

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



Cloud Admin should login to Match My Email. Navigate to Settings > Domains & Users. Click Add Domain.

The 'Add domain' 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]

Buttons: Save, Cancel

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.

DECIDE HOW USERS WILL BE ADDED TO ACCOUNT

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 'Users of' page shows a list of users (currently empty) and an 'Add user' form. The 'Add user' form has the following fields:

- Domain: [Text input]
- Username: [Text input]
- First Name: [Text input]
- Last Name: [Text input]
- Role: End-user [Dropdown]

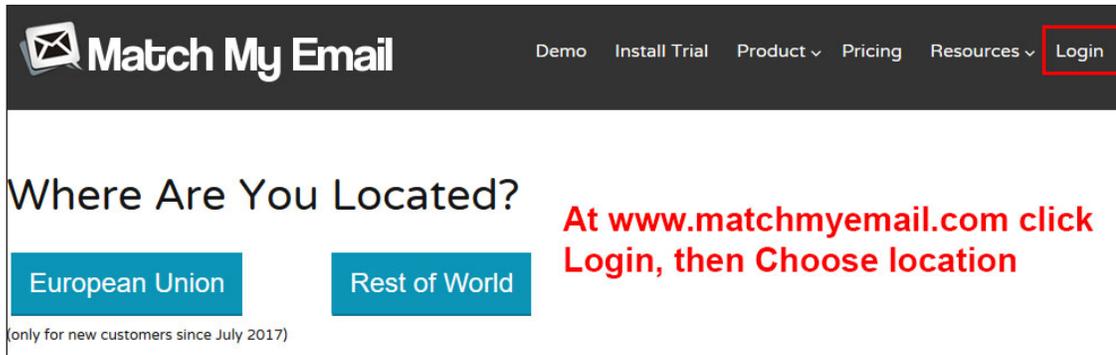
Buttons: Save, Cancel

Username is in front of @ in email address.

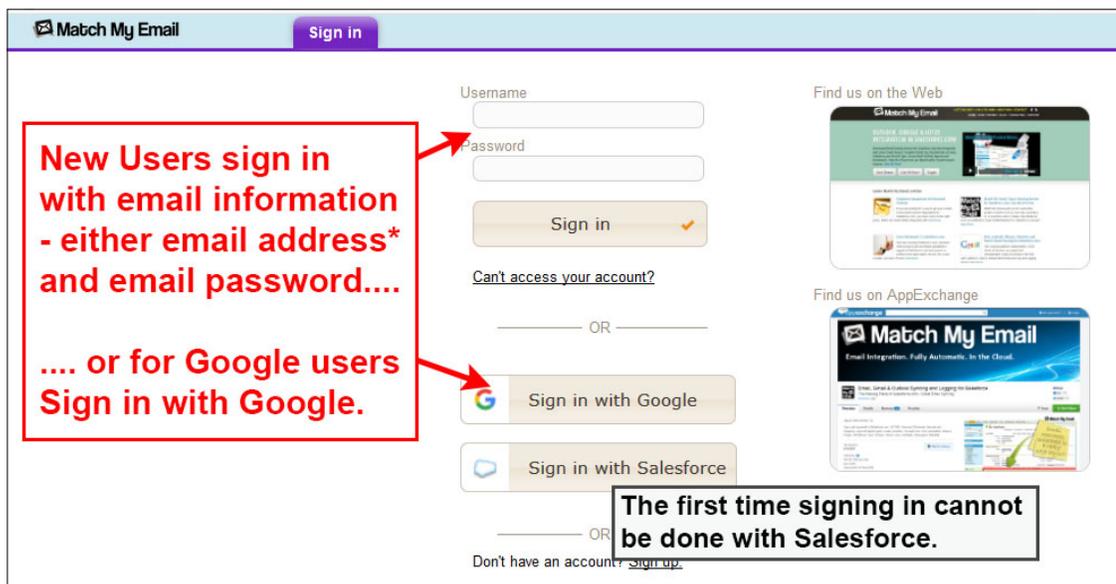
Choose role for this User in MME account.

NEW USER COMPLETES SETUP WIZARD ADMIN ADDS DOMAIN

Due to GDPR, EU Users must pick European Union.

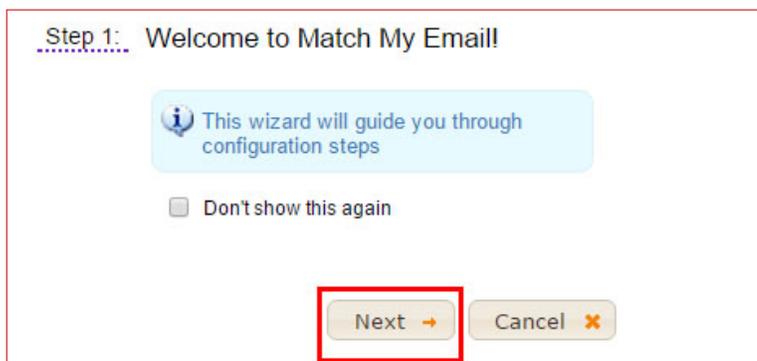


The image shows the Match My Email website header with a 'Login' button highlighted in a red box. Below the header is a 'Where Are You Located?' section with two buttons: 'European Union' and 'Rest of World'. A red text box on the right says 'At www.matchmyemail.com click Login, then Choose location'. A small note at the bottom left says '(only for new customers since July 2017)'.



The image shows the Match My Email sign-in screen. It has fields for 'Username' and 'Password', a 'Sign in' button, and a 'Sign in with Google' button. A red text box on the left says 'New Users sign in with email information - either email address* and email password.... or for Google users Sign in with Google.' A black text box on the right says 'The first time signing in cannot be done with Salesforce.' There are also links for 'Find us on the Web' and 'Find us on AppExchange'.

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

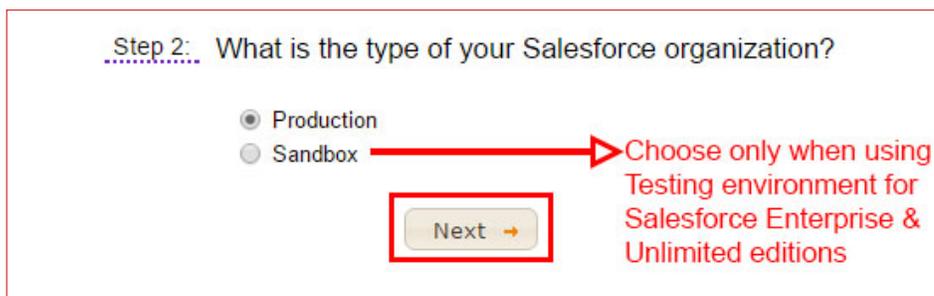


Step 1: Welcome to Match My Email

This wizard will guide you through configuration steps

Don't show this again

Next → Cancel ✕

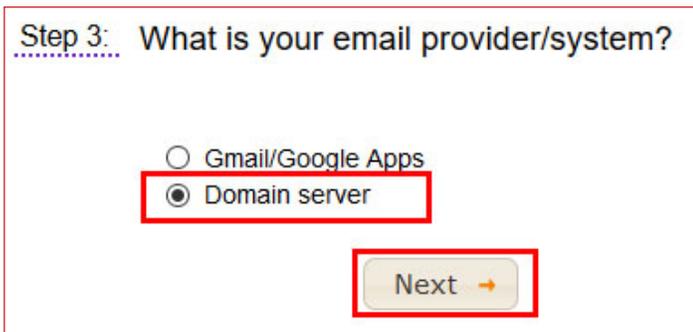
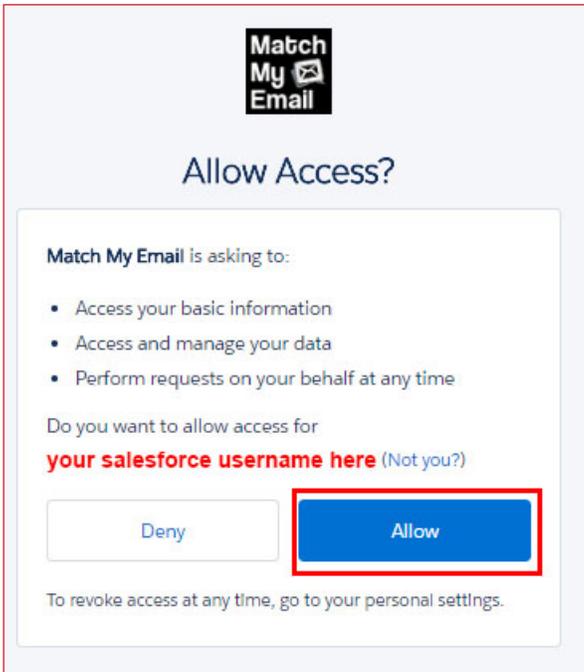


Step 2: What is the type of your Salesforce organization?

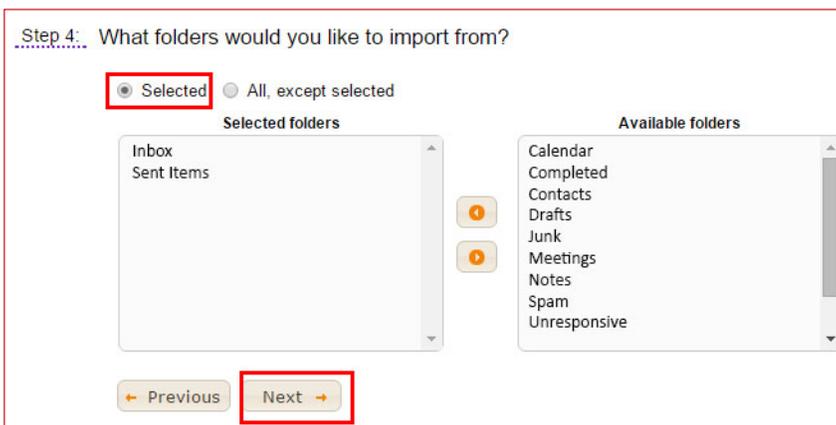
Production

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

Next →



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



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.