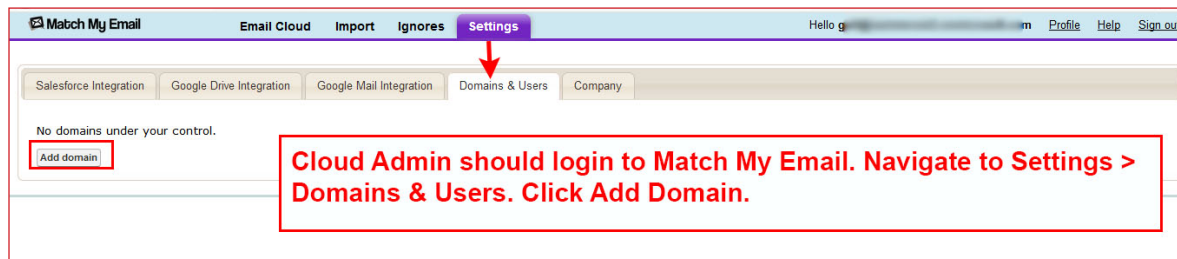


Add colleagues to your company's account you created

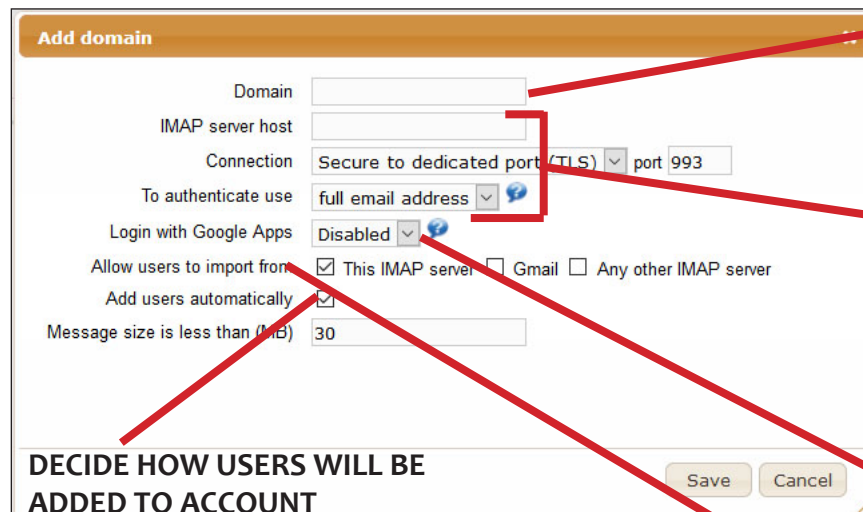
Here is what you'll be doing.

1. Adding your email domain to account
2. Deciding on how colleagues will be added (manually or automatically)
3. Having colleagues complete 2-minute setup wizard

CLOUD ADMIN ADDS DOMAIN



The screenshot shows the Match My Email interface. The top navigation bar includes 'Email Cloud', 'Import', 'Ignores', and 'Settings'. The 'Settings' tab is active. Below the navigation bar, there are tabs for 'Salesforce Integration', 'Google Drive Integration', 'Google Mail Integration', 'Domains & Users', and 'Company'. The 'Domains & Users' tab is selected, showing a message: 'No domains under your control.' Below this message is a red-bordered box containing the text 'Add domain'. A red arrow points from the 'Settings' tab to the 'Domains & Users' tab, and another red arrow points from the 'Add domain' button to a red-bordered box containing the text: 'Cloud Admin should login to Match My Email. Navigate to Settings > Domains & Users. Click Add Domain.'



The screenshot shows the 'Add domain' form. It has a title bar 'Add domain' and a close button. The form contains the following fields and options:

- Domain: [text input]
- IMAP server host: [text input]
- Connection: Secure to dedicated port (TLS) [dropdown] port 993 [text input]
- To authenticate use: full email address [dropdown]
- Login with Google Apps: Disabled [dropdown]
- Allow users to import from: ☒ This IMAP server ☐ Gmail ☐ Any other IMAP server
- Add users automatically: ☒
- Message size is less than (mb): 30 [text input]

At the bottom, there are 'Save' and 'Cancel' buttons. A red-bordered box at the bottom of the form contains the text: 'DECIDE HOW USERS WILL BE ADDED TO ACCOUNT'.

The Domain is everything after and not including the '@' symbol in email address. (Example, in jane@acme.com, the domain is acme.com)

IMAP server host, Connection, port, and To authenticate use: these fields depend on where User email is hosted. [Please refer to our wiki for a list of IMAP service providers.](#) or contact your IT staff.

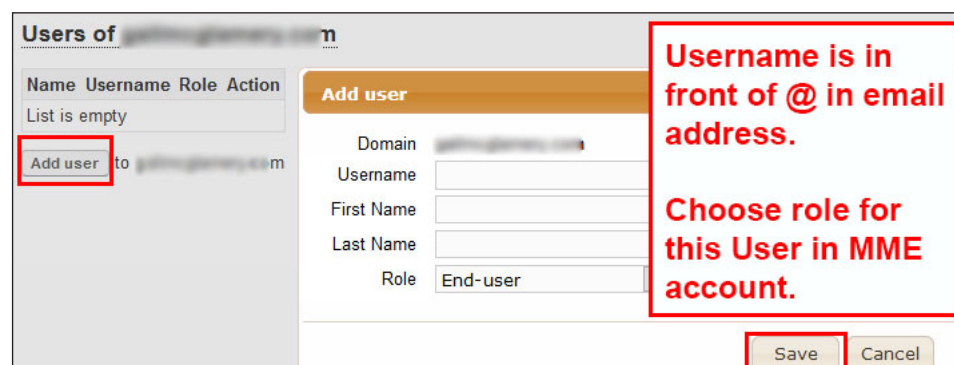
Login with Google Apps: Change to Enabled if you use Google for hosting. Non-google users disregard.

Leave option "This IMAP server" checked. If Google Users, also check Gmail.

If Add Users Automatically is checked, any user from domain can login and add themselves to account. For control over who joins account, you can uncheck and add manually.

Click SAVE

If you choose to add users manually...

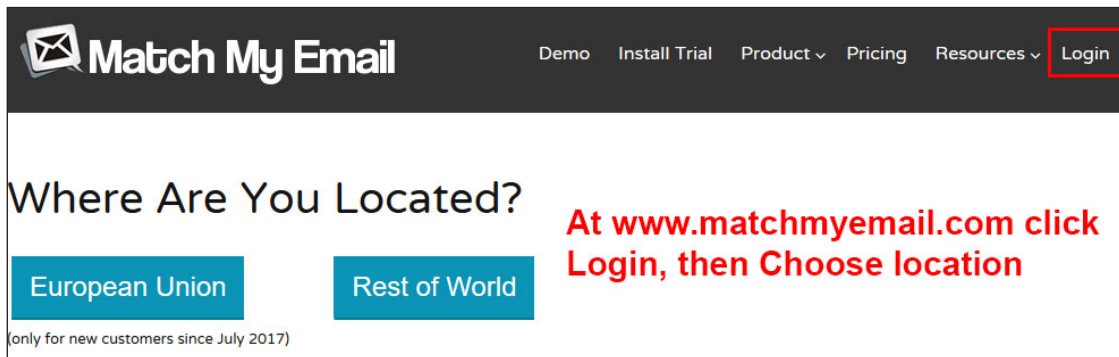


The screenshot shows the 'Users of' page. It has a title bar 'Users of' and a close button. The page contains a table with columns 'Name', 'Username', 'Role', and 'Action'. The table is empty, with the text 'List is empty' below it. Below the table is a red-bordered box containing the text 'Add user to'. To the right of the table is a form titled 'Add user' with the following fields:

- Domain: [text input]
- Username: [text input]
- First Name: [text input]
- Last Name: [text input]
- Role: End-user [dropdown]

At the bottom, there are 'Save' and 'Cancel' buttons. A red-bordered box at the bottom right of the form contains the text: 'Username is in front of @ in email address. Choose role for this User in MME account.'

NEW USER COMPLETES SETUP WIZARD ADMIN ADDS DOMAIN



Match My Email

Demo Install Trial Product ▾ Pricing Resources ▾ **Login**

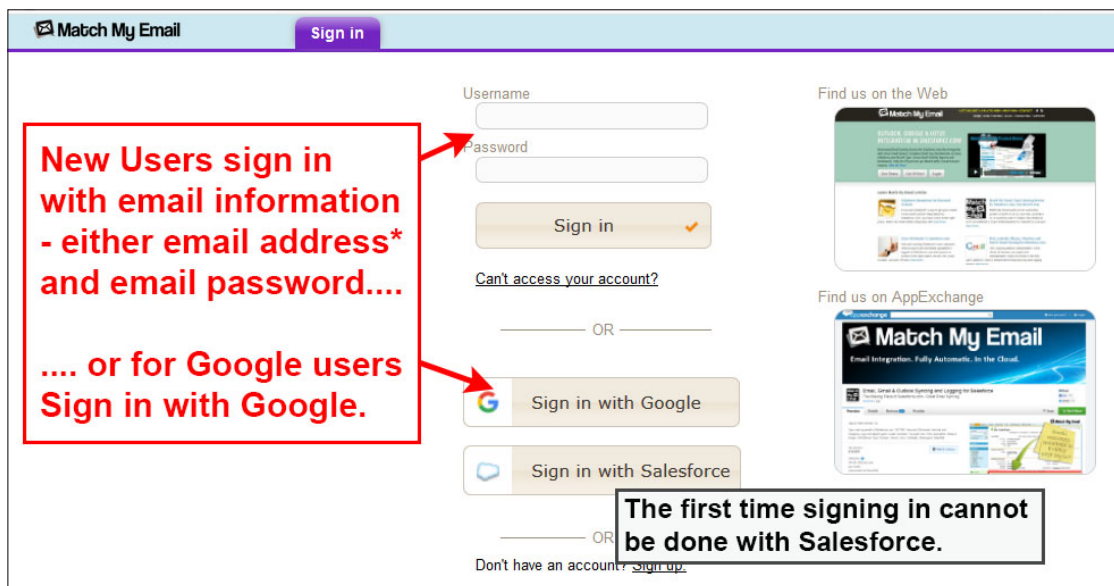
Where Are You Located?

European Union **Rest of World**

(only for new customers since July 2017)

At www.matchmyemail.com click Login, then Choose location

Due to GDPR, EU Users must pick European Union.



Match My Email **Sign in**

Username

Password

Sign in ✓

[Can't access your account?](#)

OR

Sign in with Google

Sign in with Salesforce

OR

Don't have an account? [sign up](#)

New Users sign in with email information - either email address* and email password....

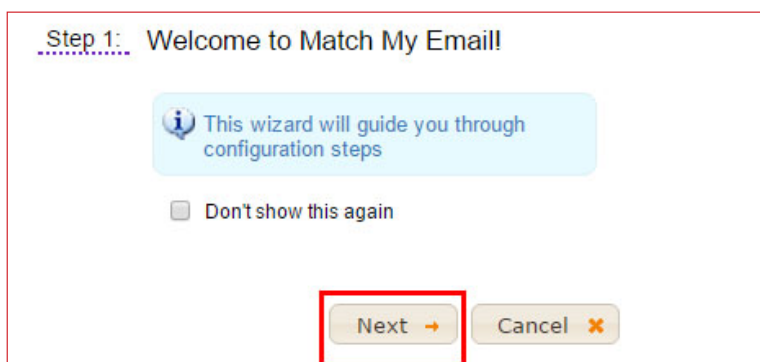
.... or for Google users Sign in with Google.

The first time signing in cannot be done with Salesforce.

Find us on the Web

Find us on AppExchange

* Users enter username@domain for servers authenticating username only.

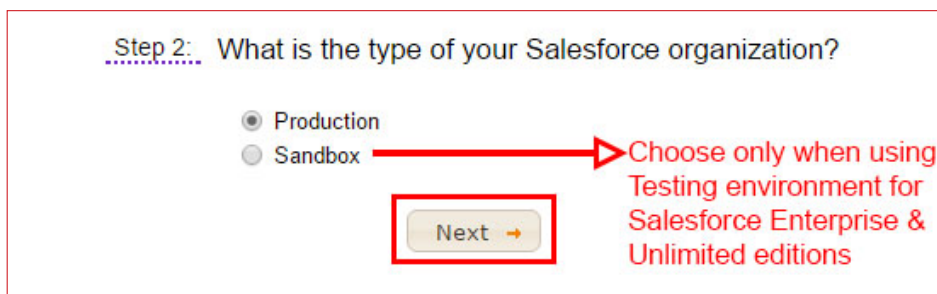


Step 1: Welcome to Match My Email!

This wizard will guide you through configuration steps

☐ Don't show this again

Next → **Cancel** ✕



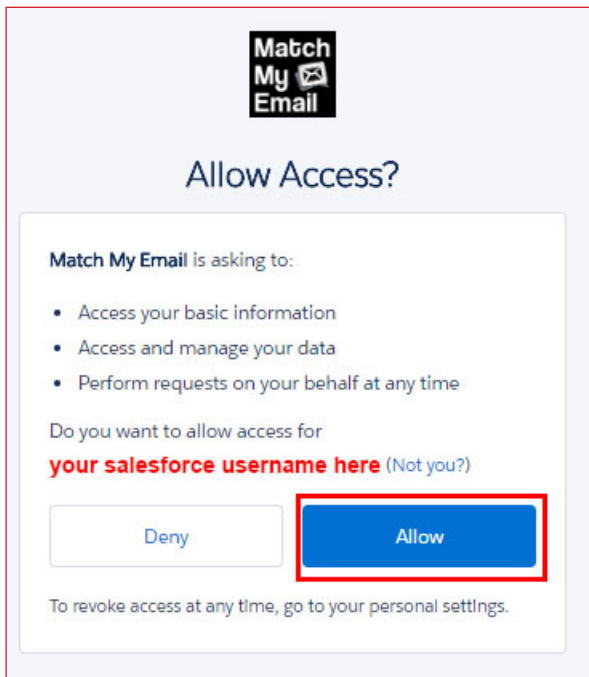
Step 2: What is the type of your Salesforce organization?

☒ Production

☐ Sandbox

Next →

Choose only when using Testing environment for Salesforce Enterprise & Unlimited editions



The screen shows the 'Match My Email' logo at the top. Below it is the heading 'Allow Access?'. A box contains the text 'Match My Email is asking to:' followed by a bulleted list: 'Access your basic information', 'Access and manage your data', and 'Perform requests on your behalf at any time'. Below the list is the question 'Do you want to allow access for' followed by 'your salesforce username here (Not you?)' in red. At the bottom are two buttons: 'Deny' and 'Allow'. The 'Allow' button is highlighted with a red box. Below the buttons is a link: 'To revoke access at any time, go to your personal settings.'

Match My Email

Allow Access?

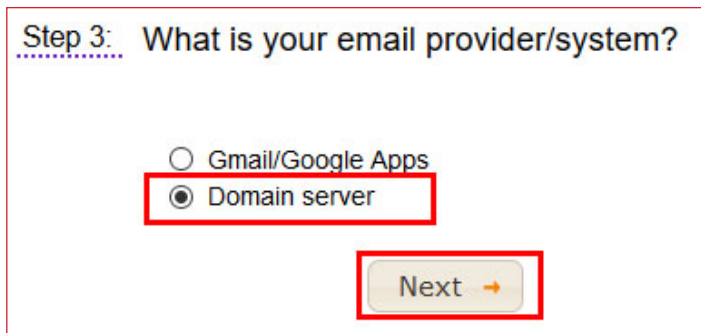
Match My Email is asking to:

- Access your basic information
- Access and manage your data
- Perform requests on your behalf at any time

Do you want to allow access for
your salesforce username here (Not you?)

Deny Allow

To revoke access at any time, go to your personal settings.



The screen shows the heading 'Step 3: What is your email provider/system?'. Below it are two radio button options: 'Gmail/Google Apps' and 'Domain server'. The 'Domain server' option is selected and highlighted with a red box. Below the options is a 'Next' button with a right arrow, also highlighted with a red box.

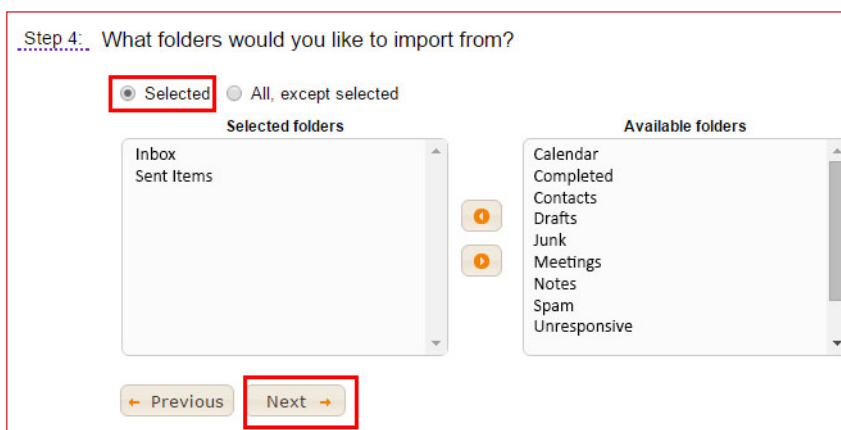
Step 3: What is your email provider/system?

☐ Gmail/Google Apps

☒ Domain server

Next →

Enter the email address and email password for the email account from which emails should be matched.



The screen shows the heading 'Step 4: What folders would you like to import from?'. Below it are two radio button options: 'Selected' and 'All, except selected'. The 'Selected' option is selected and highlighted with a red box. Below the options are two columns of folders. The 'Selected folders' column contains 'Inbox' and 'Sent Items'. The 'Available folders' column contains 'Calendar', 'Completed', 'Contacts', 'Drafts', 'Junk', 'Meetings', 'Notes', 'Spam', and 'Unresponsive'. Between the columns are two orange buttons with left and right arrows. At the bottom are two buttons: 'Previous' and 'Next'. The 'Next' button is highlighted with a red box.

Step 4: What folders would you like to import from?

☒ Selected ☐ All, except selected

Selected folders

Inbox
Sent Items

Available folders

Calendar
Completed
Contacts
Drafts
Junk
Meetings
Notes
Spam
Unresponsive

← Previous Next →

Select folders for import. Match My Email will automatically pull into Selected Folders window (on left) the INBOX and folders with SENT in name. This provides for fully automatic operation with our app. Click Next

Additional folders may be selected from Available Folders, but please note:

* Imports are most efficient when no more than 18 folders selected

* DO NOT select All Mail, Junk, Spam, Drafts, etc. These additional selections will slow down processing of relevant emails and may result in duplicate copies of Drafts.

Wait until Import is DONE. Then click NEXT, then FINISH.