

# Match My Email

## Creating a Match My Email Account - Microsoft 365 Company-level Email Service (requires Global Admin)

### 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 a MME account for your company and configure settings.
- You will establish an email service connection to Microsoft 365 at the company level with the participation of a Microsoft 365 Global Admin.
- You will be able to activate any Salesforce User for importing and matching of emails and, if desired, calendar events. End Users will not need to take any action.

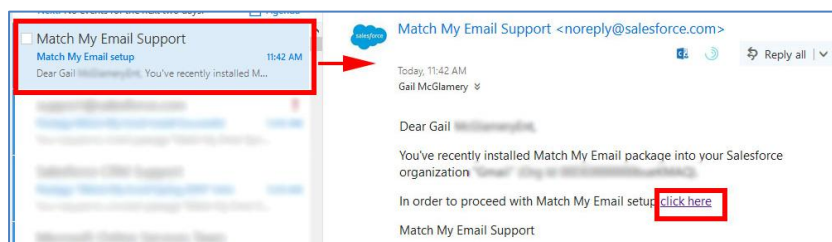
PLEASE NOTE: If you choose to use MME for calendar syncing, other tools, especially EAC, should be disabled for trial Users to ensure no conflict or unexpected behavior

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### 1. Set up Match My Email Account

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

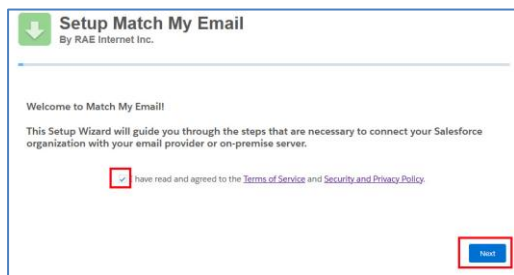


If you do not receive the email, click the best link below for your needs:

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.

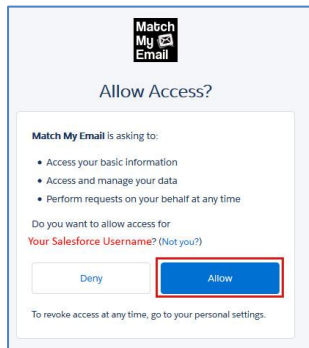


- 1.3. If you received the email in 1.1 above and clicked the link provided, our system should anticipate the correct type of Salesforce install. If, instead, you clicked on one of the path URLs in 1.1, you may be asked to reinforce your choice of Production or Sandbox.

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.



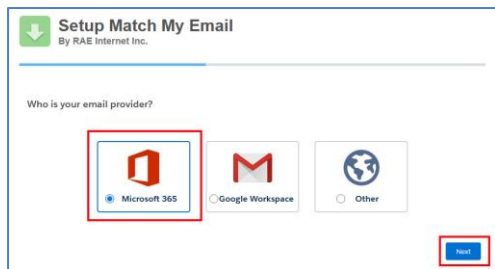
- 1.4. You will jump to Salesforce and may be prompted to login to Salesforce. MME is requesting access to connect your MME account to your Salesforce organization. This is not activating an import. Click Allow.



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

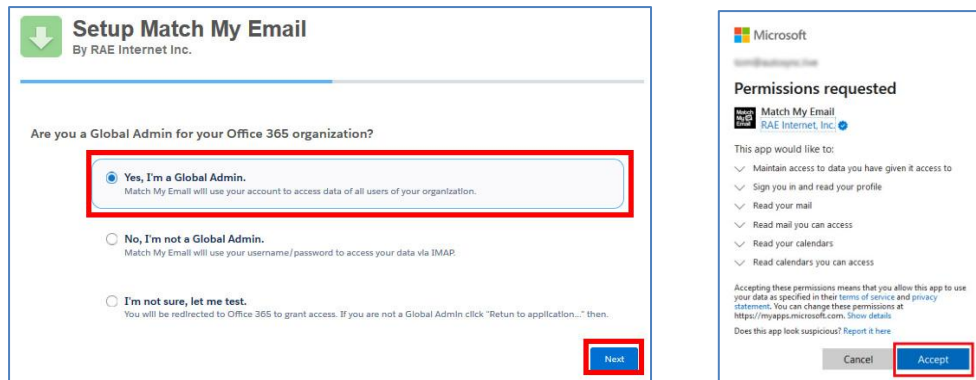
## 2. Establish an Email Service

- 2.1. Choose Microsoft 365 as your email provider and click Next.

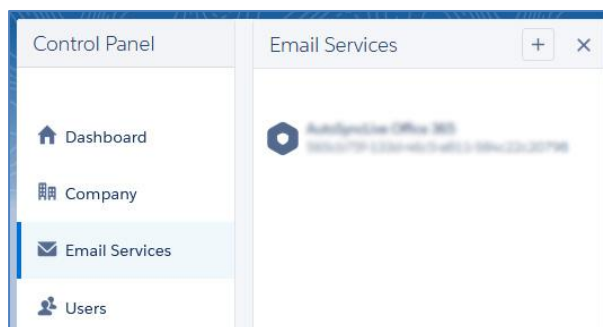


- 2.2. As a Global Admin for Microsoft 365, or if one is assisting you with setup, click “Yes, I’m a Global Admin”.

A prompt will appear to login to Microsoft 365 with a Global Administrator credential. If your Global Admin is not at your location, they will need to remotely access your screen to complete steps. Accept permissions which will allow you to activate Users within the MME account.

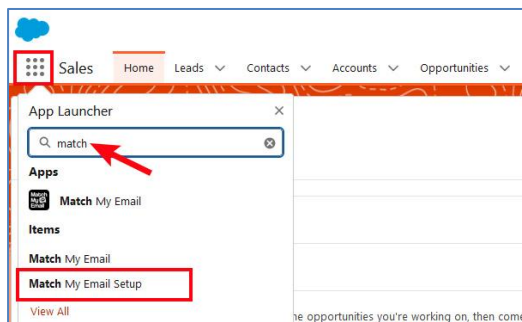


- 2.3. The saved Email Service connection will be listed in the Control Panel. Jump to 2.5.

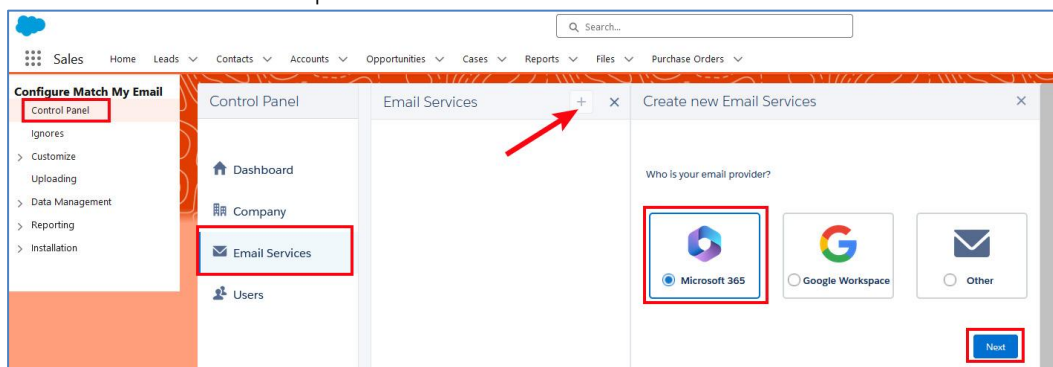


If, instead, you see a red box alert it simply means the first attempt didn't work. To try again, proceed to 2.4.

- 2.4. A second attempt must be done from within your new Match My Email account. Since the flow of the setup wizard has been interrupted, you can close the browser tab you are on.
- Access your Match My Email account from within Salesforce via App Launcher. Search and choose Match My Email Setup.



- In the menu, Control Panel should be showing by default. Click Email Services and then the + at top. Choose Microsoft 365 and proceed as in 2.2 and 2.3 to establish a service connection.



- 2.5. If you only want to manage the MME account as an Administrator and do not need to import and match your own email, ignore the prompt to find a mailbox and click Skip. On the next screen, click Finish. Skip to 3.0.
- 2.6. If you want to import and match your own email immediately, begin typing your email address and select your email account. Click Next. MME will begin running the first import automatically, going back 24 hours in the default folders of Inbox and Sent Items. Allow the system to complete processing. Click Next and then click Finish. Proceed to 3.0. Historical email importing is possible after the free trial with a subscription.

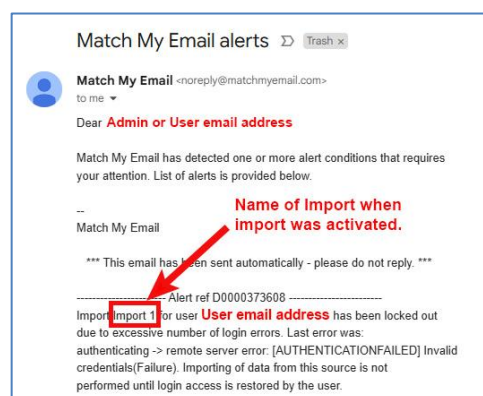
### 3. Best Practice: Add Ignore Rule for Email Domain

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.

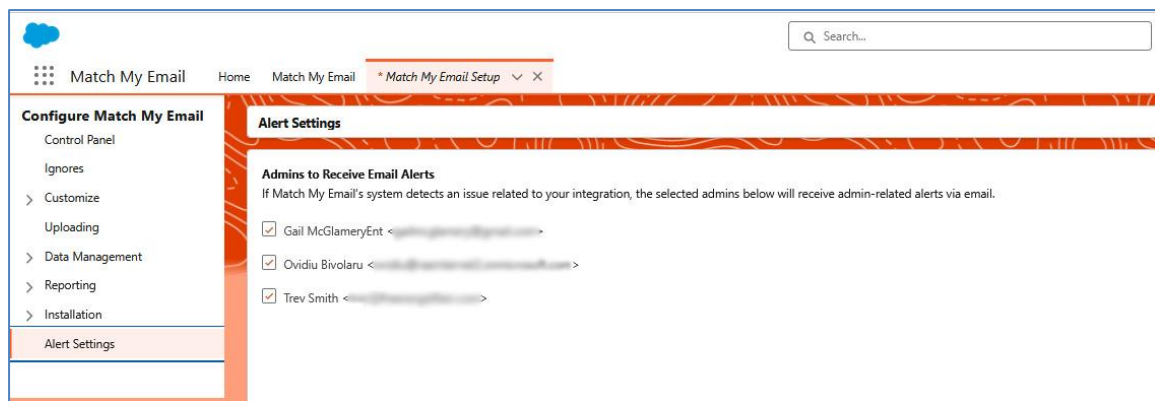
- 3.1. Navigate to App Launcher > Match My Email Setup. Click Ignores and then +New. Fill in the form as follows:
  - For Address to Ignore, type your email domain, which is everything after the @ symbol. If a company email address is [Jane@acme.com](mailto:Jane@acme.com), the domain is acme.com.
  - 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.

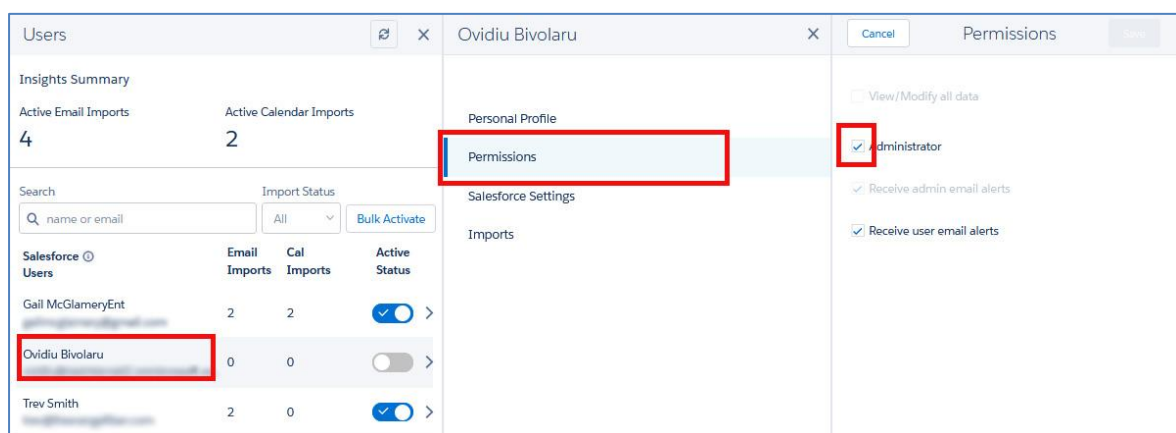
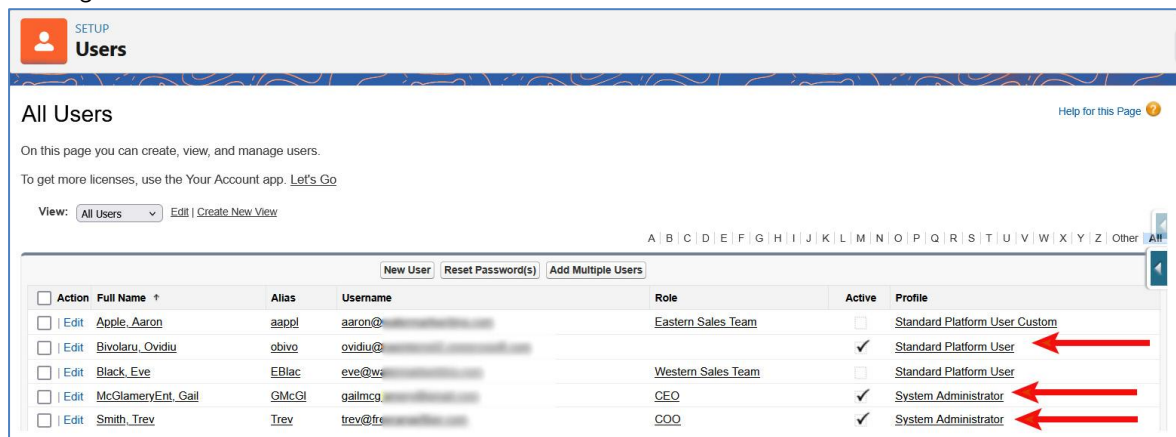


- 4.2. Any User that is a System Administrator in Salesforce is automatically an Admin in Match My Email. If you do not want all Administrative Users to receive these, but perhaps only a few Admins involved with the management of Match My Email, you can uncheck the box next to Admin Users you that should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

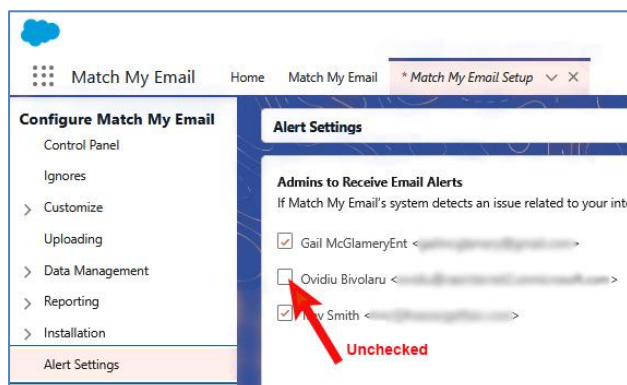


- 4.3. This list of Admins to receive alerts is drawing from user-specific permissions in the MME account. If you navigate to Control Panel > Users > Click a User Name > Permissions, you can see a box for Administrator. When someone is a System Admin in Salesforce, this box is checked by default and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

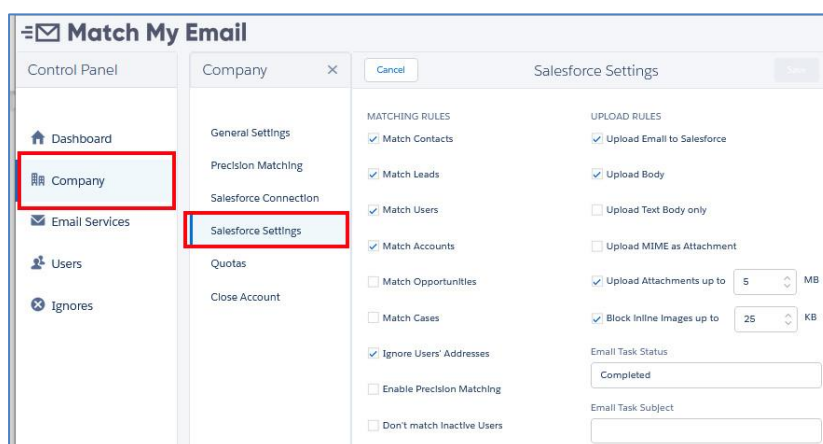


- 4.4. It is then the choice of someone managing Match My Email to uncheck the box if he should not receive alerts.



## 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. Activate End Users for Email Importing and Matching

Activating Users is accomplished in your Match My Email account Control Panel. As shown in 2.4, the easiest way to access the Control Panel is via the Salesforce App Launcher and search for Match My Email Setup.

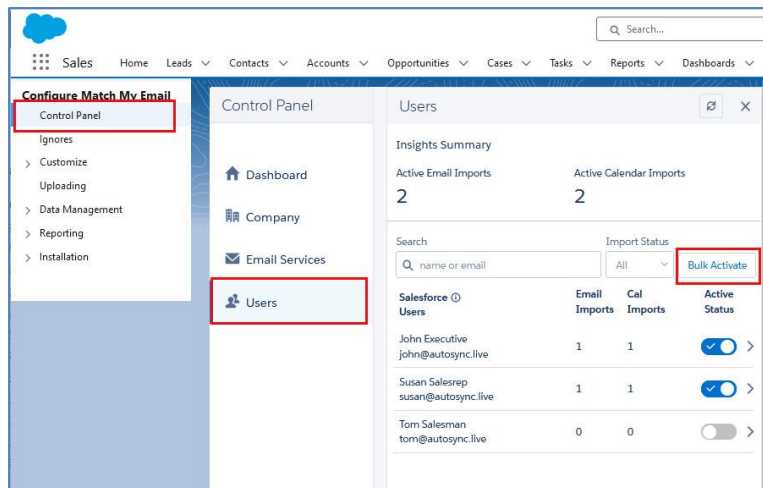
This tab provides access to the app configuration menu in Salesforce as well as the Control Panel for your cloud-hosted MME Account. The Control Panel is the default choice and will be showing in the main part of the screen.



Notes about User activation: Folders that are selected by default are Inbox and Sent Items. MME will automatically processing emails every 20 minutes. The app is importing copies from selected folders. If a User moves emails to a subfolder either immediately with a rule or manually in between 20-minute processing cycles, you can either ask the User to wait longer to do so or will need to customize that User's folder selection by selecting additional subfolders.

- If you have a large group of Users you want to activate all at once for the same folders, bulk activation is a quicker option. These steps are in 6.1.
- If you only want to activate a few Users and/or want to select specific folders for each User, jump to 6.2.

6.1. For bulk activation, from the Control Panel click Users and then the Bulk Activate button.



The Bulk Activation options are now displayed.

- You can choose to activate both Email and Calendar imports for Users which is the default – both boxes are checked. Uncheck either of these if not desired.
- Your Email Service, already created, should be listed here. If you have more than one email service connection, you can choose the appropriate one.
- Inbox and Sent Items will be displayed by default. You can remove one of these folders if you do not want it activated for all Users. You are able to add more folders, but this folder should exist for all Users you are activating.
- If you choose to leave Calendar Imports enabled at the top, the Start Date field applies. The default start date is one week prior, but you can click the calendar icon and choose to go back up to one year in the past. **\*\*VERY IMPORTANT\*\* Do not activate Calendar for Users is they still have Einstein Activity Capture enabled. You must deactivate EAC first.**
- Once you have Users selected, you will have an Activate button at the bottom.

**Bulk Activation**

Back to users

Import Type for Bulk Activation

- ☒ Email Imports
- ☒ Calendar Imports

Please only activate Calendar Imports when no other tool is enabled for calendar syncing.

Email Service: AutoSyncLive Office 365

Select Email Folders for all Users

Choose the email folders in your company's email service. Match My Email will sync to Salesforce from all users.

Inbox

Sent items

+ Add Email Folder

Calendar Start Date

For bulk activation, calendar imports are done for each user's default calendar.

2024-Dec-09

Select Users to Activate

Inactive MME Users

Users

Email Addresses to Import

Quick Find

Calendars to Import

Quick Find

Tom Salesman  
tom@autosync.live

6.2. For Individual Activation of Users, go to Match My Email Control Panel > Users

6.2.1. The list of Users presented comes from Salesforce. Click the toggle for a User to be activated. (The email address showing comes from Salesforce information and does not need to be the same as the email account to be activated.)

**Match My Email**

Control Panel

- Dashboard
- Company
- Email Services
- Users**
- Ignores

Users

Search: name or email

Import Status: All

Gail McGlamery  
gail.mcglamery@gmail.com

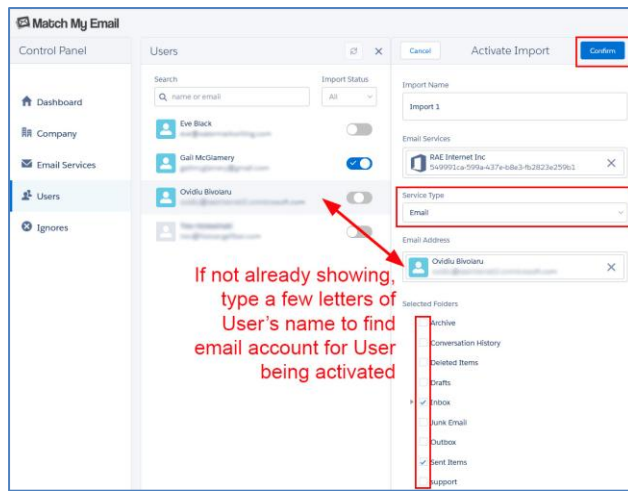
Ovidiu Bivolaru  
ovidiu.bivolaru@outlook.com

Import is inactive. Click to activate.

6.2.2. In the Activate Import panel, under Service Type, confirm it reads Email service. If the User's email 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.

Click CONFIRM at top right to confirm activation.





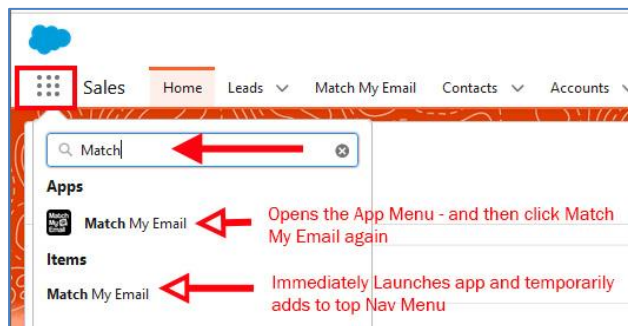
Within 20 minutes, MME will begin to import and match for the new User. No further action is required by you or the End User.

To add a Calendar Sync for this User, jump to 8.0.

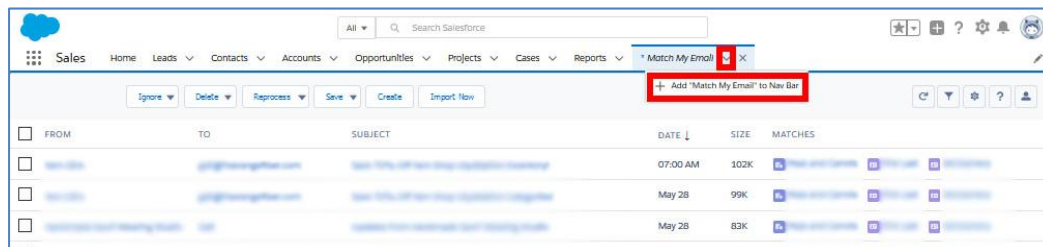
As an Admin, you can click back to left menu and choose a different User, repeating the steps to activate them.

## 7. Accessing Match My Email from within Salesforce

- 7.1. 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.



- 7.2. 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.

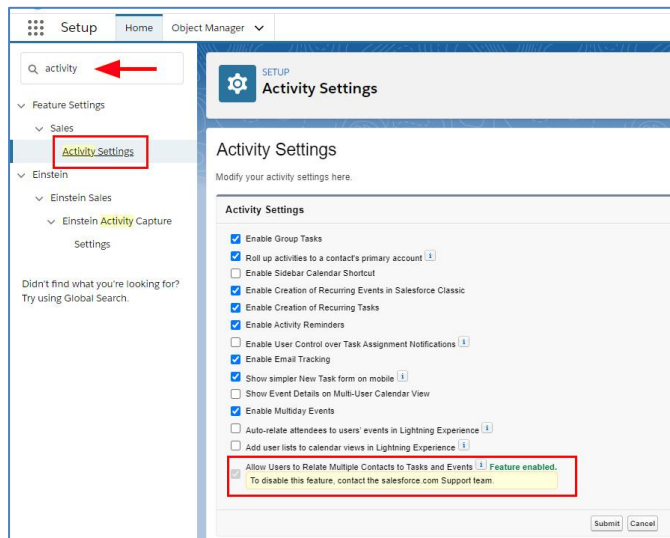


The Email Cloud view is private for each User. Emails showing a match in the right column have already been uploaded and linked to records as indicated in Salesforce where they will remain unless you decide to remove them. Matched or not, emails remain in the MME Email Cloud for the maximum number of days set in Company > General Settings (default is maximum of 45 days) and then purged.

## 8. Optional: Individually Activate Users for Calendar synchronization

Calendar Syncing is an add-on feature. It requires an Activity Setting in Salesforce and an optional picklist value. Review settings noted below in 8.1, 8.2 and 8.3.

- 8.1. 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.

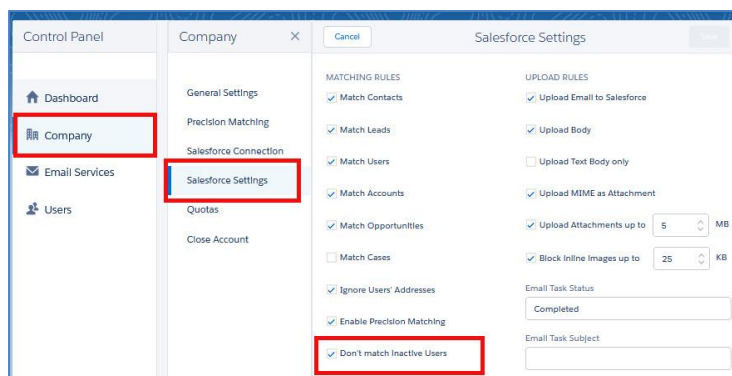


- 8.2. When MME matches and uploads an event to the Activity timeline, it can also set the value of the Type field in the Event object correctly as an Event. This is helpful for future reporting on Events. To adjust the picklist for Events:

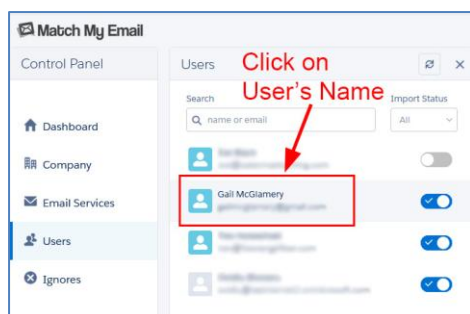
- Navigate to Salesforce Setup > Object Manager > Event. Click the label for Event.
- Click on Fields and Relationships and scroll down to find and click on the label for Type field. In the Event Type Picklist Values section, if Event is not yet listed as in the screenshot below, click New. Type in Event in the box and click Save. If Event is already listed as a value, proceed to next step.

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

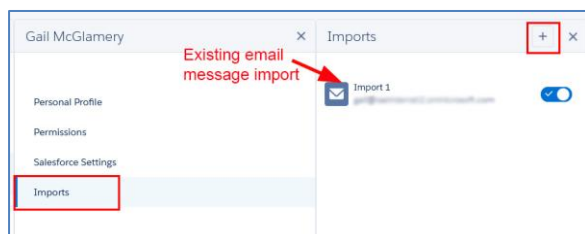
- 8.3. Navigate to the MME Control Panel (Salesforce App Launcher > Match My Email Setup). Go to Company > Salesforce Settings. In the Matching Rules column, the feature Don't Match Inactive Users should be checked. Click Save.



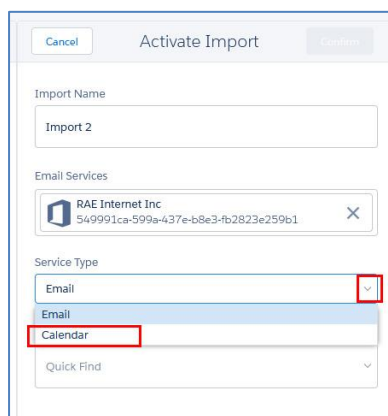
- 8.4. Sign into the MME Control Panel and click on Users. Calendar synchronization is activated per User and appears as an additional import. If an email import was individually activated for a User, the toggle will already be blue. Click the Name of the User needing a Calendar sync. If you need to activate just a Calendar import for a User, click the toggle and jump to 8.6.



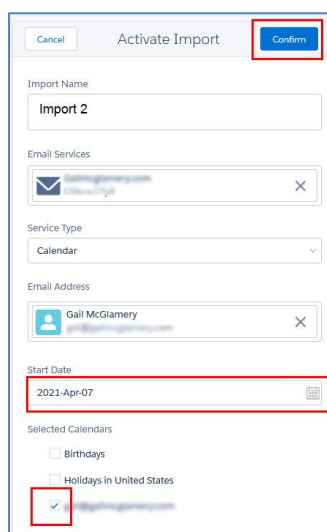
- 8.5. In the User Details panel, click Imports and then the + sign to add an import.



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



- 8.7. 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

For assistance, contact [support@matchmyemail.com](mailto:support@matchmyemail.com) or look for help in [our knowledge base](#). You can also visit <https://www.matchmyemail.com/support/> and use the scheduler to book a free support session.

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