

AI Emails Management - Userguide

Thank you for purchasing our extension. If you have any questions that are beyond the scope of this document, please feel free to contact us via support@magenest.com

By: Magenest | Support Portal:

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System Overview

AI Email Management is a web application for managing Gmail more efficiently with AI.

The application uses **Gemini 2.0 Flash** to automatically classify emails, generate summaries, and extract action items. It also supports team collaboration through internal notes and lets users create Odoo tasks directly from email conversations.

Key Features

- **Smart Inbox** - display
- **AI Classification** - Gemini evaluates email importance and urgency and generates a one-line summary.
- **Action Items** - AI extracts tasks and follow-up actions from email content.
- **Team Notes** - add internal notes to an email and mention teammates using @.
- **Custom Labels** - organize emails with labels that match the team's workflow.
- **Create Odoo Tasks** - turn an email into an Odoo task with a single action.
- **Newsletter Filtering** - automatically hide unnecessary marketing and digest emails.
- **Admin Panel** - manage users, access the team's inboxes, and review the Audit Log.
- ys emails by thread and automatically refreshes when new messages arrive.

Login

 **AI Email Management**

Đăng nhập
Sử dụng tài khoản Gmail công ty của bạn

 **Đăng nhập bằng Google**

Email

admin@example.com

Mật khẩu

.....

Đăng nhập

[← Quay lại](#)

AI Email Management uses an internal account system. An administrator provides each user with an email address and password.

Login Steps

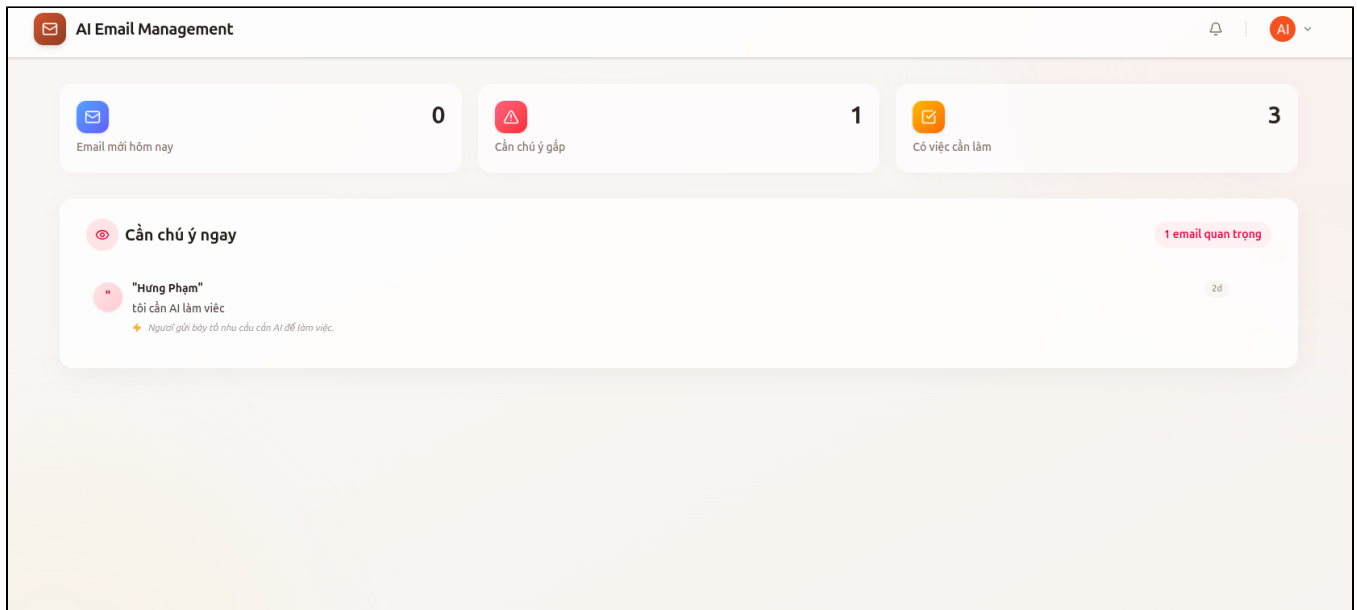
1. Open the application in your browser.
2. Enter the assigned **Email** and **Password**.
3. Click **Log In**.

Note: A login session remains active for **8 hours**. Once the session expires, the application automatically redirects you to the login page.

Change Your Password

1. Click your **avatar/email** in the upper-right corner.
2. Select **Change Password**.
3. Enter your current password and a new password of at least **6 characters**.
4. Click **Save**.

Dashboard



The Dashboard gives you a quick overview of your inbox as soon as you log in.

Dashboard Metrics

Card	Description
Emails Today	Number of emails/threads received today
Needs Attention	Number of threads classified by AI with urgency = critical
Has Action Items	Number of threads with unfinished action items

Top 5 Critical:

The **Top 5 Critical** section shows the five most important emails that need immediate attention.

Each item includes:

- Subject and sender
- Time received
- One-line AI summary
- A link to open the thread details

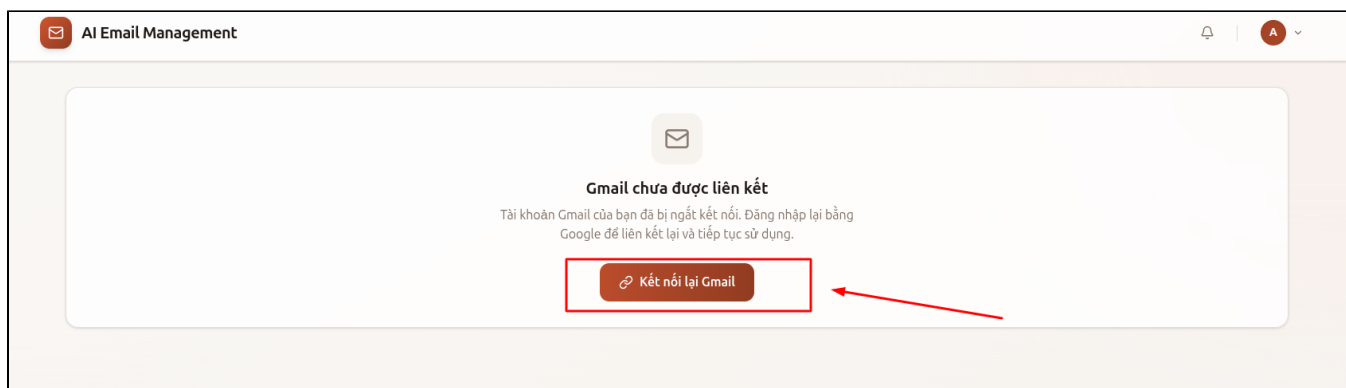
Note: The Dashboard only reflects data that has already been synchronized to the server. If Gmail has not been connected, all metrics will show 0.

Connect Gmail

The application needs permission to read your Gmail messages before it can display them.

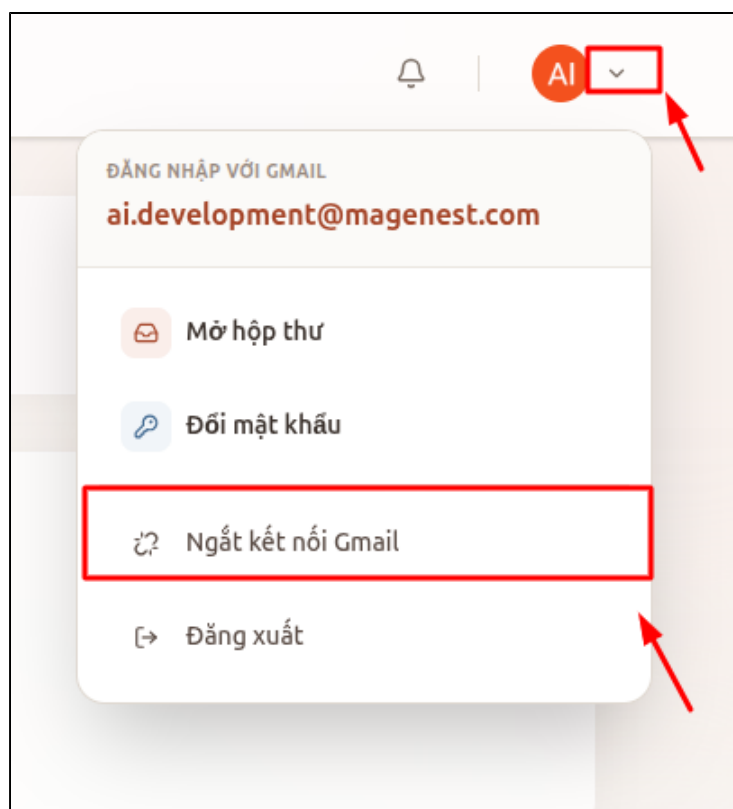
Gmail is connected through **Google OAuth2**, so the application does **not** store your Gmail password.

First-Time Connection



1. From the Dashboard or Inbox, click **Connect Gmail**.
2. Your browser opens the Google account selection page.
3. Select the Gmail account you want to connect.
4. Click **Continue** to grant permission to read email.
5. Google redirects you back to the application, and the Inbox loads automatically.

Disconnect Gmail

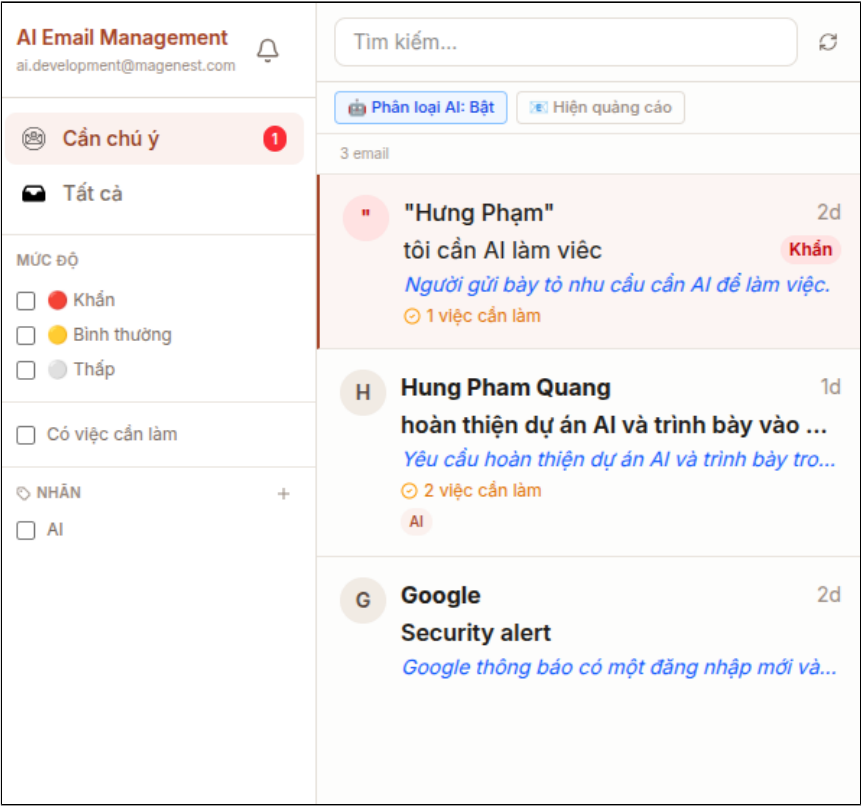


1. Click your **avatar/email** in the upper-right corner.
2. Select **Disconnect Gmail**.
3. Confirm the action in the dialog.

Note: Disconnecting Gmail removes the stored OAuth2 token. Email data already cached in the system remains available until an administrator deletes it. To reconnect Gmail, repeat the first-time connection process.

Inbox

View Email Threads



Emails are displayed by **thread**, so multiple messages with the same conversation topic are grouped into a single row.

The most recent thread appears first.+

Information Shown for Each Thread

Field	Description
Sender	Name/email of the first and most recent sender
Subject	Email subject
Preview	Snippet from the most recent email
Time	Time the most recent email was received
Messages	Total number of messages in the thread
Status Badges	UNREAD, STARRED, IMPORTANT, and custom labels
AI Urgency	critical, normal, or low, assigned by AI
AI Summary	One-line Vietnamese summary when LLM is enabled

Sorting Order

- Threads classified as **Critical** always appear first.
- Within the same urgency level, the most recent email appears first.

Tip: The application checks for new emails every **60 seconds**. When new mail arrives, the list refreshes automatically.

Filter and Search

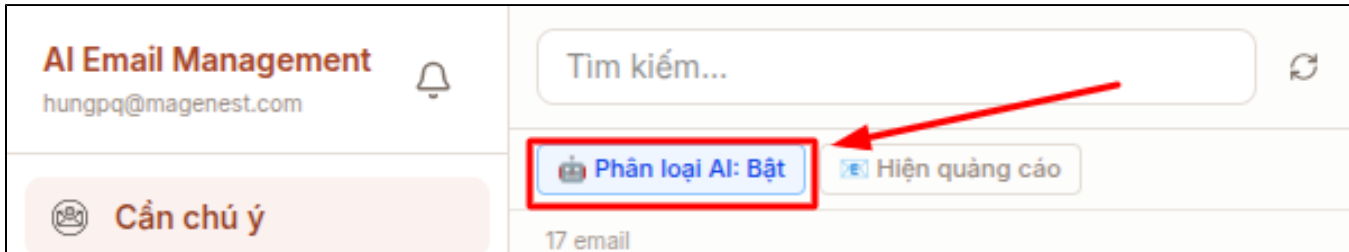
The following filters are available:

Filter	Description	Example
Label	Filter by Gmail label	INBOX, SPAM, SENT

Keyword (q)	Search email subjects and content	quotation, contract
Sender	Filter by email address or domain	client@example.com
Date	Show emails from the most recent N days	7d, 1d

Tip: When a filter is applied, the application searches directly through the Gmail API for the most accurate results.

AI Classification (LLM)



Click **AI: Off** to enable automatic AI classification. The LLM analyzes each thread and returns:

- **Importance:** important / not important
- **Urgency:** critical / normal / low
- **Summary:** a short one-line summary in Vietnamese
- **Action Items:** a list of tasks extracted from the email, described further in Section 6.3

When AI Classifies an Email as Critical

An email may be marked **Critical** when:

- A customer or partner is waiting for a response.
- A deadline, approval, or meeting requires confirmation.
- A production issue or CI/CD failure affects a live system.
- A contract or document needs immediate review.
- An internal email contains information requiring urgent action.

When AI Classifies an Email as Not Important

Examples include:

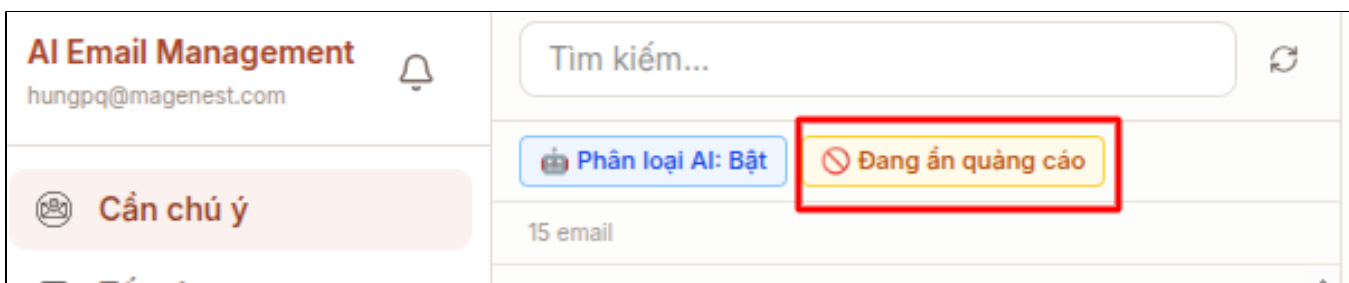
- Newsletters, digests, and promotional emails
- Social media notifications such as likes, stars, or follows
- Automated noreply emails that do not require a response

AI Cache

- AI results are stored in the database so the application does not need to call the model again every time the inbox loads.
- The cache is automatically invalidated when a new message is added to the thread.

Note: The first time LLM classification is enabled, processing may take a few seconds depending on the number of emails. Later loads are faster because cached results are reused.

Hide Promotional Emails

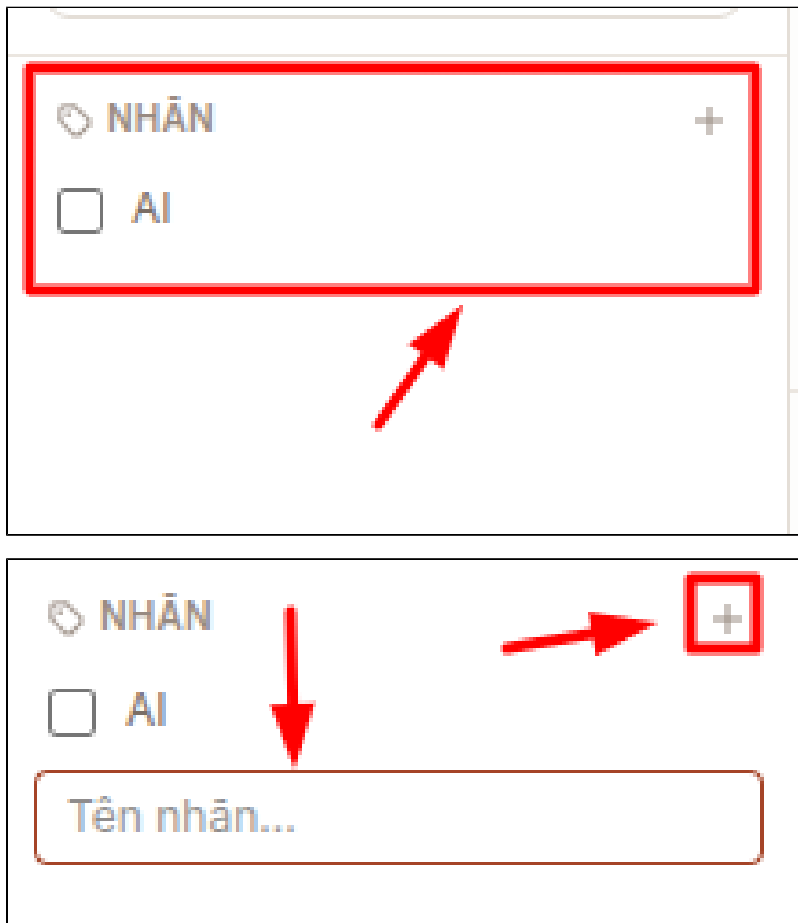


Use the **Promotional Emails: Show/Hide** button to enable or disable the newsletter filter.

When the filter is enabled, emails from the following addresses are automatically hidden:

- Medium:
 - noreply@medium.com
 - digest@medium.com
- LinkedIn:
 - noreply@linkedin.com
- GitHub:
 - noreply@github.com
 - notifications@github.com
- Substack:
 - no-reply@substack.com
 - noreply@substack.com
- Alibaba Cloud:
 - noreply@alibabacloud.com
- Addresses matching:
 - newsletter@*
 - digest@*

Custom Labels



In addition to Gmail system labels such as **INBOX** and **STARRED**, you can create your own labels to organize emails around your team's workflow.

Create a Label

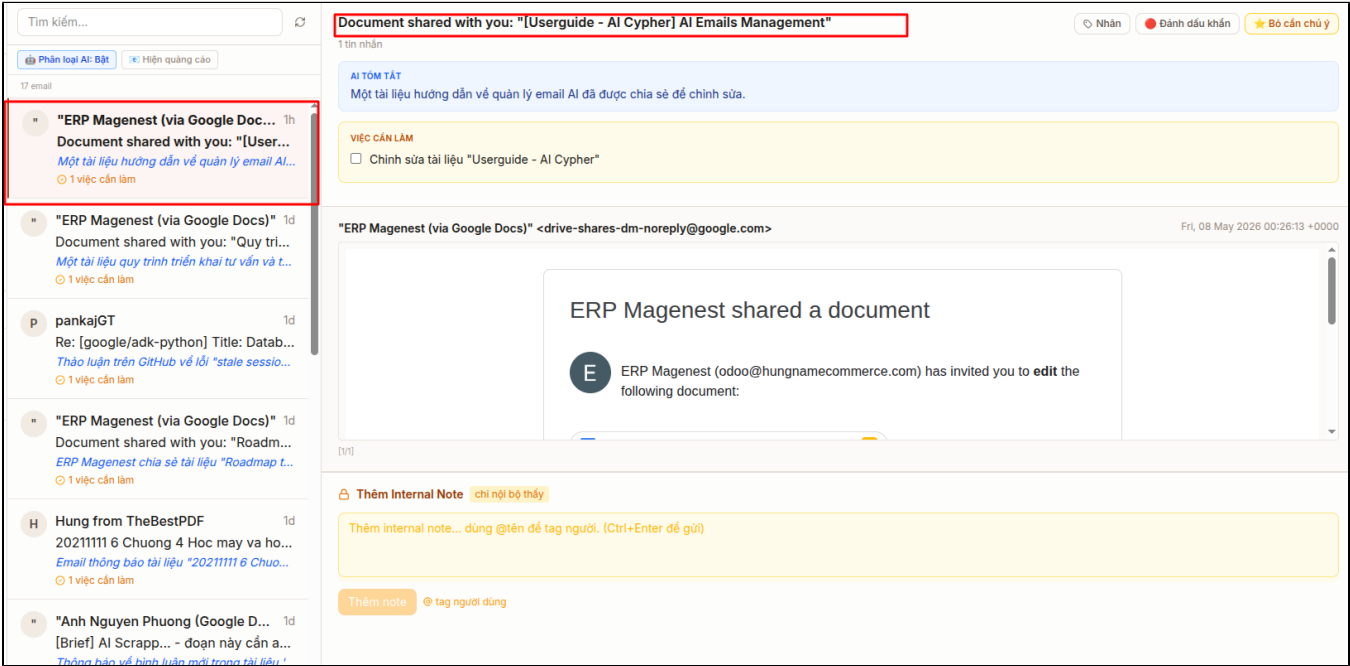
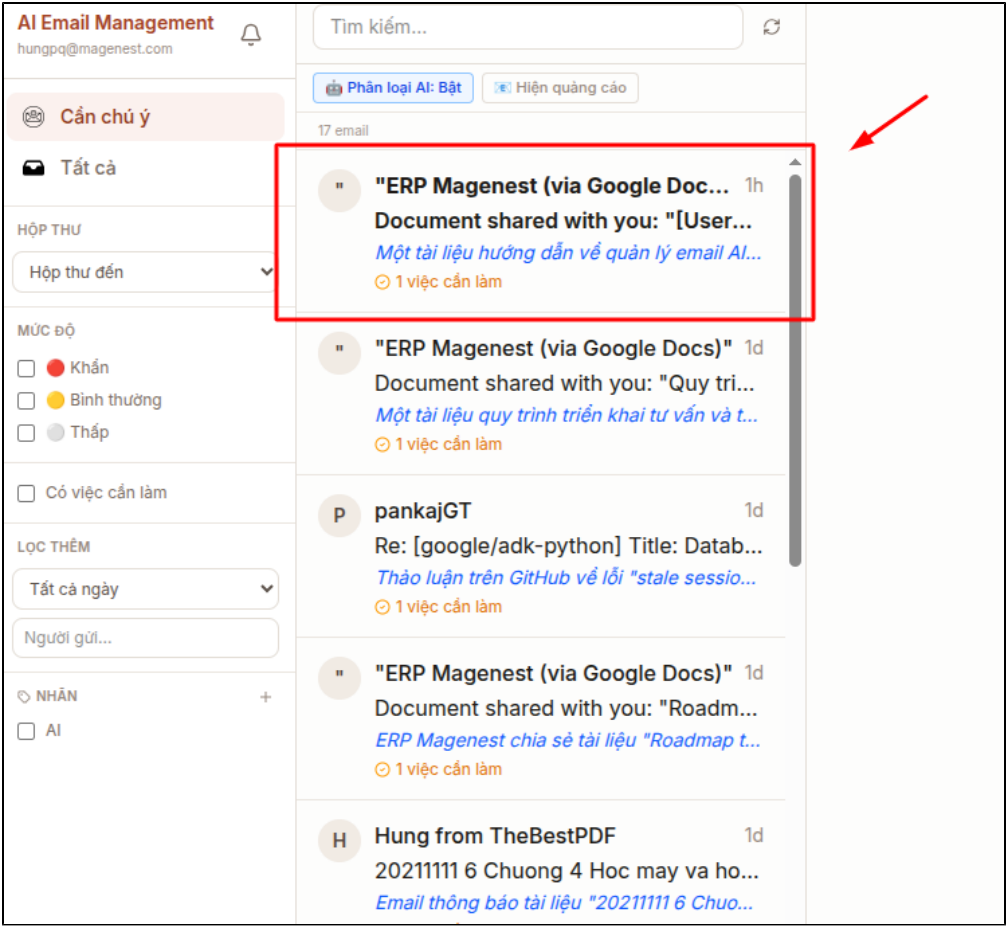
1. Click **Manage Labels** in the sidebar.
2. Enter the label name.
3. Click **Add**.

Add a Label to an Email

1. Open the thread details.
2. Click the **Label** button or tag icon.
3. Select one or more labels.

Note: Custom labels are available only inside AI Email Management. They are not synchronized back to Gmail.

View Email Details



Click any thread in the Inbox to open its details.

Email Content

Tim kiếm...



Phân loại AI: Bật



Hiện quảng cáo

17 email

"

"ERP Magenest (via Google Doc... 1h

Document shared with you: "[User...

Một tài liệu hướng dẫn về quản lý email AI...

🕒 1 việc cần làm

"

"ERP Magenest (via Google Docs)" 1d

Document shared with you: "Quy tri...

Một tài liệu quy trình triển khai tư vấn và t...

🕒 1 việc cần làm

p

pankajGT

1d

Re: [google/adk-python] Title: Datab...

Thảo luận trên GitHub về lỗi "stale sessio...

🕒 1 việc cần làm

"

"ERP Magenest (via Google Docs)" 1d

Document shared with you: "Roadm...

ERP Magenest chia sẻ tài liệu "Roadmap t...

🕒 1 việc cần làm

H

Hung from TheBestPDF

1d

20211111 6 Chuong 4 Hoc may va ho...

Email thông báo tài liệu "20211111 6 Chu...

🕒 1 việc cần làm



The detail page displays every message in the thread in chronological order.

Each message includes:

- Sender and recipients
- Sent time
- Email content in text or HTML format
- Attachments, when available - click an attachment to download it

AI Analysis

Tim kiếm...

Phân loại AI: Bật | Hiện quảng cáo

17 email

"ERP Magenest (via Google Do..." 2h

Document shared with you: "[Userguide - AI Cypher] AI Emails Management"

AI TÓM TẮT

Một tài liệu hướng dẫn về quản lý email AI đã được chia sẻ để chỉnh sửa.

VIỆC CẦN LÀM

☐ Chỉnh sửa tài liệu "Userguide - AI Cypher"

"ERP Magenest (via Google Docs)" <drive-shares-dm-noreply@google.com> Fri, 08 May 2026 00:26:13 +0000

ERP Magenest shared a document

ERP Magenest (odoo@hungrunnamecommerce.com) has invited you to **edit** the following document:

Thêm Internal Note chỉ nội bộ thấy

Thêm internal note... dùng @tên để tag người. (Ctrl+Enter để gửi)

Thêm note @ tag người dùng

The AI panel appears at the top of the thread detail page.

It shows:

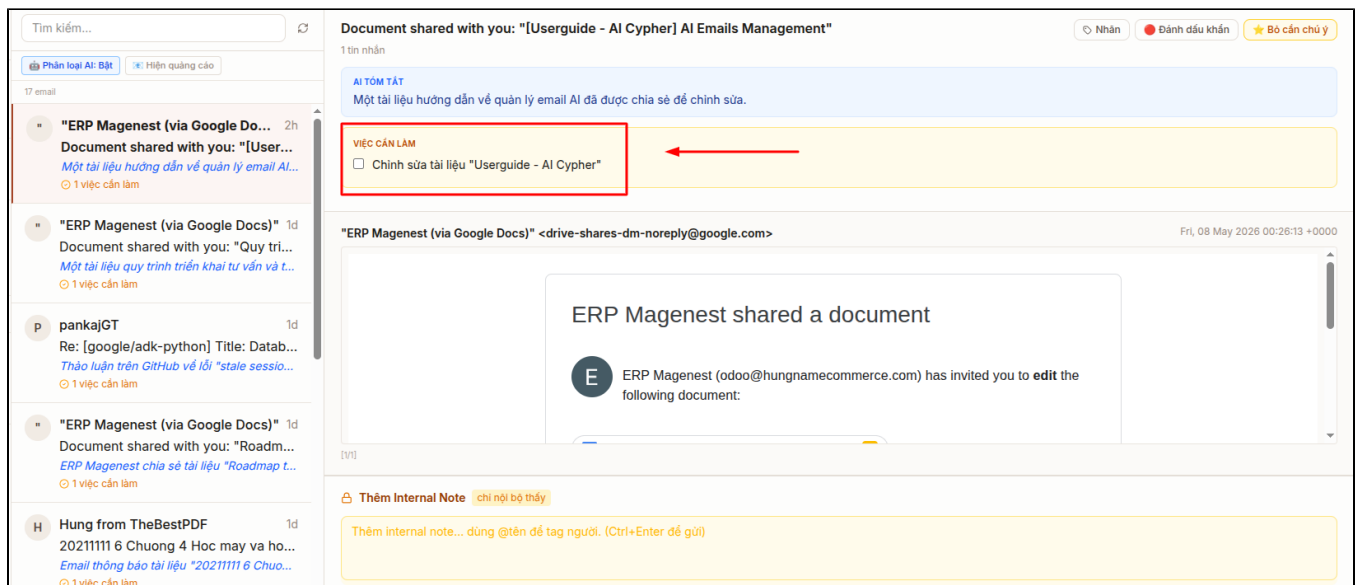
- **Summary:** the main points of the conversation in 1–2 sentences
- **Urgency:** critical / normal / low
- **Reason:** an explanation of why AI assigned that urgency level

Change Urgency Manually

1. Click the urgency badge - critical, normal, or low.
2. Select a different urgency level.

The manual value overrides the AI result and is saved to the database.

Action Items



AI automatically extracts tasks and follow-up actions from the email conversation.

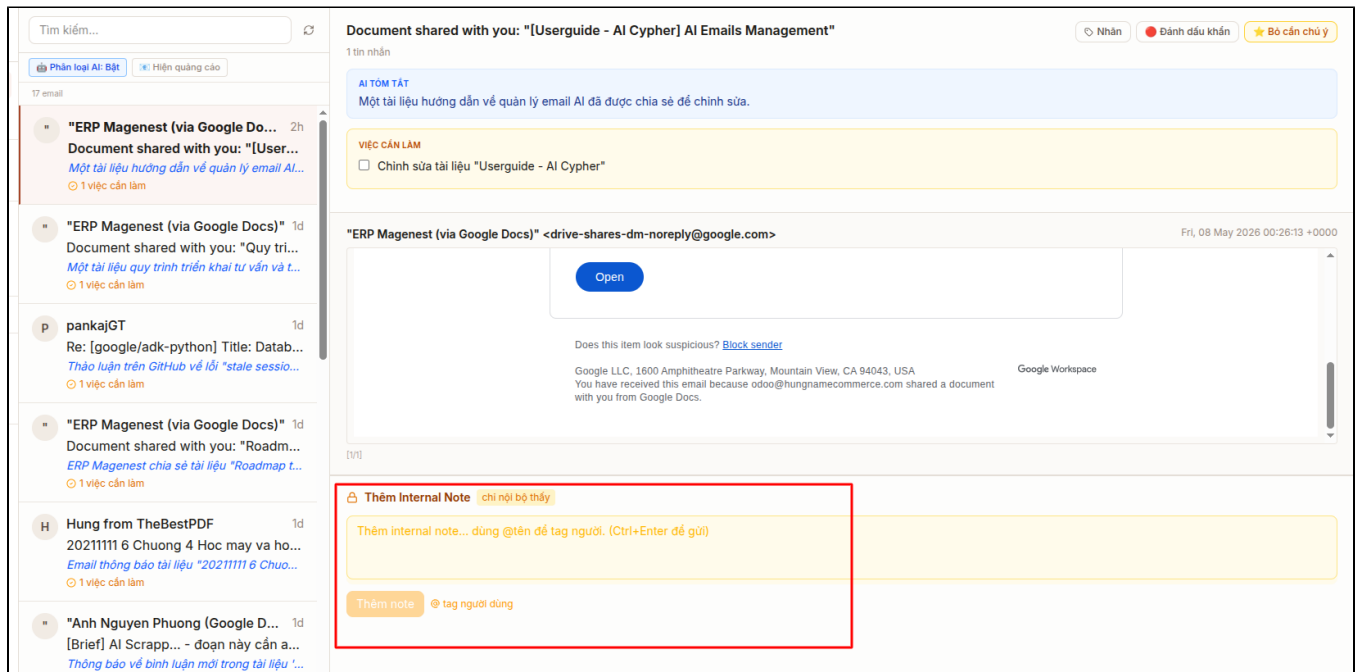
Each action item appears as a checkbox.

Using Action Items

- Select the checkbox when an item has been completed.
- Completed status is saved and visible to all team members.
- The Inbox also shows the number of action items for each thread.

Tip: Action Items are especially useful when several people are following the same email. Each team member can mark the tasks they have already handled.

Internal Notes



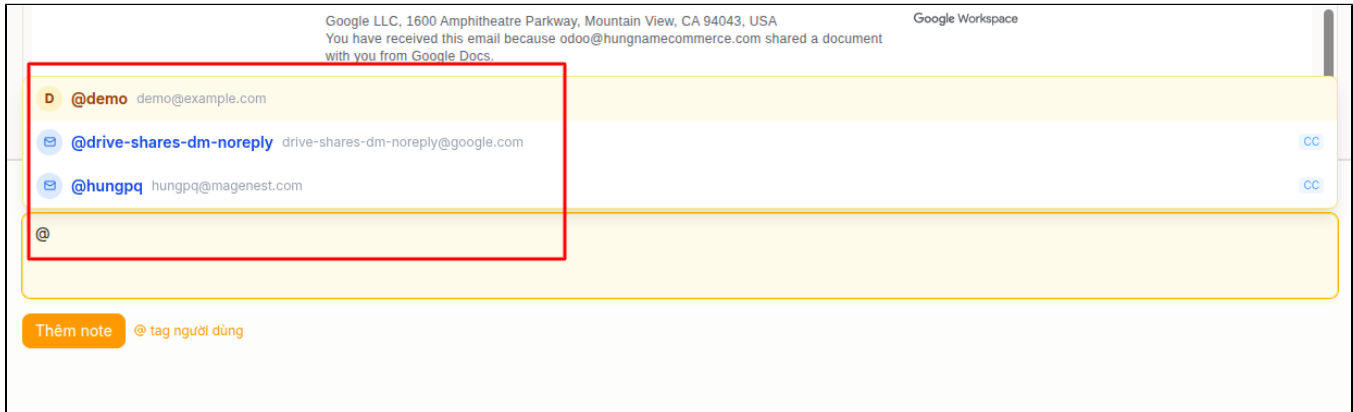
Internal Notes allow team members to discuss an email without sending a reply to the actual mailbox.

Add a Note

1. Scroll to the **Notes** section at the bottom of the detail page.

2. Enter your note.
3. Click **Send** or press **Ctrl + Enter**.

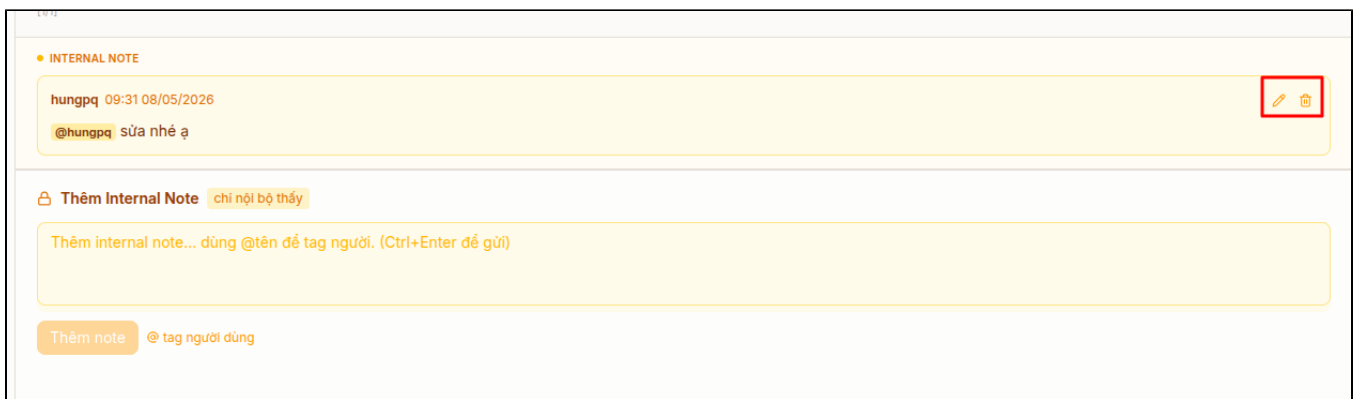
Mention a Teammate



Type @, followed by the user's username - the part before @ in their email address.

Example: @hungpq mentions the user with: hungpq@magenest.com. The mentioned user receives an instant notification.

Edit or Delete a Note



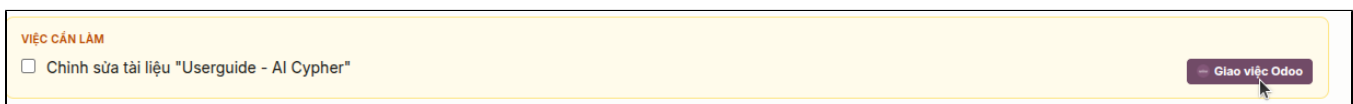
- Click **Edit** on one of your own notes to update it.
- Click **Delete** to remove it.

Users can only delete their own notes. Administrators can delete any note.

Shared Notes

If the same email is being followed by multiple team members through different Gmail accounts, the notes are shared and visible to everyone following that email.

Create an Odoo Task from an Email



This feature lets you turn an email into an Odoo task without leaving AI Email Management.

Create a Task

From the thread detail page, click **Create Odoo Task**.

Complete the following fields in the dialog:

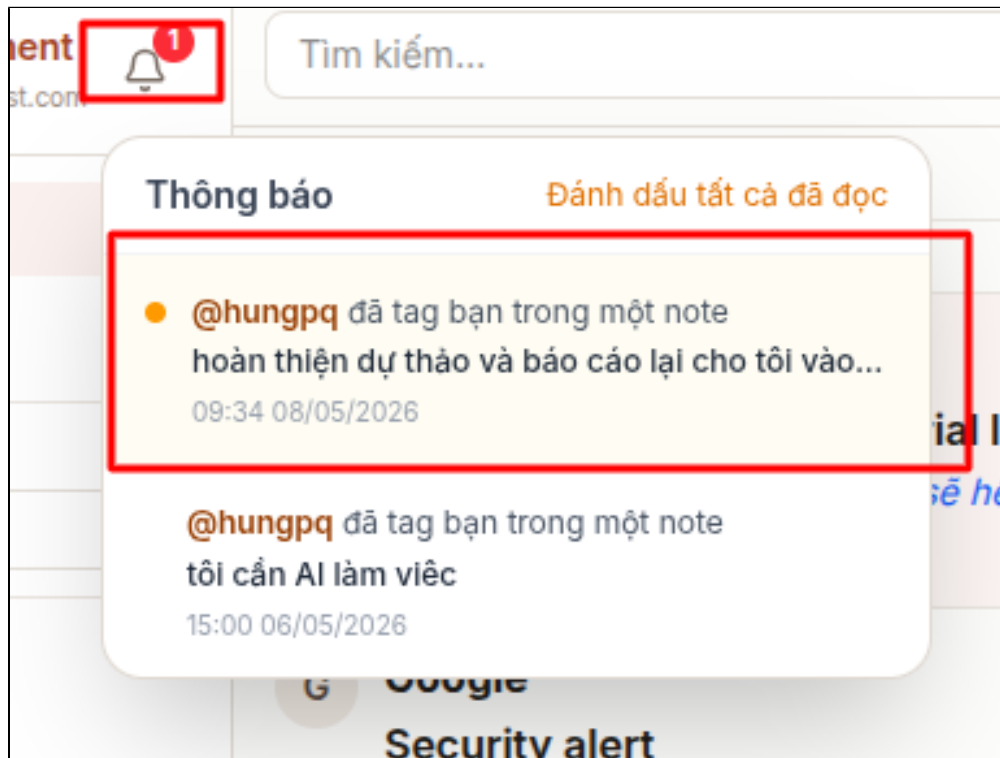
- **Project:** Select an Odoo project.
- **Task Title:** Uses the email subject by default.

- **Assignee:** Select the assignee's email.
- **Deadline:** Optional.
- **Planned Start Date:** Optional.
- **Estimated Hours:** Optional.
- **Description:** Enter the task details.
- **Priority:** normal / urgent.
- Click **Create Task**.

The system automatically attaches files from the email to the Odoo task.

After the task is created successfully, an internal note is automatically added to the thread with a link to the new task.

Notifications (@mentions)



When a teammate mentions you in an internal note, you receive an instant notification.

View Notifications

- Click the **bell icon** in the top navigation bar.
- The red badge on the bell shows the number of unread notifications.
- Click a notification to go directly to the related thread and note.

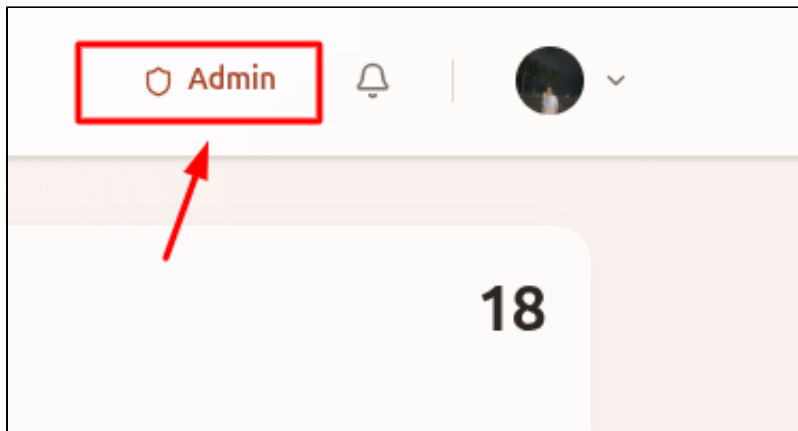
Mark Notifications as Read

- Click an individual notification to mark it as read.
- Click **Mark All as Read** to clear all unread notifications.

Note: Notifications are generated only when you are mentioned directly using @username in a note. The system keeps the most recent **50 notifications**.

Administration

The Admin section is available only to users with the **Admin** or **Manager** role.



User Management



Go to: **Admin > User Management**

Create a New User

1. Click **Add User**.
2. Enter:
 - Email
 - Password
 - Role: staff, manager, or admin
3. Click **Create**.

Edit a User

1. Click the edit icon on the relevant user.
2. Update the role or password.

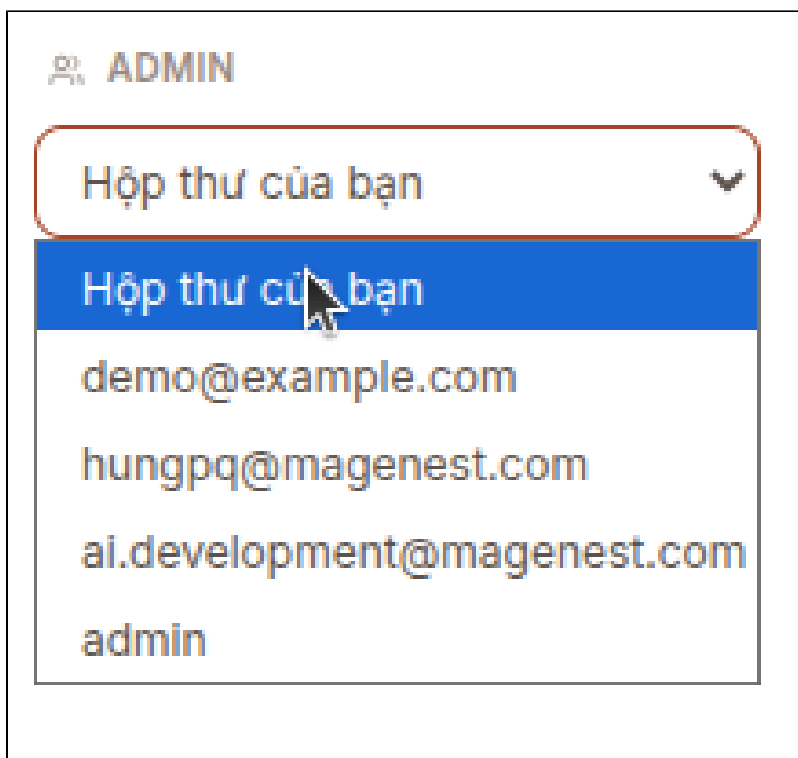
Delete a User

- Click the delete icon and confirm the action in the dialog.
- The account currently signed in cannot be deleted.

Roles

Role	Description
staff	Regular user who can access only their own Inbox
manager	Can view the entire team's inboxes from the Admin Panel
admin	Full access, including user management, Audit Log, and all inboxes

Unified Inbox



Admins and Managers can view emails from the entire team in one interface.

Go to: **Admin > Unified Inbox**

Filters

Filter	Description
User	Show the inbox of a specific team member
From / To Date	Filter by the date the email was received
Urgency	critical / normal / low
Needs Attention	Show only threads marked important by AI
Search	Full-text search across subject and snippet

Click any thread to open its details and add internal notes.

Audit Log

The Audit Log records important actions performed in the system.

Go to: **Admin > Audit Log**

Recorded Actions

- Create, update, or delete a user account
- Add an internal note

Information Stored for Each Entry

- Time
- Actor
- Action
- Target
- Additional details

Note: The Audit Log shows the most recent **200 entries**. Contact the system administrator if you need older records.

Role-Based Permissions

Feature	Staff	Manager	Admin
View own Inbox	Yes	Yes	Yes
Connect Gmail	Yes	Yes	Yes
Enable/disable LLM	Yes	Yes	Yes
Add internal notes	Yes	Yes	Yes
Create custom labels	Yes	Yes	Yes
Create Odoo tasks	Yes	Yes	Yes
View another user's Inbox through Admin Panel	No	Yes	Yes
Manage users	No	No	Yes
View Audit Log	No	No	Yes
Delete another user's notes	No	No	Yes

Frequently Asked Questions

Q1. Why aren't my emails showing in the Inbox?

- Check whether Gmail is connected. Your Gmail address should appear on the Dashboard.
- Click **Refresh**, if available, or press **F5**.
- Check the **Label** filter. You may be viewing the wrong folder, such as SPAM or SENT.
- If you have just connected Gmail for the first time, wait a few seconds for the initial synchronization to finish.

Q2. Why doesn't AI classification return any results after I turn on "AI: Off"?

- Check your internet connection.
- The Gemini API may be busy. Wait a few seconds and try again.
- If the issue continues, contact your administrator to check the LLM configuration.

Q3. Why isn't my custom label showing up?

- Custom labels exist only inside AI Email Management and are not synchronized with Gmail.
- Refresh the page if a newly created label does not appear immediately.

Q4. Why can't I create an Odoo task?

- Make sure your Gmail connection is still active.
- Make sure a **Project** has been selected.
- If the Project list is empty, contact your administrator to check the Odoo configuration.

Q5. How can I stop an email address from being hidden by the newsletter filter?

- Turn off the newsletter filter using the **Newsletter: Hide** button.
- Contact your administrator if you want a specific sender removed from the blocklist.

Q6. Why does my login session keep expiring?

- Sessions remain active for **8 hours** from the most recent login.
- Make sure your browser is not blocking cookies, including the httpOnly cookie.
- If you are using private/incognito mode, the session ends when the tab or browser session is closed.

Q7. I already read my notifications. Why is the badge still showing?

- Click **Mark All as Read** to reset the badge.
- Press **F5** to refresh the notification status.