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
- **Signature Library**: Create professional email signatures and attach them to any template
- **Compose & Send**: Write and send emails directly to contacts with CC, BCC, and scheduling support
- **Email Queue**: Monitor emails waiting to be delivered
- **Sent History**: Review all emails sent, with options to resend or retry failed messages
- **Open & Click Tracking**: See when recipients open your emails or click links
- **Gmail Integration**: Connect your Gmail account as an alternative sending method
- **SMTP Settings**: Configure a custom mail server for outgoing emails

How to Use

Managing Templates

1. Open **Email Management** — the Templates tab is shown by default
2. Click **New Template** to create a template, or click the edit icon on an existing one
3. Choose a template type: New Invoice, Payment Reminder, Payment Confirmation, Overdue Notice, or Custom
4. Enter a name, subject line, and compose the body using the rich text editor
5. Optionally attach a signature and choose whether it appears above or below the message
6. Set the template to **Active** so it can be used when sending emails
7. Click **Save** to store the template

To copy an existing template, use the **Duplicate** action — the copy is saved as inactive so you can edit it before use.

Composing an Email

1. Click **Compose Email** at the top of the page
2. Enter the recipient's address in the To field (separate multiple addresses with commas)
3. Optionally add CC or BCC recipients
4. Choose a saved template from the dropdown to pre-fill the subject and body, or write your own
5. To send later, set a **Schedule** date and time
6. Click **Send** — the email is queued and delivered automatically

Monitoring the Queue

Click the **Email Queue** tab to see emails that are pending or scheduled. Use this to confirm your messages are in line to be delivered.

Reviewing Sent Emails

Click the **Sent Emails** tab to view your sending history. From here you can:

- View the full content of any sent message
- Check open and click tracking data
- **Resend** a message to the same recipients
- **Retry** any email that failed to deliver

Email Settings

Click **Settings** in the Templates toolbar to configure:

- Your sender name and email address
- SMTP server credentials for custom mail delivery
- Gmail OAuth connection for sending via your Google account

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

Tips

- Keep templates active only when they are ready to use — inactive templates won't appear in the Compose dropdown
- Use the **Duplicate** action 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 data shows the first time a recipient opens an email, helping you follow up at the right moment