

Set-Up Guide for Standard version for all editions of Salesforce.com

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Please direct any recommendations or comments as well as questions or requests for assistance to support@matchmyemail.com.

Table of Contents

1.	Create a Match My Email Account.....	2
2.	Setting up email for import.	3
3.	Add Company's Email Domain (Optional but recommended).....	5
4.	Add Ignore Rule (*Important to avoid unnecessary data storage.).....	5
5.	Salesforce Integration Settings for Opportunities & other objects (optional)	6
6.	Adding a Match My Email Web Tab in Salesforce.com (Optional).....	7

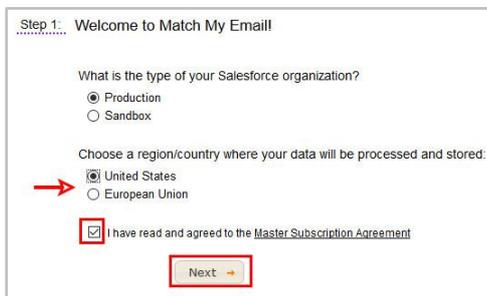
This guide is intended to use text and screenshots to get you through the above steps as quickly as possible. The average set-up takes about 5 minutes.

1. Create a Match My Email Account

If another person at your company has already signed up for Match My Email, consult the guide on how to [Add Users to Existing Match My Email account](#).

The individual at a company who will manage the Match My Email account, whether they will import and match email or not, follows these steps to create an MME account. They are known as the Cloud Admin.

- 1.1. Open a new browser tab and navigate to the sign up wizard or go to www.matchmyemail.com, click the Login link top right. Choose appropriate server storage location. Most users should choose the United States for server data location. However, for regulatory reasons, companies based within European Union should choose that option for server data storage located in European Union.
- 1.2. On next screen, at last prompt “Don’t have an account?” click the Sign Up option.
- 1.3. In most cases, leave the type of organization as Production. Users of Salesforce Enterprise and Unlimited edition may choose to sign up for Match My Email account using their Sandbox. Make geographic choice. User can open Master Subscription Agreement in new browser tab to read. Check the box once it has been read and click Next.



Step 1: Welcome to Match My Email

What is the type of your Salesforce organization?

Production
 Sandbox

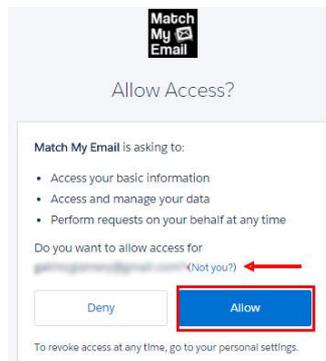
Choose a region/country where your data will be processed and stored:

United States
 European Union

I have read and agreed to the [Master Subscription Agreement](#)

Next →

- 1.4. Sign in to Salesforce organization and click Allow.



Match My Email

Allow Access?

Match My Email is asking to:

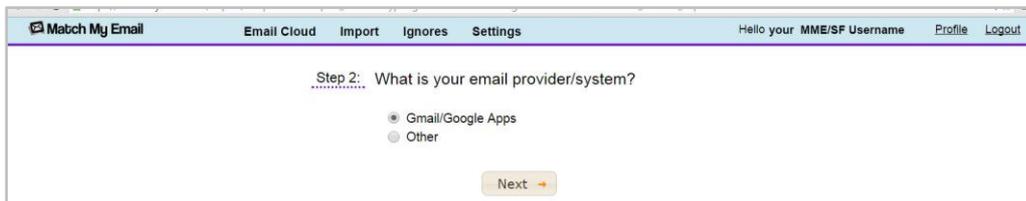
- Access your basic information
- Access and manage your data
- Perform requests on your behalf at any time

Do you want to allow access for _____ (Not you?)

Deny Allow

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

- 1.5. Upon return to Match My Email you will see the screenshot below.



Match My Email

Email Cloud Import Ignores Settings

Hello your MME/SF Username Profile Logout

Step 2: What is your email provider/system?

Gmail/Google Apps
 Other

Next →

- 1.6. The company's Match My Email account has been created. You are the Match My Email Cloud Admin and Salesforce Integration settings are established for you. The setup wizard is now taking you to Step 2 where you can establish email information.
 - If you, as the Cloud Admin, want to import and match your email continue to 2.0.
 - If you, as the Cloud Admin, will only manage account and not import own email, skip to 3.0.

2. Setting up email for import.

2.1. Example for Google. Click Next. (If Gmail/Google Apps is NOT provider, go to 2.2)

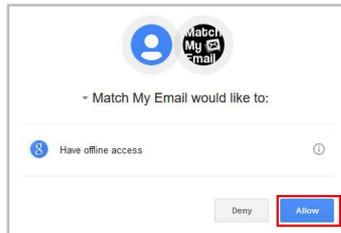


Step 3: What is your email provider/system?

Gmail/Google Apps
 Domain server
 Office 365
 Other

Next →

2.1.1. You will jump to Google where you will sign in to the appropriate Gmail account or choose it from options. After logging in to proper account, click Allow.



Match My Email

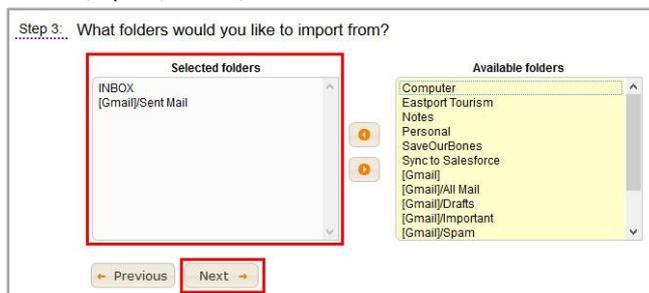
Match My Email would like to:

Have offline access

Deny Allow

2.1.2. For folder selection, MME will import from folders appearing in Selected Folders window. Default folder selection is for incoming and sent mail - INBOX and [Gmail]Sent Mail – which is recommended for efficient and fully automatic function.

User may choose other labels if desired and move to Selected Folders. Please note initially that mail only from last 24 hours in any folder/label will be imported and matched. Do not select All Mail, Spam, Drafts, etc. Click Next.



Step 3: What folders would you like to import from?

Selected folders

- INBOX
- [Gmail]Sent Mail

Available folders

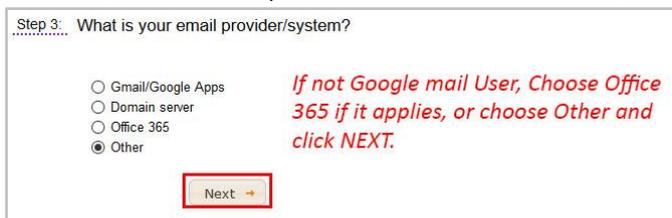
- Computer
- Eastport Tourism
- Notes
- Personal
- Save Our Bones
- Sync to Salesforce
- [Gmail]
- [Gmail]/All Mail
- [Gmail]/Drafts
- [Gmail]/Important
- [Gmail]/Spam

← Previous Next →

Continue to 2.3

2.2. Example for non-Gmail/Google Apps email.

When setting up a new account, Domain information is not yet available. If you are an Office 365 customer, choose that option and click NEXT. Otherwise, click OTHER.



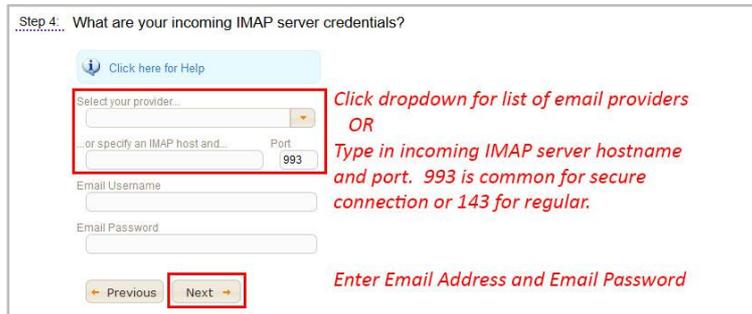
Step 3: What is your email provider/system?

Gmail/Google Apps
 Domain server
 Office 365
 Other

If not Google mail User, Choose Office 365 if it applies, or choose Other and click NEXT.

Next →

- 2.2.1.** On next screen, Office 365 Users will be prompted for email address and email password. Enter those and click NEXT. Skip to 2.2.3.
- 2.2.2.** If you chose Other, on following screen select provider from list or directly enter IMAP information. Clicking blue HELP area will also take you to a wiki page of providers and IMAP information. Click NEXT.

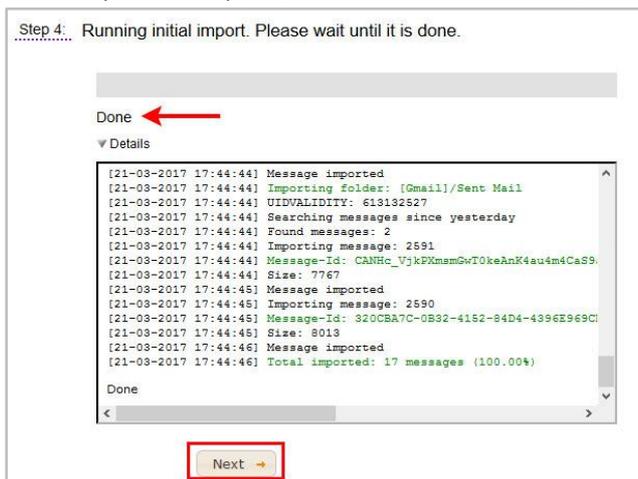


- 2.2.3.** Default folder selection is for folders containing incoming and sent mail - INBOX and Sent folder. This default selection is recommended for efficient and fully automatic function. Subfolders may be added if desired. Please note initially that mail only from last 24 hours in any folder/label will be imported and matched. Click Next.

- 2.3.** Match My Email will begin running the first import, going back 24 hours in selected folders. ([Click here for information about importing older emails.](#)) User can choose to expand Details to view import log or wait simply wait until import is done. Allow the system to complete processing.



When import is complete, click Next. On next screen, click Finish.

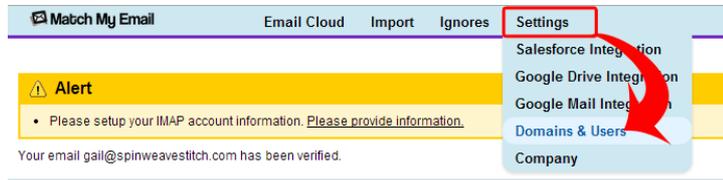


The screen will change to the Email Cloudview, the table of emails have been imported into the cloud from selected folders. Matched or not, emails remain in the MME cloud for the maximum number of days set in Settings > Company (default is maximum of 45 days) and then purged. Matched emails will already be uploaded into Salesforce.com and remain there beyond cloud retention period.

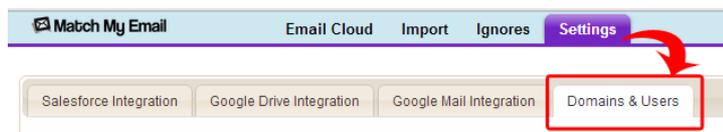
3. Recommended but Optional: Add Company's Email Domain

Adding a company's own email domain is an optional but recommended step. It registers domain in the Match My Email account making it possible to add Users in future. Public email providers, such as yahoo.com, hotmail.com, or gmail.com, cannot be added as domains.

- 3.1.** In the MME Menu Ribbon, hover over Settings and click Domains & Users. Or, when Settings tabs are showing, click the Domains & Users tab.



OR



- 3.2.** Click on “Add Domain”



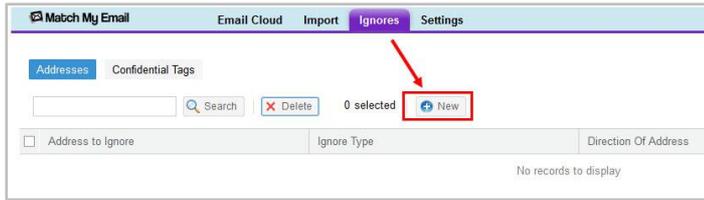
- 3.3.** Fill in fields based on following guidance.

- For **Domain**: The email domain is everything after and not including the '@' symbol in email address. (Example, in jane@acmecompany.com, the domain is acmecompany.com).
- For **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.
- For **Sign In with Google Apps**: For Google Apps Users, choose 'Enabled' to allow Users to sign in to MME by clicking Google button for convenience.
- For **Allow End-user to Import From**: "This IMAP server" restricts end-user to importing from the designated email domain. Gmail should be checked if hosting is with Google. Checking "Any other IMAP server" enables flexibility for Users to import outside of designated domain.
- **Add Users automatically** is enabled by default. It allows additional Users to sign in and add themselves automatically to User list during setup, eliminating extra step for Cloud Admin.
- **Message size is less than (MB)**: Default is 30MB. This is maximum size of a single email and attachment that can be imported into Email Cloud. It can be reduced if desired.
- Click Save.

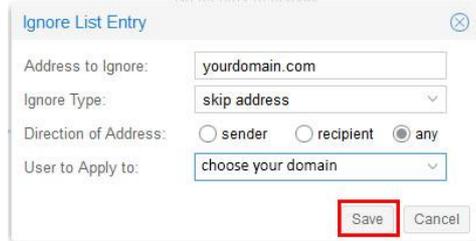
4. Add Ignore Rule (*Important to avoid unnecessary data storage.)

It is VERY IMPORTANT to add an ignore rule with type "just address" for an email domain. This is a protective measure against unnecessary or unwanted matching of internal email to Salesforce.com records that might contain employee email addresses.

4.1. Click Ignores in MME menu ribbon. Click +New.



4.2. Fill in the fields per guidelines below:.

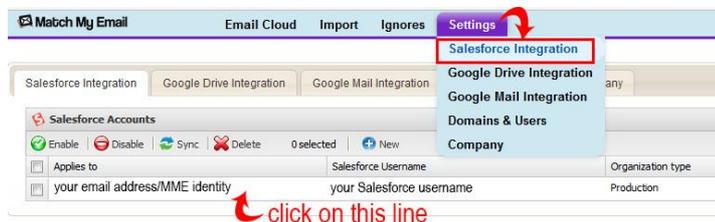


- For **Address to Ignore**: type email domain which is everything after the @ symbol. In the example jane@acmecompany.com, the domain field would contain "acmecompany.com".
- For **Ignore Type**: confirm 'skip address' is showing.
- For **Direction of Address**: click the button by 'any'
- **User to Apply to**: choose your domain in drop down.
- **Click SAVE.**

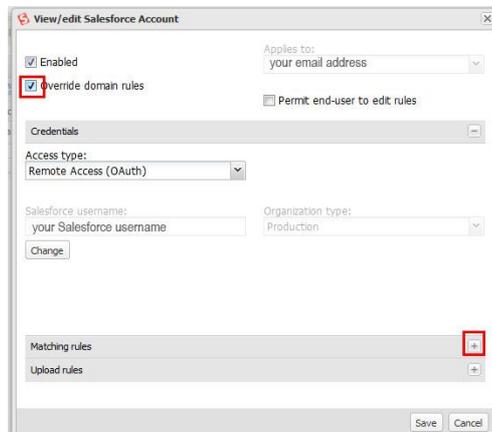
5. Optional: Salesforce Integration Settings for Opportunities & other objects

By default, matching to Contacts, Leads, and Accounts record types is enabled. If matching to Opportunities or Cases by email address is desired, it is necessary to adjust Salesforce integration Matching Rules.

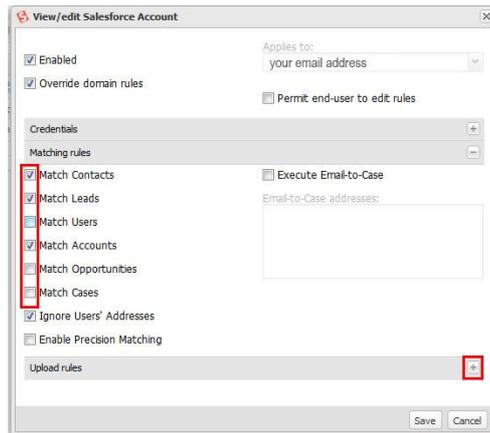
5.1. In Match My Email blue menu ribbon, navigate to Settings > Salesforce Integration. Click on the line of your personal integration listing. (do not just check the box)



5.2. In the pop-up window, check the box for Override Domain Rules at top left. Then click the + to expand Matching Rules options.



- 5.3.** By default, matching to Leads, Contacts, and Accounts is enabled, as well as Users. As a single MME User, Match User can be unchecked. It is more useful when enabled for multiple MME Users.



Uncheck boxes to disable matching to the object. To enable matching to Opportunities (by email address of Contact Role) or Cases, check those boxes.

- Those using Salesforce-Contact Manager edition should only have Match Contacts checked.
- To use Email-to-Case, please reach out to MME support staff at support@matchmyemail.com as this feature requires discussion about settings in both MME and Salesforce to work properly.

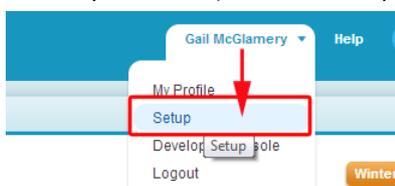
Click the “+” sign to expand Upload Rules options.

- 5.4.** Under Upload Rules it is possible to manage how MME uploads attachments into Salesforce. MME stores attachments in Salesforce organization’s more plentiful file storage. In most cases, defaults can be left as is.

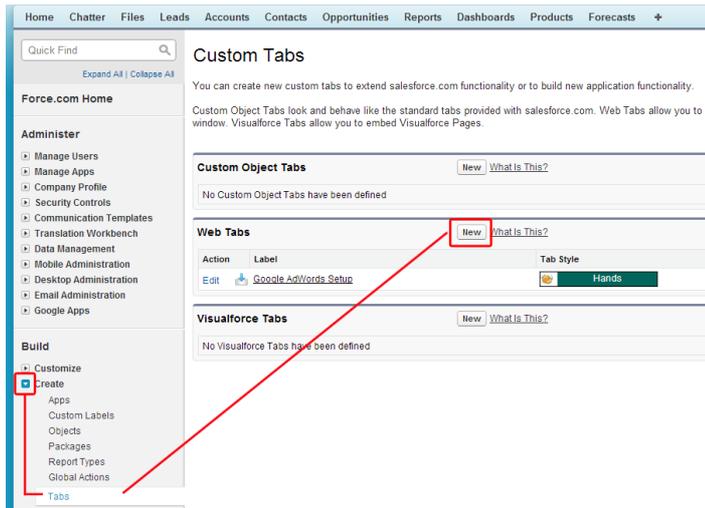
- By default, “Upload Email to Salesforce” and "Enable team dedupe" are enabled.
- For Upload Attachments:
 - With Upload Attachment box checked, it is possible to set the size in MB that can be uploaded. The default is 5MB, the upper limit into Salesforce, but can be lowered. Attachments larger than MB limit will not upload to Salesforce.
 - With Upload Attachments box checked, if size is set to 0 MB, actual attachments will not be uploaded but LINKS WILL be uploaded with email on match. Users will be able to click a link to view the attachment in the MME cloud while it is stored there for determined retention period (default is 45 days).
 - If Upload Attachments box is unchecked, only email and NO attachments or links to attachments are uploaded into Salesforce on match.
- By default, MME blocks inline images up to 25 KB. Thus, inline images such as signature logos up to 25KB will not be uploaded. This size may need to be increased if inline signatures are uploaded and not desired.
- Attachments can be uploaded to a Google Drive account if desired. All attachments entering Email Cloud will be sent to Google Drive root directory. Check the box and visit Settings > Google Drive Integration to add credential and make connection between Google Drive and MME.
- Click Save.

6. Optional: Adding a Match My Email Web Tab in Salesforce.com

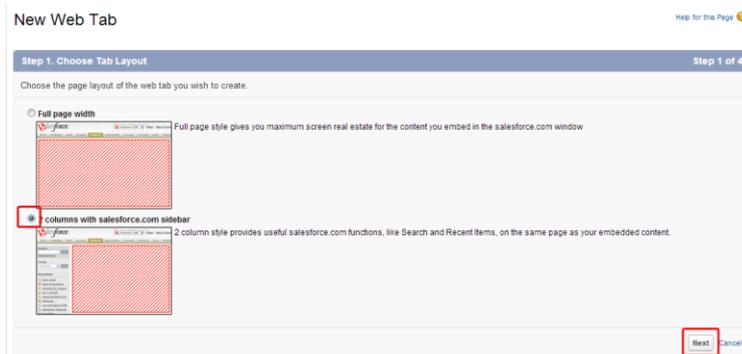
- 6.1.** Click on your name (user menu drop down) and choose Setup



6.2. Under App setup click Create, then click Tabs. Next to Web Tabs click New.

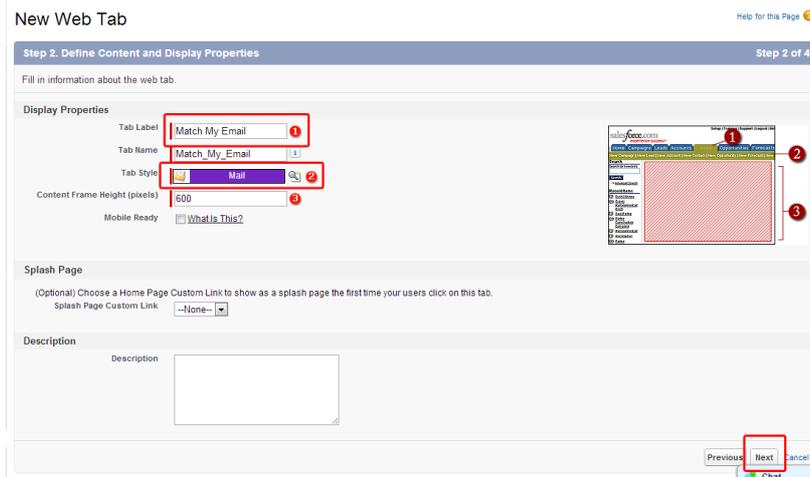


6.3. Choose Tab Layout for Two Column Layout. Click Next.



6.4. Define Content and Display Properties by filling in fields as follows and in screenshot below:

- Tab Label: type in "Match My Email"
- Tab Name will auto fill with Tab Label
- Tab Style: click box and then select one
- Leave Content Frame Height as "600"
- Click Next



6.5. In box 'Button or Link URL', type or paste in the following address:
https://matchmyemail.com/?sf_session={!API.Session_ID}&sf_serverurl={!API.Partner_Server_URL_230}

Note this is a secure site and has https as opposed to just http. Click Next

6.6. On the next screen 'Add to Custom Apps', leave all boxes checked and click Save.

6.7. You will now see the Web Tab in the list as well as in the top menu ribbon.

For assistance or for questions, contact support@matchmyemail.com or [visit our support wiki site for app information](#).

To add more Users to your Match My Email account, please visit <http://www.matchmyemail.com/wiki/managing-users-and-mme-account/add-another-match-my-email-user/> Or our pdf document <http://www.matchmyemail.com/standard-appexchange-series/adding-users-existing-match-my-email-account.pdf>

Please note that Match My Email also offers MultiMatch, a version that matches to multiple Salesforce objects automatically. To use this version, it is necessary to install our managed package and add custom objects to page layouts for viewing our email log. Visit our support page for set up guides for MultiMatch.