing section
   - Choose plan with more seats
   - Immediate seat availability

---

6. Dashboard & Analytics

6.1 Organization Dashboard

Requirements: All roles (OWNER, ADMIN, MEMBER, VIEWER)

Access: Organization → [Select Org] → **Dashboard** tab

Page Layout:

```
┌──────────────────────────────────────────────────────────┐
│  Dashboard                                                │
├──────────────────────────────────────────────────────────┤
│  Team Overview                                           │
│  ┌────────────────┬────────────────┬────────────────┐    │
│  │ Total Members  │ Active Seats   │ Plan           │    │
│  │      8         │     8 / 10     │   BUSINESS     │    │
│  └────────────────┴────────────────┴────────────────┘    │
│                                                           │
│  Feature Usage (Last 30 Days)                            │
│  ┌──────────────────────────────────────────────────┐    │
│  │ 📧 Emails Sent: 1,245                             │  │
│  │ 🤖 AI Requests: 328                               │  │
│  │ 📅 Calendar Events: 156                           │  │
│  │ 💬 SMS Messages: 89                               │  │
│  └──────────────────────────────────────────────────┘    │
│                                                           │
│  Top Active Users                                        │
│  ┌──────────────────────────────────────────────────┐    │
│  │ 1. sarah@acme.com          428 actions           │    │
│  │ 2. john@acme.com           392 actions           │    │
│  │ 3. alice@acme.com          276 actions           │    │
│  │ 4. carol@acme.com          198 actions           │    │
│  │ 5. bob@acme.com            152 actions           │    │
│  └──────────────────────────────────────────────────┘    │
│                                                           │
│  Recent Activity                                         │
│  ┌──────────────────────────────────────────────────┐    │
│  │ sarah@acme.com sent email • 2 minutes ago        │    │
│  │ john@acme.com created calendar event • 15 min ago   │ │
│  │ alice@acme.com used AI Remix • 1 hour ago          │ │
│  │ carol@acme.com sent SMS • 2 hours ago              │ │
│  └──────────────────────────────────────────────────┘    │
│                                                           │
│  Quick Actions                                           │
│  [ Manage Members ]  [ View Analytics ]  [ Settings ]    │
└──────────────────────────────────────────────────────────┘
```

Key Metrics Explained:

1. Team Overview

- **Total Members**: Current number of members in organization
- **Active Seats**: Seats used vs. total seats
- **Plan**: Current subscription tier

2. Feature Usage (Last 30 Days)

- **Emails Sent**: Total emails sent by all members
- **AI Requests**: AI Remix + AI Dictate usage combined
- **Calendar Events**: Events created via EaseMail
- **SMS Messages**: SMS messages sent through system

3. Top Active Users

- Shows top 5 most active members
- Ranked by total action count
- Includes all feature usage (emails, AI, calendar, SMS)
- Updated in real-time

4. Recent Activity

- Last 10 activities across organization
- Shows user, action type, and timestamp
- Real-time feed (auto-refreshes)
- Activity types:
  - Email sent
  - Calendar event created
  - AI feature used
  - SMS sent
  - Member added/removed
  - Settings changed

5. Quick Actions

- Direct links to common admin tasks
- Context-aware based on your role

6.2 Advanced Analytics

Requirements: All roles (OWNER, ADMIN, MEMBER can view; VIEWER has limited access)

Access: Organization → [Select Org] → **Analytics** tab

Page Layout:

```
┌──────────────────────────────────────────────────────────┐
│  Analytics                                                │
│  Time Period: [ Last 7 days ▼ ]          [ Export CSV ]  │
├──────────────────────────────────────────────────────────┤
│  Key Metrics                                             │
│  ┌────────────┬────────────┬────────────┬────────────┐   │
│  │ Total      │ Active     │ Avg Daily  │ Growth     │   │
│  │ Actions    │ Users      │ Actions    │ Rate       │   │
│  │  3,248     │     8      │    464     │  +12.5%    │   │
│  └────────────┴────────────┴────────────┴────────────┘   │
│                                                           │
│  Activity Trends                                         │
│  ┌──────────────────────────────────────────────────┐    │
│  │        Line Chart: Activity Over Time            │    │
│  │  Actions                                         │    │
│  │  600│                                            │    │
│  │  500│        /\                                  │    │
│  │  400│    /\/  \/\                                │    │
│  │  300│  /          \                              │    │
│  │  200│/             \/\                           │    │
│  │    0└────┴────┴────┴────┴────┴────┴────          │    │
│  │        Mon  Tue  Wed  Thu  Fri  Sat  Sun         │    │
│  └──────────────────────────────────────────────────┘    │
│                                                           │
│  Feature Usage Distribution                              │
│  ┌──────────────────────────────────────────────────┐    │
│  │        Pie Chart                                 │    │
│  │        ___                                       │    │
│  │      /     \                                     │    │
│  │     │  📧   │ 45% Emails                         │    │
│  │     │  🤖   │ 30% AI Features                    │    │
│  │      \ 📅  /  15% Calendar                       │    │
│  │        ───    10% SMS                            │    │
│  └──────────────────────────────────────────────────┘    │
│                                                           │
│  Feature Comparison                                      │
│  ┌──────────────────────────────────────────────────┐    │
│  │        Bar Chart                                 │    │
│  │  Emails     ████████████████████ 1,462           │    │
│  │  AI         ██████████████ 975                   │    │
│  │  Calendar   ███████ 487                          │    │
│  │  SMS        ████ 324                             │    │
│  └──────────────────────────────────────────────────┘    │
└──────────────────────────────────────────────────────────┘
```

Time Period Selection:

Available options:

- **Last 7 days** - Weekly overview
- **Last 30 days** - Monthly trends (default)
- **Last 60 days** - Quarterly comparison
- **Last 90 days** - Full quarter analysis

Example Usage:

```
Scenario: Comparing monthly performance

Step 1: Select "Last 30 days"
Step 2: Review key metrics
  - Total Actions: 3,248
  - Active Users: 8
  - Avg Daily: 108 actions/day
  - Growth: +12.5% vs. previous 30 days

Step 3: Switch to "Last 60 days" for comparison
  - Total Actions: 5,891
  - Active Users: 8
  - Avg Daily: 98 actions/day
  - Growth: +8.2% vs. previous 60 days

Insight: Team activity increasing consistently
```

Key Metrics Explained:

1. Total Actions

- Sum of all activities (emails, AI, calendar, SMS)
- Indicates overall team engagement
- Higher = more active team

2. Active Users

- Unique users who performed at least 1 action
- Helps identify inactive members
- Expected: Close to total member count

3. Avg Daily Actions

- Total Actions / Number of Days
- Smooths out daily variations
- Useful for capacity planning

4. Growth Rate

- Comparison to previous period
- Positive = increasing activity
- Negative = declining activity
- Shows trend direction

Interpreting Charts:

Activity Trends (Line Chart):

- **X-axis**: Days in selected period
- **Y-axis**: Number of actions
- **Use Cases:**
    - Identify peak usage days (Mon-Fri typically higher)
    - Spot unusual activity drops (holidays, outages)
    - Track growth trends over time

Example Interpretation:

```
Pattern observed:
Monday: 520 actions (high - catching up from weekend)
Tuesday: 480 actions
Wednesday: 510 actions (peak mid-week)
Thursday: 475 actions
Friday: 420 actions (lower - wrapping up week)
Saturday: 120 actions (minimal)
Sunday: 95 actions (minimal)

Insight: Team most active Mon-Thu, plan maintenance for weekends
```

Feature Usage Distribution (Pie Chart):

- Shows percentage breakdown by feature
- Identifies most-used features
- Helps prioritize training and support

Example Interpretation:

```
Distribution:
- Emails: 45% (1,462 actions)
- AI Features: 30% (975 actions)
- Calendar: 15% (487 actions)
- SMS: 10% (324 actions)

Insight: Email is primary use case, but AI adoption is strong (30%)
Action: Provide advanced AI training to boost further
```

Feature Comparison (Bar Chart):

- Visual comparison of feature usage
- Easy to spot imbalances
- Useful for feature adoption analysis

Example Use Case:

```
Goal: Increase SMS usage

Current State:
- Emails: 1,462 (high)
- AI: 975 (good)
- Calendar: 487 (moderate)
- SMS: 324 (low)

Actions:
1. Survey team: Why low SMS usage?
2. Provide SMS training session
3. Highlight SMS use cases
4. Track growth in next 30 days
```

Exporting Analytics Data:

Step 1: Click **"Export CSV"** button

Step 2: Browser downloads file: `analytics_Acme_Corporation_2026-02-04.csv`

Step 3: Open in Excel, Google Sheets, or data analysis tool

CSV Format:

```
Date,Emails,AI_Requests,Calendar_Events,SMS_Messages,Total_Actions
2026-01-08,45,12,8,5,70
2026-01-09,52,18,10,7,87
2026-01-10,48,15,9,6,78
...
```

Use Cases for Exported Data:

- Create custom reports in Excel
- Share with executives
- Perform trend analysis
- Compare multiple time periods
- Create presentations

6.3 Analytics Best Practices

Weekly Review Routine:

1. Check dashboard every Monday morning
2. Review top active users (recognize top performers)

3. Identify any sudden drops in activity
4. Compare to previous week

Monthly Review Routine:

1. Switch to "Last 30 days" view
2. Export CSV for records
3. Analyze growth rate vs. previous month
4. Share summary with team leads
5. Plan improvements for next month

Identifying Issues:

Low Active Users:

```
Problem: Active Users (3) < Total Members (8)
Meaning: 5 members are inactive

Action:
1. Check last login dates
2. Reach out to inactive members
3. Provide training if needed
4. Consider removing if no longer needed
```

Declining Growth Rate:

```
Problem: Growth Rate: -5.2% (declining)
Meaning: Team using platform less

Action:
1. Survey team for feedback
2. Check for technical issues
3. Review recent changes
4. Provide refresher training
```

Feature Imbalance:

```
Problem: Emails: 90%, AI: 2%, Calendar: 5%, SMS: 3%
Meaning: Team underutilizing features

Action:
1. Highlight underused features in team meeting
2. Share use case examples
3. Provide feature-specific training
4. Track adoption in next period
```

---

7. Audit Logs & Security

7.1 Understanding Audit Logs

What are Audit Logs?
Audit logs are a chronological record of all significant actions taken within your organization. They provide transparency, accountability, and help with:

- **Security**: Detect unauthorized changes
- **Compliance**: Meet regulatory requirements (SOC 2, GDPR, HIPAA)
- **Troubleshooting**: Identify when and why issues occurred
- **Accountability**: Track who made what changes

Requirements: OWNER or ADMIN role only

Access: Organization → [Select Org] → **Audit Logs** tab

7.2 Viewing Audit Logs

Page Layout:

```
┌─────────────────────────────────────────────────────────┐
│  Audit Logs                                             │
│  Search: [                    ]  Filter: [ All Actions ▼ ] │
│  [ Clear Filters ]                        [ Export CSV ]  │
├─────────────────────────────────────────────────────────┤
│  Showing 50 of 347 logs                                 │
│                                                         │
│  ┌────────────────────────────────────────────────────┐ │
│  │ Date       Time    User           Action         Details│ │
│  ├────────────────────────────────────────────────────┤ │
│  │ Feb 4   09:15 AM  sarah@acme.com  member_added   [View]│ │
│  │ Feb 4   09:10 AM  john@acme.com   invite_sent    [View]│ │
│  │ Feb 3   04:30 PM  sarah@acme.com  role_changed   [View]│ │
│  │ Feb 3   02:15 PM  john@acme.com   member_removed [View]│ │
│  │ Feb 3   11:00 AM  sarah@acme.com  transfer_owner [View]│ │
│  │ Feb 2   03:45 PM  alice@acme.com  settings_chg   [View]│ │
│  │ Feb 2   01:20 PM  john@acme.com   webhook_create [View]│ │
│  │ ...                                                │ │
│  └────────────────────────────────────────────────────┘ │
│                                                         │
│  [ Previous ]  Page 1 of 7  [ Next ]                    │
└─────────────────────────────────────────────────────────┘
```

Information Displayed:

- **Date**: Day action occurred
- **Time**: Exact timestamp (with timezone)
- **User**: Email of person who performed action
- **Action**: Type of action (see action types below)
- **Details**: View button for full details
- **Badge Color**: Visual indicator of action severity

7.3 Action Types & Meanings

Member Management Actions:

Action	Badge Color	Meaning	Example Details
member_added	● Green	New member joined organization	`{"email": "alice@acme.com", "role": "MEMBER", "invited_by": "sarah@acme.com"}`
member_removed	● Red	Member was removed	`{"email": "bob@acme.com", "role": "MEMBER", "reason": "left_company"}`
member_role_changed	● Blue	Member's role was updated	`{"email": "john@acme.com", "old_role": "MEMBER", "new_role": "ADMIN"}`
invite_sent	● Green	Invitation sent to new member	`{"email": "carol@acme.com", "role": "MEMBER", "expires": "2026-02-11"}`
invite_accepted	● Green	Invitation was accepted	`{"email": "carol@acme.com", "accepted_at": "2026-02-04T14:30:00Z"}`

Organization Management Actions:

Action	Badge Color	Meaning	Example Details
transfer_ownership	● Purple	Ownership transferred	`{"old_owner": "sarah@acme.com", "new_owner": "john@acme.com"}`
organization_updated	● Blue	Org settings changed	`{"field": "name", "old": "Acme Corp", "new": "Acme Corporation"}`
settings_changed	● Blue	Settings modified	`{"changed_fields": ["notification_emails", "webhook_url"]}`

Subscription & Billing Actions:

Action	Badge Color	Meaning	Example Details
plan_changed	● Blue	Subscription plan changed	`{"old_plan": "PRO", "new_plan": "BUSINESS", "seats_added": 5}`
subscription_cancelled	● Red	Subscription cancelled	`{"plan": "BUSINESS", "cancelled_at": "2026-02-04", "reason": "cost"}`
payment_succeeded	● Green	Payment processed	`{"amount": "$99.00", "plan": "BUSINESS", "period": "Feb 2026"}`
payment_failed	● Red	Payment failed	`{"amount": "$99.00", "reason": "insufficient_funds"}`

Integration Actions:

Action	Badge Color	Meaning	Example Details
webhook_created	● Green	New webhook configured	`{"url": "https://api.acme.com/webhook", "events": ["member_added"]}`
webhook_updated	● Blue	Webhook settings changed	`{"webhook_id": "wh_123", "changed": "events", "added": ["invite_sent"]}`
webhook_deleted	● Red	Webhook removed	`{"webhook_id": "wh_123", "url": "https://api.acme.com/webhook"}`

7.4 Viewing Log Details

Step 1: In the audit logs list, find the log entry you want to examine

Step 2: Click **"View"** button

Step 3: Detailed log dialog appears:

```
┌─────────────────────────────────────────┐
│  Audit Log Details                      │
├─────────────────────────────────────────┤
│  Action: member_role_changed            │
│  Timestamp: Feb 3, 2026 at 4:30 PM PST  │
│  User: sarah@acme.com                   │
│  IP Address: 192.168.1.100              │
│  User Agent: Chrome 120.0 (Windows)     │
│                                         │
│  Details:                               │
│  {                                      │
│    "member_email": "john@acme.com",     │
│    "old_role": "MEMBER",                │
│    "new_role": "ADMIN",                 │
│    "reason": "promoted_to_team_lead",   │
│    "effective_immediately": true        │
│  }                                      │
│                                         │
│  [ Close ]                              │
└─────────────────────────────────────────┘
```

Information in Detailed View:

- **Action**: Full action name
- **Timestamp**: Exact date and time with timezone
- **User**: Who performed the action
- **IP Address**: Source IP (for security tracking)
- **User Agent**: Browser and OS information
- **Details**: Complete JSON payload with all relevant data

7.5 Filtering and Searching Logs

Search by User Email:

Step 1: Type email in search box

```
Search: [ john@acme.com ]
```

Step 2: Results filter to only show actions by john@acme.com

Use Case: Track all actions by a specific user

Filter by Action Type:

Step 1: Click **"Filter"** dropdown

Step 2: Select action type:

```
Filter: [ member_added ▼ ]
Options:
- All Actions
- member_added
- member_removed
- member_role_changed
- invite_sent
- invite_accepted
- transfer_ownership
- plan_changed
- webhook_created
- webhook_updated
- webhook_deleted
- settings_changed
```

Step 3: List shows only that action type

Use Case: Review all member additions in last month

Combining Filters:

Example: Find all role changes made by Sarah

```
Search: sarah@acme.com
Filter: member_role_changed

Results: All role changes performed by Sarah
```

Clearing Filters:

Click **"Clear Filters"** button to reset to all logs

7.6 Exporting Audit Logs

Step 1: Apply any desired filters (optional)

Step 2: Click **"Export CSV"** button

Step 3: File downloads: `audit_logs_Acme_Corporation_2026-02-04.csv`

CSV Format:

```
Timestamp,User_Email,Action_Type,Details,IP_Address,User_Agent
2026-02-04T09:15:00Z,sarah@acme.com,member_added,"{""email"":""alice@acme.com"",""role"":""MEMBER""}",192.168.1.100,Chrome/120.0
2026-02-04T09:10:00Z,john@acme.com,invite_sent,"{""email"":""carol@acme.com"",""role"":""MEMBER""}",192.168.1.105,Firefox/118.0
...
```

Use Cases:

- **Compliance Audits**: Provide to auditors
- **Security Reviews**: Analyze unauthorized access attempts
- **Reporting**: Create executive summaries
- **Archiving**: Long-term record keeping
- **Analysis**: Import into SIEM tools

7.7 Security Best Practices with Audit Logs

Regular Review Schedule:

```
Daily (for high-security orgs):
- Review logs every morning
- Look for suspicious activity
- Check after-hours access

Weekly (for most orgs):
- Review logs every Monday
- Check for unusual patterns
- Verify expected changes

Monthly:
- Export logs for archiving
- Review access patterns
- Update security policies
```

Red Flags to Watch For:

1. Unexpected Member Additions

```
Log: member_added
User: john@acme.com (ADMIN)
Time: 2:30 AM Saturday
Email: unknown@external.com
Role: ADMIN

⚠️ Red Flag:
- Added at unusual time
- External email domain
- High privilege role

Action:
1. Contact John immediately
2. Verify if legitimate
3. Remove member if unauthorized
4. Change passwords
5. Review other recent actions by John
```

---

2. Unusual Role Escalations

```
Log: member_role_changed
User: alice@acme.com (MEMBER)
Changed: alice@acme.com (MEMBER → OWNER)
Time: 3:15 PM

⚠️ Red Flag:
- Member promoting themselves
- Not authorized to change roles

Action:
1. Account likely compromised
2. Immediately revoke alice's access
3. Reset password
4. Review all actions by alice today
5. Check for data exfiltration
```

---

3. Mass Deletions

```
Logs:
09:00 - member_removed: bob@acme.com
09:01 - member_removed: carol@acme.com
09:02 - member_removed: dave@acme.com
09:03 - member_removed: eve@acme.com
User: frank@acme.com (ADMIN)

⚠️ Red Flag:
- Multiple rapid deletions
- Unusual behavior for frank

Action:
1. Contact frank immediately
2. Verify if intentional
3. Check if account compromised
4. Re-invite members if unauthorized
5. Review frank's permissions
```

---

4. Failed Login Patterns (if captured)

```
Logs (hypothetical):
01:00 - login_failed: sarah@acme.com from 103.45.67.89
01:02 - login_failed: sarah@acme.com from 103.45.67.89
01:04 - login_failed: sarah@acme.com from 103.45.67.89
01:06 - login_succeeded: sarah@acme.com from 103.45.67.89
01:08 - member_removed: john@acme.com

⚠️ Red Flag:
- Multiple failed attempts (brute force)
- Success followed by suspicious action
- Unknown IP address

Action:
1. Contact sarah immediately
2. Force password reset
3. Enable 2FA if not already
4. Block suspicious IP
5. Restore removed member
6. Review all sarah's recent actions
```

7.8 Compliance & Regulatory Use

SOC 2 Compliance:
Audit logs help meet SOC 2 Trust Service Criteria:

- **CC6.1**: Logical access controls
- **CC6.2**: Prior to issuing credentials, registry authorized users
- **CC7.2**: System monitoring

How to Use:

- Export monthly audit logs
- Provide to SOC 2 auditor
- Show evidence of access controls
- Demonstrate monitoring practices

GDPR Compliance:
Audit logs support GDPR Article 30 (Records of Processing):

- Track data subject requests
- Log consent changes
- Monitor data access

How to Use:

- Filter logs for specific user email
- Export user-specific activity
- Provide to data subject upon request
- Demonstrate accountability

HIPAA Compliance:
Audit logs meet HIPAA § 164.312(b) (Audit Controls):

- Record access to ePHI
- Track user activity
- Monitor security incidents

How to Use:

- Enable audit logging for all users
- Review logs regularly
- Export for compliance reviews
- Maintain 6-year retention

---

8. Webhooks & Integration

8.1 What are Webhooks?

Definition:
Webhooks are automated HTTP callbacks that send real-time notifications to external systems when specific events occur in your organization.

Use Cases:

- **CRM Integration**: Auto-create contacts when members join
- **Slack Notifications**: Alert team when invitations sent
- **Analytics**: Track usage in external BI tools
- **Automation**: Trigger workflows in Zapier, Make, n8n
- **Custom Apps**: Build integrations with your internal tools

How They Work:

```
1. Event occurs in EaseMail (e.g., member added)
   ↓
2. EaseMail sends HTTP POST to your webhook URL
   ↓
3. Your server receives event data (JSON)
   ↓
4. Your server processes the event
   ↓
5. Your server responds with 200 OK
   ↓
6. Webhook marked as successfully delivered
```

8.2 Creating a Webhook

Requirements: OWNER or ADMIN role

Prerequisites:

- Public HTTPS endpoint that can receive POST requests
- (Optional) Server to verify webhook signatures

Access: Organization → [Select Org] → **Webhooks** tab

Step-by-Step Instructions:

Step 1: Click **"Create Webhook"** button

Step 2: Webhook creation dialog appears:

```
┌─────────────────────────────────────────┐
│  Create Webhook                         │
├─────────────────────────────────────────┤
│  Webhook Name *                         │
│  [ Production CRM Sync         ]        │
│                                         │
│  Endpoint URL * (must be HTTPS)         │
│  [ https://api.acme.com/webhooks ]     │
│                                         │
│  Secret Key (optional)                  │
│  [ whsec_a1b2c3d4e5f6...     ] [Generate]│
│  Used to verify webhook authenticity    │
│                                         │
│  Events to Subscribe *                  │
│  Select events that trigger this webhook│
│  ☑ member.added                          │
│  ☑ member.removed                        │
│  ☑ member.role_changed                   │
│  ☑ invite.sent                           │
│  ☑ invite.accepted                       │
│  ☐ organization.updated                  │
│  ☑ plan.changed                          │
│  ☐ subscription.cancelled                │
│  ☐ payment.succeeded                     │
│  ☐ payment.failed                        │
│                                         │
│  [ Cancel ]           [ Create Webhook ]│
└─────────────────────────────────────────┘
```

Step 3: Fill in webhook details

Field: Webhook Name

- **Purpose**: Descriptive name for your webhook
- **Example**: "Production CRM Sync", "Slack Notifications", "Analytics Feed"
- **Requirements**: 1-100 characters

Field: Endpoint URL

- **Purpose**: Your server's URL that receives webhook POSTs
- **Example**: `https://api.acme.com/webhooks/easemail`
- **Requirements**:
    - Must start with `https://` (HTTP not allowed for security)
    - Must be publicly accessible
    - Should respond with 200-299 status code

Field: Secret Key

- **Purpose**: Cryptographic key to verify webhook authenticity
- **How to Get**: Click "Generate" button
- **Format**: `whsec_` followed by 64 random characters
- **Storage**: Copy and save in your server's environment variables
- **Optional but Highly Recommended** for security

Field: Events to Subscribe

- **Purpose**: Choose which events trigger this webhook
- **Selection**: Check boxes for desired events
- **Tip**: Start with few events, add more later

Step 4: Click **"Create Webhook"**

Result:

- Webhook created and enabled by default
- Appears in webhooks list
- Ready to receive events
- Confirmation: ☑ "Webhook created successfully"

Example Configuration:

Use Case: Slack Notifications for Team Changes

```
Webhook Name: Slack Team Notifications
Endpoint URL: https://hooks.slack.com/services/T00000000/B00000000/XXXXXXXXXXXXXXXXXXXX
Secret Key: (not needed for Slack)
Events:
  ☑ member.added
  ☑ member.removed
  ☑ member.role_changed
  ☐ (all others unchecked)
```

Use Case: CRM Integration (Salesforce, HubSpot)

```
Webhook Name: Production CRM Sync
Endpoint URL: https://api.acme.com/webhooks/easemail/crm
Secret Key: whsec_k8j7h6g5f4d3s2a1... (generated)
Events:
  ☑ member.added
  ☑ member.removed
  ☑ invite.accepted
  ☐ (others unchecked)
```

Use Case: Analytics & BI (Data Warehouse)

```
Webhook Name: Analytics Pipeline
Endpoint URL: https://warehouse.acme.com/ingest/easemail
Secret Key: whsec_p9o8i7u6y5t4r3e2... (generated)
Events:
  ☑ (all events checked)
```

8.3 Available Webhook Events

Member Events:

member.added

- **Trigger**: New member joins organization (after accepting invite)
- **Payload Example**:

```
{
  "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"
  }
}
```

member.removed

- **Trigger**: Member is removed from organization
- **Payload Example**:

```
{
  "event": "member.removed",
  "organization_id": "org_abc123",
  "organization_name": "Acme Corporation",
  "timestamp": "2026-02-04T14:30:00Z",
  "data": {
    "member_id": "mem_xyz789",
    "email": "bob@acme.com",
    "role": "MEMBER",
    "removed_by": "john@acme.com",
    "reason": "left_company"
  }
}
```

member.role_changed

- **Trigger**: Member's role is updated
- **Payload Example**:

```
{
  "event": "member.role_changed",
  "organization_id": "org_abc123",
  "organization_name": "Acme Corporation",
  "timestamp": "2026-02-04T16:45:00Z",
  "data": {
    "member_id": "mem_xyz789",
    "email": "john@acme.com",
    "old_role": "MEMBER",
    "new_role": "ADMIN",
    "changed_by": "sarah@acme.com"
  }
}
```

Invitation Events:

invite.sent

- **Trigger**: New invitation is sent
- **Payload Example**:

```
{
  "event": "invite.sent",
  "organization_id": "org_abc123",
  "organization_name": "Acme Corporation",
  "timestamp": "2026-02-04T10:00:00Z",
  "data": {
    "invite_id": "inv_qwe456",
    "email": "carol@acme.com",
    "role": "MEMBER",
    "invited_by": "sarah@acme.com",
    "expires_at": "2026-02-11T10:00:00Z"
  }
}
```

invite.accepted

- **Trigger**: Recipient accepts invitation
- **Payload Example**:

```
{
  "event": "invite.accepted",
  "organization_id": "org_abc123",
  "organization_name": "Acme Corporation",
  "timestamp": "2026-02-05T11:30:00Z",
  "data": {
    "invite_id": "inv_qwe456",
    "email": "carol@acme.com",
    "role": "MEMBER",
    "accepted_at": "2026-02-05T11:30:00Z",
    "member_id": "mem_asd098"
  }
}
```

Organization Events:

organization.updated

- **Trigger**: Organization settings changed (name, etc.)
- **Payload Example**:

```
{
  "event": "organization.updated",
  "organization_id": "org_abc123",
  "organization_name": "Acme Corporation International",
  "timestamp": "2026-02-04T15:00:00Z",
  "data": {
    "updated_by": "sarah@acme.com",
    "changes": {
      "name": {
        "old": "Acme Corporation",
        "new": "Acme Corporation International"
      }
    }
  }
}
```

plan.changed

- **Trigger**: Subscription plan is upgraded or downgraded
- **Payload Example**:

```
{
  "event": "plan.changed",
  "organization_id": "org_abc123",
  "organization_name": "Acme Corporation",
  "timestamp": "2026-02-04T12:00:00Z",
  "data": {
    "old_plan": "PRO",
    "new_plan": "BUSINESS",
    "old_seats": 5,
    "new_seats": 10,
    "changed_by": "sarah@acme.com",
    "effective_date": "2026-02-04"
  }
}
```

Billing Events:

subscription.cancelled

- **Trigger**: Subscription is cancelled
- **Payload Example**:

```
{
  "event": "subscription.cancelled",
  "organization_id": "org_abc123",
  "organization_name": "Acme Corporation",
  "timestamp": "2026-02-04T17:00:00Z",
  "data": {
    "plan": "BUSINESS",
    "cancelled_by": "sarah@acme.com",
    "cancellation_date": "2026-02-04",
    "effective_date": "2026-03-04",
    "reason": "switching_provider"
  }
}
```

payment.succeeded

- **Trigger**: Payment processed successfully
- **Payload Example**:

```
{
  "event": "payment.succeeded",
  "organization_id": "org_abc123",
  "organization_name": "Acme Corporation",
  "timestamp": "2026-02-01T00:05:00Z",
  "data": {
    "payment_id": "pay_xyz789",
    "amount": 9900,
    "currency": "USD",
    "plan": "BUSINESS",
    "billing_period": "2026-02-01 to 2026-03-01",
    "payment_method": "card_ending_1234"
  }
}
```

payment.failed

- **Trigger**: Payment attempt failed
- **Payload Example**:

```
{
  "event": "payment.failed",
  "organization_id": "org_abc123",
  "organization_name": "Acme Corporation",
  "timestamp": "2026-02-01T00:05:00Z",
  "data": {
    "payment_id": "pay_xyz790",
    "amount": 9900,
    "currency": "USD",
    "plan": "BUSINESS",
    "failure_reason": "insufficient_funds",
    "next_retry": "2026-02-02T00:00:00Z"
  }
}
```

8.4 Managing Existing Webhooks

Viewing Webhook List:

Page Layout:

```
┌─────────────────────────────────────────────────────────────┐
│  Webhooks                                 [Create Webhook]  │
├─────────────────────────────────────────────────────────────┤
│                                                             │
│   ┌─────────────────────────────────────────────────────┐   │
│   │ Production CRM Sync                                 │   │
│   │ https://api.acme.com/webhooks/easemail              │   │
│   │ Status: ● Active  •  Events: 5  •  Created: Feb 1   │   │
│   │ Events: member.added, member.removed, member.role_ch...│   │
│   │ [Test] [Edit] [Disable] [View Logs] [Delete]        │   │
│   └─────────────────────────────────────────────────────┘   │
│                                                             │
│   ┌─────────────────────────────────────────────────────┐   │
│   │ Slack Notifications                                 │   │
│   │ https://hooks.slack.com/services/T00.../B00.../XXX  │   │
│   │ Status: ● Inactive  •  Events: 3  •  Created: Jan 28 │   │
│   │ Events: member.added, member.removed, invite.sent   │   │
│   │ [Test] [Edit] [Enable] [View Logs] [Delete]         │   │
│   └─────────────────────────────────────────────────────┘   │
└─────────────────────────────────────────────────────────────┘
```

Enabling/Disabling Webhooks:

Step 1: Find the webhook in the list

Step 2: Click **"Disable"** (if active) or **"Enable"** (if inactive)

Use Cases:

- **Disable**: Temporarily stop webhook without deleting (e.g., during maintenance)
- **Enable**: Reactivate webhook after maintenance
- **No confirmation required** - toggle is immediate

Status Indicators:

- ● **Active**: Webhook is enabled and sending events
- ● **Inactive**: Webhook is disabled, events not sent

Editing Webhooks:

Step 1: Click **"Edit"** button

Step 2: Edit dialog appears (same as creation dialog)

Step 3: Modify any field:

- Webhook Name
- Endpoint URL
- Secret Key (regenerate if compromised)
- Event subscriptions (add or remove)

Step 4: Click **"Save Changes"**

Note: Editing doesn't affect delivery history

Testing Webhooks:

Step 1: Click **"Test"** button

Step 2: Test dialog appears:

```
┌──────────────────────────────────┐
│  Test Webhook                    │
├──────────────────────────────────┤
│  Webhook: Production CRM Sync    │
│  URL: https://api.acme.com/webhooks │
│                                  │
│  This will send a test payload to your │
│  endpoint. Sample event: member.added │
│                                  │
│  Test Payload Preview:           │
│  ┌────────────────────────────┐  │
│  │{                           │  │
│  │  "event": "member.added",  │  │
│  │  "test": true,             │  │
│  │  "organization_id": "org_abc123", │ │
│  │  "timestamp": "2026-02-04T...", │ │
│  │  "data": {                 │  │
│  │    "email": "test@example.com", │ │
│  │    "role": "MEMBER"        │  │
│  │  }                         │  │
│  │}                           │  │
│  └────────────────────────────┘  │
│                                  │
│  [ Cancel ]          [ Send Test ] │
└──────────────────────────────────┘
```

Step 3: Click **"Send Test"**

Step 4: Result displayed:

```
Success:
✅ Test webhook sent successfully!
   Status: 200 OK
   Response: {"received": true}

Failure:
❌ Test webhook failed
   Status: 500 Internal Server Error
   Error: Connection timeout
   Suggestion: Check your endpoint URL and firewall
```

Use Cases:

- Verify endpoint is reachable
- Test your webhook handler code
- Confirm signature verification works
- Troubleshoot delivery issues

Deleting Webhooks:

Step 1: Click **"Delete"** button

Step 2: Confirmation dialog:

```
┌──────────────────────────────────┐
│  ⚠ Delete Webhook                 │
├──────────────────────────────────┤
│  Delete webhook:                 │
│  Production CRM Sync             │
│                                  │
│  This will:                      │
│  ✓ Permanently delete webhook     │
│  ✓ Stop all event deliveries      │
│  ✓ Remove delivery history        │
│                                  │
│  This action cannot be undone.   │
│                                  │
│  Type "DELETE" to confirm:       │
│  [                          ]    │
│                                  │
│  [ Cancel ]          [ Delete ]  │
└──────────────────────────────────┘
```

Step 3: Type **"DELETE"** (case-sensitive)

Step 4: Click **"Delete"**

Result:

- Webhook permanently removed
- All delivery history deleted
- Future events no longer sent to that endpoint
- Confirmation: ✅ "Webhook deleted successfully"

8.5 Webhook Delivery Logs

Purpose: Monitor webhook deliveries, troubleshoot failures, retry failed deliveries

Access: Organization → Webhooks → [Select Webhook] → **"View Logs"**

Page Layout:

```
┌─────────────────────────────────────────────────────┐
│  Delivery Logs: Production CRM Sync                 │
│  Filter: [ All Statuses ▼ ]  Event: [ All Events ▼ ] │
│  [ Clear Filters ]  [ Refresh ]                     │
├─────────────────────────────────────────────────────┤
│  Showing 50 of 234 deliveries                       │
│                                                      │
│  ┌───────────────────────────────────────────────┐  │
│  │ Event          Status    HTTP  Sent        Delivered│ │
│  ├───────────────────────────────────────────────┤  │
│  │ member.added   ✅ Success  200  Feb 4 09:15  09:15:01 │ │
│  │                                       [Details]  │ │
│  ├───────────────────────────────────────────────┤  │
│  │ member.removed ✅ Success  200  Feb 4 09:10  09:10:02 │ │
│  │                                       [Details]  │ │
│  ├───────────────────────────────────────────────┤  │
│  │ invite.sent    ❌ Failed   500  Feb 4 08:30  -     │ │
│  │                Retry 1/3 • Next: in 5 min  [Retry] │ │
│  │                                       [Details]  │ │
│  ├───────────────────────────────────────────────┤  │
│  │ member.added   ⏳ Pending  -    Feb 4 08:00  -     │ │
│  │                Retry 2/3 • Next: in 2 min  [Retry] │ │
│  │                                       [Details]  │ │
│  └───────────────────────────────────────────────┘  │
│                                                      │
│  [ Previous ]  Page 1 of 5  [ Next ]                │
└─────────────────────────────────────────────────────┘
```

Delivery Status Types:

✅ Success (Green)

- HTTP status 200-299 received
- Webhook delivered successfully
- No action needed

❌ Failed (Red)

- HTTP status 400+ or no response
- Webhook delivery failed
- Automatic retries scheduled

⏳ Pending Retry (Orange)

- Previous attempt failed
- Scheduled for automatic retry
- Retry schedule: 1 min, 5 min, 30 min (3 total attempts)

Filtering Deliveries:

By Status:

```
Filter: [ Failed ▼ ]
Options:
- All Statuses
- Success
- Failed
- Pending Retry
```

By Event Type:

```
Event: [ member.added ▼ ]
Options:
- All Events
- member.added
- member.removed
- invite.sent
- (all subscribed events)
```

Example Use Case:

```
Goal: Find all failed deliveries in last 24 hours

Step 1: Filter by "Failed"
Step 2: Review failure reasons
Step 3: Fix endpoint issue
Step 4: Manually retry failed deliveries
```

Viewing Delivery Details:

Step 1: Click **"Details"** on any delivery

Step 2: Details dialog appears:

```
┌─────────────────────────────────────────┐
│  Delivery Details                       │
├─────────────────────────────────────────┤
│  Event: member.added                    │
│  Status: ✅ Success                      │
│  HTTP Status: 200 OK                    │
│                                         │
│  Sent: Feb 4, 2026 at 9:15:00 AM        │
│  Delivered: Feb 4, 2026 at 9:15:01 AM   │
│  Response Time: 1.2 seconds             │
│                                         │
│  Request Payload:                       │
│  ┌───────────────────────────────────┐  │
│  │{                                  │  │
│  │  "event": "member.added",         │  │
│  │  "organization_id": "org_abc123", │  │
│  │  "timestamp": "2026-02-04T09:15..",│  │
│  │  "data": {                        │  │
│  │    "email": "alice@acme.com",     │  │
│  │    "role": "MEMBER"               │  │
│  │  }                                │  │
│  │}                                  │  │
│  └───────────────────────────────────┘  │
│                                         │
│  Response Body:                         │
│  ┌───────────────────────────────────┐  │
│  │{                                  │  │
│  │  "received": true,                │  │
│  │  "processed": true,               │  │
│  │  "message": "Member synced to CRM"│  │
│  │}                                  │  │
│  └───────────────────────────────────┘  │
│                                         │
│  [ Close ]                              │
└─────────────────────────────────────────┘
```

Information Displayed:

- **Event Type**: Which event triggered webhook
- **Status**: Success, Failed, or Pending
- **HTTP Status**: Response code from your server
- **Timestamps**: When sent and delivered
- **Response Time**: How long your server took
- **Request Payload**: Exact JSON sent to your endpoint
- **Response Body**: Your server's response

Manual Retry:

When to Use:

- Automatic retries exhausted (3 attempts)
- Fixed endpoint issue and want immediate retry
- Testing after code changes

Step 1: Find failed delivery in logs

Step 2: Click **"Retry"** button

Step 3: Confirmation:

```
┌─────────────────────────────────────────┐
│  Retry Webhook Delivery                 │
├─────────────────────────────────────────┤
│  Retry delivery of:                     │
│  Event: member.added                    │
│  Original Attempt: Feb 4, 2026 8:30 AM  │
│  Previous Status: Failed (500)          │
│                                         │
│  This will immediately resend the       │
│  webhook with the original payload.     │
│                                         │
│  [ Cancel ]           [ Retry Now ]     │
└─────────────────────────────────────────┘
```

Step 4: Click **"Retry Now"**

Result:

- Webhook immediately resent
- New delivery log entry created
- Status updated based on response

8.6 Implementing Webhook Handlers

Server-Side Requirements:

1. **Publicly Accessible Endpoint**
   - Must be reachable from internet
   - HTTPS required (SSL certificate)
   - Recommended: Dedicated path (e.g., `/webhooks/easemail`)
2. **Accept POST Requests**
   - Method: POST
   - Content-Type: application/json
3. **Respond Quickly**
   - Return 200-299 status within 5 seconds
   - Process asynchronously if needed
   - Don't wait for long operations
4. **Verify Signatures** (if using secret key)
   - Validate webhook authenticity

- Prevent spoofing attacks

Example Implementation (Node.js/Express):

```
const express = require('express');
const crypto = require('crypto');

const app = express();
app.use(express.json());

// Your webhook secret from EaseMail
const WEBHOOK_SECRET = process.env.EASEMAIL_WEBHOOK_SECRET;

// Verify webhook signature
function verifySignature(payload, signature) {
  const hmac = crypto.createHmac('sha256', WEBHOOK_SECRET);
  const digest = hmac.update(JSON.stringify(payload)).digest('hex');
  return crypto.timingSafeEqual(
    Buffer.from(signature),
    Buffer.from(digest)
  );
}

// Webhook endpoint
app.post('/webhooks/easemail', async (req, res) => {
  try {
    // Get signature from header
    const signature = req.headers['x-easemail-signature'];

    // Verify signature (if secret key configured)
    if (WEBHOOK_SECRET && signature) {
      if (!verifySignature(req.body, signature)) {
        return res.status(401).json({ error: 'Invalid signature' });
      }
    }

    // Get event data
    const { event, organization_id, data } = req.body;

    // Respond quickly (before processing)
    res.status(200).json({ received: true });

    // Process event asynchronously
    processWebhookEvent(event, organization_id, data);

  } catch (error) {
    console.error('Webhook error:', error);
    res.status(500).json({ error: 'Processing failed' });
  }
});

// Process events asynchronously
async function processWebhookEvent(event, orgId, data) {
  switch (event) {
    case 'member.added':
      await syncMemberToCRM(data.email, data.role);
      break;

    case 'member.removed':
      await removeMemberFromCRM(data.email);
      break;

    case 'member.role_changed':
      await updateMemberRoleInCRM(data.email, data.new_role);
      break;

    case 'invite.sent':
      await notifySlack(`New invite sent to ${data.email}`);
      break;

    case 'plan.changed':
      await updateBillingSystem(orgId, data.new_plan);
      break;

    default:
      console.log('Unhandled event:', event);
  }
}

app.listen(3000, () => {
  console.log('Webhook server running on port 3000');
});
```

Example Implementation (Python/Flask):

```python
from flask import Flask, request, jsonify
import hmac
import hashlib
import os
import json

app = Flask(__name__)

# Your webhook secret from EaseMail
WEBHOOK_SECRET = os.environ.get('EASEMAIL_WEBHOOK_SECRET')

def verify_signature(payload, signature):
    """Verify webhook signature"""
    mac = hmac.new(
        WEBHOOK_SECRET.encode(),
        msg=json.dumps(payload).encode(),
        digestmod=hashlib.sha256
    )
    return hmac.compare_digest(mac.hexdigest(), signature)

@app.route('/webhooks/easemail', methods=['POST'])
def webhook_handler():
    try:
        # Get signature from header
        signature = request.headers.get('X-EaseMail-Signature')

        # Verify signature (if secret configured)
        if WEBHOOK_SECRET and signature:
            if not verify_signature(request.json, signature):
                return jsonify({'error': 'Invalid signature'}), 401

        # Get event data
        event = request.json.get('event')
        org_id = request.json.get('organization_id')
        data = request.json.get('data')

        # Respond quickly
        response = jsonify({'received': True})

        # Process event asynchronously (use Celery, RQ, etc.)
        process_webhook_event.delay(event, org_id, data)

        return response, 200

    except Exception as e:
        print(f'Webhook error: {e}')
        return jsonify({'error': 'Processing failed'}), 500

def process_webhook_event(event, org_id, data):
    """Process webhook events"""
    if event == 'member.added':
        sync_member_to_crm(data['email'], data['role'])
    elif event == 'member.removed':
        remove_member_from_crm(data['email'])
    elif event == 'member.role_changed':
        update_member_role_in_crm(data['email'], data['new_role'])
    elif event == 'invite.sent':
        notify_slack(f"New invite sent to {data['email']}")
    elif event == 'plan.changed':
        update_billing_system(org_id, data['new_plan'])
    else:
        print(f'Unhandled event: {event}')

if __name__ == '__main__':
    app.run(port=3000)
```

8.7 Webhook Security Best Practices

1. Always Use HTTPS

- Never use HTTP for webhooks
- Ensures data encrypted in transit
- Prevents man-in-the-middle attacks

2. Verify Signatures

- Always verify `X-EaseMail-Signature` header
- Prevents spoofed webhooks
- Use timing-safe comparison

3. Validate Payload

- Check event type is expected
- Validate data structure
- Sanitize inputs before processing

4. Rate Limiting

- Implement rate limiting on webhook endpoint
- Prevent abuse if secret compromised
- Recommended: 100 requests/minute

5. Error Handling

- Always return 200 OK if received
- Log errors for debugging
- Don't expose internal errors in response

6. Timeout Protection

- Respond within 5 seconds
- Use async processing for long operations
- Queue events for batch processing

7. IP Whitelisting (Advanced)

- If possible, whitelist EaseMail's IP addresses
- Additional layer of security
- Contact support for IP ranges

8. Secret Rotation

- Rotate webhook secrets periodically (every 90 days)
- Update both EaseMail and your server
- Test after rotation

9. Monitoring

- Monitor webhook delivery success rates
- Alert on sudden increase in failures
- Track processing times

10. Idempotency

- Handle duplicate deliveries gracefully
- Use event IDs to deduplicate
- Webhooks may be delivered more than once

8.8 Common Webhook Use Cases

Use Case 1: Slack Notifications

Goal: Alert team in Slack when members join/leave

Setup:

1. Create Slack Incoming Webhook in Slack workspace
2. Copy webhook URL (https://hooks.slack.com/...)
3. Create EaseMail webhook:
    - Name: "Slack Notifications"
    - URL: (Slack webhook URL)

- Events: member.added, member.removed

4. Test webhook

Result: Slack messages like:

```
🎉 New Member Added
alice@acme.com joined as MEMBER
Invited by: sarah@acme.com
```

Use Case 2: CRM Synchronization

Goal: Auto-create/update contacts in CRM when members change

Setup:

1. Create webhook endpoint on your server
2. Implement CRM API integration (Salesforce, HubSpot, etc.)
3. Create EaseMail webhook:
   - Name: "CRM Sync"
   - URL: Your endpoint
   - Events: member.added, member.removed, member.role_changed
4. Process events to sync with CRM

Processing Logic:

```
member.added → Create contact in CRM
member.removed → Archive contact in CRM
member.role_changed → Update contact's role field
```

Use Case 3: Analytics & Data Warehouse

Goal: Track all organization events in data warehouse

Setup:

1. Create data ingestion endpoint
2. Configure database table for events
3. Create EaseMail webhook:
   - Name: "Analytics Pipeline"
   - URL: Ingestion endpoint
   - Events: (all events)
4. Store all events for analysis

Benefits:

- Historical analytics
- Custom reporting
- Trend analysis
- Compliance auditing

Use Case 4: Billing Automation

Goal: Update internal billing system when plan changes

Setup:

1. Create billing system webhook handler
2. Create EaseMail webhook:
   - Name: "Billing Sync"
   - Events: plan.changed, payment.succeeded, payment.failed
3. Sync plan changes to internal system

Processing:

```
plan.changed → Update customer's subscription
payment.succeeded → Mark invoice as paid
payment.failed → Send dunning email
```

Use Case 5: Security Monitoring

Goal: Alert security team of suspicious activity

Setup:

1. Create security monitoring endpoint
2. Implement alerting logic (PagerDuty, email, etc.)
3. Create EaseMail webhook:
   - Name: "Security Alerts"
   - Events: member.added, member.role_changed, transfer_ownership
4. Monitor for unexpected changes

Alert Conditions:

```
- Member added outside business hours → Alert
- Multiple role changes in short time → Alert
- Ownership transfer → Alert
- Member with external email domain → Alert
```

---

9. Billing & Subscriptions

9.1 Understanding Plans

Available Plans:

Plan	Price/Month	Seats	Features	Best For
FREE	$0	1	Basic email, Limited AI	Solo users, Testing
PRO	$29	5	Full AI, Priority support	Small teams
BUSINESS	$99	10	Advanced features, Webhooks	Growing companies
ENTERPRISE	Custom	50+	Custom integration, SLA	Large organizations

---

9.2 Viewing Current Plan

Step 1: Navigate to Organization → [Select Org] → Settings

Step 2: Current plan displayed in overview:

```
Current Plan: BUSINESS
Total Seats: 10
Seats Used: 8
Available: 2
Monthly Cost: $99.00
Next Billing Date: March 1, 2026
```

9.3 Upgrading/Downgrading Plans

Requirements: OWNER role

Step 1: Click Settings → **"Change Plan"**

Step 2: Plan selection dialog:

```
┌─────────────────────────────────────┐
│  Change Plan                        │
├─────────────────────────────────────┤
│  Current Plan: BUSINESS ($99/month) │
│                                     │
│  Select New Plan:                   │
│                                     │
│  ○ FREE ($0/month)                   │
│    1 seat • Basic features          │
│    ⚠ Downgrade: 7 members must be   │
│    removed first                    │
│                                     │
│  ○ PRO ($29/month)                   │
│    5 seats • Full AI features       │
│    ⚠ Downgrade: 3 members must be   │
│    removed first                    │
│                                     │
│  ◉ BUSINESS ($99/month) [Current]   │
│    10 seats • Advanced features     │
│                                     │
│  ○ ENTERPRISE (Contact Sales)       │
│    50+ seats • Custom integration   │
│    [Contact Sales]                  │
│                                     │
│  [ Cancel ]           [ Change Plan ]│
└─────────────────────────────────────┘
```

Step 3: Select desired plan

Step 4: Review changes and confirm

Upgrade Example:

```
Current: BUSINESS (10 seats, $99/mo)
New: ENTERPRISE (50 seats, $299/mo)

Changes:
- Immediate seat increase to 50
- Prorated charge for remaining month: $66.67
- Next full charge: $299 on March 1
```

Downgrade Example:

```
Current: BUSINESS (8 seats used, $99/mo)
New: PRO (5 seats max, $29/mo)

Action Required:
- Remove 3 members before downgrade
- Change effective: End of billing period (Feb 28)
- Next charge: $29 on March 1
```

---

10. Best Practices

10.1 Onboarding New Organizations

Week 1: Foundation

- Create organization
- Invite key admins (1-2 people)
- Assign ADMIN roles
- Connect email accounts
- Review help documentation

Week 2: Team Expansion

- Invite remaining team members
- Assign appropriate roles
- Provide training session
- Share use case examples

Week 3: Integration

- Set up webhooks (if needed)
- Configure CRM sync
- Test integrations
- Monitor delivery logs

Week 4: Optimization

- Review analytics
- Identify usage patterns
- Adjust roles if needed
- Gather team feedback

10.2 Security Checklist

Monthly Reviews:

- [ ] Review audit logs for suspicious activity
- [ ] Check for unexpected member additions
- [ ] Verify all OWNER/ADMIN roles are current employees
- [ ] Remove inactive members
- [ ] Rotate webhook secrets (every 90 days)

Quarterly Reviews:

- [ ] Export and archive audit logs
- [ ] Review and update access policies
- [ ] Conduct security training
- [ ] Test incident response procedures

10.3 Capacity Planning

Monitoring Seat Usage:

```
Current: 8 / 10 seats (80% utilization)
Action: Consider upgrade when reaching 90%

Recommended Timeline:
- 80-89%: Plan for upgrade next quarter
- 90-95%: Upgrade within 30 days
- 96-100%: Upgrade immediately
```

Growth Planning:

```
Current Team: 8 members
Expected Growth: 5 new hires in Q2
Required Seats: 13 seats

Action: Upgrade from BUSINESS (10) to ENTERPRISE (50)
Best Time: Beginning of Q2 (prorated charges)
```

---

11. Troubleshooting

11.1 Invitation Issues

Problem: Recipient Didn't Receive Invitation Email

Possible Causes:

1. Email in spam folder
2. Incorrect email address
3. Corporate email filter blocking

Solutions:

1. Ask recipient to check spam/junk folder
2. Verify email address is correct
3. Resend invitation

4. Ask recipient to whitelist `@easemail.com` or `@resend.dev`
5. Contact recipient's IT department

Problem: Invitation Link Expired

Symptoms:

- Recipient clicks link, sees "Invitation expired" error

Solution:

1. Go to Members tab
2. Find invitation in "Pending Invitations"
3. Click "Resend"
4. New invitation sent with extended 7-day expiry

Problem: Cannot Send Invitation - No Seats Available

Symptoms:

- Error message: "No available seats"
- Seats: 10 / 10

Solutions:

1. **Remove Inactive Members:**
    - Review member list
    - Remove members who left company
    - Each removal frees 1 seat
2. **Revoke Pending Invitations:**
    - Check "Pending Invitations"
    - Revoke invitations that won't be accepted
    - Each revoke frees 1 seat
3. **Upgrade Plan:**
    - Settings → Change Plan
    - Select plan with more seats
    - Immediate seat availability

11.2 Role & Permission Issues

Problem: ADMIN Cannot Remove OWNER

Symptoms:

- "Remove" button disabled for OWNER
- Error: "Insufficient permissions"

Explanation:

- By design, ADMINs cannot remove OWNER
- Only OWNER can transfer ownership or delete org

Solution:

- Ask OWNER to remove member
- Or OWNER transfers ownership to you first

Problem: Cannot Change OWNER Role

Symptoms:

- "Edit" button missing for OWNER
- Error: "Cannot modify OWNER role"

Explanation:

- OWNER role cannot be changed directly
- Must use Transfer Ownership feature

Solution:

1. Settings → Transfer Ownership
2. Select new owner
3. Confirm transfer
4. Previous owner becomes ADMIN

11.3 Webhook Issues

Problem: Webhook Deliveries Failing

Symptoms:

- Delivery logs show ✕ Failed status
- HTTP status: 500, 502, 503, or timeout

Diagnostic Steps:

1. **Check Endpoint Accessibility:**
```
Test: curl -X POST https://your-endpoint.com/webhook
Expected: 200-299 response
```
2. **Verify HTTPS:**
    - Webhook URL must start with `https://`
    - SSL certificate must be valid
3. **Check Firewall:**
    - Ensure endpoint is publicly accessible
    - Whitelist EaseMail's IP ranges (contact support)
4. **Review Server Logs:**
    - Check your server's error logs
    - Look for exceptions, crashes
5. **Test Webhook:**
    - Use "Test" button in EaseMail
    - Verify your handler receives and processes correctly

Common Causes:

- Server down or restarting
- Firewall blocking requests
- SSL certificate expired
- Code error in webhook handler
- Timeout (taking > 5 seconds to respond)

Solutions:

- Fix server issues
- Update firewall rules
- Renew SSL certificate
- Debug and fix handler code
- Optimize response time (< 5 seconds)

Problem: Webhooks Not Being Sent

Symptoms:

- No deliveries in delivery logs
- Events occurring but no webhooks

Diagnostic Steps:

1. **Check Webhook Status:**
    - Is webhook enabled? (● Active)
    - If ● Inactive, click "Enable"

2. **Verify Event Subscriptions:**
   - Edit webhook
   - Check event checkboxes
   - Ensure desired events are selected
3. **Confirm Events Are Occurring:**
   - Dashboard → Recent Activity
   - Verify events are actually happening

Solutions:

- Enable webhook if disabled
- Add event subscriptions
- Trigger test event

11.4 Dashboard & Analytics Issues

Problem: Analytics Show Zero Data

Symptoms:

- All metrics show 0
- Charts are empty

Possible Causes:

1. Time period too old (no data yet)
2. Organization just created
3. No team activity yet

Solutions:

- Switch to "Last 7 days" (most recent data)
- Wait for team to use platform
- Check "Recent Activity" for signs of usage

Problem: Export CSV Not Working

Symptoms:

- Click "Export CSV" but nothing downloads
- Browser error

Solutions:

1. **Check Browser Popup Blocker:**
   - Allow popups for easemail.com
   - Try again
2. **Clear Browser Cache:**
   - Hard refresh: Ctrl+Shift+R (Windows) or Cmd+Shift+R (Mac)
3. **Try Different Browser:**
   - Chrome, Firefox, Edge
4. **Check Download Permissions:**
   - Ensure browser can save files

---

12. FAQ

Q: What's the difference between OWNER and ADMIN?
A: OWNER has full control including deleting the organization and transferring ownership. ADMIN can manage members and webhooks but cannot delete the org or change ownership.

Q: Can I have multiple OWNERs?
A: No, there can only be one OWNER at a time. However, you can have multiple ADMINs with nearly identical permissions.

Q: How do I add more seats?
A: Go to Settings → Change Plan, then select a plan with more seats (PRO: 5, BUSINESS: 10, ENTERPRISE: 50+).

Q: What happens when I remove a member?
A: The member loses access to the organization but their personal EaseMail account remains active. The seat becomes available for a new member.

Q: Can members belong to multiple organizations?
A: Yes, users can be members of multiple organizations with different roles in each.

Q: How long are invitations valid?
A: Invitations expire after 7 days. You can resend to extend the expiration.

Q: Do webhook deliveries retry automatically?
A: Yes, failed deliveries retry 3 times with delays: 1 minute, 5 minutes, and 30 minutes. After 3 failures, you must retry manually.

Q: Can I view audit logs for specific members?
A: Yes, use the search box to filter audit logs by member email address.

Q: How do I export data for compliance?
A: Use "Export CSV" on Analytics and Audit Logs pages. Both export to CSV format for compliance documentation.

Q: Is there a way to bulk invite members?
A: Currently, members must be invited one at a time. Bulk invite feature is planned for future release.

Q: What happens if payment fails?
A: You'll receive email notification. The system retries payment after 24 hours. After 3 failures, the account may be downgraded to FREE plan.

Q: Can I cancel my subscription anytime?
A: Yes, OWNER can cancel anytime. Access continues until end of billing period, then downgrades to FREE plan.

Q: How do I transfer an organization to someone else?
A: Settings → Transfer Ownership. Select the new owner (must be existing member), confirm, and they become OWNER while you become ADMIN.

Q: Are webhooks secure?
A: Yes, webhooks use HTTPS encryption and optional signature verification. Always verify signatures and use HTTPS endpoints.

Q: How do I troubleshoot failed webhook deliveries?
A: Check Webhooks → [Select Webhook] → View Logs. Click "Details" on failed delivery to see error message and response. Use "Test" button to verify endpoint.

Q: Can I recover a deleted organization?
A: No, organization deletion is permanent and cannot be undone. All data is permanently deleted.

Q: How often should I review audit logs?
A: Weekly for most organizations. Daily for high-security or compliance-heavy environments.

Q: What's the maximum number of webhooks per organization?
A: Currently unlimited, but recommended to keep under 10 for performance.

Q: Do seat limits include pending invitations?
A: Yes, pending invitations count toward seat limit until they expire or are revoked.

Q: Can I customize webhook payloads?
A: No, webhook payloads are standardized. However, you can select which events to subscribe to for each webhook.

Appendix A: Keyboard Shortcuts

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

Appendix B: Support Resources

Help Center:

- In-app: Click "Help" in sidebar
- Web: https://easemail.com/help

Contact Support:

- Email: support@easemail.com
- Response Time: < 24 hours (PRO/BUSINESS/ENTERPRISE)

Community:

- Discord: https://discord.gg/easemail
- Forum: https://community.easemail.com

Status Page:

- https://status.easemail.com
- Real-time system status
- Incident history

Appendix C: Glossary

Organization: A group of users working together, similar to a workspace or team

Seat: A single user slot in an organization; each member occupies one seat

Invitation: A secure link sent via email to invite someone to join an organization

Role: Permission level assigned to members (OWNER, ADMIN, MEMBER, VIEWER)

Audit Log: Chronological record of all actions taken in the organization

Webhook: Automated HTTP callback that sends real-time event notifications to external systems

Delivery Log: Record of webhook delivery attempts with status and response details

Token: Secure random string used for invitation links and webhook authentication

Prorated Charge: Partial charge when changing plans mid-billing cycle

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End of Organization Admin Guide