



Adding/Removing Users to Existing Match My Email Account

Removing Users

If an employee leaves your company, or if an employee will no longer be using Match My Email, it is necessary to remove them as a User in order to affect subscription costs. It is not enough to remove their listing under Settings > Salesforce Integration.

Please know that the employee’s emails matched into Salesforce WILL REMAIN in Salesforce. However, all emails in the Match My Email cloud, matched or with No Match status will be deleted. Thus, please review No Match status messages for manual matching or creating new Leads/Contacts prior to deleting User.

1. The Cloud Admin signs in to Match My Email.
2. In menu bar, hover over Settings and click Domains & Users
3. Find the User in the listings on the right for the correct Domain.
4. Click Delete next to their name
5. Confirm deletion.

Adding Users

Steps for Cloud Admin

1. Add Domain and/or choose Add User method
2. Add/Confirm Salesforce Integration for Domain
3. Add/Confirm Ignore Rule for email domain

Steps for New Users

4. Sign in to MME with email credentials.
5. Follow wizard steps to allow access to Salesforce account and to email folders.

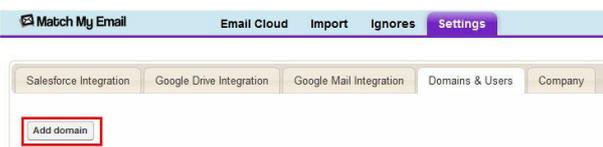
Steps for Cloud Admin

1. Add Domain and/or choose Add User method

- 1.1. Cloud Admin logs in to Match My Email and navigates to Settings > Domains & Users



- 1.2. If Domain to which Users should be added is already present, skip to step 1.4. If Domain is not yet added, click “Add Domain”. (Domains under company control can be added. Public domains such as yahoo.com, gmail.com, etc. cannot be added here.)



- 1.3. Fill in fields based on following guidance.

The 'Add domain' dialog box contains the following fields and options:

- Domain: [Text input field]
- IMAP server host: [Text input field]
- Connection: Secure to dedicated port (TLS) [dropdown] port, 993
- To authenticate use: full email address [dropdown]
- Login with Google Apps: Disabled [dropdown]
- Allow users to import from: This IMAP server Gmail Any other IMAP server
- Add users automatically:
- Message size is less than (MB): 30 [text input field]

Buttons: Save, Cancel

- For **Domain**: The email domain is everything after and not including the '@' symbol in email address. (Ex. For email jane@acmecompany.com, the domain is “acmecompany.com”).

- For **IMAP server host, Connection, Port** and **To authenticate use**: these fields depend on where company email is hosted. Please [visit our list of standard providers](#), or contact company IT staff.
- **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 this designated email domain. Checking "Any other IMAP server" enables flexibility for IMAP imports and is recommended. Google users should also check "Gmail"
- **Add users automatically**: See guidance for this option in step 1.4.
- **Message size is less than (MB)**: size of email messages allowed to be imported into Email Cloud. Default is maximum of 30 MB.

1.4. Choose Add User method for Domain:

- Checking the box Add Users Automatically is recommended. It alleviates future Cloud Admin involvement and employees at company can sign in, add themselves, and get setup quickly. Confirm box is checked, click Save to ensure that option is saved. Skip to 2.0.
- If Cloud Admin wants to maintain control over employees that can participate, then leave Add Users Automatically unchecked, click Add User to the right of Domain, and fill in the details as follows:

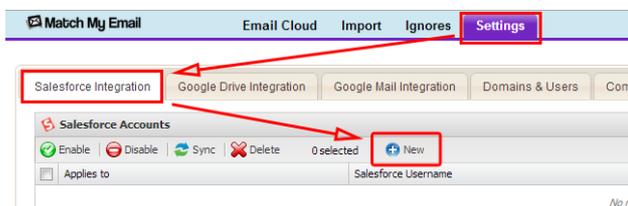
- For **Username**: Type in what is in front of @ symbol in employees email address. For example, in address [jane@acme.com](#), username is jane. (Some servers may authenticate username only which may require entering the system accepted username which is different. Consult your email administrator.)
- Enter **First Name** and **Last Name**
- For **Role**: Choose End User if you want this User to be a basic User. Choose Domain Admin if you want this User to be able to modify domain settings and create Ignore rules for the domain.
- Click **Save**

2. Add/Confirm Salesforce Integration for Domain

2.1. Click the leftmost tab, Salesforce Integration (Settings > Salesforce Integration)

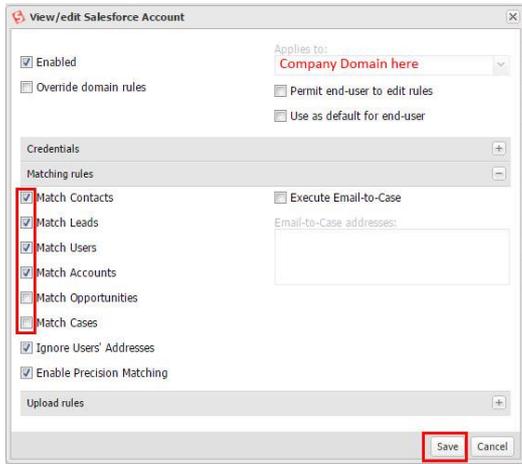
2.2. In the list of integrations, look for company domain (for example, if a company email address is bob@acme.com, the domain would be acme.com). If it is there, proceed to Step 3. If not, continue to 2.3.

2.3. Click the +New button.



2.4. In pop up window, check box for enabled and use drop down menu under Applies To: to select domain. Leave Access type as Remote Access OAuth and click Grant button.

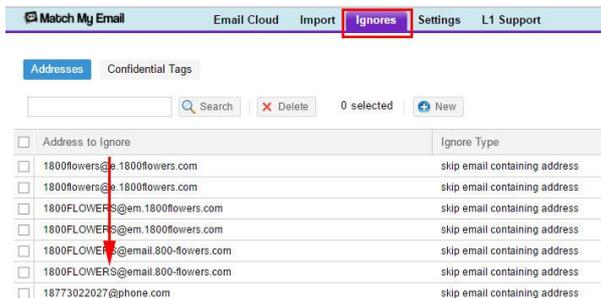
- 2.5. When presented with option for Production or Sandbox, leave as Production and click Next. (Sandbox is only a valid choice when testing MME in sandbox environment of organization.) Upon jump to Salesforce, login with System Administrator credentials and click Allow.
- 2.6. Upon return to Match My Email window, expand Matching Rules option near bottom of pop up window. By default, matching to Leads, Contacts, and Accounts is enabled. If one of these should be disabled, uncheck the box. Matching can be added for Opportunities and Cases by checking the box. If changes are made, click SAVE.



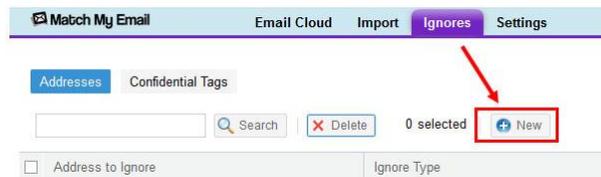
3. Add/Confirm Ignore Rule for Email Domain

This rule is a recommended best practice. If Salesforce records for a Lead or Contact contain an internal company email address, now or in future, this rule directs MME to ignore (i.e. skip matching to) those records yet still match emails to external addresses.

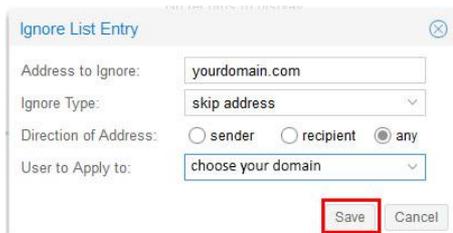
- 3.1. Click Ignores in MME menu ribbon. In the Address to Ignore column, look for a listing that is only company email domain. For this listing, the Ignore Type should show 'skip address', Direction should show 'any', and applied to email domain. If this is in place, skip to User's Steps 4 and 5.



- 3.2. If ignore rule for domain does not exist, click +New button.



- 3.3. Fill in the fields per guidelines below:



- For **Address to Ignore**: enter email domain (everything after and not including @ in email addresses)
- For **Ignore Type**: confirm 'skip address' is showing. This is **VERY** important for this particular rule.
- For **Direction of Address**: click the button for 'any'
- **User to Apply to**: choose company email domain.
- Click SAVE.

Steps for New Users

4. User signs in to Match My Email

- 4.1.** User can click webtab within Salesforce or open new browser tab and navigate to:
European Union customers – <https://eu.matchmyemail.com>
All other customers – <https://matchmyemail.com>

- 4.2.** Google users can click Sign In with Google and make jump there to allow access.
Non-Google users enter for username the User's email address. For password enter email password. Click Submit.

5. Once signed in, Match My Email menu is across top. Follow Wizard Steps by clicking NEXT.

- 5.1.** If presented with choice for Production or Sandbox, leave as Production (in most cases). Click Next again.

..Step 2.. What is the type of your Salesforce organization?

Production
 Sandbox

Next →

Choose only when using Testing environment for Salesforce Enterprise & Unlimited editions

- 5.2.** Jump will occur to Salesforce. Login and verify credential is correct for User. 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
Your Salesforce Username here (Not you?)

Deny Allow

- 5.3.** If prompted for email choice, Google mail users choose that option. Otherwise, choose Domain Server. Click Next.

..Step 3.. What is your email provider/system?

Gmail/Google Apps
 Domain server
 Other

Next →

- 5.4.** If Gmail/Google Apps was selected, jump to Google will occur. Sign in and Allow.

- 5.5.** If Domain Server selected, you will jump to next step.

- 5.6.** Select folders for import. Match My Email will automatically pull into Selected Folders window (on left) the INBOX and folders with SENT in name. This provides for fully automatic operation with our app. Click Next

..Step 4.. What folders would you like to import from?

Selected folders

- INBOX
- [Gmail/Sent Mail]

Available folders

- INBOX
- Outbox
- Deleted Items
- Recovery Key
- Spam
- Unread Mail
- Workgroup
- Workgroup - Deleted Items
- Workgroup - Deleted Items (2)
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← Previous Next →

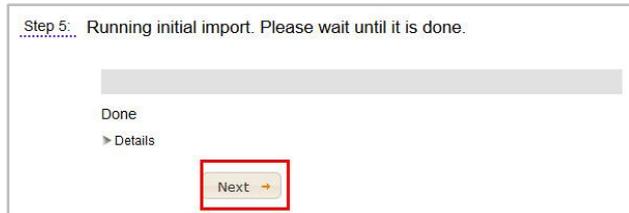
User can select and move additional folders to Selected.

Most users leave "Inbox" and "Sent" folders selected for synchronization with Salesforce. Additional folders may be selected from Available Folders, but please note:

* Imports are most efficient when no more than 18 folders selected

* **Do not** select All Mail, Junk, Spam, Draft, etc. These additional selections will slow down processing of relevant emails and may result in duplicate copies of Drafts. Please click [here for more details on folder selection](#).

5.7. Please allow first import to run and complete. Wait until it is done. When import finishes, click Next.



5.8. Click Finish



For assistance or for questions, reach out to support@matchmyemail.com.