

Match My Email

Setting Up Match My Email to upload to the MME Custom Object

Start Setup with Steps in Salesforce

This is the first of two documents a Salesforce System Administrator needs for a complete setup of Match My Email (MME). The Custom Object option will mean:

- Emails will be uploaded and visible in the MME custom object and will not appear in the Activity Timeline in Lightning.
- The custom object is a Lightning component for Lightning and a Visualforce component in Classic.
- The MME Lightning component has advanced search, filtering, and interface features.
- Each email can be related to multiple Leads or Contacts (WhoID records) and multiple Accounts, Person Accounts, Opportunities, Cases, and custom objects (WhatID records).
- Email is reportable with Salesforce reporting tools. Some reports may require a custom report type or joined report depending on data desired. A free Reporting Package with additional data fields can be requested.

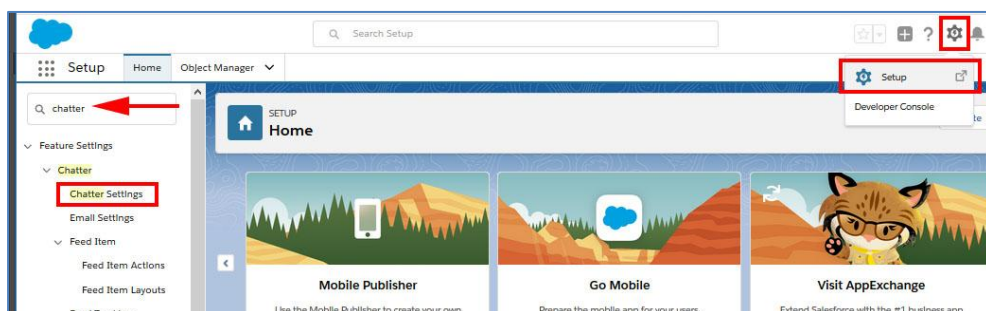
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1. Prior to package install: Enable Chatter, Enable Actions in Publisher, and Confirm My Domain

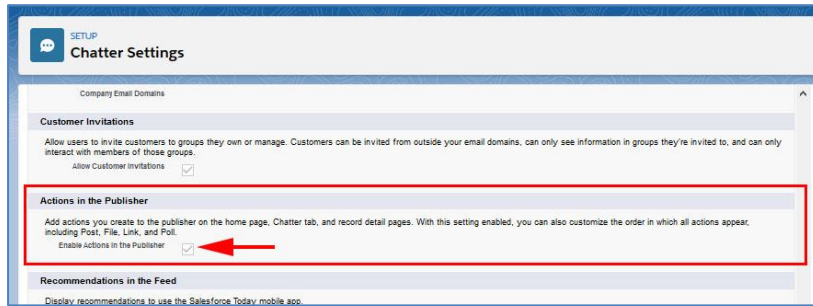
Chatter & Actions in Publisher are required to use the MME custom object. Salesforce.com requires users of Lightning to set up My Domain in order to have access to custom managed apps and components. [Click here](#) for more about this Salesforce.com requirement.

- 1.1. Click gear icon top right and choose Setup. In left sidebar, use Quick Find to search for chatter and then click on Chatter Settings.

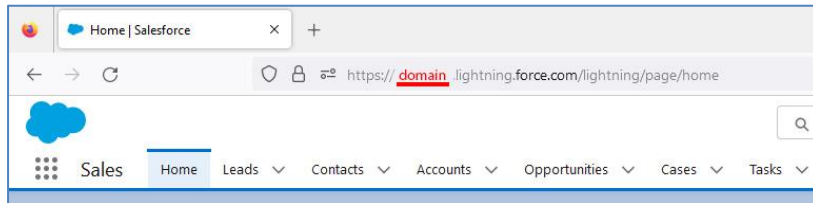


If you are unable to find Chatter in your Setup menu, please contact Salesforce support.

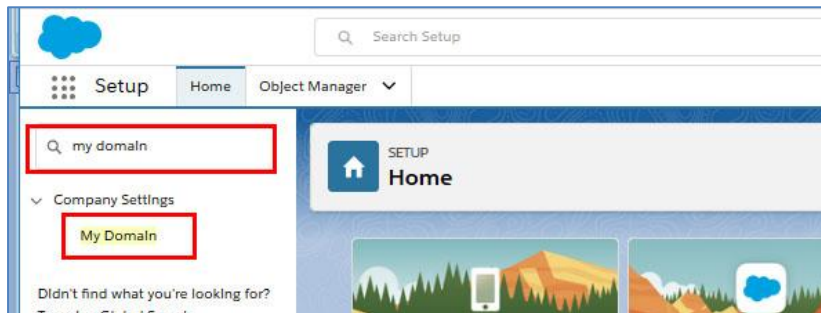
- 1.2. Scroll down on screen to Actions in the Publisher section and confirm that box Enable Actions in the Publisher is checked. If not, click Edit at top of screen, check this box, and Save.



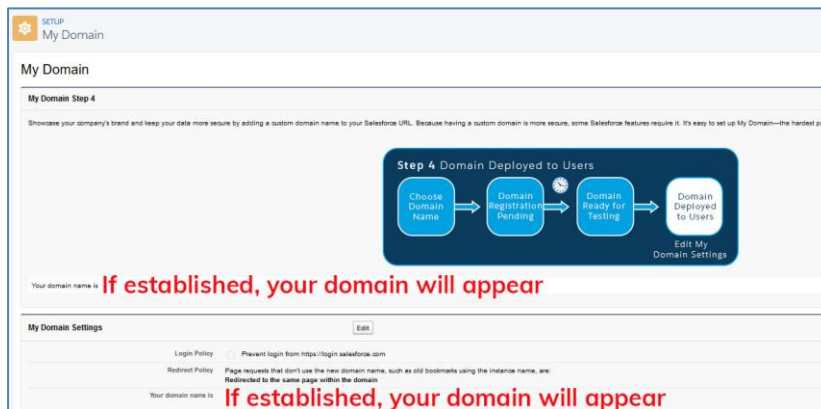
- 1.3. Confirm that My Domain is set by checking if your company's name is part of your Salesforce instance address.



- 1.4. If it is not or you aren't sure, using Quick Find to search for and click on My Domain.



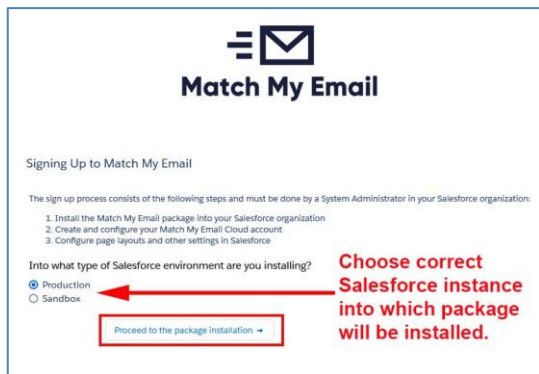
- 1.5. If My Domain steps have been completed, the screen will appear as below. Proceed to Step 2. If not completed, it is necessary to follow the instructions as presented by Salesforce.com. You must wait until steps are completed and domain is deployed to users before proceeding.



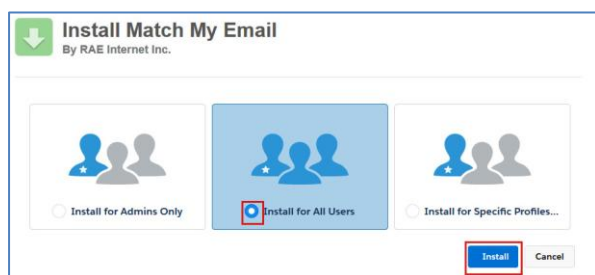
2. Install Match My Email AppExchange Package in Salesforce.com

- 2.1. Navigate to <https://matchmyemail.com/signup/> . Choose correct type of Salesforce instance – Production or Sandbox.

Those using Enterprise and Unlimited editions of Salesforce have the option of installing into their Sandbox environment for testing. At a later date, if it is desired to have MME in Production, the setup steps in this guide will need to be repeated and a new MME account created that connects to the Production instance.

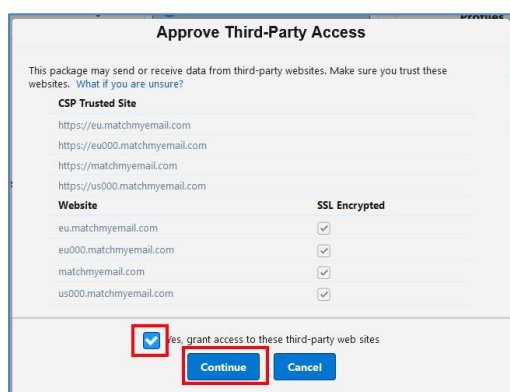


- 2.2. Login to Salesforce if prompted. Choose **Install for All Users** and click Install. This does not activate all Users for the app, but rather it ensures permissions are available for non-Admin Users.



IMPORTANT: If you choose Admins Only, you may need to do back track on permissions to expand app accessibility to other profiles in the future. It is best to Install for All Users and utilize permissions to control access.

- 2.3. Check the box to approve third-party access and click Continue. Approving Third-Party Access adds remote site settings. This enables our Email Sync Assistant feature, if you choose to use it, to communicate with the User's MME cloud and aid in creating records from unmatched email addresses.

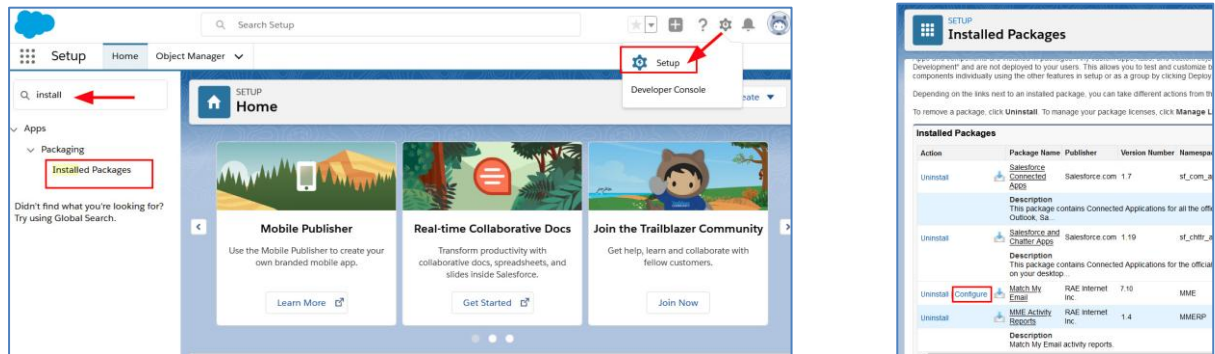


The installation will either be completed quickly, or you may see a message that the installation will take a bit longer to fully install into Salesforce. On that screen, click DONE and you will be taken to your list of installed packages. You will receive an email from Salesforce when the installation is complete.

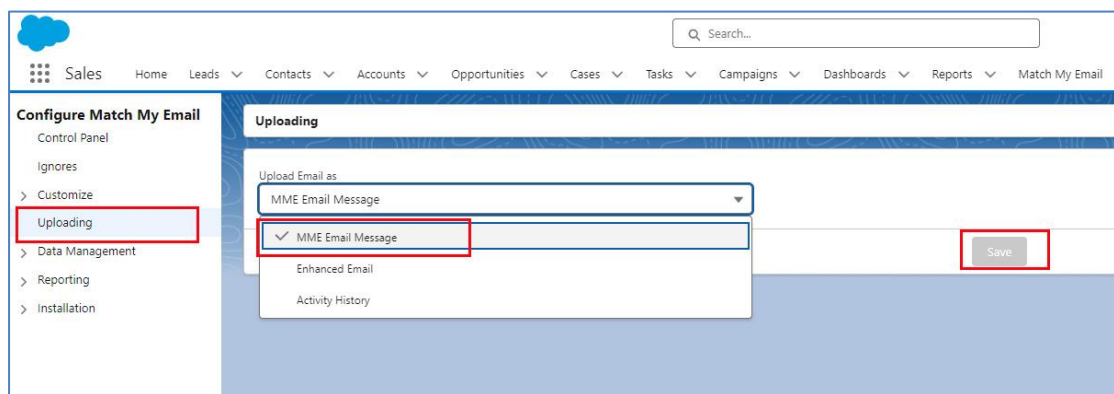
You will also receive an email from Match My Email support prompting you to click a link to proceed with setup. Please wait to use that link until the package is listed in your Installed Packages list. You will be directed to use that link in your second setup document.

3. Adjust Uploading Strategy for the Match My Email Custom Object

- 3.1. Once MME is successfully installed (which may take a bit of time), navigate to the Installed Packages List. Scroll to find it in the list and click Configure to the left.



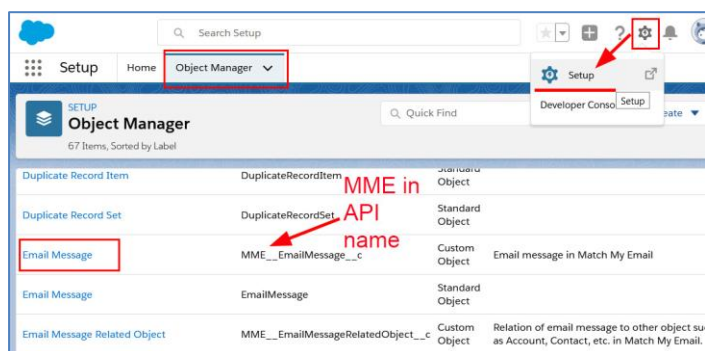
- 3.2. In the menu, click on Uploading. Change the option to MME Email Message. Click SAVE.



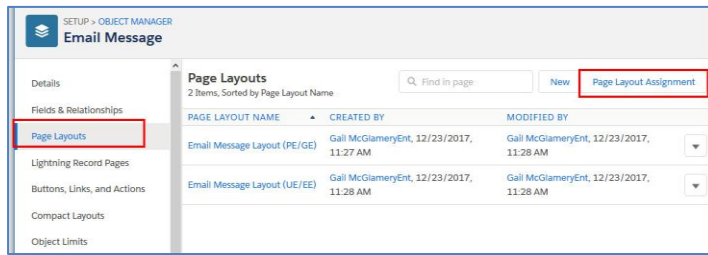
4. For Enterprise & Unlimited Salesforce Editions Only: Change Email Message Page Layout

If you are not sure of your Salesforce edition, navigate to Salesforce Setup and in the Quick Find search for and click on Company Information. Look for the field Organization Edition which is typically in the right column. The following steps are only necessary for Enterprise and Unlimited editions.

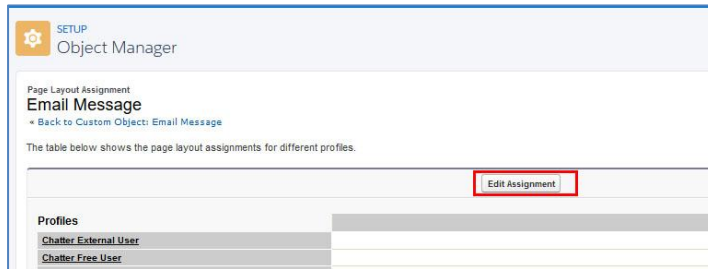
- 4.1. Go to Salesforce > Setup > Object Manager. Click on the label for Email Message with an API Name beginning with MME.



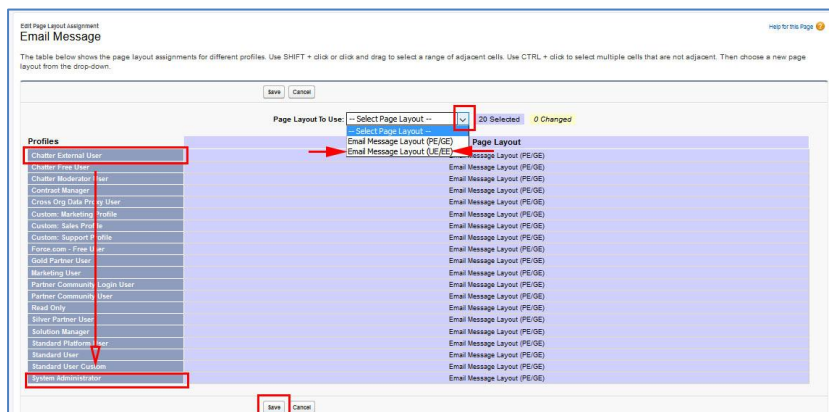
- 4.2. In left menu, click on Page Layouts and then click on Page Layout Assignment button top right.



- 4.3. On the next screen, click Edit Assignment.



- 4.4. Select all Profiles. You can click the grey Page Layout column header to select all profiles, or Click on first, hold down shift, click on last). For Page Layout to Use, choose the 2nd option for UE/EE (Unlimited/Enterprise editions). Click SAVE.

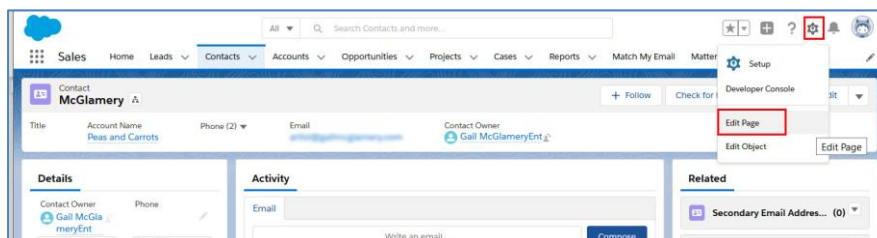


- 4.5. Repeat these steps from 4.1 for Email Message Related Object.

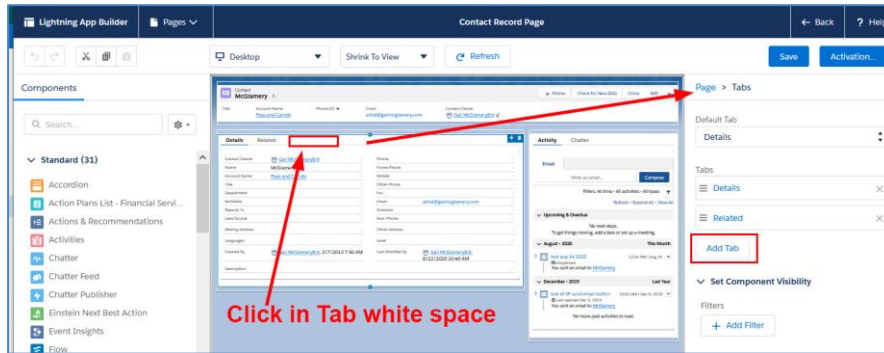
5. Add Email Messages component to Lightning Record Pages

These steps should be followed for each of the Salesforce objects (Leads, Contacts, Accounts, Opportunities, Cases) being used by your organization. The below example is for Contacts.

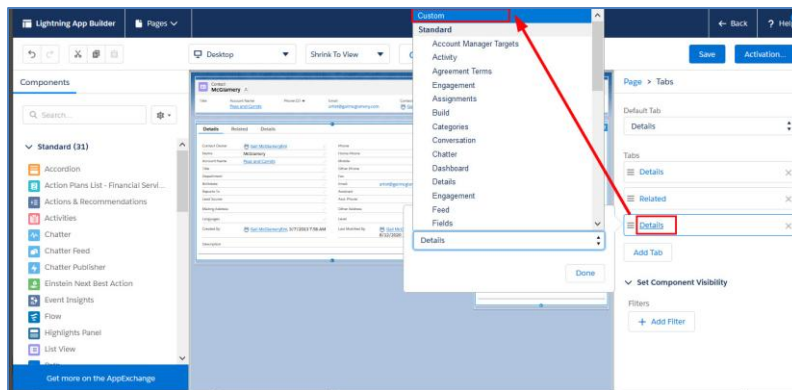
- 5.1. Navigate to a Contact record. Click the Settings button top right and choose the option Edit Page.



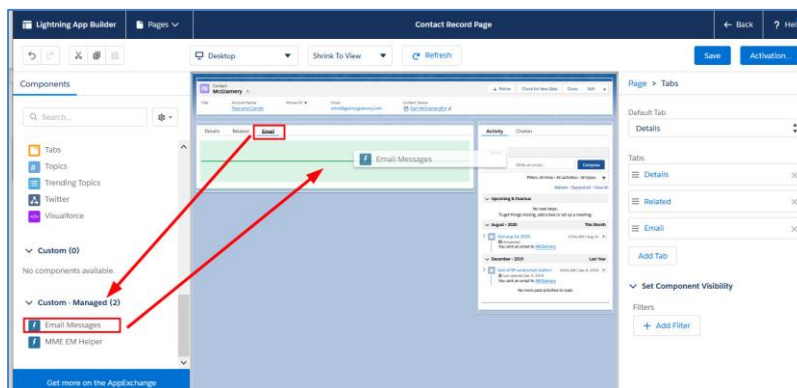
- 5.2. In the middle of the screen, click in the white space at the top of the main section. The right sidebar will change to information for this section. Click Add Tab.



- 5.3. By default, the tab added is Details. Click on that name and in the pop-up window scroll to the top to click on Custom. In the field that appears, type in Email and click Done.



- 5.4. Click on the new tab just added in the middle of the screen. In the left sidebar, scroll to the bottom to find Custom Managed components. Click on Email Messages and drag it into the new tab. Click Save.



Repeat these steps from 5.1 for additional Lightning Record pages for each of the objects you use.

NEXT STEP

The steps for Salesforce are complete. You are halfway through the setup of MME. You will be able to access Match My Email through the App Launcher. However, trying that now will likely result in the following alert. This means you have not yet created your MME account.



To do so, please open the appropriate document for Part 3 based on your email hosting and authentication choice.

OTHER RESOURCES

Please visit [our support page](#) for documentation including:

- How to deploy and use the Email Sync Assistant
- Guidance on Managing Users and Imports
- Match My Email User's Guide

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

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