

Creating a Match My Email Account - Microsoft 365 Individual Authentication

Finish Setup with Steps on Match My Email System

This is the second of two documents you will need for the complete setup of Match My Email (MME). Prior to using this document, a Salesforce System Administrator should perform steps to install the application, choose an uploading strategy, and configure Salesforce.

In this document:

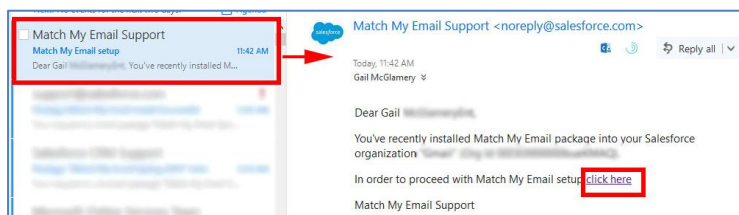
- You will create an MME account for your company and configure settings.
- Individuals will be able to complete their own individual connection with Microsoft 365 (which may require Microsoft 365 Admin approval)
- PLEASE NOTE: If you choose to use MME for calendar syncing, other tools, especially EAC, should be disabled for trial Users to ensure no conflict or unexpected behavior

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1. Set up Match My Email Account

- 1.1. Following the successful install of the app, you will receive an email from MME Support (as shown in image below) that contains the link 'click here' to proceed.

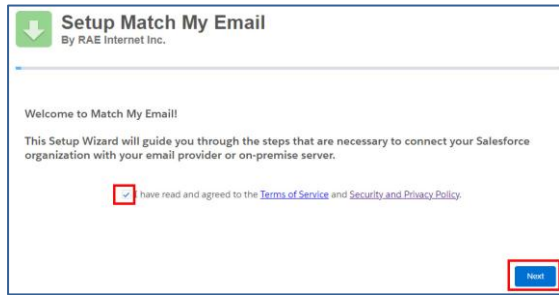


If you do not receive the email, click the best link below for your needs:

For account/data on U.S.-based server, <https://us000.matchmyemail.com/install>

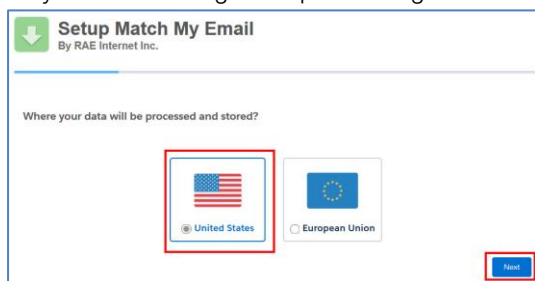
For account/data on E.U.-based server (GDPR compliant), <https://eu.matchmyemail.com/install>.

- 1.2. The first screen presents the Terms of Service and Security Policy. After reviewing documents, check the box to confirm and click Next.

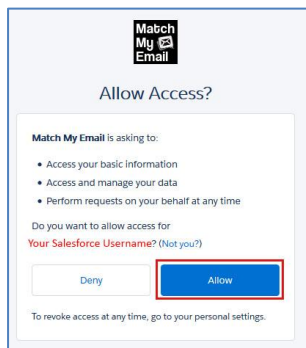


- 1.3. If you received the email in 1.1 above and clicked the link provided, our system should anticipate the correct type of Salesforce install. If, instead, you clicked on one of the links in 1.1, you may be asked to reinforce your choice of Production or Sandbox.

If you/your company is located within the European Union or needs to meet GDPR compliance, choose the European Union server to reinforce your cloud choice. Otherwise, choose the United States as the location for your data storage and processing. Click Next.



- 1.4. You will jump to Salesforce and may be prompted to login to Salesforce. MME is requesting access to connect your MME account to your Salesforce organization. This is not activating an import. Click Allow.

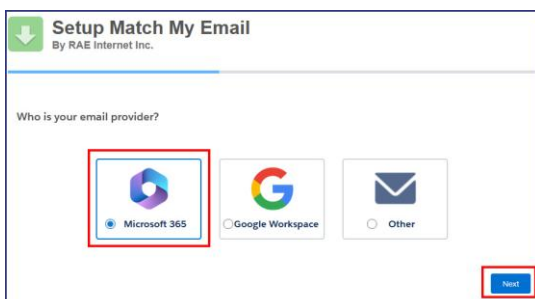


An MME account has now been created and you are able to manage the account. Proceed to the next step to connect the account to your email server.

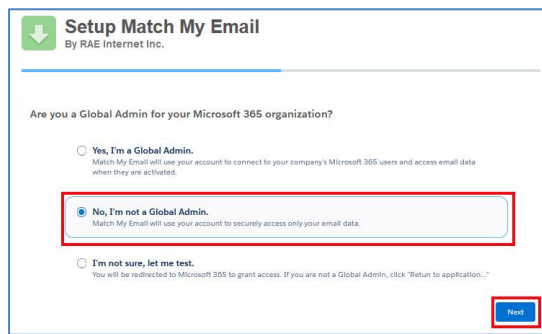
2. Activate yourself (Salesforce Administrative User) using Individual Authentication

If, as an Administrative User, you do not want to import and match email but rather only manage the account, skip to 3.0. If you do need to activate yourself, you can continue with the setup wizard steps.

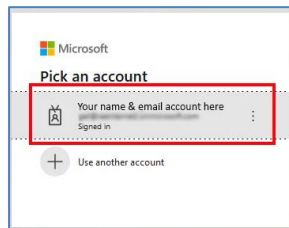
- 2.1. Choose Microsoft 365 and Next.



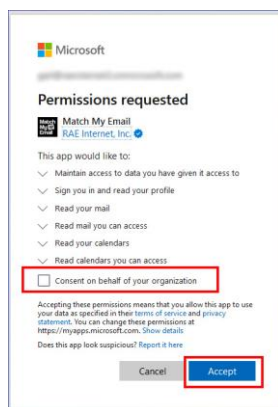
- 2.2. Choose “No, I’m not a Global Admin” to proceed in connecting an individual API connection to Microsoft 365.



- 2.3. You will be prompted to sign into the email account from which MME should process emails.



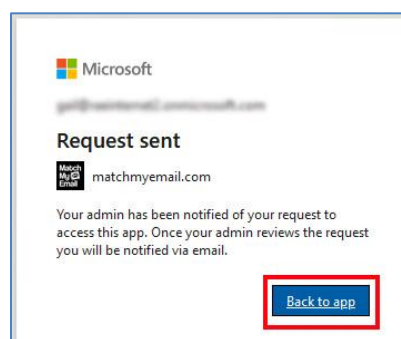
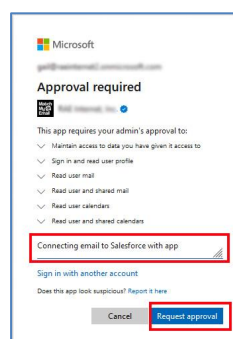
- 2.3.1. If you are an Admin for Microsoft 365, you may be presented with an option to Consent on behalf of your organization. If your Email Administrator has pre-approved the MME application, then you may be prompted to accept permissions. Click Accept.



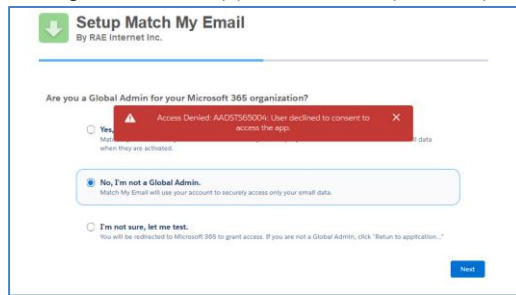
If you prefer to adjust settings before activating your import, or if you are an Admin and do not need an active import, click Skip and then Finish. Skip to 3.0.

If you want to proceed with activating your import, click Next. MME will begin running the first import automatically, going back 24 hours in the default folders of Inbox and Sent. Allow it to run and then click Finish. (<https://www.matchmyemail.com/wiki/frequently-asked-questions/importing-email-history-with-match-my-email/>). Skip to 3.0.

- 2.3.2. If your Email Administrator has reserved the ability to approve third-party app connections, then you will see a message indicating Approval Required. Fill in your reason for the approval (ex. Connecting email to Salesforce with app) and click Request Approval. On the next prompt, click Back to App. You will need to wait for your Admin to approve.



Upon return to MME, you may see an Access Denied message. It simply is reinforcing that you are having to wait for approval to complete import activation. Skip to 3.0.

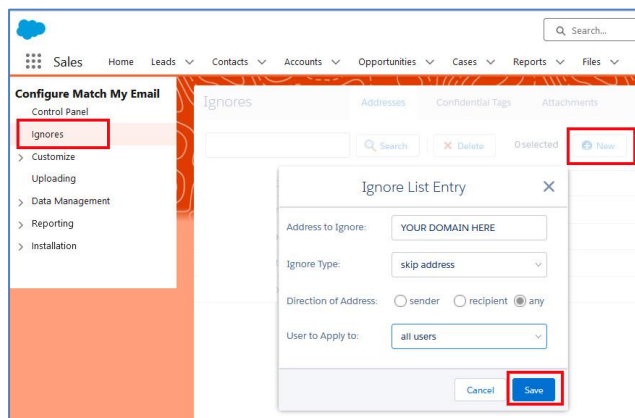


3. Best Practice: Add Ignore Rule for Email Domain

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

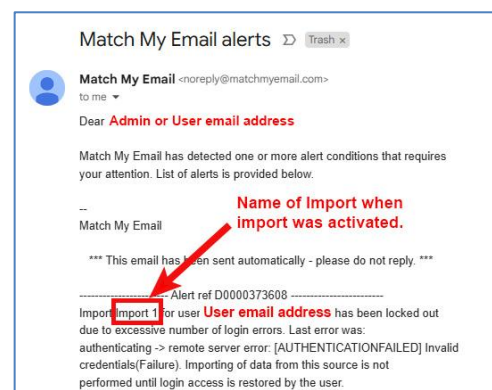
3.1. Navigate to your Salesforce App Launcher > Match My Email Setup. Click Ignores and then +New. Fill in the form as follows:

- 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.

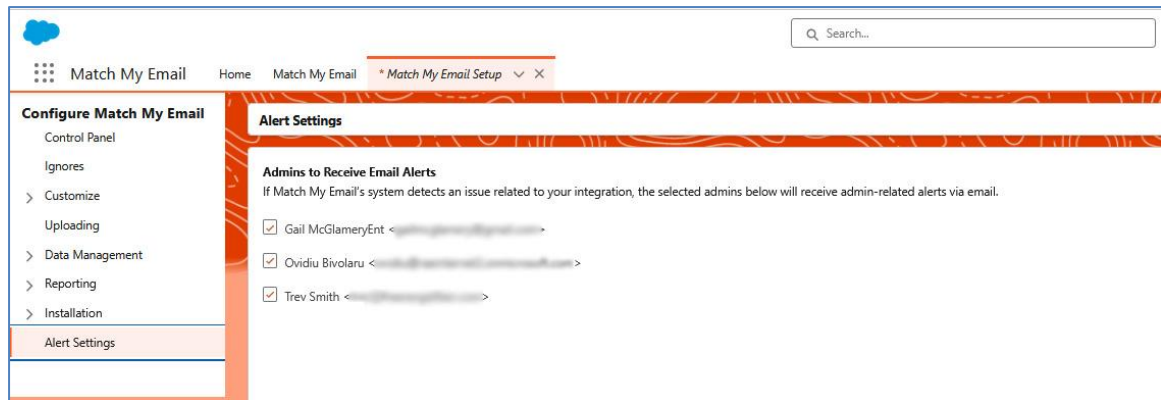


4. Review Alert Settings

4.1. MME will send email alerts to Users and Admins when connectivity is broken either for Salesforce or for email & calendar importing. They will appear as in the following example of a broken email connection. The alert language will be descriptive to the kind of error occurring. It will be addressed to the User approved for receiving alerts for ALL Users and include an Alert Reference #. The Import Name saved during import activation will be indicated along with the email address in question.

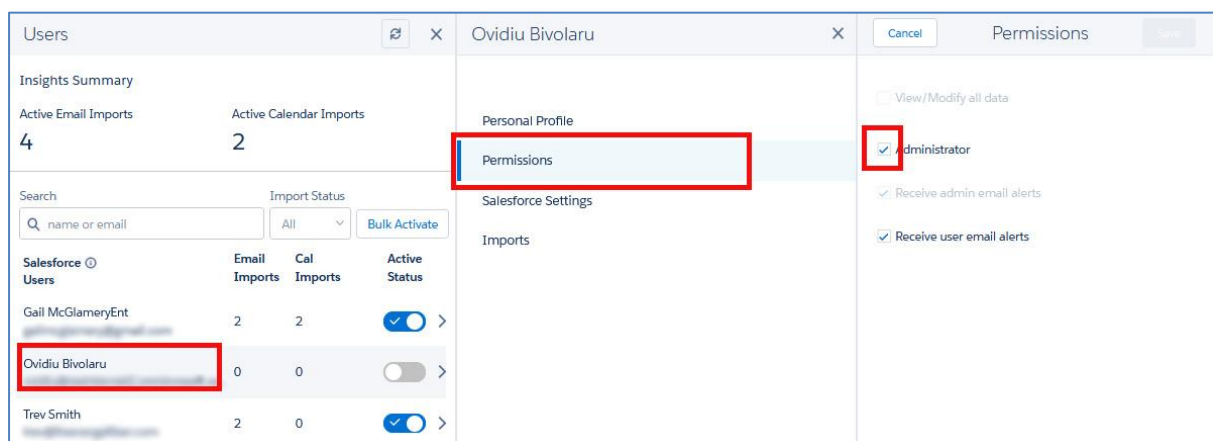
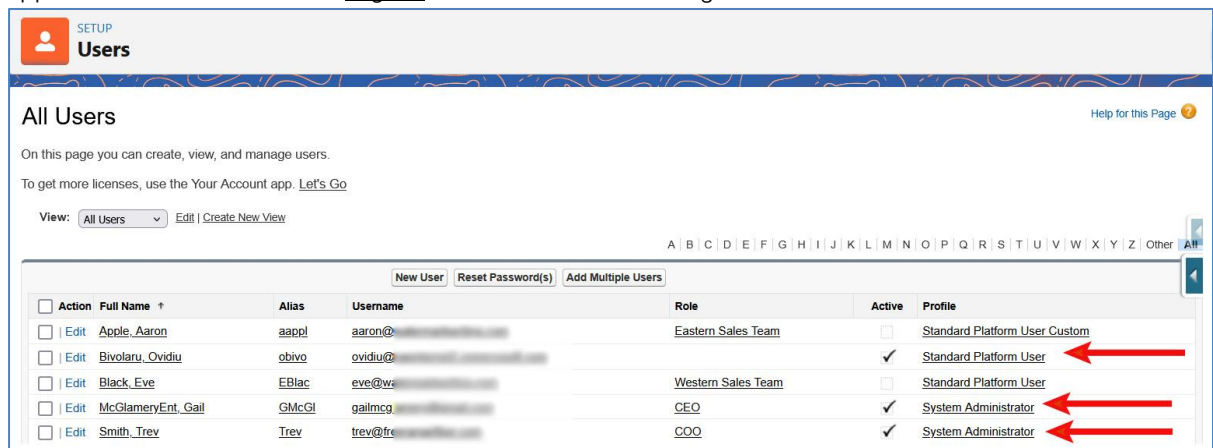


- 4.2. Any User that is a System Administrator in Salesforce is automatically an Admin in Match My Email. If you do not want all Administrative Users to receive these, but perhaps only a few Admins involved with the management of Match My Email, you can uncheck the box next to Admin Users you that should be exempt from alert messaging. Remember to click Save at the bottom of the screen.

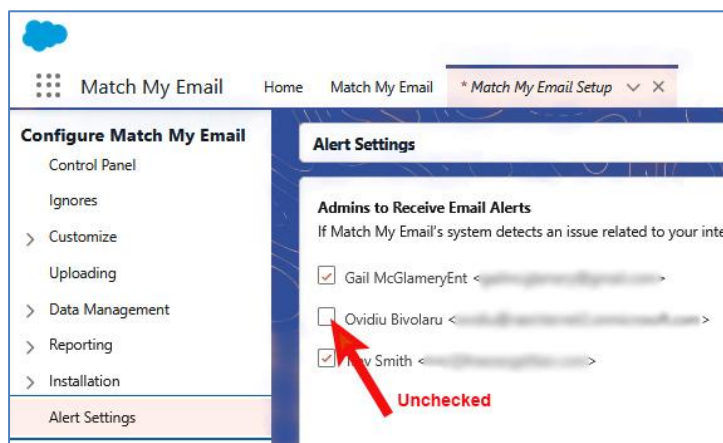


- 4.3. This list of Admins to receive alerts is drawing from user-specific permissions in the MME account. If you navigate to Control Panel > Users > Click a User Name > Permissions, you can see a box for Administrator. When someone is a System Admin in Salesforce, this box is checked by default and will always remain so.

It is possible, though, to grant a Salesforce End User Admin rights in Match My Email. In the screenshot below, the User Ovidiu has the Standard Platform User profile in Salesforce. In the Match My Email Control Panel, navigating to his specific permissions in Match My Email we can see he has been made an Administrator in the app. This indicates that he is eligible to be on the Alert Settings list.

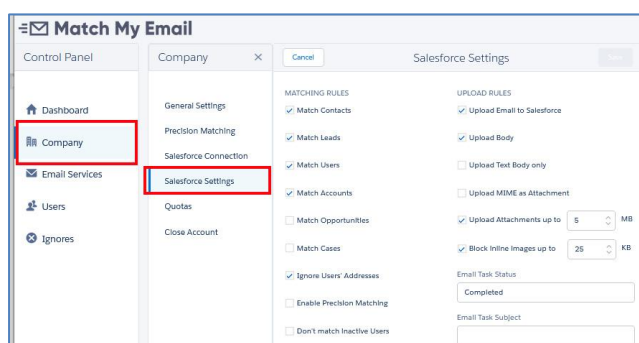


- 4.4. It is then the choice of someone managing Match My Email to uncheck the box if he should not receive alerts.



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

- 5.1. From Control Panel, go to Company > Salesforce Settings.



In the first column, Matching Rules are enabled for Contacts, Leads and Accounts by default as well as Salesforce Users. Uncheck boxes to disable matching. IMPORTANT: Check the box for the last option “Don't match inactive Users”. This is particularly important if you plan to use MME for calendar syncing.

Check a box to enable matching to Opportunities or Cases. The app will match all open Opportunities when a Contact is matched and they are also a Contact Role. Alternatively, when no Contact Role is defined, the app will match all open Opportunities rolling down from Account. For Cases, it is similar.

Precision matching is possible to Opportunities by tag or words in the subject or to Case by unique Case # with custom app rules. However, with Enhanced Email we can relate an email to one WhatId record for reporting. Contact our support team to inquire.

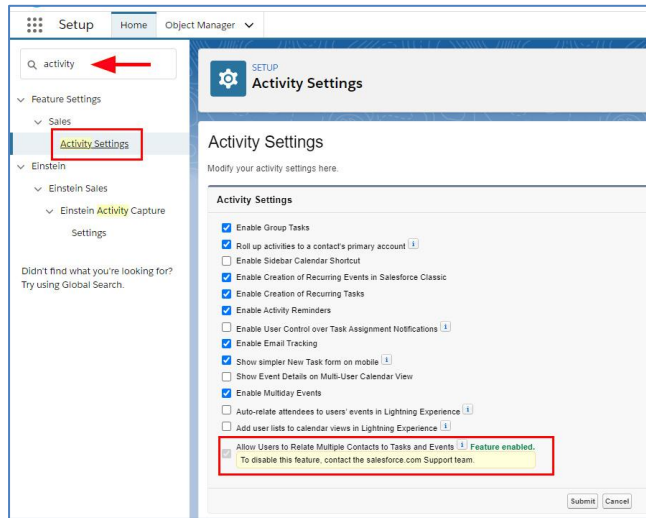
The default settings on Upload Rules are to move data into Salesforce, upload email body, upload attachments up to 5 MB, and to block inline images up to 25 KB. Details on how to modify these rules can be found on our [support site wiki post](#).

Don't forget to save any changes you make.

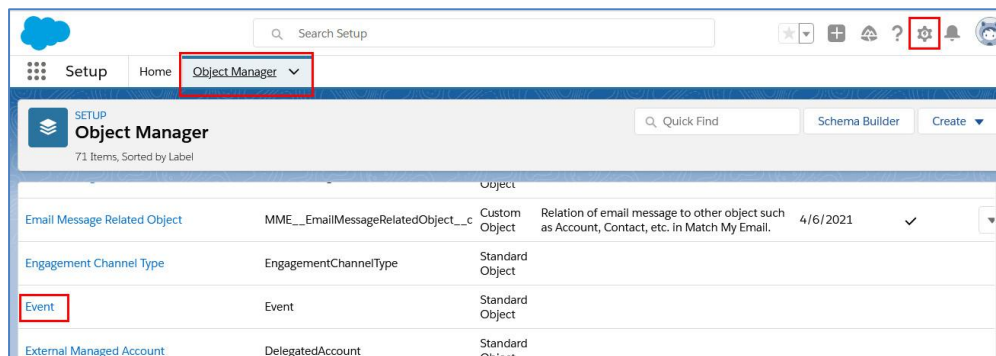
6. Optional: Confirm Settings for Calendar synchronization (Salesforce Admin step)

Calendar Syncing is an add-on feature. It requires an Activity Setting in Salesforce and an optional picklist value. Review settings noted below in 6.1, 6.2 and 6.3.

- 6.1. Go to Salesforce Setup > Activity Settings and look for the feature “Allow Users to Relate Multiple Contacts to Tasks and Events” which is often at the bottom of the list. It may already be enabled and highlighted in yellow. If it is not, check the box and click Submit. Salesforce may indicate it can take time to fully enable this.



- 6.2. When MME matches and uploads an event to the Activity timeline, it can also set the value of the Type field in the Event object correctly as an Event. This is helpful for future reporting on Events. To adjust the picklist for Events, navigate to Salesforce Setup > Object Manager > Event

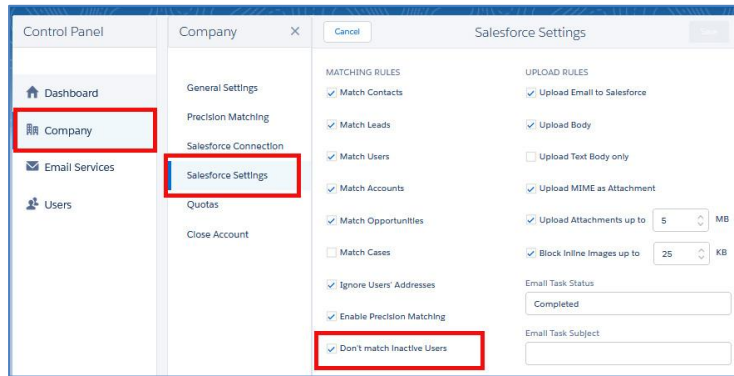


Click on Fields and Relationships and scroll down to find and click on the label for Type field.

In the Event Type Picklist Values section, if Event is not yet listed as in the screenshot below, click New. Type in Event in the box and click Save. If Event is already listed as a value, proceed to next step.

| Event Type Picklist Values | | | | |
|--|---------|----------|--------------------------|----------------------|
| New Reorder Replace Printable View | | | | |
| Action | Values | API Name | Default | Modified By |
| Edit Del Deactivate | Email | Email | <input type="checkbox"/> | System Administrator |
| Edit Del Deactivate | Meeting | Meeting | <input type="checkbox"/> | System Administrator |
| Edit Del Deactivate | Other | Other | <input type="checkbox"/> | System Administrator |
| Edit Del Deactivate | Call | Call | <input type="checkbox"/> | System Administrator |

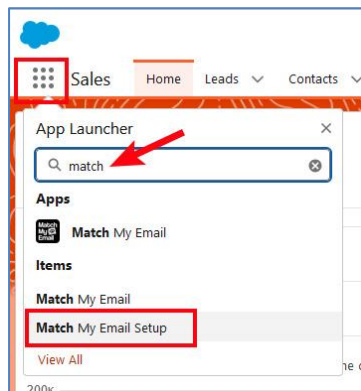
- 6.3. Navigate to the MME Control Panel (Salesforce App Launcher > Match My Email Setup). Go to Company > Salesforce Settings. In the Matching Rules column, the feature Don't Match Inactive Users should be checked. Click Save.



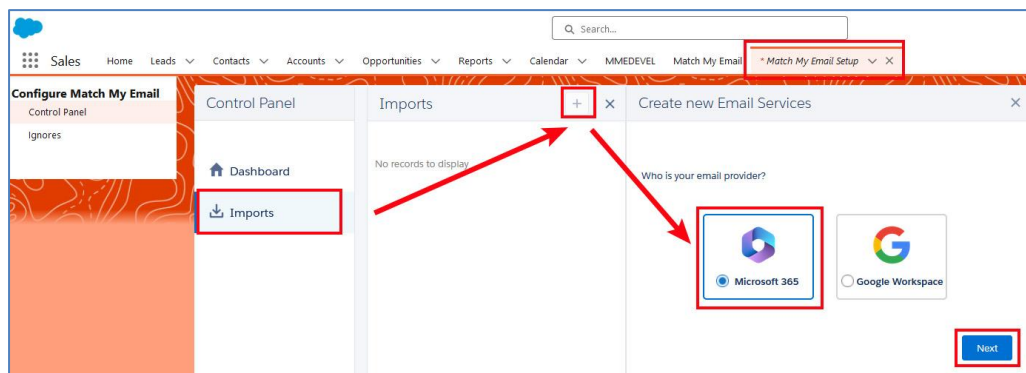
7. Match My Email Activation Steps for Individual Users

The Individual Authentication strategy requires each End User to perform the steps in this section.

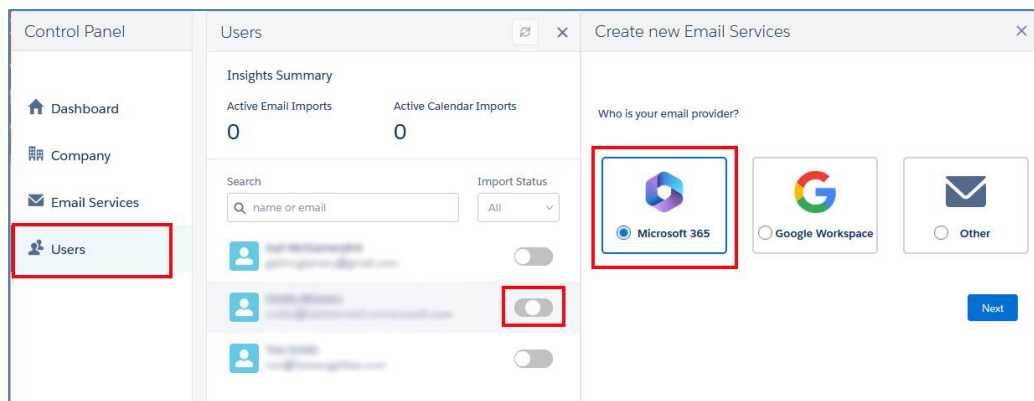
- 7.1. From the Salesforce App Launcher, search and choose Match My Email Setup. You will land on the Control Panel view.



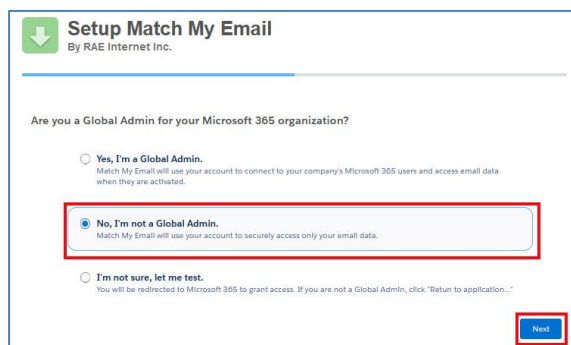
- 7.2. Users that are not Salesforce Admins will have a minimal menu. Click on Imports > + > Microsoft 365 > Next.



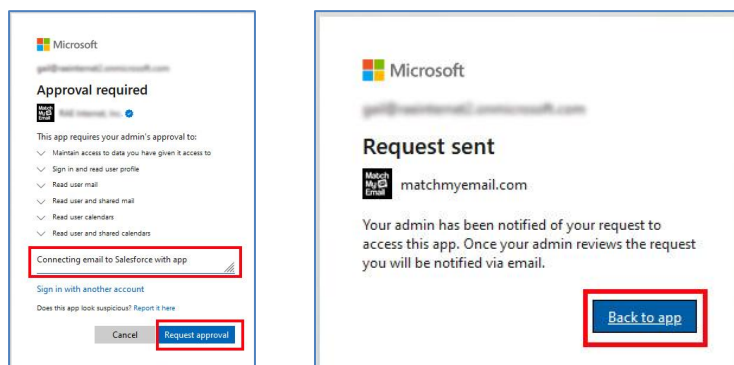
Users that are Salesforce admins will have more menu options. Click on Users. For your Users listing, click the toggle. Choose Microsoft 365 and then Next.



- 7.3. On next prompt, choose “No, I’m not a Global Admin” and Next.



- 7.4. You will next be prompted to login for Microsoft 365. Sign into your account from which you want Match My Email to sync emails.
- 7.5. If your Email Administrator has reserved the ability to approve third-party app connections, then you will see a message indicating Approval Required. Fill in your reason for the approval (ex. Connecting email to Salesforce with app) and click Request Approval. On the next prompt, click Back to App. You will need to wait for your Admin to approve.



Upon return to MME, you may see an Access Denied message. It is simply reinforcing that you are having to wait for approval to complete import activation. Skip to 8.0.

- 7.6. If your Email Administrator has already approved Match My Email, you will be able to Accept permissions and will arrive back in the Control Panel where you can verify folder selection and Confirm your import.

8. Optional: Match My Email Calendar Activation Steps for Individual Users

Calendar syncing is set up as a second import in which Individual authentication is repeated.

- 8.1. Navigate back to your view of the Match My Email Control Panel > Imports.
- 8.2. End Users will click on Imports to see the Imports panel. Click the + Sign to add an import.

- 8.3. Admins will need to click on Users > Their Name > Imports to arrive at this view. Click the + to add an import.

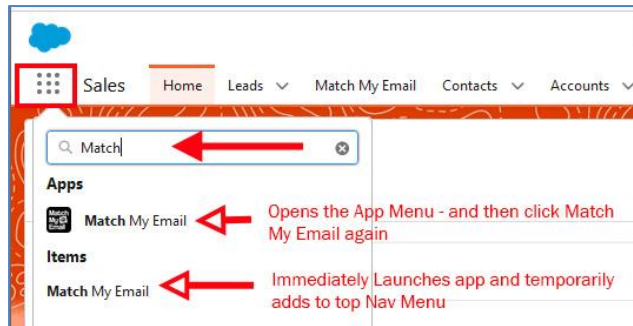
- 8.4. Below the Email Services field, expand the Service Type option to choose Calendar.

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.

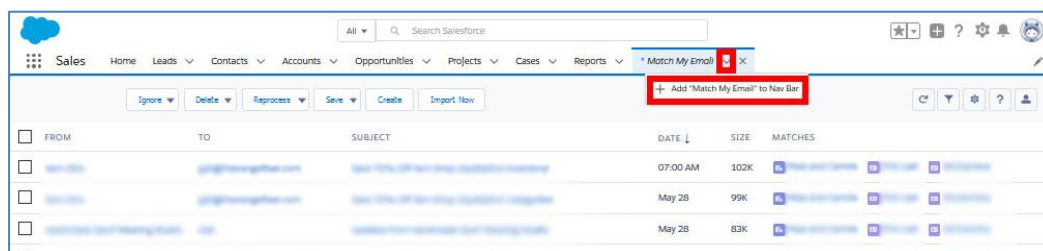
Please note that once activated, the start date cannot be altered. Click Confirm at the top to save the import

9. Accessing Match My Email from within Salesforce

- 9.1. Access to MME is available from the Salesforce App Launcher. You can click the App to bring up the app menu. You then need to click the tab label Match My Email to the right of Home.



- 9.2. For one click access from the home screen, choose under Items/All Items the listing Match My Email. It will temporarily add a web tab to your navigation menu. Click the drop menu and choose Add to Nav Bar.



The Email Cloud view is private for each User. Emails showing a match in the right column have already been uploaded and linked to records as indicated in Salesforce where they will remain 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.

For assistance with set up or for questions, contact support@matchmyemail.com. You can also visit <https://www.matchmyemail.com/support/> 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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