

EaseMail 26 - Organization Administrator User Manual

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1. Introduction

1.1 What is EaseMail 26?

EaseMail 26 is a comprehensive email management platform designed for teams and organizations. It provides a unified inbox experience, advanced email automation, AI-powered features, and robust administrative controls.

1.2 Who is This Manual For?

This manual is specifically designed for **Organization Administrators** who are responsible for:

- Managing user accounts and permissions
- Configuring organization settings
- Monitoring usage and analytics
- Managing billing and subscriptions
- Setting up integrations and API keys
- Ensuring security and compliance

1.3 Administrator Roles

EaseMail 26 has three levels of administrative access:

Role	Description	Permissions
Owner	Organization creator with full control	All permissions including billing, deletion, and role assignment
Admin	Administrative user with most permissions	User management, settings, reports (no billing or ownership transfer)

Member	Regular user with no admin privileges	Own email and settings only
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1.4 System Requirements

Browser Requirements:

- Chrome 90+ (Recommended)
- Firefox 88+
- Safari 14+
- Edge 90+

Screen Resolution:

- Minimum: 1280x720
- Recommended: 1920x1080 or higher

Internet Connection:

- Stable broadband connection (minimum 1 Mbps)

2. Getting Started

2.1 Accessing the Admin Panel

Step 1: Log In to EaseMail 26

1. Navigate to your EaseMail 26 URL (e.g., `https://your-org.easemail.app`)
2. Enter your email address and password
3. Click **Sign In**
4. If prompted, complete two-factor authentication (2FA)

Step 2: Navigate to Admin Panel

1. Once logged in, look for the **Admin** option in the left sidebar
2. Click on **Admin** → **Analytics** to open the admin dashboard
3. You should see the admin navigation menu

Note: If you don't see the Admin option, you may not have administrator privileges. Contact your Organization Owner.

2.2 Understanding the Admin Interface

The admin interface consists of several key areas:

Left Sidebar Navigation:

- **Analytics** - Overview dashboard with key metrics
- **Users** - Manage all organization users
- **Organizations** - Organization settings and information
- **Settings** - System-wide configuration

Top Navigation:

- User profile menu
- Theme toggle (Light/Dark mode)
- Notifications

- Quick actions

Main Content Area:

- Dashboard widgets and data displays
- Management interfaces
- Configuration forms

2.3 First-Time Setup Checklist

When you first access the admin panel, complete these essential tasks:

- ☐ **Review Organization Profile**
 - Verify organization name and details
 - Set organization logo (if applicable)
 - Configure contact information
 - ☐ **Set Up User Accounts**
 - Invite team members
 - Assign appropriate roles
 - Configure default user settings
 - ☐ **Connect Email Accounts**
 - Set up email provider integrations (Gmail, Outlook, etc.)
 - Configure SMTP settings if needed
 - Test email sending/receiving
 - ☐ **Configure Security Settings**
 - Enable two-factor authentication (2FA) requirement
 - Set password policies
 - Review access logs
 - ☐ **Set Up Billing (If Applicable)**
 - Add payment method
 - Review subscription status
 - Set up billing contacts
 - ☐ **Create Templates**
 - Set up common email templates
 - Create canned responses
 - Configure signature templates
-

3. Admin Dashboard Overview

3.1 Accessing the Dashboard

Path: Admin → Analytics

The admin dashboard provides a comprehensive overview of your organization's email activity, user engagement, and system health.

3.2 Key Metrics Display

Organization Overview Section

Total Users

- Shows the total number of users in your organization
- Click to view detailed user list
- Color-coded status indicators (Active/Inactive)

Email Accounts

- Total number of connected email accounts across all users
- Breakdown by provider (Gmail, Outlook, Custom SMTP)
- Connection status indicators

Monthly Active Users (MAU)

- Number of users who logged in during the past 30 days
- Percentage change from previous month
- Trend graph (if available)

Total Organizations

- Displays total number of sub-organizations (if using multi-org setup)
- Useful for enterprise deployments

Email Activity Metrics

Emails Sent (Last 30 Days)

- Total emails sent by all users
- Average per user
- Daily trend graph

Emails Received

- Total emails received across all accounts
- Spam/filter statistics
- Unread email count

Response Time

- Average time to first response
- Useful for support teams
- Department/team breakdowns

3.3 Charts and Visualizations

Email Activity Over Time

- **Location:** Top of dashboard
- **Data Shown:** Daily email volume for past 30 days
- **Interaction:** Hover over chart to see specific day details
- **Colors:**
 - Blue: Emails sent
 - Green: Emails received
 - Orange: Spam filtered

User Activity Heatmap

- **Location:** Middle section
- **Data Shown:** User login and activity patterns
- **Time Range:** Past 7 or 30 days
- **Use Case:** Identify peak usage times for maintenance scheduling

Storage Usage

- **Location:** Right sidebar
- **Data Shown:** Attachment storage consumption
- **Alerts:** Warns when approaching storage limits
- **Action:** Click to manage attachments

3.4 Quick Actions Panel

Located in the top-right corner of the dashboard:

Add User - Quickly invite a new team member **View Reports** - Access detailed analytics reports **System Status** - Check API health and service status **Support** - Quick access to help resources

3.5 Refreshing Dashboard Data

The dashboard automatically refreshes every 5 minutes. To manually refresh:

1. Click the **Refresh** icon (↻) in the top-right corner
2. Or press `Ctrl+R` (Windows) / `Cmd+R` (Mac) to refresh the page

Tip: Dashboard data is cached for performance. Real-time data may take 1-2 minutes to appear.

4. Organization Management

4.1 Viewing Organization Details

Step 1: Navigate to Organization Settings

1. Click **Admin** in the left sidebar
2. Select **Organizations**
3. Your organization details will be displayed

Step 2: Review Organization Information

You'll see the following information:

Basic Information:

- **Organization Name:** Display name for your organization
- **Slug:** URL-friendly identifier (e.g., `acme-corp`)
- **Created Date:** When the organization was established
- **Owner:** Primary administrator email

Subscription Information:

- **Plan:** Current subscription tier (Free, Pro, Business, Enterprise)
- **Status:** Active, Trial, Suspended, etc.
- **Seats:** Number of user licenses
- **Seats Used:** Current user count

Usage Statistics:

- **Members:** Total users in organization
- **Email Accounts:** Connected email accounts
- **Monthly Usage:** Email volume this month
- **Storage Used:** Attachment storage consumption

4.2 Editing Organization Profile

To Update Organization Name:

1. Navigate to **Admin** → **Organizations**
2. Click **Edit Organization** button
3. Update the **Organization Name** field
4. Click **Save Changes**

Note: Changing the organization name does not change the URL slug. Contact support to change the slug.

To Update Contact Information:

1. In the Organization Settings page
2. Scroll to **Contact Information** section
3. Update fields:
 - Billing Email
 - Support Contact
 - Phone Number (optional)
 - Address (for invoicing)
4. Click **Save Changes**

To Set Organization Logo:

1. Navigate to **Settings** → **Appearance**
2. Click **Upload Logo**
3. Select an image file (PNG, JPG, SVG)
 - Recommended size: 200x200px
 - Maximum file size: 2MB
4. Crop/adjust if needed
5. Click **Save**

The logo will appear in:

- Login page
- Email signatures (if configured)
- Invoices and receipts

4.3 Managing Organization Seats

Understanding Seats

A "seat" represents one user license. Each active user in your organization consumes one seat.

Viewing Current Seat Usage:

1. Go to **Admin** → **Organizations**
2. Look for **Seats** section
3. You'll see: "X of Y seats used"
 - X = Current active users

- Y = Total available seats

Adding More Seats:

1. Navigate to **Admin** → **Organizations**
2. Click **Add Seats** button
3. Enter the number of additional seats needed
4. Review the updated subscription cost
5. Click **Confirm**
6. Complete payment if required

Example:

- Current: 5 seats (\$25/seat/month = \$125/month)
- Adding: 3 seats
- New Total: 8 seats (\$25/seat/month = \$200/month)

Important: Adding seats may trigger immediate prorated charges. See *Billing* section for details.

Removing Seats:

You cannot remove seats below your current user count. To reduce seats:

1. First deactivate or remove users (see User Management section)
2. Once user count is below seat count, contact billing to adjust
3. Changes take effect at next billing cycle

4.4 Organization Settings

Email Settings

Default Email Signature:

1. Go to **Settings** → **Email**
2. Click **Manage Organization Signature**
3. Enter default signature HTML/text
4. Variables available:
 - `{{user.name}}` - User's full name
 - `{{user.email}}` - User's email address
 - `{{user.title}}` - User's job title
 - `{{org.name}}` - Organization name
5. Click **Save**

Email Retention Policy:

1. Navigate to **Settings** → **Email** → **Retention**
2. Set retention period (30, 60, 90 days, or indefinite)
3. Configure what happens to old emails:
 - Archive to storage
 - Permanently delete
 - Move to cold storage
4. Click **Save Policy**

Warning: Deleted emails cannot be recovered. Always backup important data.

Spam Filter Settings:

1. Go to **Settings** → **Security** → **Spam Filtering**
2. Configure sensitivity:
 - **Low:** More emails pass through, some spam may slip by
 - **Medium:** (Recommended) Balanced filtering
 - **High:** Aggressive filtering, may catch some legitimate emails
3. Add whitelist/blacklist domains
4. Enable/disable attachment scanning
5. Click **Save**

Security Settings

Password Requirements:

1. Navigate to **Settings** → **Security** → **Password Policy**
2. Configure:
 - Minimum password length (8-32 characters)
 - Require uppercase letters
 - Require numbers
 - Require special characters
 - Password expiration (30, 60, 90 days, or never)
 - Password history (prevent reuse of last X passwords)
3. Click **Save Policy**

Session Management:

1. Go to **Settings** → **Security** → **Sessions**
2. Set session timeout (15 min, 30 min, 1 hour, 8 hours, 24 hours)
3. Enable "Remember Me" option (optional)
4. Configure concurrent session limit
5. Click **Save**

IP Allowlist (Enterprise Only):

1. Navigate to **Settings** → **Security** → **IP Restrictions**
2. Click **Add IP Range**
3. Enter IP address or CIDR block (e.g., `192.168.1.0/24`)
4. Add description (e.g., "Office Network")
5. Click **Save**
6. Users outside these IPs will be blocked

Caution: Test IP restrictions with a backup admin account to avoid lockout.

4.5 Deleting an Organization

This action is irreversible and should only be performed by the Organization Owner.

Prerequisites:

- Must be Organization Owner
- All users must be removed or transferred
- All active subscriptions must be cancelled
- Confirm data backup (if needed)

Deletion Steps:

1. Navigate to **Admin** → **Organizations**

2. Scroll to bottom of page
3. Click **Delete Organization** (red button)
4. You will be prompted to confirm:
 - Enter organization name to confirm
 - Check "I understand this action cannot be undone"
 - Enter your password
5. Click **Permanently Delete Organization**

What Gets Deleted:

- All user accounts
- All email data and attachments
- All templates and automations
- All billing history
- All API keys and integrations

What Happens Next:

- All users immediately lose access
- Active subscriptions are cancelled
- Prorated refunds processed (if applicable)
- Confirmation email sent to Owner
- Data retained for 30 days in backups (for recovery requests)

Support Note: If you accidentally delete your organization within 30 days, contact support@easemail.app immediately for recovery options.

5. User Management

5.1 Viewing All Users

Navigate to User Management:

1. Click **Admin** in the left sidebar
2. Select **Users**
3. You'll see a table of all organization users

User Table Columns:

Column	Description
Name	User's full name
Email	User's email address
Role	Owner, Admin, or Member
Status	Active, Inactive, Suspended
2FA	Whether two-factor auth is enabled
Last Login	Most recent login timestamp
Email Accounts	Number of connected email accounts
Actions	Edit, Suspend, Delete buttons

Filtering and Searching:

Search Bar:

- Located at top of user table
- Search by name, email, or role
- Results update in real-time

Filter Options:

- **By Role:** Show only Owners, Admins, or Members
- **By Status:** Active, Inactive, Suspended
- **By 2FA:** Enabled or Disabled
- **By Last Login:** Last 7 days, 30 days, 90 days, Never

Sorting:

- Click column headers to sort
- Click again to reverse sort order
- Default sort: Alphabetical by name

5.2 Adding New Users

Method 1: Single User Invite

Step 1: Open Invite Dialog

1. Navigate to **Admin** → **Users**
2. Click **Add User** or **Invite User** button
3. Invite dialog opens

Step 2: Enter User Details

1. **Email Address:** (Required) User's email
2. **Full Name:** (Optional but recommended)
3. **Role:** Select from dropdown
 - Member (default)
 - Admin
 - Owner (transfer ownership - use with caution)
4. **Send Welcome Email:** Check to send invitation

Step 3: Send Invitation

1. Review details
2. Click **Send Invitation**
3. User receives email with setup link

Step 4: User Completes Setup

- User clicks link in email
- Sets their password
- Completes profile
- Connects email account(s)

Method 2: Bulk User Import

Step 1: Prepare CSV File

Create a CSV file with the following columns:

```
email,name,role
john.doe@company.com,John Doe,member
jane.smith@company.com,Jane Smith,admin
```

Required columns:

- **email** - User's email address
- **name** - Full name
- **role** - owner, admin, or member

Step 2: Upload CSV

1. Navigate to **Admin → Users**
2. Click **Import Users** button
3. Click **Choose File** and select your CSV
4. Review preview of users to be imported
5. Check **Send welcome emails** if desired
6. Click **Import X Users**

Step 3: Review Results

- Successfully imported users appear immediately
- Errors are shown with specific reasons
- Download error report if needed

Tip: Maximum 1,000 users per CSV import. For larger imports, split into multiple files.

5.3 Editing User Details

To Edit a User:

Step 1: Locate User

1. Go to **Admin → Users**
2. Find user in the table (use search if needed)
3. Click **Edit** button (pencil icon) in Actions column

Step 2: Update Information

You can edit:

- **Name:** Change user's display name
- **Email:** Change user's email address
 - ⚠ User must verify new email
 - Old email becomes invalid
- **Role:** Change permission level
 - Member → Admin (grants admin access)
 - Admin → Member (removes admin access)
 - Transfer ownership (special process)
- **Status:** Active, Inactive, Suspended

Step 3: Save Changes

1. Review all changes
2. Click **Save Changes**

3. User is notified of changes via email

Changing User Roles:

To Promote Member to Admin:

1. Edit user
2. Change Role to **Admin**
3. Save
4. User gets admin access immediately

To Demote Admin to Member:

1. Edit user
2. Change Role to **Member**
3. Save
4. User loses admin access immediately

To Transfer Ownership:

1. Edit user
2. Change Role to **Owner**
3. **Warning:** You will become an Admin
4. Confirm transfer
5. New owner receives confirmation email
6. Transfer completes immediately

Important: Only one Owner per organization. Transferring ownership demotes the current owner to Admin.

5.4 Suspending Users

Suspending a user temporarily blocks their access without deleting their account or data.

When to Suspend:

- User on leave/vacation
- Security concern
- Billing issue
- Offboarding in progress

To Suspend a User:

Step 1: Locate User

1. Navigate to **Admin** → **Users**
2. Find the user in the table

Step 2: Suspend

1. Click **Actions** dropdown (⋮)
2. Select **Suspend User**
3. Confirm action

What Happens:

- User immediately loses access
- Active sessions terminated
- User cannot log in
- Email continues to be received

- User does not consume a seat while suspended

To Reactivate a Suspended User:

1. Find suspended user (filter by Status: Suspended)
2. Click **Actions** dropdown
3. Select **Activate User**
4. User can log in immediately

5.5 Removing Users

Removing a user permanently deletes their account and associated data.

⚠ Before You Delete:

- ☐ Back up any important emails/data
- ☐ Transfer ownership of shared templates/drafts
- ☐ Reassign any automations
- ☐ Update team distribution lists
- ☐ Notify affected team members

To Remove a User:

Step 1: Navigate to User

1. Go to **Admin** → **Users**
2. Find user to remove

Step 2: Initiate Removal

1. Click **Actions** dropdown (⋮)
2. Select **Delete User**
3. Confirmation dialog appears

Step 3: Confirm Deletion

1. Review what will be deleted:
 - User account
 - Email accounts connections
 - Personal templates
 - Drafts and scheduled emails
 - Usage history
2. Check "I understand this cannot be undone"
3. Click **Delete User**

What Happens:

- User immediately loses access
- Account permanently deleted
- Email accounts disconnected
- Seat becomes available
- User data retained in backups for 30 days (for recovery)

Data Retention: While user account is deleted, organization-level data (sent emails, shared templates) is retained per your retention policy.

5.6 Managing User Permissions

Permission Levels Overview:

Owner Permissions:

- All admin permissions
- Manage billing and subscriptions
- Add/remove seats
- Transfer ownership
- Delete organization
- Access billing history
- Manage payment methods

Admin Permissions:

- View all users
- Add/edit/suspend/delete users
- View organization settings
- Edit organization profile
- Manage templates
- View analytics and reports
- Manage API keys
- Configure security settings

Member Permissions:

- Manage own email accounts
- Send/receive emails
- Create personal templates
- Use shared templates
- View own usage statistics
- Manage own profile and settings
- Enable own 2FA

Custom Permission Sets (Enterprise):

Enterprise plans can create custom roles:

1. Navigate to **Settings → Roles & Permissions**
2. Click **Create Custom Role**
3. Name the role (e.g., "Support Lead", "Billing Admin")
4. Select permissions from checklist:
 - User management
 - Billing access
 - Analytics viewing
 - Template management
 - API key management
 - Security settings
5. Click **Save Role**
6. Assign users to this role

5.7 Viewing User Activity

To View Individual User Activity:

Step 1: Access User Details

1. Go to **Admin** → **Users**
2. Click on user's name or email (opens detail view)

Step 2: Review Activity Tabs

Overview Tab:

- Total emails sent/received
- Average response time
- Last login date and IP address
- Connected email accounts
- Storage used

Activity Log Tab:

- Chronological list of user actions:
 - Login/logout events
 - Email sent
 - Settings changed
 - Template created/used
 - Failed login attempts
- Filter by date range
- Export to CSV

Email Accounts Tab:

- List of connected email accounts
- Provider (Gmail, Outlook, Custom)
- Status (Active, Error, Disconnected)
- Last sync time
- Actions: Reconnect, Remove

Sessions Tab:

- Active sessions
- Device type (Desktop, Mobile, Tablet)
- Browser and OS
- IP address and location
- Login time
- Action: **Terminate Session** (force logout)

Bulk User Activity Report:

1. Navigate to **Admin** → **Users**
2. Click **Export User Activity** button
3. Select date range
4. Choose format (CSV or Excel)
5. Click **Generate Report**
6. Download when ready

Report includes:

- User name and email
- Total logins
- Total emails sent/received

- Last active date
 - 2FA status
 - Connected accounts
-

6. Email Account Management

6.1 Understanding Email Accounts

What Are Email Accounts?

In EaseMail 26, an "email account" refers to a connected email provider (Gmail, Outlook, custom SMTP) that a user links to their EaseMail account for sending and receiving emails.

Key Concepts:

- One user can have multiple email accounts
- Each account must be separately connected
- Accounts can be primary or secondary
- Users can switch between accounts when composing

6.2 Supported Email Providers

EaseMail 26 supports the following providers:

Provider	Connection Type	Features
Gmail	OAuth 2.0	Full sync, labels, filters
Google Workspace	OAuth 2.0	Admin console integration
Outlook/Office 365	OAuth 2.0	Full sync, folders, rules
Exchange	OAuth 2.0	On-premise and cloud
Custom SMTP/IMAP	Username/Password	Basic send/receive
Custom Domain	SMTP/IMAP	Advanced users

6.3 Connecting Email Accounts (For Users)

While admins cannot directly connect email accounts for users, you should guide users through this process.

Gmail/Google Workspace Connection:

Step 1: Start Connection Process

1. User logs into EaseMail 26
2. Navigates to **Settings** → **Email Accounts**
3. Clicks **Connect Email Account**
4. Selects **Gmail** or **Google Workspace**

Step 2: OAuth Authorization

1. Redirected to Google login page
2. User signs in with Google account
3. Reviews requested permissions:
 - Read and send email

- Manage labels and folders
- Access contacts

4. Clicks **Allow**

Step 3: Verification

1. Redirected back to EaseMail 26
2. Account appears in connected accounts list
3. Initial email sync begins (may take several minutes)
4. Success notification displayed

Troubleshooting Gmail Connection:

- Ensure "Less secure app access" is NOT enabled (use OAuth)
- Check Google Admin Console allows third-party apps
- Verify user has not exceeded Google API rate limits

Outlook/Office 365 Connection:

Step 1: Initiate Connection

1. User clicks **Connect Email Account**
2. Selects **Outlook** or **Office 365**
3. Clicks **Continue**

Step 2: Microsoft Authorization

1. Redirected to Microsoft login page
2. User signs in with Microsoft account
3. Reviews requested permissions
4. Clicks **Accept**

Step 3: Complete Setup

1. Returned to EaseMail 26
2. Account connected
3. Email sync starts

Troubleshooting Outlook/Office 365:

- Ensure admin has allowed OAuth apps in Microsoft Admin Center
- Check conditional access policies
- Verify Exchange Online is enabled

Custom SMTP/IMAP Connection:

Step 1: Gather Server Information

User needs from their email provider:

- SMTP server address (e.g., `smtp.example.com`)
- SMTP port (usually 587 or 465)
- IMAP server address (e.g., `imap.example.com`)
- IMAP port (usually 993 or 143)
- Username (usually full email address)
- Password or app-specific password
- SSL/TLS requirements

Step 2: Enter Settings

1. Click **Connect Email Account**
2. Select **Custom SMTP/IMAP**
3. Fill in form:

Email Address: user@example.com

SMTP Settings:

Server: smtp.example.com

Port: 587

Security: TLS

Username: user@example.com

Password: ••••••••

IMAP Settings:

Server: imap.example.com

Port: 993

Security: SSL

Username: user@example.com

Password: ••••••••

4. Click **Test Connection**
5. If successful, click **Save**

Step 3: Verify

1. Send test email to verify SMTP
2. Check if IMAP folders load
3. Verify sent items appear

Common SMTP/IMAP Settings:

Gmail (if using app password):

- SMTP: smtp.gmail.com:587 (TLS)
- IMAP: imap.gmail.com:993 (SSL)

Outlook.com:

- SMTP: smtp-mail.outlook.com:587 (TLS)
- IMAP: outlook.office365.com:993 (SSL)

Yahoo:

- SMTP: smtp.mail.yahoo.com:587 (TLS)
- IMAP: imap.mail.yahoo.com:993 (SSL)

6.4 Viewing Organization Email Accounts




As an Admin, View All Accounts:

Step 1: Access Email Accounts Overview

1. Navigate to **Admin** → **Email Accounts** (or under Users)
2. See table of all connected accounts

Step 2: Review Account Information

Table shows:

- **User:** Which user owns this account
- **Email:** The email address
- **Provider:** Gmail, Outlook, Custom, etc.
- **Status:**
 -  Active - Working properly
 -  Warning - Minor issues (needs reauth)
 -  Error - Not working (needs reconnection)
- **Last Sync:** When emails were last synced
- **Messages:** Total email count
- **Storage:** Space used by attachments

Filtering and Searching:

Filter By Provider:

1. Click **Filter** dropdown
2. Select provider (Gmail, Outlook, All)
3. Table updates

Search:

- Search by email address or user name
- Real-time results

Export:

1. Click **Export** button
2. Select CSV or Excel
3. Download report

6.5 Troubleshooting Email Account Issues

Common Issues and Solutions:

Issue: "Authentication Failed"

Causes:

- Password changed on provider
- OAuth token expired
- Account locked

Solution:

1. User needs to reconnect account
2. Navigate to Settings → Email Accounts
3. Click **Reconnect** next to the failing account
4. Complete OAuth flow again

Admin Action:

- Notify user via email
 - If persists, check provider admin console
-

Issue: "Sync Stopped" or "Last Sync: X days ago"

Causes:

- API rate limit hit
- Network issue
- Provider outage

Solution:

1. Check provider status page
2. Click **Force Sync** button
3. If fails, review error logs

Admin Action:

- Monitor multiple users with same issue (indicates provider problem)
 - Contact support if widespread
-

Issue: "Cannot Send Emails"

Causes:

- SMTP server down
- Daily send limit exceeded
- Account suspended by provider

Solution:

1. Verify SMTP settings
2. Check provider send limits
3. Test with different email account

Admin Action:

- Review organization send volume
 - Check if multiple users affected
-

Issue: "Missing Emails" or "Emails Not Appearing"

Causes:

- Sync incomplete
- Folder/label filters active
- IMAP settings incorrect

Solution:

1. Check folder selection (Settings → Email → Folders)
2. Ensure all folders are selected for sync
3. Force full resync

Admin Action:

- May need to debug with logs

6.6 Disconnecting Email Accounts

User Self-Service:

Users can disconnect their own accounts:

1. Settings → Email Accounts
2. Click **Disconnect** next to account
3. Confirm action

What Happens:

- Immediate disconnection
- No more email sync
- Existing emails remain (based on retention policy)
- Can reconnect same account later

Admin-Initiated Disconnection:

In rare cases, admins may need to disconnect a user's account:

Step 1: Navigate to User

1. Admin → Users
2. Click on user
3. Go to **Email Accounts** tab

Step 2: Disconnect

1. Find account to disconnect
2. Click **Actions** → **Force Disconnect**
3. Enter reason (for audit log)
4. Confirm

When to Force Disconnect:

- Security breach
- User left organization
- Account causing system issues
- Compliance requirement

What Happens:

- Immediate disconnection
- User notified via email
- Audit log entry created
- User can reconnect if they still have access

6.7 Email Account Limits

Organization-Wide Limits:

Free Plan:

- Max 1 email account per user
- 100 emails sent per day per user

Pro Plan:

- Max 3 email accounts per user
- 1,000 emails sent per day per user

Business Plan:

- Max 5 email accounts per user
- 5,000 emails sent per day per user

Enterprise Plan:

- Unlimited email accounts per user
- Custom send limits

Note: Limits are enforced per 24-hour period and reset at midnight UTC.

Provider-Specific Limits:**Gmail/Google Workspace:**

- Send limit: 500/day (Gmail), 2,000/day (Workspace)
- API calls: 250 million/day per project
- Attachment size: 25 MB

Outlook/Office 365:

- Send limit: 300/day (Outlook.com), 10,000/day (Office 365)
- Attachment size: 25 MB
- API calls: Based on Office 365 license

Custom SMTP:

- Varies by provider
- Check with your email host

Monitoring Send Limits:**As Admin:**

1. Navigate to **Admin** → **Analytics**
2. View **Email Sending** chart
3. See daily volume per user
4. Alerts shown if approaching limits

Setting Alerts:

1. Go to **Settings** → **Notifications**
 2. Enable **Send Limit Alerts**
 3. Set threshold (e.g., 80% of limit)
 4. Add email recipients for alerts
 5. Save
-

7. Billing & Subscription Management

7.1 Viewing Subscription Information

Accessing Billing Dashboard:**Step 1: Navigate to Billing**

1. Click **Admin** in sidebar
2. Select **Settings** → **Billing** (or dedicated Billing tab if available)

Note: Only Organization Owners can access billing. Admins have read-only access (if granted).

Step 2: Review Subscription Details

You'll see:

Current Plan:

- Plan name (Free, Pro, Business, Enterprise)
- Billing cycle (Monthly or Annual)
- Status (Active, Trial, Past Due, Cancelled)

Seat Information:

- Total seats purchased
- Seats currently used
- Available seats

Billing Dates:

- Current period start/end
- Next billing date
- Renewal date (for annual plans)

Amount:

- Current charge per period
- Total amount due on next billing date
- Any prorated charges

7.2 Managing Payment Methods

Adding a Payment Method:

Step 1: Navigate to Payment Methods

1. Go to **Settings** → **Billing** → **Payment Methods**
2. Click **Add Payment Method**

Step 2: Enter Card Details

Form fields:

- **Card Number:** 16-digit card number
- **Expiration Date:** MM/YY
- **CVC:** 3 or 4-digit security code
- **Cardholder Name:** Name on card
- **Billing Address:**
 - Street address
 - City
 - State/Province
 - Postal/ZIP code
 - Country

Step 3: Save

1. Review details
2. Check "Set as default payment method" (if desired)
3. Click **Add Card**
4. Card is tokenized securely (via Stripe)

5. Success message appears

Security: EaseMail 26 never stores your full card number. We use Stripe for secure payment processing.

Updating Payment Method:

To Update Card Details:

1. Go to **Billing** → **Payment Methods**
2. Find card to update
3. Click **Update**
4. Enter new card details
5. Click **Save**

Note: You cannot "edit" a card. You must add a new one and remove the old one.

To Set Default Payment Method:

1. In Payment Methods list
2. Find desired card
3. Click **Set as Default**
4. This card will be used for future charges

Removing a Payment Method:

Step 1: Navigate to Payment Methods

1. Settings → Billing → Payment Methods

Step 2: Remove Card

1. Find card to remove
2. Click **Remove** or trash icon
3. Confirm removal

Warning: Cannot remove default payment method if it's the only one. Add a new card first, then remove old one.

7.3 Viewing Invoices

Accessing Invoice History:

Step 1: Navigate to Invoices

1. Settings → Billing → **Invoices** tab
2. See list of all invoices

Invoice Table:

Invoice #	Date	Description	Amount	Status	Actions
INV-0123	Jan 15, 2026	Monthly subscription	\$200.00	Paid	View • Download
INV-0122	Dec 15, 2025	Monthly subscription	\$150.00	Paid	View • Download
INV-0121	Dec 10, 2025	Additional seats	\$75.00	Paid	View • Download

Invoice Actions:

View Invoice:

1. Click **View** button
2. Opens invoice in new tab
3. Shows detailed line items:
 - Plan charges
 - Seat charges
 - Prorated amounts
 - Tax (if applicable)
 - Total amount

Download Invoice:

1. Click **Download** button
2. PDF downloads to your computer
3. File named: `EaseMail_Invoice_INV-XXXX.pdf`

Email Invoice:

1. Click **Actions** dropdown (⋮)
2. Select **Email Invoice**
3. Enter recipient email
4. Invoice PDF sent via email

Print Invoice:

1. Click **View** to open invoice
2. Use browser print function (Ctrl+P / Cmd+P)
3. Or click **Print** button on invoice page

7.4 Changing Subscription Plans

Upgrading Your Plan:

Step 1: Navigate to Plans

1. Settings → Billing → **Plans** tab
2. See available plans with features

Step 2: Select New Plan

1. Compare plans (features, limits, pricing)
2. Click **Upgrade to [Plan Name]** button
3. Review changes:
 - New features
 - New limits
 - Price change
 - Proration details

Step 3: Confirm Upgrade

1. Review proration:
 - You'll be charged prorated amount for remainder of current period
 - Next billing cycle will be at new plan rate
2. Click **Confirm Upgrade**
3. Payment processed
4. Plan upgraded immediately

Example Proration Calculation:

- Current plan: \$100/month (paid on 1st)
- Today: 15th of month (15 days into billing period)
- Upgrading to: \$200/month
- Days remaining: 15 (until next billing date)
- Prorated charge: $(\$200 - \$100) \times (15/30) = \$50$
- You pay: \$50 today, then \$200 on next billing date

Downgrading Your Plan:

Step 1: Initiate Downgrade

1. Settings → Billing → Plans
2. Click **Change Plan** on lower-tier plan
3. Review impact:
 - Features you'll lose
 - Reduced limits
 - Any data migration needed

Step 2: Review Warnings

System checks for:


- **Seat count:** If new plan has fewer seats than current users, you must remove users first
- **Feature usage:** If you're using features not in lower plan (e.g., API keys), you'll be prompted to remove them
- **Storage:** If attachments exceed new plan storage, you'll need to delete some

Step 3: Confirm Downgrade

1. Review that you understand changes
2. Click **Confirm Downgrade**
3. Downgrade scheduled for end of current billing period
4. You keep current features until then

Note: Downgrades take effect at the end of your current billing period. You won't receive a refund for the current period.

7.5 Cancelling Subscription

 **Important:** Cancelling your subscription will:

- End your access to paid features at period end
- Downgrade you to Free plan (if available)
- Delete data beyond Free plan limits
- Close all user accounts (if cancelling entirely)

To Cancel Subscription:

Step 1: Navigate to Billing

1. Settings → Billing
2. Scroll to bottom of page

Step 2: Initiate Cancellation

1. Click **Cancel Subscription** button
2. You may be offered retention incentives (discounts, pause, etc.)

3. Select reason for cancellation (helps us improve)

Step 3: Confirm Cancellation

1. Review cancellation details:
 - Last day of access
 - What happens to data
 - How to reactivate
2. Check "I understand my data may be deleted"
3. Click **Confirm Cancellation**

What Happens Next:

- **Immediately:** Cancellation recorded, receipt emailed
- **Until period end:** You retain full access to paid features
- **After period end:**
 - Access revoked
 - Downgraded to Free plan (if available)
 - Data deleted per retention policy
 - Can reactivate within 30 days by re-subscribing

Reactivating After Cancellation:

Within 30 Days:

1. Log back in
2. Go to Settings → Billing
3. Click **Reactivate Subscription**
4. Choose plan
5. Add payment method
6. Your data is restored

After 30 Days:

- Data is permanently deleted
- Must sign up as new organization
- Cannot recover old data

7.6 Managing Billing Contacts

Setting Billing Email:

Step 1: Navigate to Billing Settings

1. Settings → Billing → **Billing Contact**

Step 2: Update Email

1. Enter billing contact email
2. This email receives:
 - Invoices
 - Payment receipts
 - Payment failure notifications
 - Renewal reminders
3. Can be different from Owner email
4. Can add multiple emails (comma-separated)

5. Click **Save**

Adding Finance Team Members:

For read-only billing access (Enterprise only):

1. Settings → Billing → **Billing Access**
2. Click **Add Billing Contact**
3. Enter email of finance team member
4. Select permissions:
 - View invoices
 - Download receipts
 - View payment methods (masked)
 - Manage payment methods
5. Click **Add**
6. They receive invitation email

Note: Billing contacts are NOT organization users and do not consume seats.

7.7 Billing FAQs

Q: When am I charged? A: Charges occur on your billing date (typically the day you signed up) each month or year.

Q: Can I get a refund? A: We offer 30-day money-back guarantee for new subscriptions. Downgrades/cancellations are not prorated.

Q: What happens if my payment fails? A: We'll retry 3 times over 10 days. If all fail, your account is suspended. You can reactivate by updating your payment method.

Q: Can I switch from monthly to annual billing? A: Yes! Go to Settings → Billing → Billing Cycle. Annual billing offers ~17% discount (10 months for the price of 12).

Q: Do you offer discounts for nonprofits/education? A: Yes! Contact support@easemail.app with your tax-exempt documentation for special pricing.

Q: What payment methods do you accept? A: Credit cards (Visa, MasterCard, Amex, Discover), debit cards. Enterprise plans can pay via invoice/wire transfer.

Q: Is my payment information secure? A: Yes. We use Stripe for payment processing. We never store your full card number. All transactions are encrypted with TLS 1.3.

Q: Can I get custom pricing for my organization? A: Enterprise plans (100+ seats) qualify for custom pricing. Contact sales for a quote.

8. API Keys & Integrations

8.1 Understanding API Keys

What Are API Keys?

API keys allow EaseMail 26 to integrate with external services and enable programmatic access to your organization's data.

Types of API Keys in EaseMail 26:

1. **EaseMail API Keys**

- Generated by EaseMail for external services to access your data
- Used for custom integrations, webhooks, third-party apps
- Scoped permissions (read-only, read-write, admin)

2. External Service Keys (Stored)

- Your OpenAI API key (for AI features)
- Stripe keys (for payment processing)
- Other third-party services

3. OAuth Tokens

- Managed automatically for Gmail, Outlook, etc.
- Not directly visible to admins
- Refresh automatically

8.2 Viewing Organization API Keys

Navigate to API Keys:

Step 1: Access API Management

1. Click **Admin** in sidebar
2. Navigate to **Settings** → **API Keys** (or **Integrations**)

Step 2: Review API Key List

Table shows:

- **Key Name:** Descriptive name (e.g., "Zapier Integration")
- **Key:** Truncated key (e.g., `ek_live_.....1234`)
- **Type:** EaseMail API, OpenAI, Custom
- **Permissions:** read, write, admin
- **Created:** Date created
- **Last Used:** Recent activity timestamp
- **Status:** Active, Revoked, Expired
- **Actions:** Edit, Revoke, Delete

8.3 Creating New API Keys

Creating an EaseMail API Key:

Step 1: Initiate Creation

1. Go to API Keys page
2. Click **Create API Key** button

Step 2: Configure Key

Basic Settings:

- **Key Name:** Descriptive name (e.g., "Mobile App", "Zapier", "Custom Dashboard")
- **Description:** Optional notes about usage

Permissions: Select scopes for this key:

- ☒ **Read emails** - Fetch email content
- ☒ **Send emails** - Send emails on behalf of users

- ☐ **Manage users** - Create/edit/delete users
- ☐ **View analytics** - Access reports and statistics
- ☐ **Manage billing** - Access billing info
- ☒ **Manage templates** - CRUD operations on templates
- ☐ **Admin access** - Full organization control

Expiration:

- Select expiration period: 30 days, 90 days, 1 year, Never
- Or set custom date

IP Restrictions (Optional):

- Add allowed IP addresses or CIDR blocks
- Leave empty for no IP restrictions

Step 3: Generate Key

1. Review settings
2. Click **Generate API Key**
3. **Important:** Key is shown ONCE
4. Copy key immediately
5. Store securely (password manager, secrets vault)
6. Check "I have saved this key securely"
7. Click **Done**

Example API Key:

```
ek_live_1a2b3c4d5e6f7g8h9i0j
```

Security Warning: API keys grant access to your organization's data. Never share keys publicly, commit to git repositories, or expose in client-side code.

Using Your API Key:

HTTP Header Authentication:

```
curl -X GET https://api.easemail.app/v1/emails \
  -H "Authorization: Bearer ek_live_1a2b3c4d5e6f7g8h9i0j"
```

API Documentation:

- Full API docs: <https://docs.easemail.app/api>
- Interactive API explorer available
- Code examples in multiple languages (Python, Node.js, PHP, Ruby)

8.4 Managing External Service Keys

EaseMail 26 can store API keys for services it integrates with.

Adding OpenAI API Key (for AI Features):

Why: Powers AI Remix, AI Dictate, Smart Replies, and email categorization.

Step 1: Get OpenAI Key

1. Go to <https://platform.openai.com>
2. Create account (if needed)
3. Navigate to API Keys section
4. Click **Create new secret key**
5. Copy the key (starts with `sk-`)

Step 2: Add to EaseMail

1. In EaseMail, go to **Settings** → **Integrations** → **OpenAI**
2. Click **Add API Key**
3. Paste OpenAI key
4. Select model preferences:
 - Default model: GPT-4 Turbo (recommended) or GPT-3.5
 - Whisper for voice transcription
5. Click **Save**
6. Click **Test Connection** to verify

Step 3: Configure AI Features

1. Enable/disable AI features for organization:
 - ☐ AI Remix (email rewriting)
 - ☐ AI Dictate (voice to text)
 - ☐ Smart Replies
 - ☐ Email Categorization
 - ☐ Calendar Event Extraction
2. Set usage limits (optional):
 - Max requests per user per day
 - Max tokens per request
3. Click **Save Settings**

Cost Warning: OpenAI charges per token. Monitor usage in OpenAI dashboard. Typical costs: \$0.01-0.03 per AI Remix.

Organization vs. User API Keys:

Organization-Level Key:

- Added by admin in Settings → Integrations
- Shared across all users
- Costs billed to organization
- Centralized usage tracking

User-Level Key (if enabled):

- User adds their own key in personal settings
- Costs billed to user's OpenAI account
- User has full control

To Enable User-Level Keys:

1. Settings → Integrations → OpenAI
2. Check "Allow users to add personal OpenAI keys"
3. Save

8.5 Revoking API Keys

When to Revoke:

- Key compromised or leaked
- Integration no longer needed
- Employee left organization
- Rotating keys as security practice
- Suspicious activity detected

To Revoke a Key:

Step 1: Navigate to API Keys

1. Settings → API Keys

Step 2: Revoke

1. Find key to revoke in list
2. Click **Actions** dropdown (:)
3. Select **Revoke Key**
4. Confirm action

What Happens:

- Key immediately stops working
- All API requests with this key return 401 Unauthorized
- Key moved to "Revoked" section
- Audit log entry created

Can You Un-Revoke?

- No. Revocation is permanent.
- Generate new key if needed

8.6 API Key Security Best Practices



DO:

- Store keys in environment variables or secret managers
- Use different keys for dev/staging/production
- Set minimal required permissions
- Set expiration dates
- Rotate keys regularly (every 90 days)
- Use IP restrictions when possible
- Monitor API usage for anomalies



DON'T:

- Commit keys to git repositories
- Share keys via email or chat
- Use same key across multiple services
- Grant more permissions than needed
- Expose keys in client-side code
- Leave unused keys active

Monitoring API Usage:

Step 1: View Usage

1. Settings → API Keys
2. Click on specific key
3. View **Usage Statistics** tab

Metrics Shown:

- Total requests (last 7/30 days)
- Request breakdown by endpoint
- Error rate
- Average response time
- Geographic distribution (if available)

Step 2: Set Up Alerts

1. Click **Configure Alerts**
2. Set thresholds:
 - Requests per hour exceeds X
 - Error rate exceeds Y%
 - Unusual geographic activity
3. Add email recipients
4. Save

8.7 Webhooks

Webhooks allow EaseMail to send real-time notifications to your external services when events occur.

Supported Webhook Events:

- `email.sent` - Email sent by user
- `email.received` - New email arrived
- `user.created` - New user added
- `user.deleted` - User removed
- `subscription.updated` - Billing change
- `quota.exceeded` - Usage limit hit
- `security.alert` - Security event

Creating a Webhook:

Step 1: Navigate to Webhooks

1. Settings → API Keys → **Webhooks** tab
2. Click **Add Webhook**

Step 2: Configure

Webhook URL:

- Enter your endpoint URL (must be HTTPS)
- Example: `https://api.yourapp.com/webhooks/easemail`

Events:

- Select events to subscribe to
- Check specific events or "All events"

Secret:

- Webhook signing secret (auto-generated)

- Used to verify webhook authenticity
- Save this securely

Step 3: Test

1. Click **Send Test Event**
2. Check your endpoint receives test payload
3. If successful, click **Activate Webhook**

Webhook Payload Example:

```
{
  "event": "email.sent",
  "timestamp": "2026-02-03T10:30:00Z",
  "data": {
    "message_id": "msg_1a2b3c4d",
    "user_id": "user_xyz",
    "to": ["recipient@example.com"],
    "subject": "Test Email",
    "sent_at": "2026-02-03T10:30:00Z"
  },
  "signature": "sha256=abcdef123456..."
}
```

Verifying Webhook Signatures:

```
import hmac
import hashlib

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

    return hmac.compare_digest(f"sha256={expected}", signature)
```

9. Settings & Preferences

9.1 Organization Settings

Company Information:

Location: Settings → Organization → Profile

Editable Fields:

- Organization Name
- Display Name (if different)
- Website URL
- Industry/Category

- Company Size
- Time Zone
- Language/Locale
- Phone Number
- Primary Contact Email

To Update:

1. Click **Edit** next to section
2. Modify fields
3. Click **Save Changes**

Appearance Settings:

Theme:

- Light mode (default)
- Dark mode
- Auto (follows system preference)

Branding:

- Upload logo (200x200px, PNG/JPG/SVG)
- Set brand color (for emails, login page)
- Custom CSS (Enterprise only)

9.2 Email Settings

Default From Name:

- How organization name appears in sent emails
- Format options:
 - Name <email@domain.com>
 - email@domain.com (Name)
 - "Name" <email@domain.com>

Reply-To Configuration:

- Set default reply-to address if different from sender
- Useful for support@ or info@ addresses

Email Signature:

- Organization-wide default signature
- Supports HTML and variables
- Can be overridden by users

Auto-Reply/Out of Office:

- Organization-wide out of office rules
- Blackout dates (holidays)

9.3 Notification Settings

Configure how and when users receive notifications:

Email Notifications:

- New email received

- Mentioned in email (@mentions)
- Calendar invitations
- Security alerts
- Billing notifications

In-App Notifications:

- Desktop push notifications
- Browser notifications
- Sound alerts

Frequency:

- Real-time
- Digest (hourly, daily)
- Disabled

Admin Notifications:

- User activity alerts
- Security events
- System errors
- Usage threshold alerts
- API limit warnings

9.4 Privacy & Data Retention

Email Retention Policy:

- Keep forever
- Delete after 30/60/90/180/365 days
- Archive to cold storage

Attachment Retention:

- Same as email
- Separate retention period
- Maximum attachment age

Deleted Items:

- Permanently delete immediately
- Keep in trash for 30 days (default)
- Custom period

Data Export:

- Enable user data export
- Format: MBOX, PST, EML
- Include attachments

GDPR Compliance:

- Data processing agreement
- User consent management
- Right to erasure
- Data portability

9.5 Security Settings (Organization-Wide)

Access Controls:

- Enforce 2FA for all users
- Password requirements
- Session timeout
- IP allowlist/blocklist

Audit Logging:

- Log all admin actions
- Log user access
- Log API calls
- Retention period for logs

Data Encryption:

- At-rest encryption (always enabled)
- End-to-end encryption (optional, Enterprise)
- Email encryption (S/MIME, PGP)

9.6 Integration Settings

Allowed Integrations:

- OAuth apps whitelist
- Block third-party access
- Require admin approval

Data Sharing:

- Control what data integrations can access
 - Audit integration access logs
-

10. Reports & Analytics

10.1 Accessing Reports

Navigation: Admin → Analytics or Reports

EaseMail 26 provides comprehensive analytics to help you understand usage patterns, identify trends, and make data-driven decisions.

10.2 Available Reports

Email Activity Report

Metrics:

- Total emails sent (by day/week/month)
- Total emails received
- Average emails per user
- Peak activity times
- Response time distribution

Filters:

- Date range
- User/team
- Email account
- Domain

Visualizations:

- Line chart: Email volume over time
- Bar chart: Emails by user
- Heatmap: Activity by day/hour
- Pie chart: Sent vs. received

Export: CSV, Excel, PDF

User Engagement Report**Metrics:**

- Daily/Monthly Active Users
- Login frequency
- Feature usage (compose, search, filters, etc.)
- Average session duration
- Device breakdown (desktop, mobile, tablet)

Insights:

- Identify power users
- Find inactive users
- Track feature adoption

Response Time Report**Metrics:**

- Average first response time
- Average full resolution time
- Response time by user
- Response time by day of week

Use Cases:

- Measure support team performance
- Identify bottlenecks
- Set SLA targets

Storage & Attachment Report**Metrics:**

- Total storage used
- Storage per user
- Largest files/attachments
- Storage growth trend
- Projections

Actions:

- Identify users consuming most storage
- Clean up old attachments

- Plan for storage upgrades

Security & Audit Report

Metrics:

- Failed login attempts
- 2FA adoption rate
- Unusual activity alerts
- API key usage
- Admin actions log

Use Cases:

- Identify security threats
- Compliance reporting
- Troubleshooting access issues

10.3 Custom Reports (Enterprise)

Creating Custom Reports:

1. Navigate to Reports → **Custom Reports**
2. Click **Create Report**
3. Select data source:
 - Users
 - Emails
 - Billing
 - API usage
4. Choose metrics and dimensions
5. Add filters
6. Select visualization type
7. Save report

Scheduling Reports:

1. Open any report
2. Click **Schedule** button
3. Set frequency:
 - Daily
 - Weekly (select day)
 - Monthly (select date)
 - Quarterly
4. Add email recipients
5. Select format (PDF, CSV, Excel)
6. Click **Save Schedule**

10.4 Exporting Data

Manual Export:

1. Open any report
2. Click **Export** button
3. Select format:
 - CSV (for data analysis)
 - Excel (with charts)

- PDF (for sharing)

4. Click **Download**

Bulk Data Export:

For complete data export (e.g., for migration):

1. Settings → Data → **Export**
2. Select data to export:
 - All emails
 - Contacts
 - Calendar events
 - Settings
 - Templates
3. Select format (MBOX, PST, JSON)
4. Click **Request Export**
5. Receive email when ready (can take hours for large exports)
6. Download zip file

Note: Bulk exports can take several hours and are limited to once per 24 hours.

11. Security & Two-Factor Authentication

11.1 Two-Factor Authentication (2FA)

What is 2FA?

Two-factor authentication adds an extra layer of security by requiring two forms of verification:

1. Something you know (password)
2. Something you have (phone, authenticator app)

Supported 2FA Methods:

- **Authenticator App** (Recommended)
 - Google Authenticator
 - Microsoft Authenticator
 - Authy
 - 1Password
- **SMS Text Message**
 - Less secure but more convenient
 - Carrier fees may apply
- **Backup Codes**
 - One-time use codes for account recovery
 - Keep in safe place

11.2 Enabling 2FA for Yourself (Admin)

Step 1: Navigate to Security Settings

1. Click your profile icon (top-right)
2. Select **Settings** → **Security**

3. Find **Two-Factor Authentication** section

Step 2: Choose Method

Option A: Authenticator App (Recommended)

1. Click **Enable 2FA** → **Authenticator App**
2. You'll see:
 - QR code
 - Text code (if you can't scan QR)
3. Open your authenticator app
4. Scan the QR code or enter text code manually
5. App generates 6-digit code
6. Enter code in EaseMail to verify
7. Click **Verify**

Option B: SMS Text Message

1. Click **Enable 2FA** → **SMS**
2. Enter your mobile phone number
3. Select country code
4. Click **Send Code**
5. Receive SMS with 6-digit code
6. Enter code in EaseMail
7. Click **Verify**

Step 3: Save Backup Codes

IMPORTANT: After enabling 2FA:

1. You'll see 10 backup codes
2. **Save these immediately:**
 - Download as text file
 - Print and store in safe place
 - Add to password manager
3. Each code can be used once
4. Use backup codes if you lose access to 2FA device

Example Backup Codes:

9876 5432
1234 5678
4321 8765
...

5. Check "I have saved my backup codes"
6. Click **Continue**

Step 4: Test 2FA

1. Log out of EaseMail
2. Log back in with email + password
3. You'll be prompted for 2FA code
4. Enter 6-digit code from authenticator app
5. If correct, you're logged in

11.3 Enforcing 2FA for All Users

As an admin, you can require all users to enable 2FA.

Step 1: Navigate to Organization Security

1. Admin → Settings → **Security**
2. Find **Two-Factor Authentication Policy** section

Step 2: Configure Policy

Options:

- ☐ **Recommended** - Users see banner encouraging 2FA
- ☒ **Required** - All users must enable 2FA
- ☐ **Required for Admins Only** - Only admin/owner roles need 2FA

Grace Period:

- Immediate (users must set up 2FA on next login)
- 7 days
- 30 days
- 90 days

Enforcement:

- Users without 2FA cannot access account after grace period

Step 3: Notify Users

1. Check "Send notification to all users"
2. Customize message (optional)
3. Click **Save Policy**

What Happens:

- All users receive email notification
- Banner appears in app for users without 2FA
- After grace period, users are forced to set up 2FA before accessing account

Monitoring 2FA Adoption:

1. Admin → Users
2. Click **Filter** → **2FA Disabled**
3. See list of users without 2FA
4. Send reminders as needed

Bulk Actions:

- Select multiple users
- Click **Actions** → **Require 2FA Setup**
- Sends email with instructions

11.4 Resetting User 2FA

If a user loses access to their 2FA device, admins can reset it.

To Reset 2FA for a User:

Step 1: Verify User Identity

- Confirm user identity through:
 - Email verification
 - Phone call
 - Knowledge-based questions
 - Video call (for high-security environments)

Step 2: Reset 2FA

1. Admin → Users
2. Find user who needs reset
3. Click **Actions** (:) → **Reset 2FA**
4. Confirm action
5. Enter reason for audit log

What Happens:

- User's 2FA is disabled
- User receives email notification
- User can log in with password only
- User is prompted to set up 2FA again

Security Note: Always verify user identity before resetting 2FA. This is a common social engineering attack vector.

11.5 Security Best Practices

For Admins:

- ☒ Enable 2FA on your own account
- ☒ Use authenticator app (not SMS)
- ☒ Save backup codes in secure location
- ☒ Use strong, unique password
- ☒ Review audit logs weekly
- ☒ Monitor failed login attempts
- ☒ Keep email addresses up to date
- ☒ Log out from public/shared computers

For Organization:

- ☒ Enforce 2FA for all users
- ☒ Set password expiration policy
- ☒ Enable IP allowlist (if applicable)
- ☒ Regular security awareness training
- ☒ Conduct periodic access reviews
- ☒ Monitor third-party integrations
- ☒ Have incident response plan

11.6 Security Incident Response

If you suspect a security breach:

Immediate Actions:

1. Secure Admin Accounts:

- Change admin passwords immediately
- Reset 2FA

- Revoke all API keys
- Log out all sessions

2. Investigate:

- Check audit logs for unusual activity
- Review recent user additions/deletions
- Check API usage for anomalies
- Review email send logs

3. Contain:

- Suspend affected user accounts
- Revoke compromised integrations
- Block suspicious IP addresses
- Reset all user sessions

4. Notify:

- Inform affected users
- Contact support@easemail.app
- Report to security team
- Document incident

5. Recover:

- Restore from backup if needed
- Reset passwords for all users
- Re-enable accounts with new credentials
- Update security policies

Contacting Support for Security Issues:

Email: security@easemail.app **Subject Line:** [URGENT SECURITY] Brief description **Include:**

- Organization name
- Admin contact email
- Description of incident
- Timeline of events
- Actions taken so far

Response Time: Critical security issues receive priority response within 1 hour during business hours.

12. Templates & Automation

12.1 Email Templates

What Are Templates?

Templates are pre-written email content that can be reused for common scenarios:

- Welcome emails
- Follow-ups
- Meeting requests
- Customer support responses
- Status updates

Viewing Organization Templates:

Step 1: Navigate to Templates

1. Admin → Settings → **Templates** OR
2. In email composer → **Templates** dropdown

Step 2: Browse Templates

Templates are organized by category:

- **Sales** - Prospecting, follow-ups, proposals
- **Support** - Common issues, FAQs, escalations
- **Internal** - Team communications, announcements
- **Marketing** - Campaigns, newsletters
- **Personal** - Signatures, out-of-office

12.2 Creating Templates

Step 1: Open Template Creator

1. Navigate to Templates page
2. Click **Create Template** button

Step 2: Fill in Template Details

Basic Information:

- **Template Name:** Internal identifier (e.g., "Welcome Email - New Customer")
- **Display Name:** What users see in dropdown
- **Category:** Select or create new category
- **Visibility:**
 - Organization (all users can use)
 - Team (specific team only)
 - Personal (creator only)

Template Content:

- **Subject Line:** Email subject (supports variables)
- **Body:** Email content (supports HTML and variables)

Variables:

Use double curly braces for dynamic content:

- `{{user.name}}` - Current user's name
- `{{user.email}}` - Current user's email
- `{{recipient.name}}` - Recipient's name
- `{{recipient.company}}` - Recipient's company
- `{{date}}` - Current date
- `{{time}}` - Current time
- `{{custom.field}}` - Custom fields

Example Template:

Subject: Welcome to `{{recipient.company}}`, `{{recipient.name}}`!

Hi `{{recipient.name}}`,

Thanks for signing up! I'm {{user.name}} from the team, and I'll be your main point of contact.

To get started:

1. Complete your profile
2. Connect your first email account
3. Explore our features

Let me know if you have any questions!

Best regards,
{{user.name}}
{{user.title}}
{{user.company}}

Step 3: Add Attachments (Optional)

1. Click **Add Attachments**
2. Upload files (max 5 MB each)
3. Attachments included when template is used

Step 4: Set Options

Advanced Options:

- **Tags:** Keywords for searching
- **Track Opens:** Track if recipient opened email
- **Track Clicks:** Track link clicks
- **Auto-Follow-Up:** Send follow-up if no reply in X days
- **Scheduling:** Default to send immediately or schedule

Step 5: Save Template

1. Click **Preview** to see how it looks
2. Test with sample data
3. Click **Save Template**
4. Template now available to authorized users

12.3 Managing Templates

Editing Templates:

1. Templates → Find template
2. Click **Edit**
3. Make changes
4. Click **Update Template**

Version History: Enterprise plans track template versions. You can revert to previous version if needed.

Duplicating Templates:

1. Find template
2. Click **Actions** (?) → **Duplicate**
3. Edit duplicated version
4. Save as new template

Deleting Templates:

1. Find template
2. Click **Actions** → **Delete**
3. Confirm deletion

Warning: Deleting templates does not affect emails already sent using them.

Organizing Templates:

Categories:

- Create custom categories
- Drag-and-drop to reorder
- Assign colors for visual organization

Permissions:

- Set which roles can use each template
- Restrict sensitive templates to admins
- Allow users to create personal templates

12.4 Canned Responses

Canned responses are quick, short snippets inserted into emails (vs. full templates).

Creating Canned Response:

1. Templates → **Canned Responses** tab
2. Click **Add Response**
3. Enter:
 - **Trigger:** Shortcut text (e.g., `/thanks` , `/sig` , `/meeting`)
 - **Content:** Text to insert
4. Save

Using Canned Response:

1. While composing email
2. Type trigger (e.g., `/thanks`)
3. Text auto-expands to full response

Example Canned Responses:

Trigger	Content
<code>/thanks</code>	Thank you for reaching out! I'll get back to you within 24 hours.
<code>/meeting</code>	Would you be available for a 30-minute call next week?
<code>/sig</code>	Best regards, John Doe Support Team

12.5 Automated Workflows (Enterprise)

What Are Workflows?

Workflows automate repetitive email tasks based on triggers and conditions.

Example Use Cases:

- Auto-reply to specific senders
- Forward emails to team members based on keywords
- Schedule follow-up emails
- Tag and categorize incoming emails
- Create tasks from emails

Creating a Workflow:

Step 1: Define Trigger

What event starts the workflow?

- New email received
- Email sent
- Specific sender/recipient
- Keyword in subject/body
- Time-based (daily, weekly)

Step 2: Set Conditions

Filter when workflow runs:

- From specific domain (e.g., @client.com)
- Contains keywords
- Has attachments
- Marked as priority
- Time of day/day of week

Step 3: Define Actions

What happens when conditions are met?

- Send auto-reply
- Forward to user/team
- Apply label/tag
- Move to folder
- Create task/reminder
- Send to external webhook

Step 4: Test & Activate

1. Test with sample emails
2. Review results
3. Activate workflow

Example Workflow:

```
Trigger: Email received
Conditions:
- From: *@support.com
- Subject contains: "urgent" OR "emergency"
Actions:
- Forward to: support-team@company.com
- Send SMS notification to: On-call engineer
- Add label: "Priority"
```

13. Advanced Features

13.1 AI Features

AI Remix

What It Does: Rewrites your email in different tones while preserving meaning.

How to Use:

1. Compose an email
2. Click **AI Remix** button
3. Select tone:
 - Professional
 - Friendly
 - Brief
 - Detailed
4. AI generates rewritten version
5. Review and edit
6. Click **Use This Version** or **Remix Again**

Tips:

- Works best with 50-300 words
- Review for accuracy (AI may misunderstand context)
- Your original draft is never lost

AI Dictate

What It Does: Converts voice to text for email composition.

How to Use:

1. Click **AI Dictate** button (microphone icon)
2. Allow microphone access (browser prompt)
3. Speak your message clearly
4. Click **Stop** when done
5. Text appears in composer
6. Edit as needed

Tips:

- Speak in full sentences
- Include punctuation verbally ("comma", "period", "question mark")
- Works best in quiet environment
- Supports 50+ languages

Smart Replies

What It Does: Suggests quick reply options based on email content.

How to Use:

1. Open an email
2. View 3 AI-generated reply suggestions below email
3. Click on suggestion to use

4. Edit reply if needed
5. Send

Examples:

Email received: "Can we schedule a call next week?"

Smart Replies:

- "Sure! Tuesday at 2pm works for me. Does that work for you?"
- "I'd love to. Could you send over some times that work?"
- "Absolutely. I'll send you my calendar link."

13.2 Email Categorization

What It Does: Automatically sorts emails into categories using AI.

Categories:

- **People:** Direct conversations, personal emails
- **Newsletters:** Marketing emails, subscriptions
- **Notifications:** Alerts, receipts, automated messages

How to Enable:

1. Settings → Features → **Email Categorization**
2. Toggle **Enable Auto-Categorization**
3. Click **Categorize Existing Emails** (processes past 30 days)
4. Wait for completion (1-5 minutes)

How to Use:

1. In inbox, click category tabs at top
2. View filtered emails
3. Move emails between categories if needed
4. AI learns from your corrections

13.3 Scheduled Sending

What It Does: Schedule emails to send at specific time.

How to Use:

1. Compose email
2. Click **Schedule** button (clock icon next to Send)
3. Choose option:
 - Send in 1 hour
 - Send tomorrow at 9am
 - Custom date and time
4. Select time zone (if sending to different zone)
5. Click **Schedule**
6. Email queued for sending

Managing Scheduled Emails:

1. Navigate to **Scheduled** folder in sidebar
2. View all pending scheduled emails

3. Edit, reschedule, or cancel before send time

Tips:

- Schedule for optimal recipient time zones
- Use for follow-ups after meetings
- Queue emails to send during business hours

13.4 Email Snooze

What It Does: Temporarily removes email from inbox, returns at specified time.

How to Use:

1. Select email(s) in inbox
2. Click **Snooze** button
3. Choose duration:
 - Later today (4pm)
 - Tomorrow (9am)
 - This weekend (Saturday 9am)
 - Next week (Monday 9am)
 - Custom date/time
4. Email disappears from inbox
5. Returns at specified time as "unread"

Viewing Snoozed Emails:

1. Click **Snoozed** in sidebar
2. See all snoozed emails with return times
3. Un-snooze early if needed

Use Cases:

- "Reply to this after meeting"
- "Review this proposal next week"
- "Follow up if no reply by Friday"

13.5 Email Signatures

Creating Signature:

1. Settings → **Email Signatures**
2. Click **Create Signature**
3. Enter signature name
4. Design signature:

Simple Text:

Best regards,
John Doe
Sales Manager
Acme Corp
john.doe@acmecorp.com
(555) 123-4567

HTML Signature:

```

<div style="font-family: Arial, sans-serif;">
  <p><strong>John Doe</strong><br>
  Sales Manager<br>
  Acme Corp</p>

  <p>
    ✉ john.doe@acmecorp.com<br>
    📠 (555) 123-4567<br>
    🌐 <a href="https://acmecorp.com">acmecorp.com</a>
  </p>

  <p><em>Making business easier, one email at a time.</em></p>
</div>

```

5. Preview signature
6. Set as default (optional)
7. Save

Variables in Signatures:

- `{{name}}` - Your name
- `{{title}}` - Your job title
- `{{company}}` - Company name
- `{{phone}}` - Phone number
- `{{email}}` - Email address

Using Signatures:

- Auto-inserted in new emails (if set as default)
- Choose signature from dropdown in composer
- Different signatures for different accounts

13.6 Spam Filtering

EaseMail 26 includes advanced spam filtering.

How It Works:

Automatic Filtering:

- Known spam domains blocked
- Suspicious patterns detected
- Machine learning adapts to your preferences

User Training:

- Mark emails as spam → System learns
- Mark as "Not Spam" → System learns
- Over time, accuracy improves

Configuring Spam Filter:

1. Settings → Security → **Spam Filter**
2. Adjust sensitivity:
 - **Low:** Catches obvious spam only
 - **Medium:** (Recommended) Balanced

- **High:** Aggressive, may have false positives
3. Configure actions:
 - Move to Spam folder
 - Delete immediately
 - Tag as spam (but leave in inbox)
 4. Whitelist/Blacklist:
 - Whitelist: Never mark these as spam
 - Blacklist: Always mark as spam
 5. Save settings

Reviewing Spam:

1. Click **Spam** folder in sidebar
 2. Review filtered emails
 3. Mark legitimate emails as "Not Spam"
 4. Emails automatically deleted after 30 days
-

14. Troubleshooting

14.1 Common Issues

Issue: "Cannot Connect Email Account"

Symptoms:

- OAuth fails
- Error: "Authentication failed"
- Redirected back to EaseMail without connecting

Solutions:

For Gmail/Google:

1. Ensure "Allow less secure apps" is OFF (should use OAuth)
2. Check Google Admin Console:
 - Apps → Google Workspace Marketplace → Configure third-party apps
 - Ensure EaseMail is allowed
3. Try incognito/private browser window
4. Clear browser cache and cookies
5. Disable browser extensions temporarily

For Outlook/Office 365:

1. Check Microsoft 365 Admin Center:
 - Settings → Org settings → Services → Office 365 on the web
 - Ensure third-party apps allowed
2. Verify user has Exchange Online license
3. Check conditional access policies
4. Try different browser

For Custom SMTP/IMAP:

1. Verify server addresses and ports
2. Confirm SSL/TLS settings

3. Test credentials in email client (Thunderbird, Apple Mail)
 4. Check firewall rules
 5. Contact email provider
-

Issue: "Emails Not Syncing"

Symptoms:

- New emails not appearing
- Old emails missing
- Sync stopped days ago

Solutions:

1. Check Connection Status:

- Settings → Email Accounts
- Look for red/yellow status indicators
- Click "Reconnect" if needed

2. Force Sync:

- Click Refresh button in inbox
- Or Settings → Email Account → **Force Sync**

3. Check Sync Settings:

- Settings → Email → **Sync Settings**
- Ensure "Sync all folders" is enabled
- Verify sync frequency

4. Check Provider Status:

- Visit Gmail/Outlook status pages
- Verify provider is not having outages

5. Review Quotas:

- Check if you've hit API rate limits
 - Wait a few hours and retry
-

Issue: "Cannot Send Emails"

Symptoms:

- "Send" button disabled
- Error: "Failed to send"
- Emails stuck in Outbox

Solutions:

1. Check Email Account:

- Verify account is connected
- Check if SMTP authentication is valid
- Reconnect account if needed

2. Check Send Limits:

- May have exceeded daily send limit
- Gmail: 500/day (Gmail), 2,000/day (Workspace)
- Wait until limit resets (midnight UTC)

3. Verify Recipients:

- Ensure valid email addresses
- No typos (e.g., user@gmial.com)
- Remove any bounced addresses

4. Check Attachments:

- Total size under 25 MB
- No dangerous file types
- Files not corrupted

5. Review Spam Score:

- Content may be flagged as spam
- Avoid spam trigger words
- Check SPF/DKIM/DMARC records

Issue: "Slow Performance"

Symptoms:

- Inbox takes long to load
- Composing email is laggy
- Search is slow

Solutions:

1. Browser:

- Clear cache and cookies
- Update to latest browser version
- Disable unnecessary extensions
- Try different browser

2. Internet Connection:

- Check connection speed (speedtest.net)
- Use wired connection if on WiFi
- Restart router/modem

3. Large Mailbox:

- Archive old emails
- Delete large attachments
- Compact folders

4. Background Sync:

- Pause sync temporarily (Settings → Sync → Pause)
- Let initial sync complete
- Resume after

5. System Resources:

- Close other tabs/applications
 - Restart browser
 - Restart computer
-

14.2 Error Messages

"Unauthorized (401)"

Meaning: Your session expired or you don't have permission.

Solution:

- Log out and log back in
 - Clear browser cache
 - If persists, contact admin to verify your account status
-

"Forbidden (403)"

Meaning: You lack permission for this action.

Solution:

- Verify your role (Settings → Profile)
 - Request elevated permissions from admin
 - If admin, check organization settings
-

"Not Found (404)"

Meaning: Resource doesn't exist or was deleted.

Solution:

- Verify URL is correct
 - Resource may have been deleted
 - Refresh page
 - Go back to dashboard and try again
-

"Rate Limit Exceeded (429)"

Meaning: Too many requests in short time.

Solution:

- Wait 5-15 minutes
 - Reduce API call frequency
 - Contact support if hitting limits during normal usage
-

"Server Error (500)"

Meaning: Something went wrong on our end.

Solution:

- Refresh page
- Try again in a few minutes
- If persists, contact support with error details

- Check status.easemail.app for incidents
-

14.3 Getting Help

Self-Service Resources:

Knowledge Base:

- <https://help.easemail.app>
- Searchable articles and guides
- Video tutorials
- FAQs

Community Forum:

- <https://community.easemail.app>
- Ask questions
- Share tips
- Vote on feature requests

Status Page:

- <https://status.easemail.app>
- Real-time system status
- Incident history
- Subscribe for updates

Contacting Support:

Email: support@easemail.app

Response Times:

- Critical issues: 1 hour (business hours)
- High priority: 4 hours
- Normal: 24 hours
- Low priority: 48 hours

When Contacting Support, Include:

- Your organization name
- Admin email address
- Detailed description of issue
- Steps to reproduce
- Screenshots (if applicable)
- Browser and OS version
- Any error messages

Example Support Email:

Subject: [URGENT] Cannot send emails from Outlook account

Organization: Acme Corp

Admin Email: john.doe@acmecorp.com

Issue:

Since yesterday (Feb 2, 2026), I cannot send emails from my Outlook account

(jdoe@outlook.com).

Steps to Reproduce:

1. Compose email
2. Click Send
3. Error: "Failed to send email"

Browser: Chrome 120.0.6099.129 (Windows 11)

Screenshot attached.

I've tried:

- Reconnecting account (still fails)
- Different browser (same error)
- Force sync (works for receiving)

Please advise ASAP as this is blocking my work.

Thanks,
John Doe

15. Frequently Asked Questions

General

Q: What is EaseMail 26? A: EaseMail 26 is a comprehensive email management platform designed for organizations. It provides unified inbox, email automation, AI features, and admin controls.

Q: How is EaseMail different from Gmail/Outlook? A: EaseMail connects to your existing Gmail/Outlook accounts and adds:

- Unified inbox for multiple accounts
- Advanced automation and templates
- AI-powered features (remix, dictate, smart replies)
- Team collaboration features
- Centralized admin controls

Q: Can I use my existing email address? A: Yes! EaseMail connects to your existing email accounts. No need for new email addresses.

Q: Does EaseMail store my emails? A: EaseMail syncs and caches your emails for faster access. All data is encrypted. You can configure retention policies in settings.

Account & Access

Q: How do I reset my password? A: On the login page, click "Forgot Password". Enter your email, and you'll receive a reset link.

Q: Can I change my email address? A: Yes. Settings → Profile → Email. You'll need to verify the new address.

Q: What happens if I lose my 2FA device? A: Use your backup codes to log in. If you don't have them, contact your admin to reset 2FA.

Q: How many email accounts can I connect? A: Depends on your plan:

- Free: 1 account
 - Pro: 3 accounts
 - Business: 5 accounts
 - Enterprise: Unlimited
-

Features & Functionality

Q: Does EaseMail work offline? A: Limited offline support. Recently cached emails are viewable offline. Sending requires internet connection.

Q: Can I use EaseMail on mobile? A: Yes. EaseMail is mobile-responsive. Native iOS/Android apps may be available (check app stores).

Q: Is there an API? A: Yes! Business and Enterprise plans include API access. See Settings → API Keys for documentation.

Q: Can I import my existing emails? A: Yes. When you connect an email account, EaseMail automatically syncs your existing emails.

Q: How do I export my data? A: Settings → Data → Export. Choose format (MBOX, PST, EML) and click Request Export.

Billing & Plans

Q: Can I try before buying? A: Contact support for trial options or demo accounts.

Q: Can I change my plan anytime? A: Yes. Upgrades are immediate. Downgrades take effect at end of current billing period.

Q: Do you offer refunds? A: 30-day money-back guarantee for new subscriptions. See terms of service for details.

Q: What happens if my payment fails? A: We'll retry 3 times over 10 days. If all fail, your account is suspended. Update payment method to reactivate.

Q: Do you offer annual billing discounts? A: Yes! Annual billing is ~17% cheaper (10 months for the price of 12).

Security & Privacy

Q: Is my data secure? A: Yes. We use:

- TLS 1.3 encryption in transit
- AES-256 encryption at rest
- Regular security audits
- SOC 2 Type II certified (Enterprise)

Q: Who can see my emails? A: Only you and admins with explicit permissions. EaseMail staff cannot access your emails without your permission.

Q: Do you sell my data? A: Never. We don't sell, share, or monetize your email data. See our Privacy Policy.

Q: Is EaseMail GDPR compliant? A: Yes. We're fully GDPR compliant. See Settings → Privacy for data processing agreements.

Q: What happens to my data if I cancel? A: Data is retained for 30 days for recovery, then permanently deleted. You can export before cancelling.

Admin-Specific

Q: How do I add new users? A: Admin → Users → Add User. Enter email and role, click Send Invitation.

Q: Can I bulk import users? A: Yes. Admin → Users → Import Users. Upload CSV with columns: email, name, role.

Q: How do I remove a user? A: Admin → Users → Find user → Actions → Delete User. Confirm deletion.

Q: Can I set user permissions? A: Yes. Three roles: Owner, Admin, Member. Enterprise plans support custom roles.

Q: How do I monitor user activity? A: Admin → Analytics or Admin → Users → [User] → Activity Log.

Technical

Q: What browsers are supported? A: Chrome 90+, Firefox 88+, Safari 14+, Edge 90+. Chrome recommended.

Q: What email providers are supported? A: Gmail, Google Workspace, Outlook, Office 365, Exchange, any custom SMTP/IMAP.

Q: Is there a file size limit for attachments? A: 25 MB per file (Nylas/provider limit). Check your plan for storage limits.

Q: Can I integrate with other tools? A: Yes. EaseMail integrates with:

- Zapier
 - Slack
 - Salesforce
 - HubSpot
 - Custom integrations via API
-

16. Support & Resources

16.1 Getting Help

Email Support:

- Email: support@easemail.app
- Response time: Within 24 hours (business days)
- For urgent issues, include [URGENT] in subject line

Help Center:

- <https://help.easemail.app>
- Searchable knowledge base
- Video tutorials
- Step-by-step guides

Community Forum:

- <https://community.easemail.app>
- Ask questions
- Share tips and tricks

- Connect with other admins

Status Page:

- <https://status.easemail.app>
- Real-time system status
- Planned maintenance announcements
- Incident history

16.2 Additional Resources

API Documentation:

- <https://docs.easemail.app/api>
- Interactive API explorer
- Code examples (Python, JavaScript, PHP, Ruby)
- Webhook documentation

Video Tutorials:

- <https://youtube.com/@easemailapp>
- Getting started series
- Admin training
- Feature deep-dives

Webinars:

- Monthly live training sessions
- Q&A with product team
- Register: <https://easemail.app/webinars>

Blog:

- <https://blog.easemail.app>
- Product updates
- Email best practices
- Industry news

16.3 Training & Onboarding

Admin Training Program:

- Self-paced online course
- Covers all admin features
- Certificate upon completion
- Free for all plans

Custom Onboarding (Enterprise):

- Dedicated onboarding specialist
- Custom training for your team
- Implementation support
- Included in Enterprise plans

16.4 Feedback & Feature Requests

We love hearing from our users!

Submit Feature Request:

1. Visit <https://feedback.easemail.app>
2. Search existing requests (vote if already submitted)
3. If new, click "Submit Request"
4. Describe feature
5. Explain use case
6. Vote and track progress

Report Bug:

1. Email: bugs@easemail.app
2. Include:
 - Description of bug
 - Steps to reproduce
 - Expected vs. actual behavior
 - Screenshots/video
 - Browser and OS
3. We'll investigate and update you

16.5 Emergency Contacts

Critical Security Issues:

- Email: security@easemail.app
- For: Data breaches, vulnerabilities, unauthorized access
- Response: Within 1 hour

Service Outages:

- Check: <https://status.easemail.app>
- Subscribe for SMS/email alerts
- Follow @EaseMailStatus on Twitter

Abuse Reports:

- Email: abuse@easemail.app
 - For: Spam, phishing, policy violations
-

Appendix A: Keyboard Shortcuts

Global Shortcuts

Action	Windows/Linux	Mac
Compose new email	c	c
Search	/ OR Ctrl+F	/ OR Cmd+F
Go to inbox	g then i	g then i
Go to sent	g then s	g then s
Refresh	R	R
Settings	Ctrl+,	Cmd+,

Email Actions

Action	Shortcut
Reply	R
Reply all	A
Forward	F
Archive	E
Delete	Shift+3 OR #
Mark as read/unread	Shift+U
Star/Unstar	S
Snooze	B

Navigation

Action	Shortcut
Next email	J OR ↓
Previous email	K OR ↑
Open email	Enter
Back to list	Esc
Select email	X
Select all	Ctrl+A / Cmd+A

Appendix B: Glossary

2FA (Two-Factor Authentication): Security method requiring two forms of verification.

API (Application Programming Interface): Allows software to communicate with EaseMail programmatically.

Archive: Remove from inbox but keep for future reference.

Attachment: File included with an email.

Canned Response: Pre-written text snippet for quick insertion.

DMARC: Email authentication protocol.

DKIM: Email signing standard for authenticity.

Grant ID: Unique identifier for email account connection (Nylas).

IMAP: Protocol for receiving emails.

OAuth: Secure authentication method (no password sharing).

Proration: Proportional charge/refund when changing plans mid-cycle.

SMTP: Protocol for sending emails.

Snooze: Temporarily hide email, return later.

SPF: Email authentication standard.

Template: Reusable email content.

Thread: Related emails grouped together.

Webhook: Automated message sent to external URL when event occurs.

Whitelist: List of approved senders/domains.

Appendix C: System Limits

Email Limits

Limit	Free	Pro	Business	Enterprise
Emails/day/user	100	1,000	5,000	Custom
Recipients/email	50	100	500	1,000
Attachment size	25 MB	25 MB	25 MB	50 MB
Attachments/email	10	10	20	50

Storage Limits

Limit	Free	Pro	Business	Enterprise
Storage/user	5 GB	25 GB	100 GB	Custom
Email retention	30 days	1 year	Unlimited	Unlimited

API Limits

Limit	Free	Pro	Business	Enterprise
API calls/hour	N/A	1,000	10,000	Custom
Webhooks	N/A	5	20	Unlimited

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