Match My Email

Setting Up Match My Email (MME) to upload as Enhanced Email in Salesforce.com using an IMAP connection

This guide contains the steps to setup Match My Email so that messages from IMAP-enabled email accounts are uploaded as an Enhanced Email object to the Activity Timeline in Lightning Experience.

Please note that messages will be displayed in the Activity timeline as an email type listing with distinct icon and filtering. Email will match to multiple Lead and Contact records, but only one "what" record. This means matching an email to only one Account, one Opportunity, one Case, or one custom object record. Users that have access to the record will be able to see matched emails from all other Match My Email Users.

Those using Financial Services Cloud and Person Accounts will only have a match to the Person Account. If matching to Household is also wanted, instead of Enhanced Email Users should upload to our custom object Email Messages and reference the appropriate setup guide.

Table of Contents

1. Install Match My Email AppExchange Package in Salesforce.com

1.1.   Navigate to www.matchmyemail.com. Click Login in top menu.
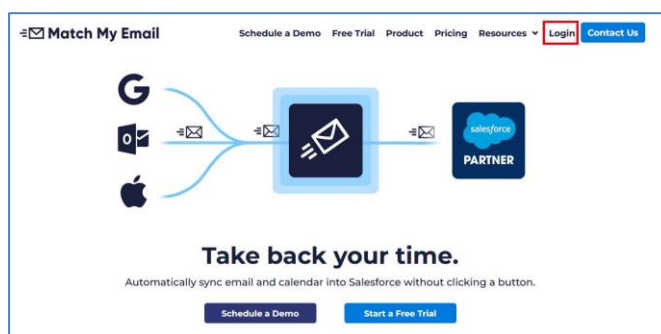
1.2.   Choose the correct portal.

1.3.   Choose the type of Salesforce environment into which you want to install the app and click the button Proceed to the package installation.

Those using Enterprise and Unlimited editions of Salesforce have the option of installing into a Sandbox environment for testing. For use in a Production environment, setup steps in this guide will need to be repeated and a new Match My Email account created that connects to the Production instance.
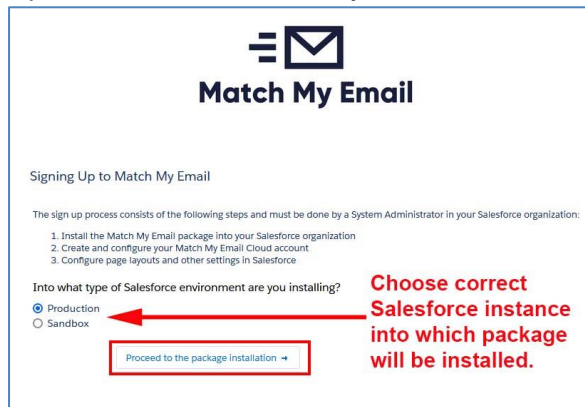
1.4.   Login to Salesforce if prompted. Choose **Install for All Users** and click Install. This does not activate all Users for the app, but rather it ensures permissions are available for non-Admin Users in the future IMPORTANT: If you choose Admins Only, you will have to do back track on permissions to expand app accessibility to other profiles in the future. It is best to Install for All Users and utilize permissions to control access.
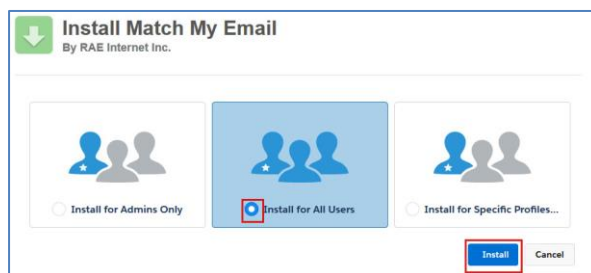
1.5.   Check the box to approve third-party access and click Continue. Approving Third-Party Access adds remote site settings and enables our Email Sync Assistant feature (Details in Section 10) to bring information about unmatched email addresses into Salesforce.

The install will either complete quickly or you will be alerted that it will take a bit more time. More often than not, you will see a message that the install will take a bit longer to fully install into Salesforce. On that screen, click DONE and you will be taken to your list of installed packages. You will receive an email from Salesforce when the install is complete.

Wait for the package to show up in the Installed Packages list in Salesforce. Once it does, and **BEFORE** you proceed in setting up a Match My Email account, complete the following 2.0, 3.0 and 4.0 sections.

2. Confirm Enhanced Email Enabled and Activity Settings

2.1.   Go to Salesforce Setup. Use the Quick Find and select Enhanced Email. If you see a button for Enable, click to do so. If it is already enabled, you will see a button to Disable and can disregard.
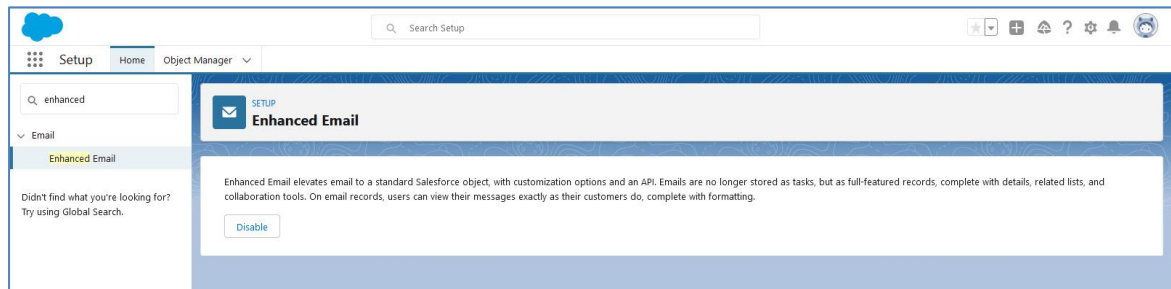

2.2.   Use the Setup Quick Find to find and select Activity Settings. Confirm that the choice "Allow Users to Relate Multiple Contacts to Tasks and Events" is enabled. If it is not, check the box and allow time for the feature to take effect.
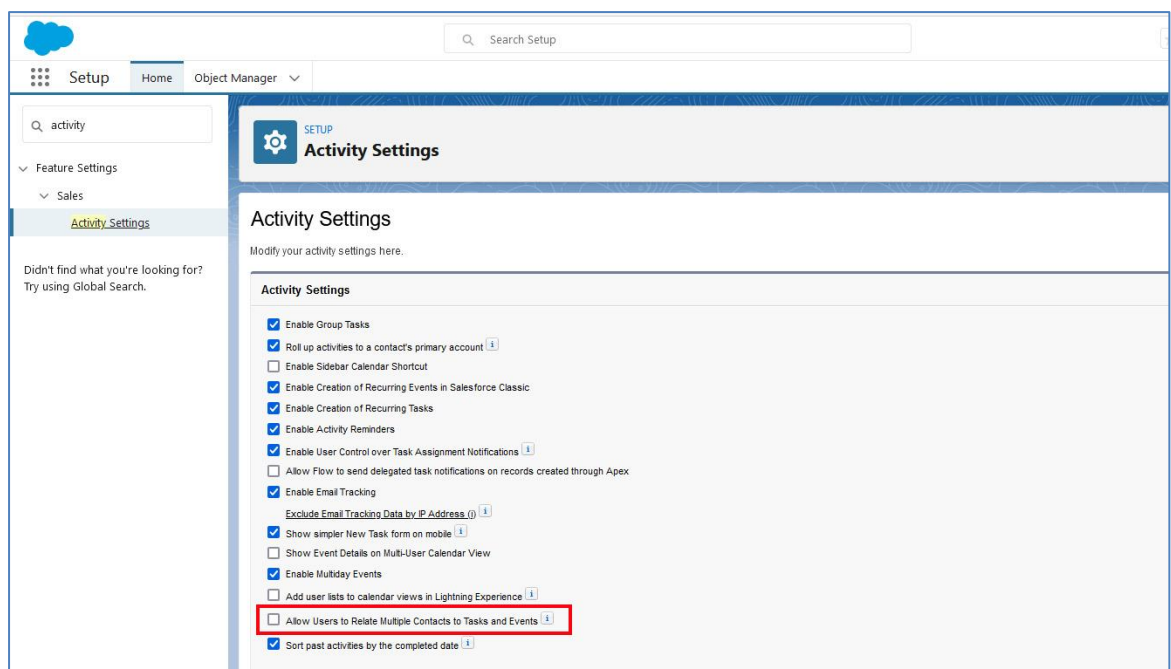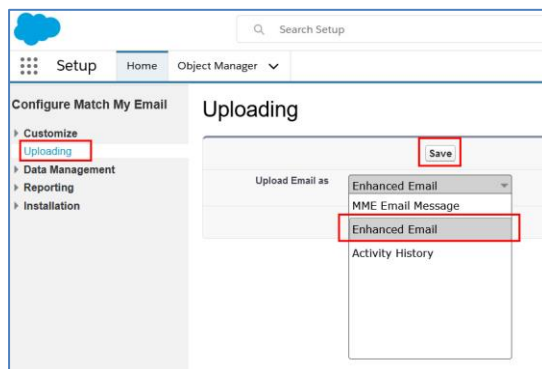
3. Adjust Uploading Strategy for Enhanced Email

3.1. Once Match My Email is successfully installed, navigate to the Installed Packages List. Scroll to find it in the list and click Configure to the left.
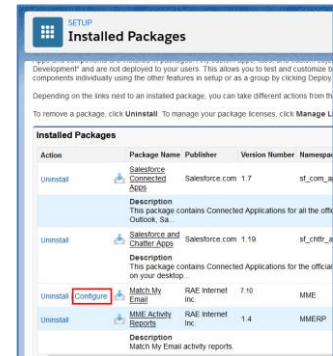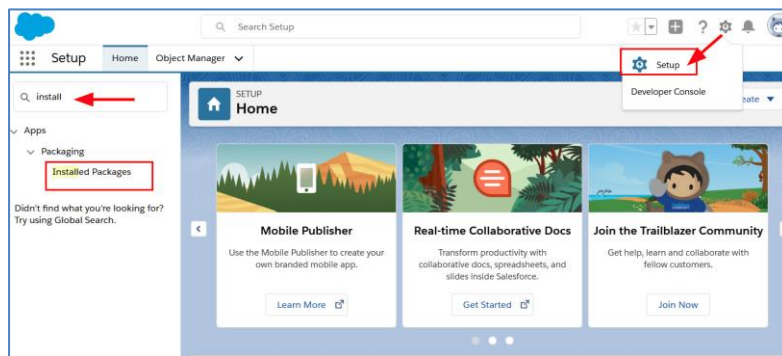

3.2. In the menu, click on Uploading. Change the option to Enhanced Email. Click SAVE.

4. Adjust Picklists for Tasks and Events

When Match My Email uploads and matches an email and/or calendar event to the Activity timeline, it can also set the value of the Type field in each correctly as an Email or Event, respectively. This is not required for matching to occur, but it is helpful for future reporting of Activity data.

4.1. Navigate to Salesforce Setup > Object Manager > Task
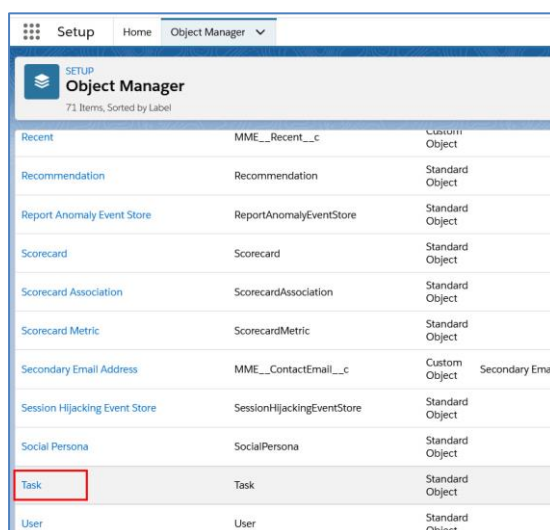
4.2.   Click on Fields and Relationships and then click on the Type field. Check that Email is a Picklist value. If it is not, click New and enter it as a picklist value.

4.3.   Similarly, navigate to Salesforce Setup > Object Manager > Event

4.4.   Click on Fields and Relationships and then click on the Type field. Check that Event is a Picklist value. If it is not, click New and enter it.

5. Set Up Match My Email account

5.1.   You should receive an email from Match My Email Support (as shown in image below) that contains the link 'click here' to proceed.
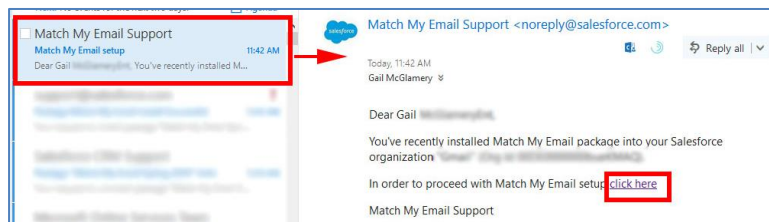
If you do not receive the email, click the following appropriate link:
https://matchmyemail.com/install to have your Match My Email account and data on our US server, or
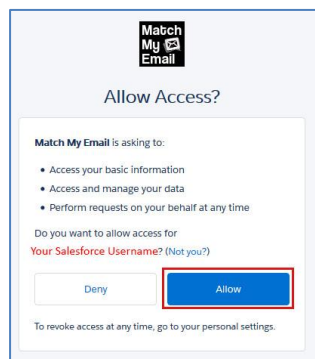https://eu.matchmyemail.com/install to have your Match My Email account and data on our EU server.

5.2.   The first screen is about the Master Subscription Agreement ("MSA"). You can click the link to read the document or right click it to open the MSA in new tab and read it later. The MSA can also be found on the Match My Email web site at https://www.matchmyemail.com/legal/. You will need to check the box to confirm you have read and agreed to the MSA and then click Next.

5.3.   If you/your company is located within the European Union, reinforce your cloud choice that meets with GDPR compliance. Otherwise, choose the United States to reinforce the location for your data storage and processing. Click Next.

5.4.   You will be taken to a screen to prompt you for login to Salesforce with your System Administrator credential, if you are not already logged into Salesforce on another tab. Match My Email is requesting access to connect to your Salesforce organization. Click Allow.

A Match My Email account has now been created and you are able to manage the account. Proceed to next step to connect the account to your email server.

5.5.   Since this guide is intended for users connecting via IMAP, choose email provider as Other.
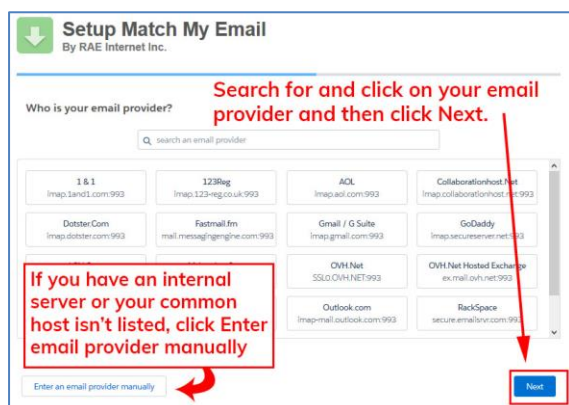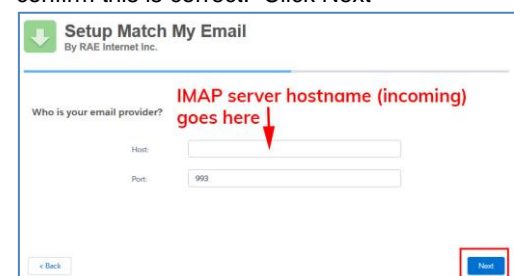

Please Note:
The choice for Microsoft 365 connects to Microsoft via an API, steps of which are included in a different setup guide. It is no longer possible to connect to Microsoft 365 using IMAP.

The choice for Google connects to the Google API and requires administrative steps in Google which are included in the setup guide for Google Workspace.

5.6.   Many common email service providers are listed. Search or use scroll bar to select the host you use and click Next. If you use an internal server or do not see your provider listed, click the button bottom left to enter information manually.

If you click to enter manually, on next screen enter your IMAP server hostname (incoming). Most IMAP is routed through port 993, but you should confirm this is correct. Click Next

5.7. If you <u>only</u> want to manage the MME account as an Administrative User and not use the app to sync your own emails to Salesforce, click Skip and on the next screen click Finish and go to Step 5.9. If you want to match your emails into Salesofrce, enter your email address and email password and click Next. This will enable email syncing by starting your first email import.


Note: If the authentication fails, confirm you have the correct password for your email account. If you have two-step or multi-factor authentication enabled for your email account, you will need to create an app-specific password for Match My Email to have access. Navigate to your email account and go to the control panel or settings for password or security options. Once an app-specific password is created, you can paste that into the screen to continue with setup.

Match My Email will begin running the first import, going back 24 hours in the default folders of Inbox and Sent. (Click here for information about importing older emails.) User can choose to expand Details to view import log or wait until import is done. Allow the system to complete processing.

5.8. When the import is complete, click Next. Upon completing setup, click Finish.

5.9. You will then jump into Salesforce on a web tab for Match My Email. If you skipped creating an import, you will not have email messages showing. If you did create an import, you will be looking at a copies of emails imported from your selected folders to the MME Email Cloud.

You are the only person who has access to this view. Emails showing a match in far right column have already been uploaded and linked to records as indicated in Salesforce.com and remain there unless you decide to remove them. Matched or not, emails remain in the MME Email Cloud for the maximum number of days set in Company > General Settings (default is maximum of 45 days) and then purged.

To add this tab to your Nav Bar, click the drop down option and then click Add to Nav Bar.
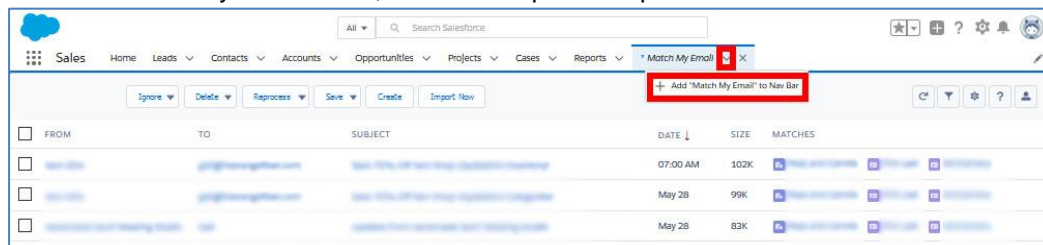

6. Best Practice: Add Ignore Rule for Email Domain

We strongly recommend as a best practice that you add an ignore rule for an email domain. This is a protective measure against unnecessary or unwanted matching of internal email into Salesforce.com records that might contain employee email addresses.

6.1. When signed in to Match My Email account, click the gear icon at right and choose Control Panel.
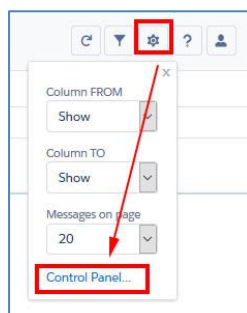
6.2. In the Control Panel, click Ignores on the left. Click +New button. Fill in the fields as described below and click SAVE.
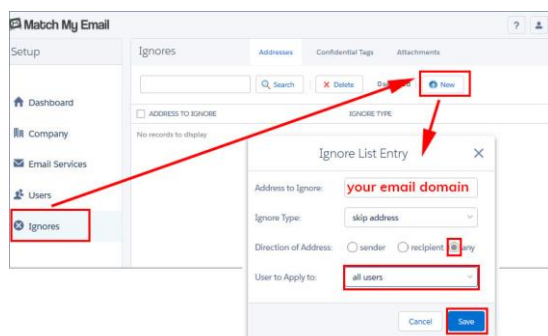
- For Address to Ignore, type your email domain, which is everything after the @ symbol. If a company email address is Jane@acme.com, the domain is acme.com.
- For Ignore Type, confirm 'skip address' is showing.
- For Direction of Address, click the button by 'any'
- User to Apply to, choose all users
- Click Save.

7. Confirm company-wide settings for Matching and Upload Rules

7.1. In account Control Panel, go to Company > Salesforce Settings.
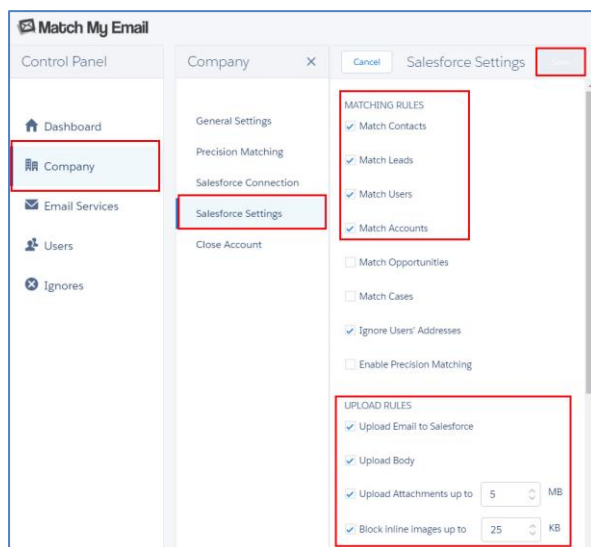
By default, Matching Rules are enabled for Contacts, Leads and Accounts as well as Salesforce Users (for future reporting).

Uncheck boxes to disable matching to an object you do not use. Check a box to enable matching to Opportunities or Cases.

The algorithm will match all Opportunities with Status Open (not Closed) where Contact matching by email address has a Contact Role. Alternatively, it will match all Opportunities with status Open for parent Account when a Contact is matched by email address with NO Contact Role.

For Cases, it is similar.

Customized matching to Opportunities by tag or words in Subject Line or matching to Case by unique Case # is possible with custom programming. However, with Enhanced Email we can only match to one What record. Contact our support team to inquire.

The default settings on Upload Rules are to move data into Salesforce, upload email body, upload attachments up to 5 MB, and to block inline images up to 25 KB. Details on how to modify these rules can be found on our support site wiki post.

8. Remotely add and/or activate End Users to a Match My Email account

*Adding and Activating Users to a Match My Email account is a two-step process. First, the User needs to be (1) activated and (2) then their account confirmed based on their email username and password. The first step can **only** be done by the Salesforce Admin who setup the Match My Email account. The second step can be done either by the Salesforce Admin or by the End User. In order for the Salesforce Admin to activate an End User, the admin must have the End User's email username and password.*

8.1.   If you are the Salesforce Admin managing the Match My Email account, navigate back to your view of the Email Cloud. (Click the web tab in your Salesforce Nav Bar.)

8.2.   Click the Match My Email Gear, the middle icon button top right, and click Control Panel.
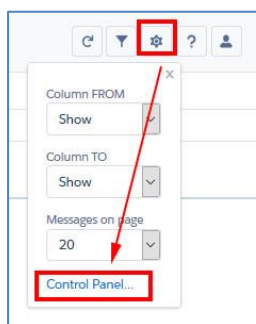
8.3.   On the left, click Users. In next panel, the list will show Salesforce Users in the organization. Click on the User's name to be activated. In next panel, click on Email Imports. Click + to Add or Activate an import.
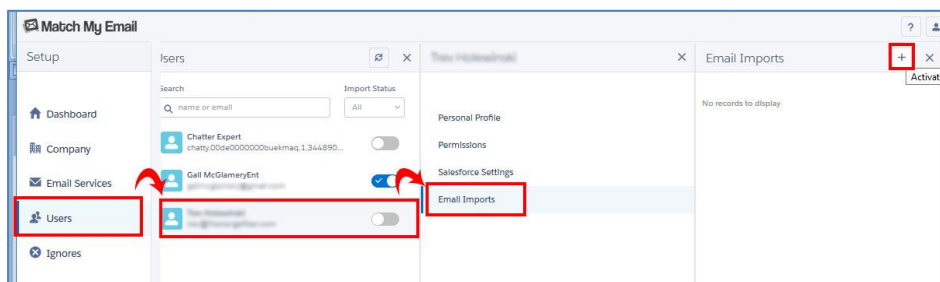

8.4.   By default the first email import is labeled Import 1, you can leave the default label or enter a new name. Don't change the Email Service as it represents the IMAP email server where your company's email is hosted.

8.5.   You now have two options. By clicking User (as shown at right) and Confirm, you will be adding the End User as an active user to the Match My email account. IMPORTANTLY, the End User will need to complete the steps in 8.5.1 to login and enter their own email address and password.
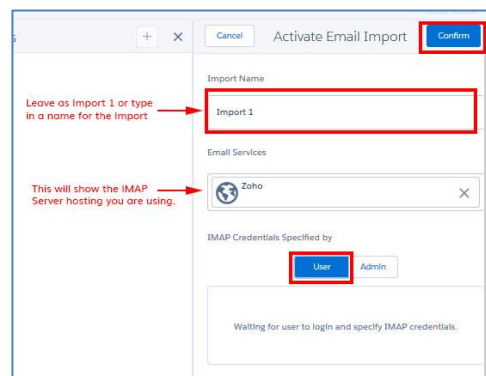

If you click Admin (as shown at right), you can remotely activate the End User if you have their email address and password. To check if the username and password are correct, click Refresh Folders. If the folder structure of the End User appears then the credentials are correct. INBOX and SENT should already be selected. (If not, then there is an issue with either the username or password or the user has two-step authentication enabled so you will need to use an application-specific password.) You can check any other folder or subfolder on the list to activate import from it was well. Once you are finished selecting folders for import, click Confirm at the top. Jump to Step 8.6.
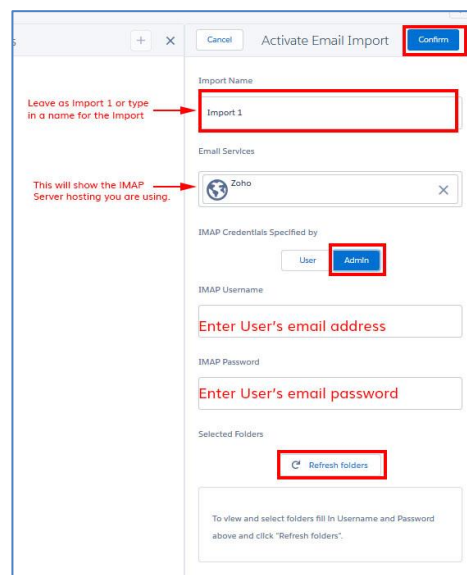
8.5.1.　If you selected User on the Activate Email Import screen, then the End User must log into Salesforce themselves. On main Salesforce screen, they must click the App Launcher (the grid of 9 dots at left). Look in the All Items section for Match My Email and click on it.
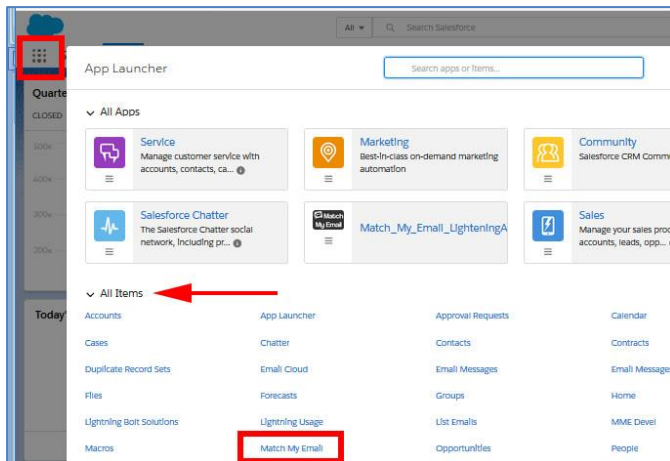

8.5.2.　The Match My Email web tab will launch and bring the user to a view of the Email Cloud that is empty. If they want to add Match My Email to their Nav Bar which is recommended, they can click the drop down arrow and choose that option.
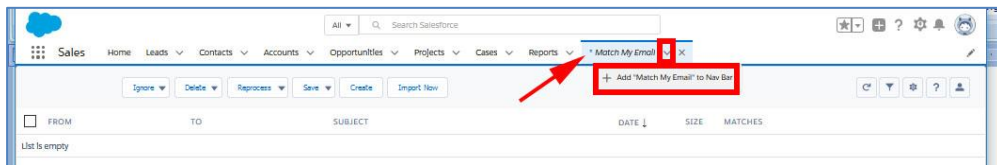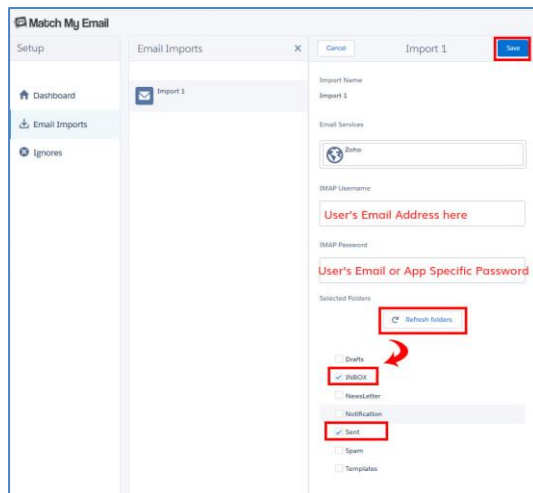

8.5.3.　The User will click the MME gear icon at right and choose Control Panel.
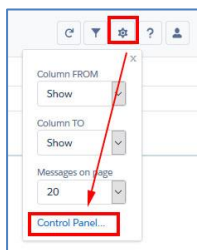
8.5.4.　The User sees a Personal Control Panel which does not include many of the controls visible in the Admin Control Panel.   At left, the End User clicks Email Imports, then Import 1, and the pen to Edit.
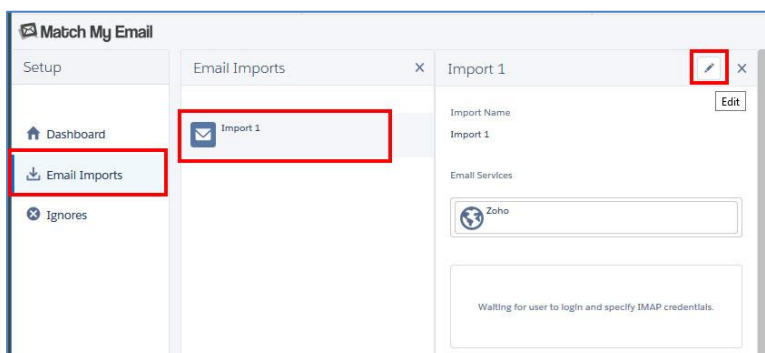
8.5.5. User enters email address and email password (or app-specific password if multi-factor authentication is enabled). Then clicks Refresh Folders and then checks the boxes next to the folders desired for import. This means MME will bring copies of emails from these selected folders to Email Cloud and work to match them into Salesforce. Click SAVE at the top.
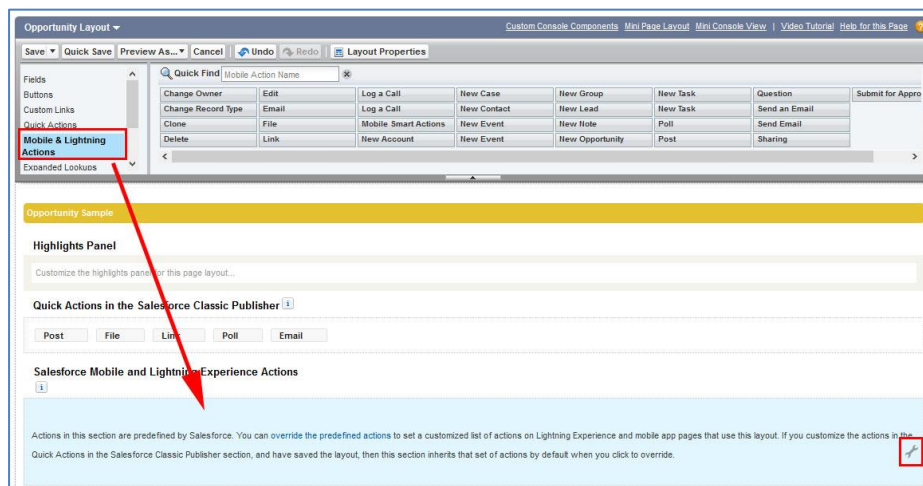

8.6. Import will begin within 20 minutes for this new User. As an Admin, you can click back to left menu and choose Users and repeat the steps to activate another User.

9. Optional: Convert to Match My Email's Send Email button

Match My Email's Send Email button will appear at top of screen when viewing email in Lightning and in bottom menu in Salesforce Mobile. It provides the ability to send, reply, reply all and forward email from within Salesforce.

9.1. Navigate to Salesforce Setup > Object Manager > Opportunity (as an example). In left menu click on Page Layouts. In list, for the layouts you use click the name of layout to Edit.

9.2. At top left, click on Mobile and Lightning Actions. If the Salesforce Mobile and Lightning Experience Actions section below does not already show items it contains, hover over grey area. It will highlight as blue, click the wrench icon to open the section for edits.

9.3.   There may be two actions for Send Email. Hover over each to find the MME custom button named MME__SendEmailLwc. Note, you want to use the button with Lwc at the end of Name. Drag it into the Salesforce Mobile and Lightning Experience Actions section. We recommend placing first, with green indicator appearing as in screenshot below.

Pick the Send Email that has Lwc at end of API Name
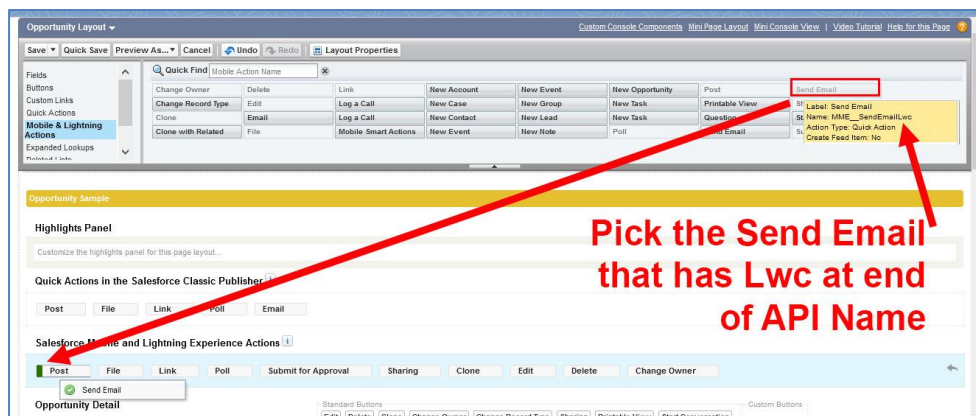
9.4.   Click on any pre-existing Send Email and Send an Email buttons, one at a time, drag to the top Fields area to remove them from layout. Click Save at top left to save changes.
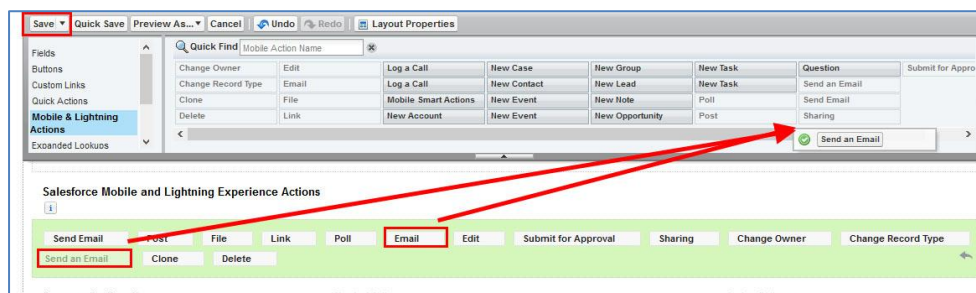
Repeat steps for other objects (Lead, Account, and Contact objects) used in Salesforce. For Sending Email from a Case object, please refer to https://www.matchmyemail.com/wiki/using-send-email-button-on-cases/ for slightly different steps.


10. **Optional: Add Email Sync Assistant to Salesforce Home Page**

The Email Sync Assistant allows Users to evaluate email addresses for which Match My Email did not find a match. They can create Leads, Contacts or Ignore Rules from those addresses or choose to dismiss them for a later decision. The recommendation is to place the component on the home page for easy access, as is described below.

10.1.   Navigate to your company's main Salesforce Home Page. Click the Salesforce setup icon and choose Edit Page in the drop menu.
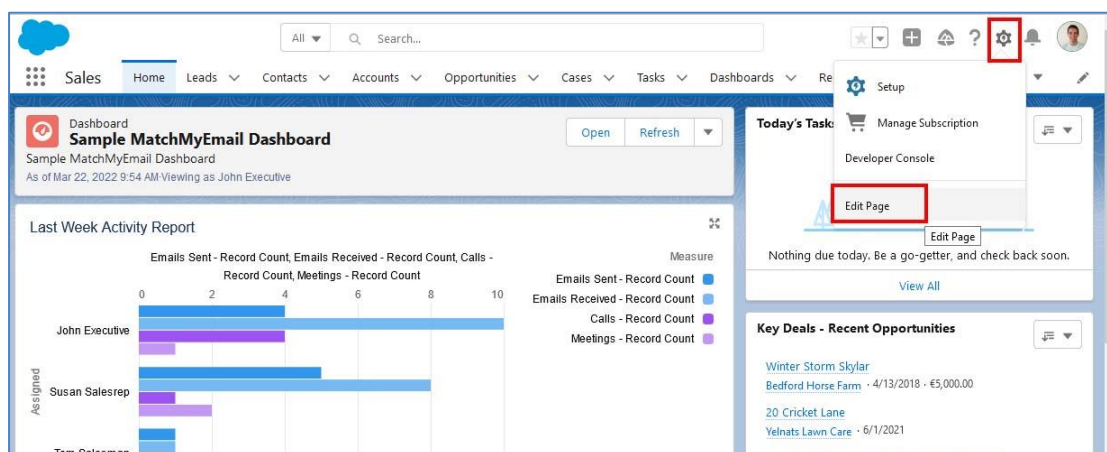
10.2. Decide where on the home page you would like to place the Email Sync Assistant component. We suggest placing it at the top of the right column as shown below. On left sidebar, scroll to Custom Managed components. Click and drag Email Sync Assistant to the chosen location using the green line to guide placement. Save the change to the Home Page.
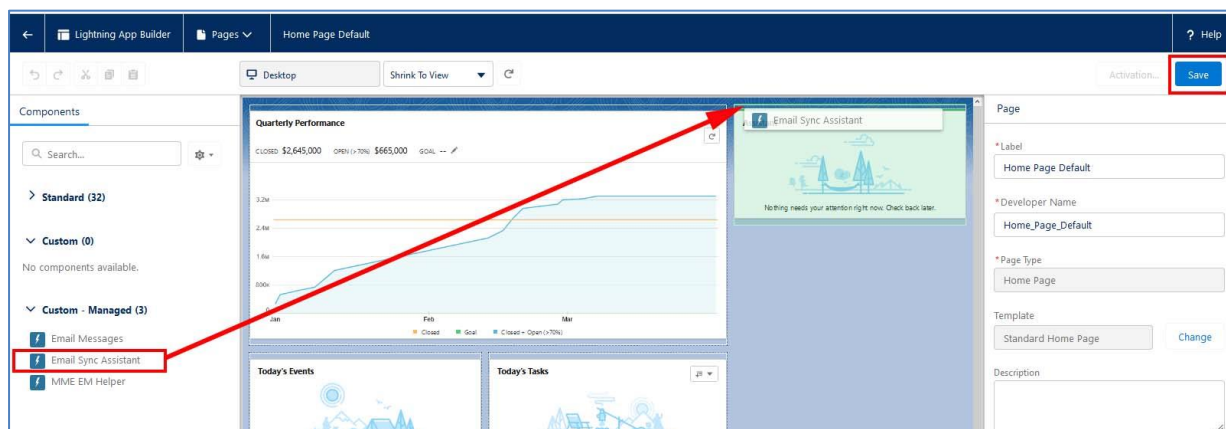
[Click here for guidance on how to customize and use the Email Sync Assistant](#).

For assistance with set up or for questions, contact support@matchmyemail.com. You can also visit our support page and use the scheduler to book a free support session as well as Resources > Wiki to find our knowledge base of articles and online User Guide.