

# EaseMail Organization Administrator Guide

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## Organization Administrator

### Complete User Guide

#### Master Guide for Managing Teams, Members, Security & Integrations

Version 2.0

February 2026

For Organization Owners & Administrators

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## Executive Summary

This comprehensive guide provides organization administrators with everything needed to effectively manage teams, monitor activity, ensure security, and integrate EaseMail with your existing systems.

### What You'll Master:

- Complete member and team management
- Advanced security and compliance monitoring
- Real-time webhook integrations
- Analytics and productivity insights
- Billing and subscription administration

### Who Should Read This:

- Organization Owners (OWNER role)
- Organization Administrators (ADMIN role)
- IT Managers implementing EaseMail
- Compliance Officers reviewing audit capabilities

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## 1. Quick Start Guide

### Your First 15 Minutes with EaseMail

#### Step 1: Create Your Organization (3 minutes)

Navigate to:

Login → **Organization** → **“+ New Organization”**

Enter Details:

Organization **Name:** [Your Company **Name**]  
Example: **“Acme Corporation”**

Click: Create

Result: Organization created with FREE plan, you are OWNER

#### Step 2: Invite Your First Team Member (5 minutes)

Click: + Invite Member

Fill In:

Email: colleague@company.com  
Role: ADMIN (**for** your **first** invite)

Click: Send Invite

What Happens:

- Beautiful invitation email sent instantly
- 7-day expiration countdown starts
- Invitation appears in “Pending Invitations”

Email Template Preview:

You're Invited!   
  
Join Acme Corporation  
on EaseMail  
  
Role: ADMIN  
  
[ACCEPT INVITATION]  
  
Expires in 7 days

#### Step 3: Review Dashboard (3 minutes)

Navigate to: Dashboard tab

You'll See:

- Team Overview (members, seats)
- Feature Usage (last 30 days)
- Top Active Users
- Recent Activity feed

Bookmark this page for daily checkins

Step 4: Upgrade Plan (Optional - 4 minutes)

If adding more than 1 person:

Navigate to: Settings → Change Plan

Select:

- **PRO** (5 seats) - \$29/month - Small teams
- **BUSINESS** (10 seats) - \$99/month - Growing teams
- **ENTERPRISE** (50+ seats) - Custom pricing - Large organizations

Confirm billing → Plan upgraded instantly

Next Steps Checklist

Immediate (Today):

- ☐ Wait **for** first member to accept invitation
- ☐ Add 2-3 more key team members
- ☐ Connect your email account
- ☐ Review audit logs

This Week:

- ☐ Invite remaining team members
- ☐ **Set** up webhooks (if integrating)
- ☐ Review analytics features
- ☐ Train team on EaseMail features

This Month:

- ☐ Monitor team activity and adoption
- ☐ Adjust roles as needed
- ☐ Export first analytics report
- ☐ Review security audit logs

2. Roles & Permissions

Role Hierarchy

```
OWNER (Highest Authority)
├──
├── ADMIN (Management Level)
│   ├──
│   └── MEMBER (Standard User)
│       ├──
│       └── VIEWER (Read-Only)
```

Complete Permissions Matrix

Feature	OWNER	ADMIN	MEMBER	VIEWER
<b>Organization</b>				
Rename Organization	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Delete Organization	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Transfer Ownership	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
View Settings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Members</b>				
Invite Members	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Remove Members	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Change Roles	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
View Member List	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Monitoring</b>				
View Dashboard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> (Limited)
View Analytics	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Export Analytics	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
View Audit Logs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Integration</b>				
Create Webhooks	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Manage Webhooks	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
View API Keys	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Billing</b>				
Change Plan	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Update Billing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
View Plan Info	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Email Features</b>				
Send/Receive Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Use AI Features	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Calendar	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

\*ADMIN cannot remove/modify OWNER

Choosing the Right Role

Decision Tree

```
Adding New Member?
├──
├── Do they manage others?
│   ├── YES → ADMIN
│   └── NO → Do they need email features?
│       ├── YES → MEMBER
│       └── NO → VIEWER
```

Role Examples

**OWNER** - CEO, Founder, IT Director

- Full organizational control
- Billing responsibility
- 1 person only

**ADMIN** - Team Leads, HR Manager, IT Admin

- Member management
- Security monitoring
- 2-5 people recommended

**MEMBER** - Regular Employees (80-90% of users)

- Full email features
- No administrative duties
- Most common role

**VIEWER** - External Auditors, Consultants

- Read-only dashboard access
- Temporary access
- Rare use case

3. Organization Settings

Accessing Settings

Settings Overview

BASIC INFORMATION

Organization **Name**  
[Acme Corporation ]

Organization ID  
org\_abc123xyz789 (Read-Only)

Created: January 15, 2026

SUBSCRIPTION

Plan: BUSINESS

Seats: 8 / 10 (80% used)

Monthly: \$99.00

Next Billing: March 1, 2026

[ Change Plan ]

DANGER **ZONE**

[ Transfer Ownership ]

[ **Delete** Organization ]

[ Cancel ] [ Save Changes ]

Renaming Organization

How to Rename:

1. Click in "Organization Name" field
2. Edit name
3. Click "Save Changes"

Result:

- ☒ Name updated everywhere
- ☒ Audit log entry created
- ☒ Webhooks fired (if configured)
- ⚠ Organization ID stays the same

Transfer Ownership

⚠ **CRITICAL:** This action is permanent and changes your role to ADMIN.

Requirements:

- You must be OWNER
- Organization must have 2+ members
- New owner must already be a member

Steps:

1. Settings → Transfer Ownership
2. Select new owner from dropdown
3. Type "TRANSFER" to confirm
4. Click Transfer button

What Happens:

- New owner receives OWNER role
- Your role changes to ADMIN
- Billing transferred to new owner
- Audit log records change
- **Cannot be undone** (new owner must transfer back)

Delete Organization

⚠ **EXTREME CAUTION:** This permanently deletes everything.

What Gets Deleted:

- ✖ All member access
- ✖ All organization data
- ✖ All audit logs
- ✖ All webhooks
- ✖ All billing history
- ✖ **CANNOT BE RECOVERED**

Alternatives to Consider:

1. **Downgrade to FREE** - Keep data, stop paying
2. **Remove all members** - Disable without deleting
3. **Transfer ownership** - Hand off to someone else

Deletion Steps:

1. Settings → Delete Organization
2. Read all warnings carefully
3. Type exact organization name
4. Check all confirmation boxes
5. Type "DELETE FOREVER"
6. Click Delete button

Result: Organization and all data permanently erased.

4. Member Management

Viewing Members

Member List Layout

Members (8) [+ Invite Member]

Seats: 8 / 10  80%

CURRENT MEMBERS

Email	Role	Joined	Actions
sarah@acme.com	OWNER	Jan 15	[...]
john@acme.com	ADMIN	Jan 16	[Edit]
alice@acme.com	MEMBER	Jan 18	[Edit]
bob@acme.com	MEMBER	Jan 19	[Edit]

PENDING INVITATIONS (2)

carol@acme.com	MEMBER	Feb 1	[Resend]
dave@acme.com	ADMIN	Feb 2	[Resend]

Changing Member Roles

Steps:

1. Find member in list
2. Click "Edit" button
3. Select new role from dropdown

**Example:**

```
Result:
☒ Alice can now manage members
☒ Alice can access audit logs
☒ Audit log entry created
```

**Steps:**

1. Find member in list
2. Click "Remove" button
3. Type "REMOVE" to confirm
4. Click Remove button

- Member loses organization access
- Seat freed (seats used decrements)
- Personal EaseMail account remains active
- Can be re-invited later

- Cannot remove OWNER (use transfer first)
- Cannot remove yourself if sole OWNER
- ADMIN cannot remove OWNER

```
SEND INVITE
  ↓
Email Sent (Beautiful HTML template)
  ↓
Recipient Clicks Link
  ↓
Accept Invitation
  ↓
MEMBER ADDED
```

1. Click+ Invite Member
2. Enter email address
3. Select role (ADMIN/MEMBER/VIEWER)
4. Click "Send Invite"

- Secure token generated
- Expires in 7 days
- Email sent immediately
- Counts toward seat limit

```
You're Invited!

[Inviter] has invited you to
join [Organization].

Role: [ADMIN/MEMBER/VIEWER]

[ACCEPT INVITATION]

Expires: February 11, 2026
```

- Pending Invitations → Find invite → Resend
- Extends expiration by 7 days
- Same invitation token

- Pending Invitations → Find invite → Revoke
- Invitation link becomes invalid
- Frees up seat

1. Check spam/junk folder (80% of cases)
2. Verify email address spelling
3. Resend invitation
4. Ask recipient to whitelist @easemail.com

1. Remove inactive member (frees seat)
2. Revoke pending invitation (frees seat)
3. Upgrade plan (immediate availability)

- Resend existing invitation
- OR revoke and send new invite
- OR wait 7 days for expiration

### Dashboard Layout

TEAM OVERVIEW
Members: 8   Seats: 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
RECENT ACTIVITY
sarah sent email · 2 min ago
john created event · 15 min ago
alice used AI · 1 hour ago

Advanced Analytics

Organization → [Select Org] → Analytics

Time Period Selection:

- Last 7 days (weekly overview)
- Last 30 days (monthly trends)
- Last 60 days (quarterly comparison)
- Last 90 days (full quarter)

Key Metrics:

Total Actions:	3,248
Active Users:	8
Avg Daily:	108 actions/day
Growth Rate:	+12.5%

Charts Available:

- Activity Over Time (line chart)
- Feature Usage Distribution (pie chart)
- Feature Comparison (bar chart)

Export Data:

- Click "Export CSV"
- Opens in Excel/Google Sheets
- Includes all time-series data

7. Audit Logs & Security

What Are Audit Logs?

Audit logs are a complete, chronological record of all actions in your organization. Essential for:

- Security - Detect unauthorized access
- Compliance - Meet SOC 2, GDPR, HIPAA requirements
- Troubleshooting - Identify when issues occurred
- Accountability - Track who did what and when

Accessing Audit Logs

Organization → [Select Org] → Audit Logs

Requirements: OWNER or ADMIN role only

Audit Log View

Audit Logs

Search: [   ]   Filter: [All Actions ▼]  
[ Export CSV ]

Date	User	Action	Details
Feb 4 9AM	sarah@acme.com	member_added	
Feb 4 8AM	john@acme.com	invite_sent	
Feb 3 4PM	sarah@acme.com	role_changed	
Feb 3 2PM	john@acme.com	member_removed	

Action Types Logged

Member Management:

- member\_added - New member joined
- member\_removed - Member was removed
- member\_role\_changed - Role updated
- invite\_sent - Invitation sent
- invite\_accepted - Invitation accepted

Organization:

- organization\_updated - Settings changed
- transfer\_ownership - Ownership transferred
- plan\_changed - Subscription changed

Integration:

- webhook\_created - Webhook configured
- webhook\_updated - Webhook modified
- webhook\_deleted - Webhook removed

Viewing Log Details

Click "View" on any log entry:

Audit Log Details
Action: member_role_changed
Timestamp: Feb 3, 2026 4:30 PM PST
User: sarah@acme.com
IP Address: 192.168.1.100
Details:
{
"member": "john@acme.com",
"old_role": "MEMBER",
"new_role": "ADMIN"
}
[ Close ]

Filtering and Searching

Search by User:

Search box: john@acme.com  
Result: Shows all actions by john

Filter by Action:

**Filter** dropdown: member\_added  
**Result:** Shows **only member** additions

**Export Logs:**

- Click "Export CSV"
- Save for compliance records
- Import into SIEM tools

**Security Best Practices**

**Review Schedule:**

Weekly (Recommended):  
☐ Review logs every **Monday**  
☐ **Check** for unexpected changes  
☐ Verify all role changes  
☐ Investigate after-hours activity

Monthly:  
☐ **Export** logs for archiving  
☐ Review access patterns  
☐ **Update** security policies

**Red Flags to Watch For:**

- Member additions at unusual hours
- Unexpected role escalations
- Rapid member removals
- Failed access attempts (if logged)

**8. Webhooks Complete Guide**

**What Are Webhooks?**

Webhooks send real-time HTTP notifications to your external systems when events occur in your organization.

**Use Cases:**

- **Slack Notifications** - Alert team when members join
- **CRM Sync** - Auto-create contacts
- **Analytics** - Track events in data warehouse
- **Automation** - Trigger workflows in Zapier/Make

**How Webhooks Work**

Event Occurs in EaseMail  
|  
Webhook Fires  
|  
HTTP POST to Your URL  
|  
Your Server Processes Event  
|  
Returns 200 OK  
|  
Delivery Marked Successful

**Creating a Webhook**

Organization → [Select Org] → Webhooks → Create Webhook

**Form Fields:**

Webhook Name \*  
[Production CRM Sync ]

Endpoint URL \* (HTTPS only)  
[https://api.acme.com/webhook]

Secret Key (recommended)  
[whsec\_abc123... ] [Generate]

Events to Subscribe \*  
☒ member.added  
☒ member.removed  
☒ member.role\_changed  
☐ invite.sent  
☐ organization.updated

[ Cancel ] [ Create Webhook ]

Click: Create Webhook

**Available Events**

Event	When It Fires	Payload Includes
member.added	New member joins	email, role, joined_at
member.removed	Member removed	email, role, removed_by
member.role_changed	Role updated	email, old_role, new_role
invite.sent	Invitation sent	email, role, expires_at
invite.accepted	Invite accepted	email, role, accepted_at
organization.updated	Org settings changed	changed_fields
plan.changed	Plan upgraded/downgraded	old_plan, new_plan, seats
payment.succeeded	Payment processed	amount, plan, period
payment.failed	Payment failed	amount, reason

**Example Webhook Payload**

```
{
  "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"
  }
}
```

**Managing Webhooks**

**Enable/Disable:**

- Toggle switch on webhook card
- Disabled webhooks don't send events
- No data lost (can re-enable anytime)

**Test Webhook:**

- Click "Test" button
- Sends sample payload to your endpoint
- Verifies connectivity
- Shows response status

**Edit Webhook:**

- Click "Edit"
- Change URL, events, or secret
- Save changes

Delete Webhook:

- Click "Delete"
- Type "DELETE" to confirm
- Permanently removes webhook

Webhook Delivery Logs

Webhooks → [Select Webhook] → View Logs

Delivery Status:

- ☒ Success (200-299) - Delivered successfully
- ☒ Failed (400+) - Delivery failed
- ☒ Pending Retry - Scheduled for retry

Retry Logic:

Attempt 1: Immediate  
Attempt 2: 1 minute later  
Attempt 3: 5 minutes later  
Attempt 4: 30 minutes later  
  
After 4 failures: Manual retry required

Manual Retry:

- Find failed delivery in logs
- Click "Retry" button
- Immediate resend attempt

Webhook Security

Best Practices:

1. Always Use HTTPS
  - Never HTTP (insecure)
  - Valid SSL certificate required
2. Verify Signatures
  - Check X-EaseMail-Signature header
  - Use webhook secret key
  - Prevents spoofed webhooks
3. Respond Quickly
  - Return 200 OK within 5 seconds
  - Process asynchronously if needed
4. Validate Payload
  - Check event type is expected
  - Verify organization ID
  - Sanitize all inputs
5. Rate Limiting
  - Implement on your endpoint
  - Prevent abuse

Example Implementation (Node.js)

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

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

const WEBHOOK_SECRET = process.env.EASEMAIL_WEBHOOK_SECRET;

// Verify 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) => {
  // Verify signature
  const signature = req.headers['x-easemail-signature'];
  if (!verifySignature(req.body, signature)) {
    return res.status(401).json({ error: 'Invalid signature' });
  }

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

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

  if (event === 'member.added') {
    await syncMemberToCRM(data.email, data.role);
  }
});

app.listen(3000);
```

9. API Reference

Base URL

Production: <https://easemail-terminal.vercel.app/api>

Authentication

All API requests require authentication via session cookies (handled by browser).

Common Endpoints

Endpoint	Method	Purpose
/api/organizations	GET	List user's organizations
/api/organizations	POST	Create organization
/api/organizations/{id}	GET	Get org details
/api/organizations/{id}	PATCH	Update org
/api/organizations/{id}	DELETE	Delete org
/api/organizations/{id}/members	POST	Invite member
/api/organizations/{id}/members	DELETE	Remove member
/api/organizations/{id}/members/role	PATCH	Change role
/api/organizations/{id}/dashboard	GET	Get dashboard data
/api/organizations/{id}/analytics	GET	Get analytics
/api/organizations/{id}/audit-logs	GET	Get audit logs
/api/organizations/{id}/webhooks	GET/POST	Manage webhooks

Example: Invite Member

Request:

```
POST /api/organizations/org_abc123/members
Content-Type: application/json

{
  "email": "alice@sacme.com",
  "role": "MEMBER"
}
```

Response:

```
{
  "success": true,
  "message": "Invitation sent successfully",
  "invite": {
    "id": "inv_xyz789",
    "email": "alice@sacme.com",
    "role": "MEMBER",
    "expires_at": "2026-02-11T09:30:00Z"
  }
}
```

## 10. Billing & Subscriptions

### Available Plans

Plan	Price/Month	Seats	Features
FREE	\$0	1	Basic email
PRO	\$29	5	Full AI, Priority support
BUSINESS	\$99	10	Webhooks, Audit logs
ENTERPRISE	Custom	50+	Custom integration, SLA

### Viewing Current Plan

Organization → [Select Org] → Settings

Displays:

- Current plan name
- Total seats
- Seats used
- Monthly cost
- Next billing date

### Upgrading/Downgrading

Steps:

1. Settings → "Change Plan"
2. Select new plan
3. Review changes
4. Confirm

Upgrade:

- Immediate seat increase
- Prorated charge for current period

Downgrade:

- Must remove members if over new seat limit
- Effective at end of current billing period

## 11. Troubleshooting

### Common Issues & Solutions

#### Invitation Problems

**Problem:** Recipient didn't receive email

**Solution:**

1. Check spam folder
2. Verify email spelling
3. Resend invitation
4. Ask to whitelist @easemail.com

**Problem:** No seats available

**Solution:**

1. Remove inactive member
2. Revoke pending invitation
3. Upgrade plan

#### Role Issues

**Problem:** Cannot remove OWNER

**Solution:** ADMIN cannot remove OWNER by design. Use Transfer Ownership first.

**Problem:** Cannot change OWNER role

**Solution:** Use Transfer Ownership feature instead.

#### Webhook Issues

**Problem:** Webhook deliveries failing

**Solutions:**

1. Test endpoint with curl
2. Verify HTTPS (not HTTP)
3. Check firewall settings
4. Review server logs
5. Ensure response within 5 seconds

**Problem:** Webhooks not sending

**Solutions:**

1. Check webhook is enabled (not disabled)
2. Verify event subscriptions
3. Confirm events are actually occurring

#### Dashboard Issues

**Problem:** Analytics show zero

**Solutions:**

1. Switch to "Last 7 days" (most recent)
2. Wait for team activity
3. Check Recent Activity feed

**Problem:** Export CSV not working

**Solutions:**

1. Check browser popup blocker
2. Try different browser
3. Clear cache

## Appendix A: Keyboard Shortcuts

Action	Shortcut
Open Search	Ctrl+K (Win) / 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: Glossary

**Audit Log** - Chronological record of all actions in organization

**Invitation** - Secure email link to join organization (7-day expiration)

**Member** - User with organization access

**Organization** - Group of users (like workspace or team)

**Role** - Permission level (OWNER, ADMIN, MEMBER, VIEWER)

**Seat** - Single user slot in organization; each member uses 1 seat

**Token** - Secure random string for invitations and webhooks

**Webhook** - Automated HTTP callback for real-time event notifications

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## Support & Resources

**Help Center:**

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

**Contact Support:**

- Email: [support@easemail.com](mailto:support@easemail.com)
- Response Time: < 24 hours (PRO+)

**System Status:**

- <https://status.easemail.com>

**Community:**

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

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END OF GUIDE