

Match My Email

Setting Up Match My Email (MME) to upload as Enhanced Email in Salesforce.com using Microsoft 365 Graph API

This guide contains the steps to setup Match My Email so that messages from Microsoft 365 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 WhatID record, so 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.

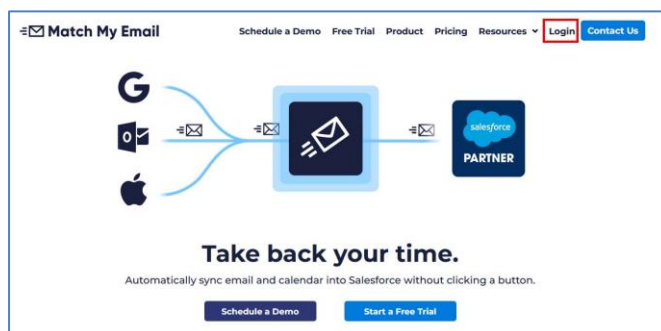
Those using Financial Services Cloud (either the Individual or Person Accounts model) can encounter challenges with the WhatID limitation when also wanting to see emails on the Household object. It is strongly recommended that Financial Services Cloud Users upload to our custom object Email Messages and reference the appropriate setup guide.

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

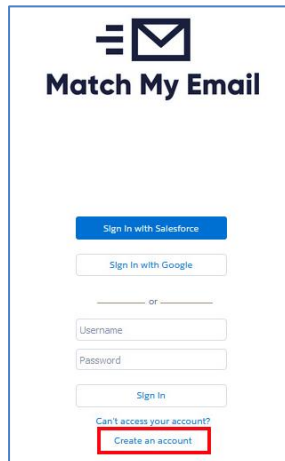
- 1.1. Navigate to www.matchmyemail.com. Click Login in top menu.



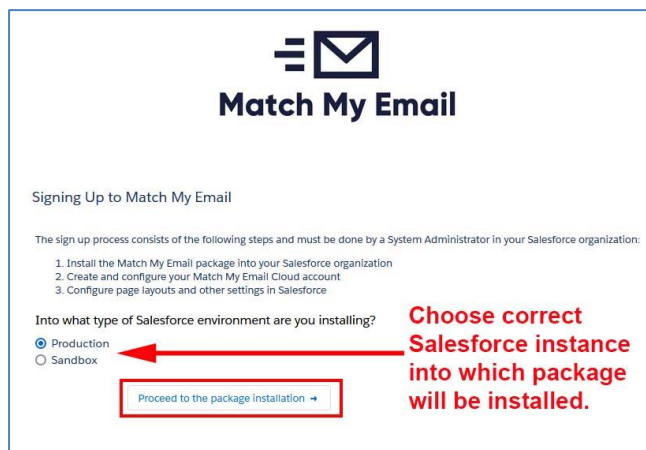
- 1.2. Choose the correct portal.



- 1.3. Click Create Account at the bottom of the list of options.

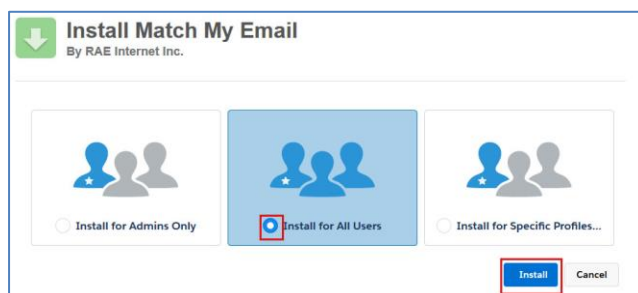


- 1.4. Choose the type of Salesforce environment into which you want to install the app and click the button 'Proceed to the package installation'.

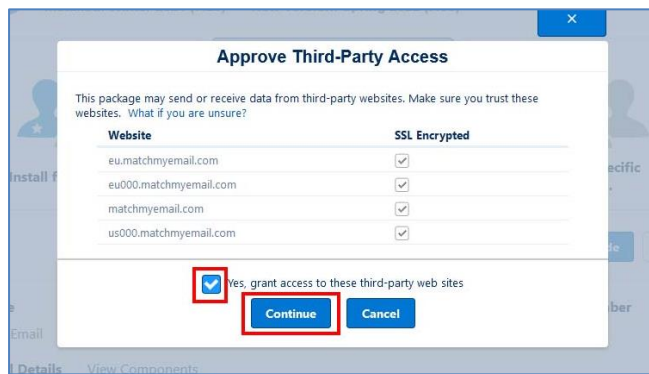


Those using Enterprise and Unlimited editions of Salesforce have the option of installing into a Sandbox environment for testing. To use Match My Email subsequently in a Production environment, setup steps in this guide will need to be repeated and a new Match My Email account created/.

- 1.5. 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 access is available for non-Admin Users.



- 1.6. Check the box to approve third-party access and click Continue. Approving Third-Party Access adds four remote site settings necessary to use the Email Sync Assistant feature (Details in Section 12) to bring information about No Match messages into Salesforce.

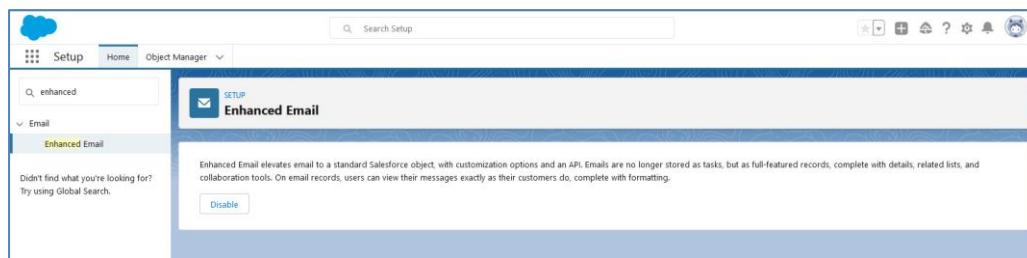


The install may complete quickly though in most cases you will see a message that the install will take a bit longer. On that screen, click DONE, and you will be taken to your list of Salesforce installed packages. You will receive an email from Salesforce when the install is complete.

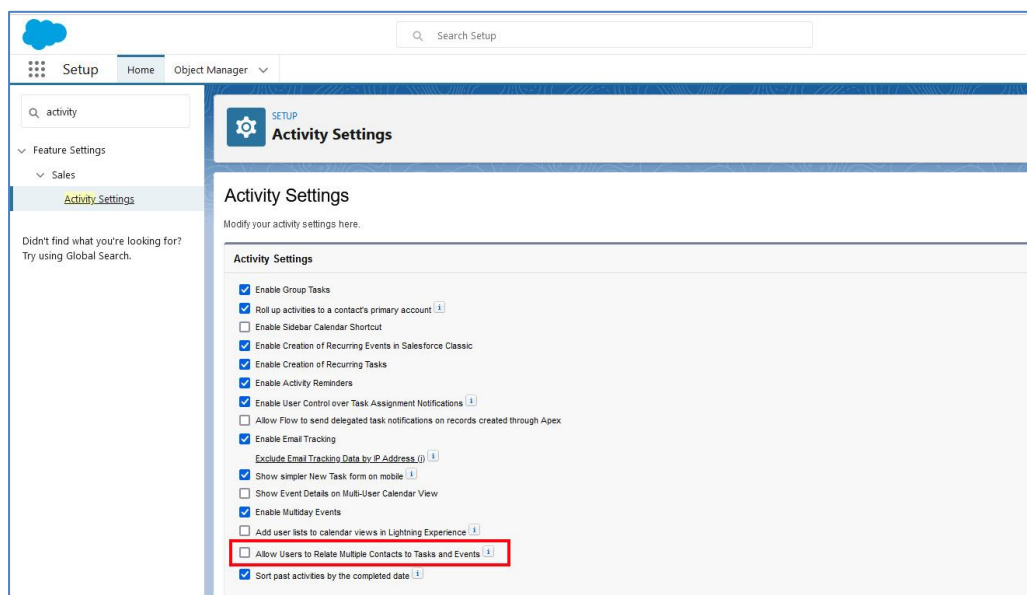
Refresh the Installed Packages list in Salesforce. Once Match My Email is a listed package, and **BEFORE** you proceed in setting up a Match My Email account, complete the following 2.0, 3.0 and 4.0 sections.

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.

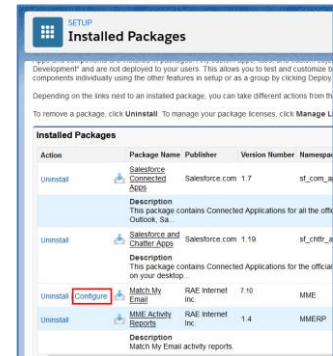
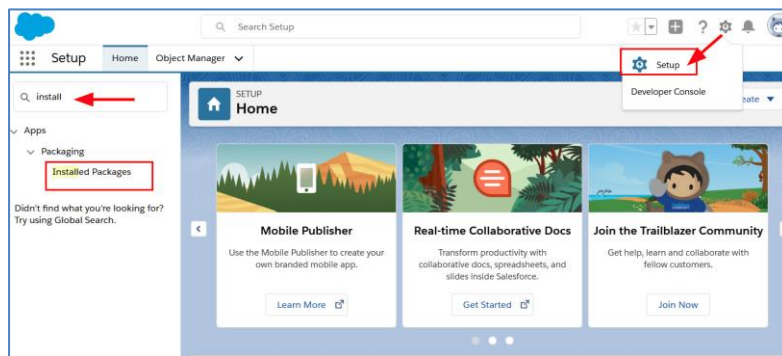


- 2.2. Use the Setup Quick Find to find and select Activity Settings. Confirm that the choice “Allow Users to Relate Multiple Contacts to Tasks and Events” is enabled. If it is not, check the box. Salesforce will indicate it may take a bit of time for the feature to be fully enabled.

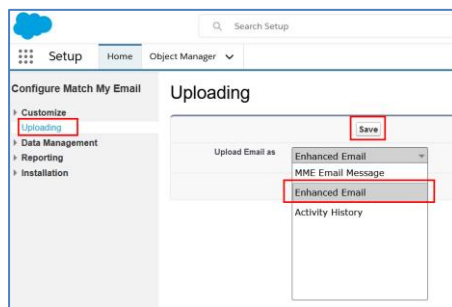


3. Adjust Uploading Strategy for Enhanced Email

- 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.



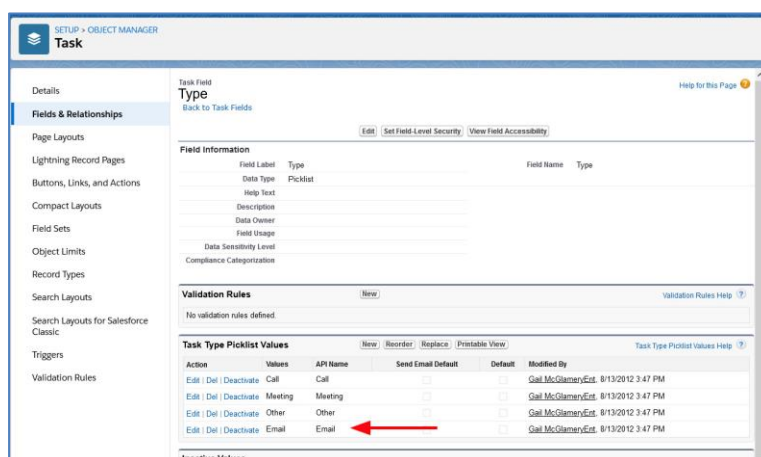
- 3.2. In the menu, click on Uploading. Change the option to Enhanced Email. Click SAVE.



4. Adjust Picklists for Tasks and Events

When Match My Email uploads and matches an email to the Activity timeline, it can also set the value of the Type field in both the Task and Event objects correctly as an Email or Event, respectively. This is important for future reporting of Activity data.

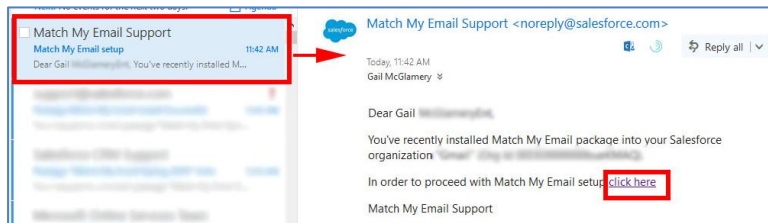
- 4.1. Navigate to Salesforce Setup > Object Manager > Task
- 4.2. Click on Fields and Relationships and then click on the Type field. Check that Email is a Picklist value. If it is not, click New and enter it as a picklist value.



- 4.3. If you plan to also have Match My Email upload events with a calendar import, 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.

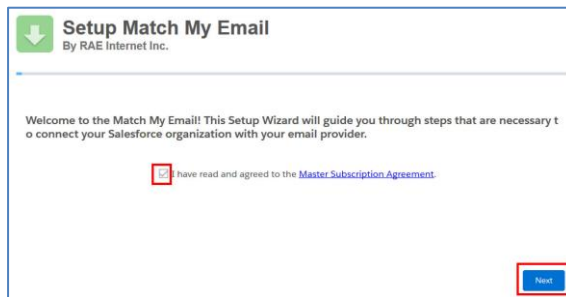


If you do not receive the email, click the following appropriate link:

For account/data on U.S.-based server, click <https://matchmyemail.com/install>

For account/data on E.U.-based server (GDPR compliance), click <https://eu.matchmyemail.com/install>.

- 5.2. The first screen is about the Master Subscription Agreement ("MSA"). You can click the link to read the document or right-click on 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.

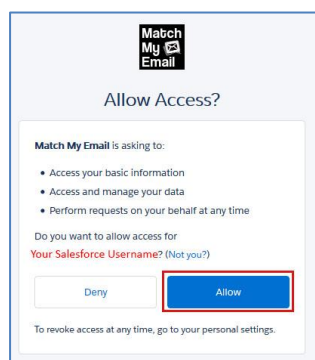


- 5.3. If you used just the link above, you may be asked to reinforce your choice of Production or Sandbox. If you received the email and clicked that link provided, our system should anticipate the correct environment.

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

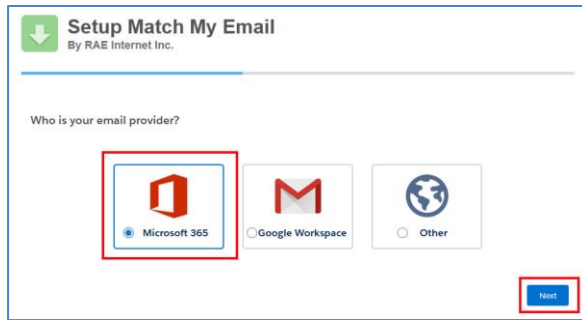


- 5.4. You will be taken to a screen to prompt you for login to Salesforce with your System Administrator credential, if you are not already logged into Salesforce on another tab. Match My Email is requesting access to connect to your Salesforce organization. Click Allow.



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. Choose Microsoft 365 as the email provider.

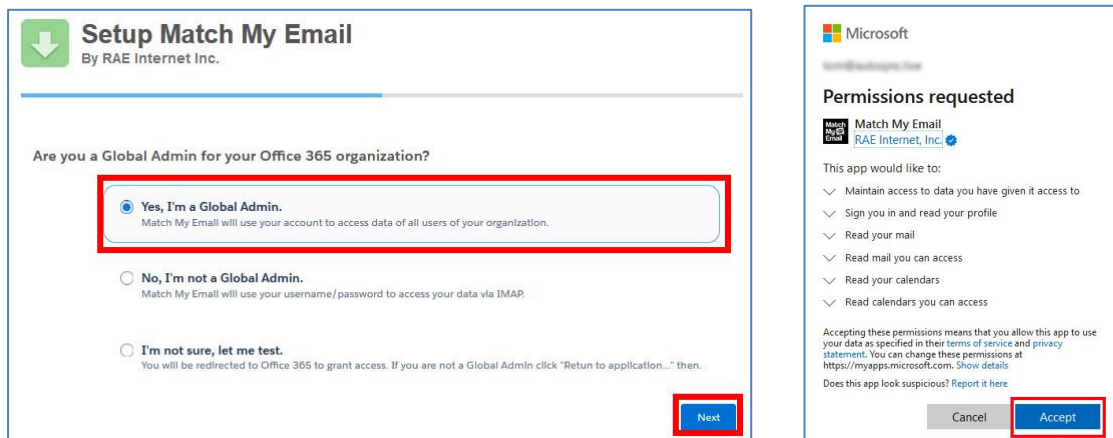


- 5.6. Make appropriate choice based on your role with Microsoft 365.

If you are, or have the participation of, a Global Admin, leave this as the default and preferred choice. This will setup an Email Service Connection for your entire team that will allow you to remotely activate your Users. Click Next.

***If you are unable to use a Global Admin credential, Choose “No, I’m not a Global Admin” and you may proceed in connecting an individual API connection to Microsoft 365. Jump to Step 10 where these steps are outlined*

- 5.7. You will be prompted to login to Microsoft 365 with a Global Administrator credential. Accept permissions that will allow you to activate Users within the Match My Email account

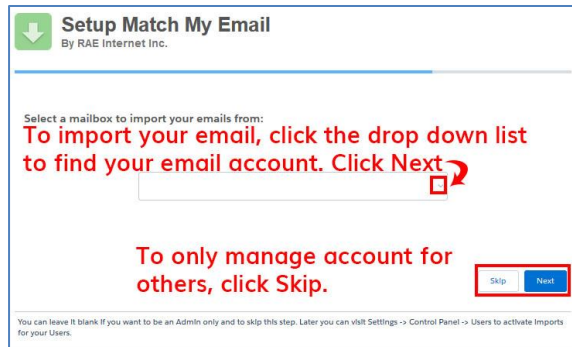


**** Please note that you may not have success in making the connection to Microsoft 365 on the first attempt. If you receive a red box alert, the steps to make the connection simply need to be repeated once more. However, since the flow of the setup wizard has been interrupted, please do the following:**

- Click <https://matchmyemail.com> (US cloud) or <https://eu.matchmyemail.com> (EU cloud) to login to your newly created account.
- On the right, click the middle Settings button and in drop menu choose Control Panel.
- In Control Panel, in left menu choose Email Services and then click the + button at top to add a service.
- Choose Microsoft 365 and proceed through the screens beginning with Step 5.5.
- Once the service is saved, skip to Step 5.12 and continue.

- 5.8. If you only want to manage the MME account as an administrator and do not need to import and match your own email, click SKIP and on next screen click Finish and go to Step 5.11.

- 5.9. If you want to import and match your own email immediately, find your email account and click Next. This will start your import.

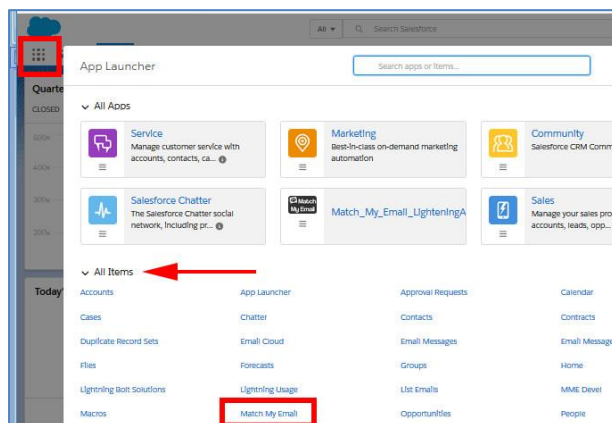


Match My Email will begin running the first import automatically, going back 24 hours in the default folders of Inbox and Sent. ([Click here for information about importing older emails.](#)).

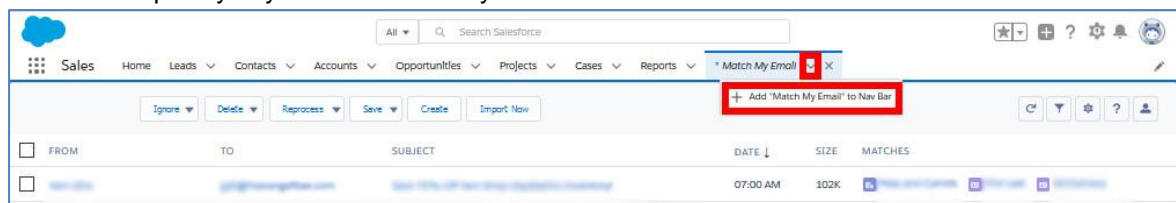
- 5.10. When import is complete, click Next. Upon completing setup, click Finish.
- 5.11. You will then jump to Salesforce and be viewing the Match My Email web tab. If you skipped creating an import, you will not have email messages showing. If you did create an import, you will be looking at copies 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 the 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.

- 5.12. To access Match My Email from within Salesforce, click on the App Launcher. You can click the App and then, in the App Menu click Match My Email. To add a tab to your Nav Bar, from the App Launcher click View All. Instead of clicking the App image, in the lower section find and click on the label for Match My Email.



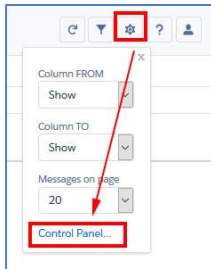
It will be temporary in your Nav Bar and you can click the carat to choose Add to Nav Bar.



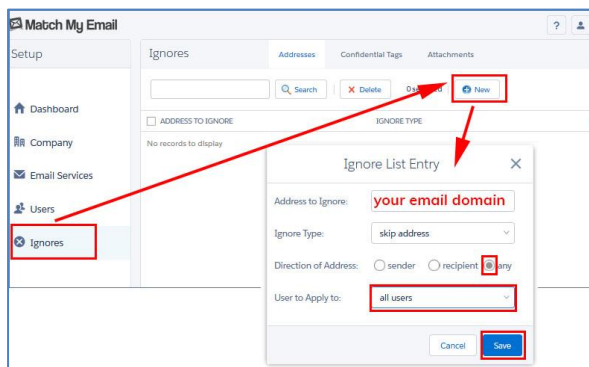
6. Best Practice: Add Ignore Rule for Email Domain

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.



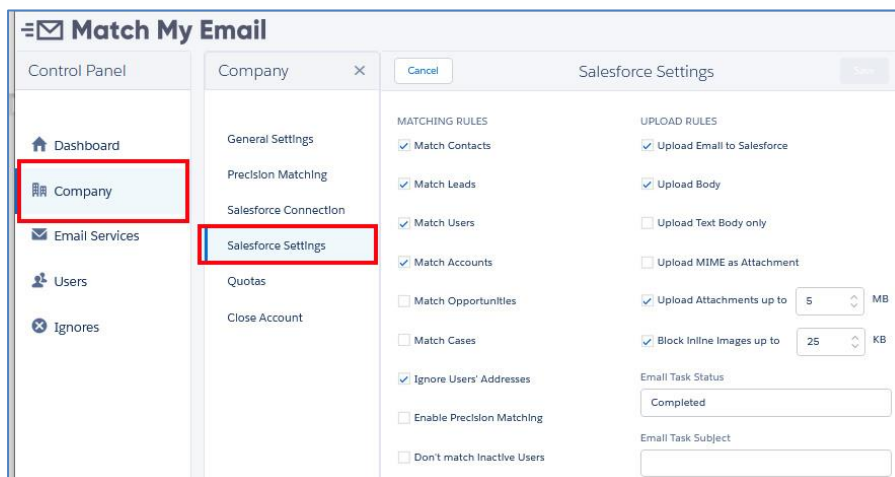
- 6.2. In the Control Panel, click Ignores on the left. Click +New button. Fill in the fields as described below and click SAVE.



- 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 app 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.

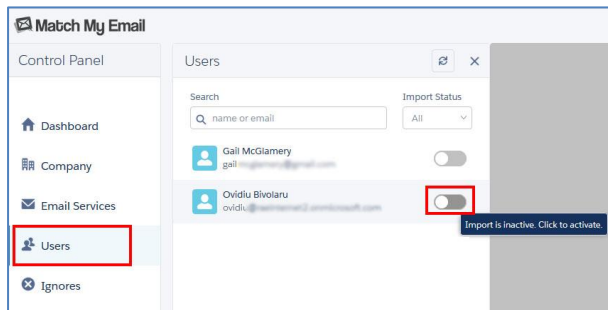
Customized matching to Opportunities by tag or words in Subject Line or matching to Case by unique Case # is possible with custom programming. However, with Enhanced Email we can only match to one What record. Contact our support team to inquire.

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 activate additional Users for email importing & matching using Global Authentication

Adding and Activating Users to a Match My Email account can be completed remotely by a Match My Email Admin. An Admin user in Salesforce is automatically an Admin user within Match My Email. The ability to remotely activate users is made possible through the Global Email Service connection created in Step 5.6

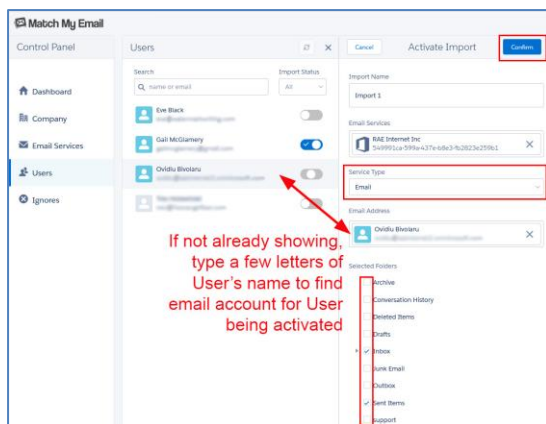
- 8.1. Navigate back to your view of the Email Cloud. (Click the Match My Email web tab in your Salesforce Nav Bar or click the App Launcher > All Items > Match My Email)
- 8.2. Click the Match My Email Gear, the middle icon button to the top right of the screen and click Control Panel.
- 8.3. On the left, click Users. In next panel, the list will show Salesforce Users in the organization. Find the correct User and click on the toggle.



- 8.4. Through the Microsoft 365 API connection, Match My Email should be able to display the User's email account and folders in the panel to the right. If their account is not already showing, under Email Address, enter a few letters in the Quick Find to search for and then click on their account.

By default, the import is named Import 1 and Inbox and Sent folders are selected. The import name can be changed to something more descriptive as desired. Additional folders, such as subfolders into which User quickly move emails (within 20 minutes of receiving them) can also be selected for import. We do not recommend choosing All Mail or all folders, as this can bring in spam, drafts/duplicates, and undesirable email. Click Confirm at the top.

Click CONFIRM at top right to confirm activation.



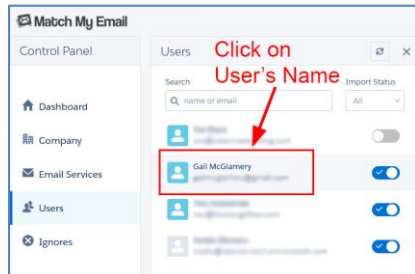
Within 20 minutes, Match My Email will begin to import and match for the new User. No further action is required by you or the End User.

As an Admin, you can click back to left menu and choose a different User, repeating the steps to activate them.

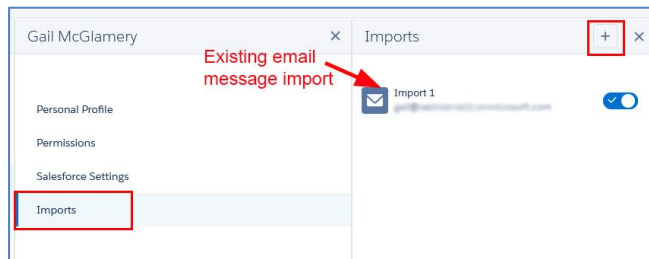
9. Optional: Remotely activate additional Users for Calendar synchronization

Please disable any other Salesforce calendar syncing tool, such as Einstein Activity Capture, Lightning Sync, or Calendly, before adding an MME Calendar import. Otherwise, you may encounter duplication of events and emails or other issues.

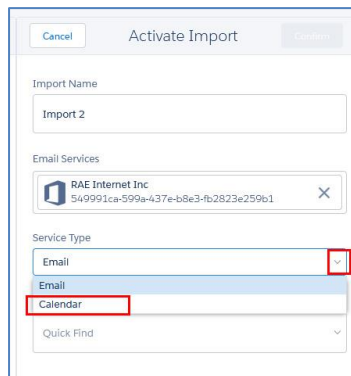
- 9.1. Sign into the Match My Email Control Panel and click on Users. Calendar synchronization is activated per User and appears as an additional import. We assume an email import was already confirmed for your Users per Step 8. The toggle will already be blue for Users you have activated. Do not click the toggle, as that will suggest to the system you want to deactivate the import. Click the Name of the User needing a Calendar sync.



- 9.2. In the User Details panel that opens, click Imports. In the Imports panel that opens to the right, click the + sign at the top to add an import.



- 9.3. Below the Email Services field, expand the Service Type option to choose Calendar.



- 9.4. In most cases, the Email Address field will automatically fill in based on the system matching up the User with what is available. However, if it does not, simply type a few letters of the User's name or email address into the Quick Find and select the correct account.

The Start Date field will default to a date one week prior to the day you are activating this import. If you want to go back further, you can use the calendar icon to choose a date farther back in time up to one year. Please note that once activated, the start date cannot be altered. Click Confirm at the top to save the import.

10. Optional: Create Individual API Connection

- 10.1. Coming from the step 5.6, you would have selected the middle option “No, I’m not a Global Admin” and clicked Next. You will be prompted to login to Microsoft 365, first entering your email address and then entering your email password.
- 10.2. You will then see a list of permissions required.

- 10.2.1. You may be presented with the option to Accept these permissions. This means your Microsoft 365 Administrator has pre-approved your ability to accept permissions. Click Accept. You will see folder options as represented in Step 8.4. Choose and click Confirm. Return to step 5.12.

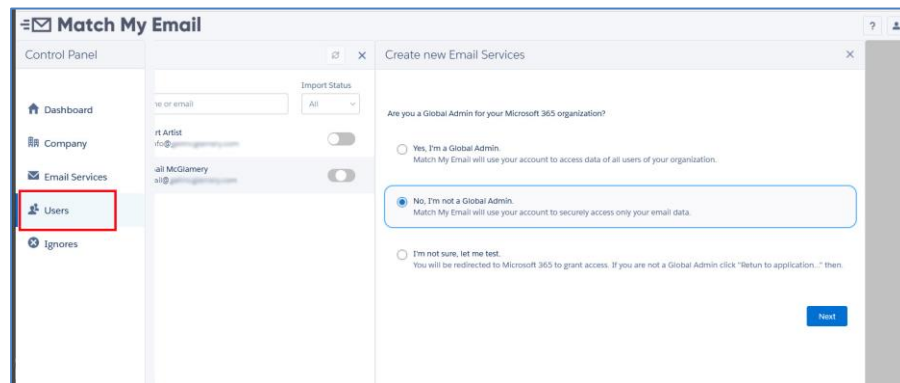
- 10.2.2. If your Microsoft Administrator has restricted Users’ ability to accept permissions, then you will see language indicating approval is required. Fill in the field with justification for request. We suggest “Match My Email (Salesforce) application access”. Click Request approval.

- 10.2.3. You will receive a confirmation your request has been sent with a button to click Back to App. You need to wait until your Microsoft Admin has approved the access request before you can activate your import. However, you can adjust other settings. Please jump back to Step 5.12.

Once access is approved by your Microsoft Administrator, you will need to do the following to complete your personal setup.

10.3. As in steps 8.1 and 8.2, navigate to the Match My Email Control Panel. Menus are different depending on what kind of Salesforce User you are.

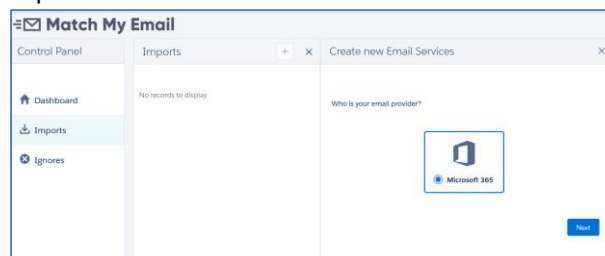
10.3.1. If you are a Salesforce Administrative User, you will click Users on the left, find your name in the list and click the toggle. Then choose “No, I am not a Global Admin” and click Next.



You will then be prompted to login and complete your personal import, reviewing folders before confirming your import.

10.3.2. If you are not a Salesforce Administrative User, you will click on Imports on the left. Click the + sign at the top to add an import.

Choose Microsoft 365 as your email provider and click Next. Login to your Microsoft Account and proceed through screens to accept permissions, review folder selection, and confirm your import.

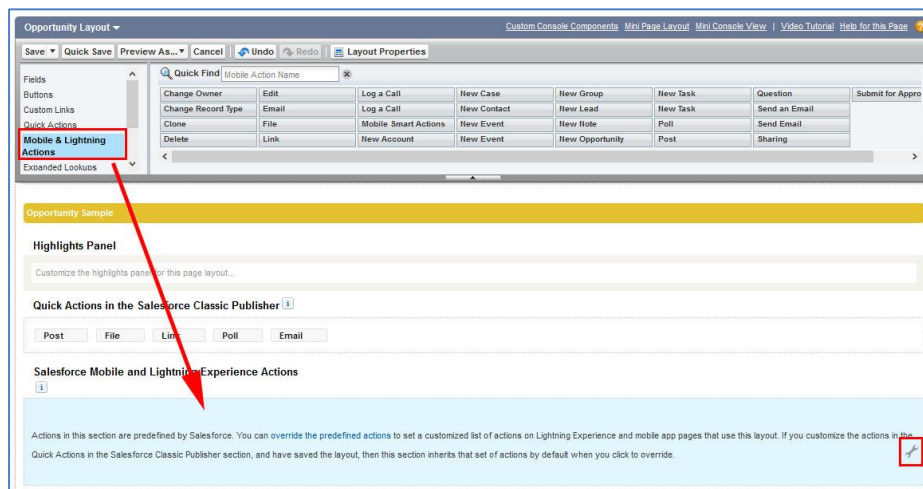


11. Optional: Convert to Match My Email's Send Email button

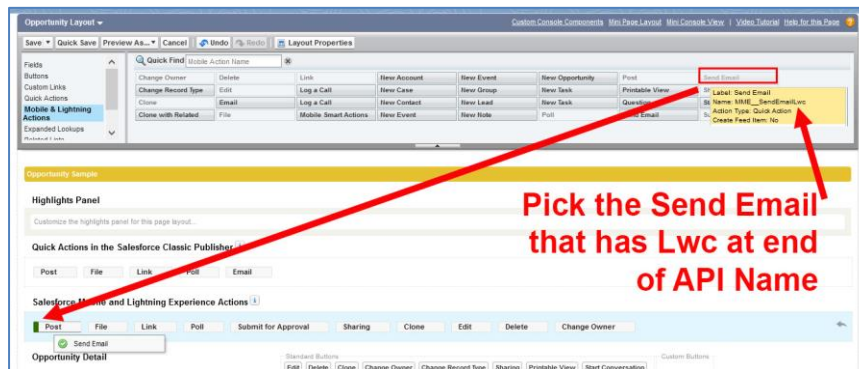
Match My Email's Send Email button will appear at top of screen when viewing email in Lightning and in bottom menu in Salesforce Mobile. It provides the ability to send, reply, reply all and forward email from within Salesforce.

11.1. 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.

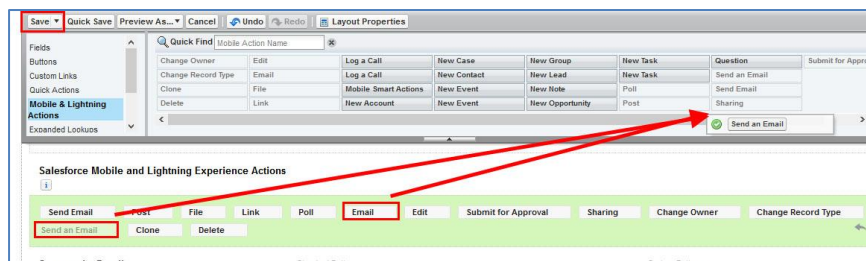
- 11.2. At top left, click on Mobile and Lightning Actions. If the Salesforce Mobile and Lightning Experience Actions section below does not already show items it contains, hover over grey area. It will highlight as blue, click the wrench icon to open the section for edits.



- 11.3. 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.



- 11.4. 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.

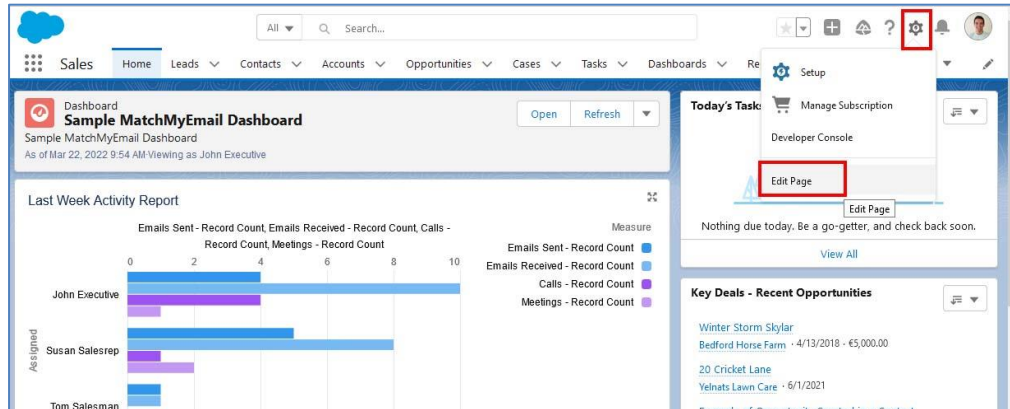


Repeat steps for other objects (Lead, Account, and Contact objects) used in Salesforce. For Cases, you will need to add a Dynamic Action as described at <https://www.matchmyemail.com/wiki/using-send-email-button-on-cases/>.

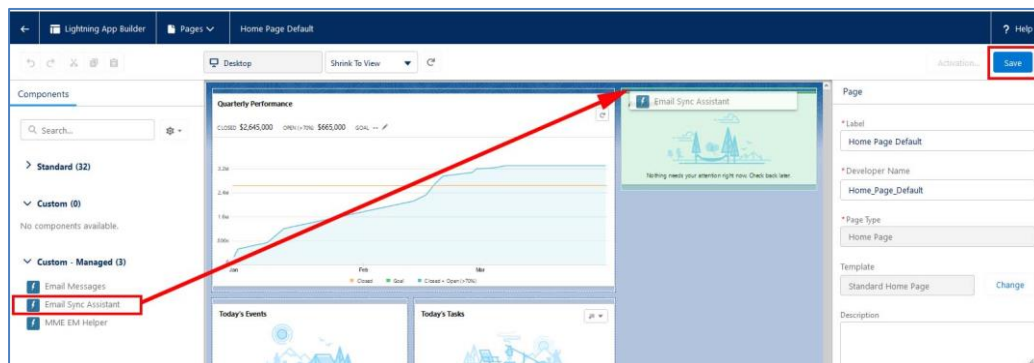
12. Optional: Add Email Sync Assistant to Salesforce Home Page

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.

- 12.1. Navigate to your company's main Salesforce Home Page. Click the Salesforce setup icon and choose Edit Page in the drop menu.



- 12.2. 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.

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