



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