



# Email Management

Create and manage email templates, compose and send emails to contacts, and track delivery status — all from one central hub.

## Key Features

- **Email Templates:** Build reusable templates for invoices, payment reminders, confirmations, and custom messages — dynamic placeholders like `{{client_name}}` fill in automatically at send time
- **Signature Library:** Create professional email signatures and attach them to any template
- **Compose & Send:** Write and send emails with CC, BCC, scheduling, priority, and optional tracking
- **Email Queue:** Monitor emails waiting to be delivered, with options to edit, retry, or cancel
- **Sent History:** Review all emails sent, with options to resend and view tracking data
- **Open & Click Tracking:** See when recipients open your emails or click links
- **Gmail Integration:** Connect your Gmail account via secure OAuth — sent emails appear in your Gmail Sent folder, no password stored
- **SMTP Settings:** Configure a custom mail server with built-in connection testing

## How to Use

### Managing Templates

1. Open **Email Management** — the Templates tab appears by default
2. Click **New Template** to create one, or click the edit icon on an existing template
3. Choose a type: New Invoice, Payment Reminder, Payment Confirmation, Overdue Notice, Welcome Email, or Custom
4. Enter a name, subject, and compose the body using the rich text editor
5. Optionally attach a signature, then set the template to **Active** so it appears in the Compose dropdown
6. Click **Save**

Use **Duplicate** to copy a template — the copy saves as inactive so you can edit before use. ACME Creative Agency, for example, keeps separate Payment Reminder templates for near-due and overdue invoices. Select multiple templates with the checkboxes to **Activate**, **Deactivate**, or **Delete** in bulk.

### Composing an Email

1. Click **Compose Email** at the top of the page
2. Enter recipients in the **To** field; optionally add **CC** and **BCC**
3. Choose a saved template to pre-fill the subject and body, or write your own
4. Set **Priority** (Low, Normal, or High) and toggle **Tracking** to monitor opens and link clicks
5. To send later, check **Schedule for later** and pick a date and time
6. Click **Send** — the email joins the queue and is delivered automatically

### Monitoring the Queue

Click the **Email Queue** tab to see pending, processing, failed, and scheduled emails. Edit a pending message, retry a failed one, or cancel delivery. Select multiple emails to retry, cancel, or delete in bulk.

### Reviewing Sent Emails

Click the **Sent Emails** tab to view your full sending history. From here you can resend any message to the same recipients, check open and click tracking data, or filter by status and priority.

## Email Settings

Click **Settings** to configure four areas:

- **SMTP:** Server credentials and encryption — click **Test Connection** to verify before saving
- **Gmail:** Connect your Google account via OAuth for better deliverability; no password is stored and emails appear in your Gmail Sent folder
- **Tracking:** Enable tracking by default and set a custom tracking domain
- **Default Settings:** From name, reply-to address, and default signature

Click **Signatures** to create or edit your reusable email signatures.

## Tips

- Only active templates appear in the Compose dropdown — keep drafts inactive until they're ready
- Use **Duplicate** to create variations of a template without starting from scratch
- Check the **Email Queue** after sending to confirm your message was accepted for delivery
- Tracking shows the first time a recipient opens your email — helpful for knowing when to follow up
- Gmail integration keeps your sent history in one place and improves inbox deliverability