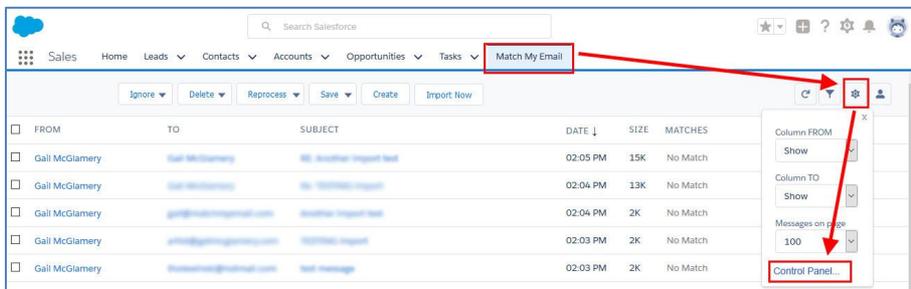


Adding Users to a Match My Email Account

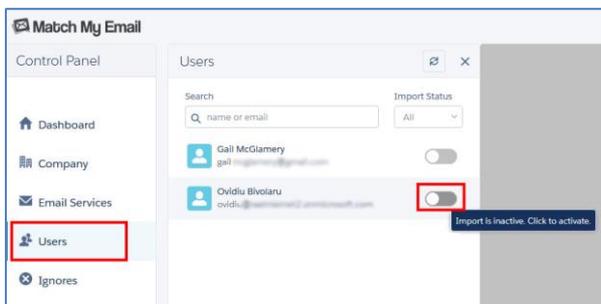
Activating Users

The Match My Email (MME) Cloud Admin can activate any Salesforce User to the Match My Email account by following these steps.

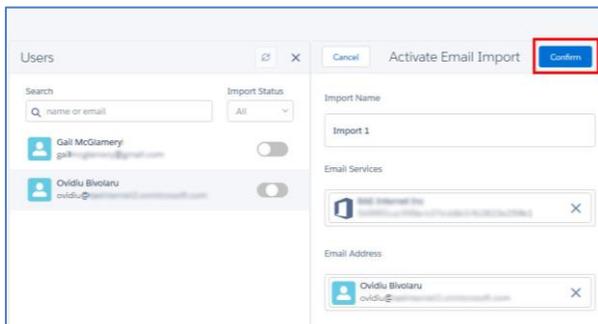
1. In Salesforce, the Cloud Admin clicks on the Match My Email tab to open the interface. At top right, click the Settings icon and then Control Panel. A new browser tab will open for account management.



2. 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.



3. 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.

4. Default settings for an import are that it is labeled Import 1 and Inbox and Sent Items are selected. The import name can be changed to something more descriptive as desired. If the User's email address was not found, click into the field and find the correct email account from the list. Folders selected for import can also be modified. Please note that Inbox subfolders into which Users quickly move (less than 20 minutes after receiving) important emails should also be selected for import.

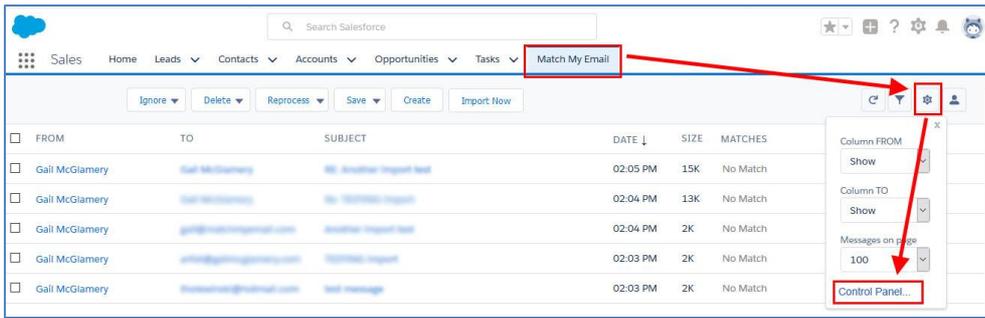
The new User can click the Match My Email tab in Salesforce and will be able to see their data in the Email Cloud.

Deactivating Users

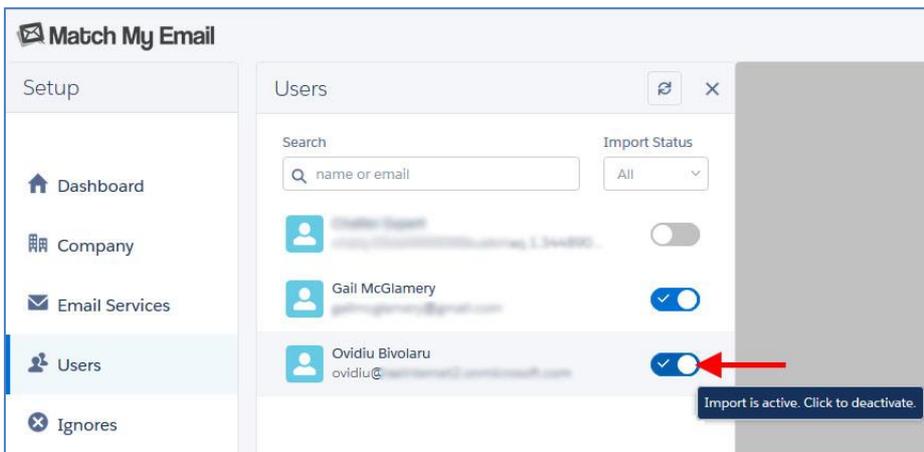
If an employee temporarily leaves the company, or is on leave, you may want to pause importing for them and resume at a later date. Deactivating an import means you are pausing the imports for a period of time, but can easily resume them.

To deactivate someone as a User from a Match My Email account:

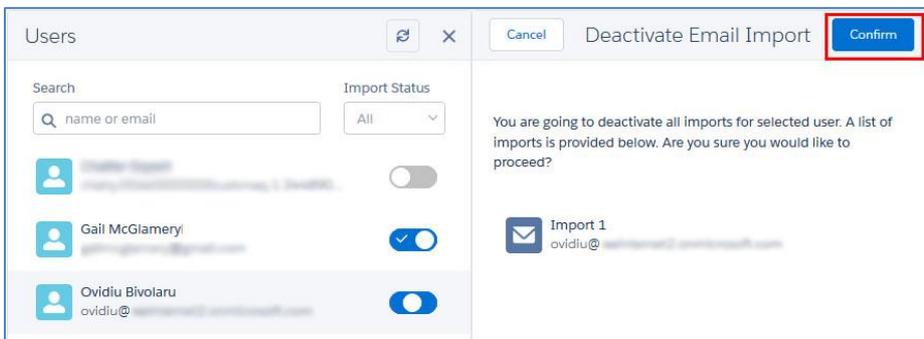
- In Salesforce, the Cloud Admin clicks on the Match My Email tab to open the interface. At top right, click the Settings icon and then Control Panel.



- On the left sidebar, click Users. In the list of Users, find the one to deactivate in Match My Email and click on the toggle as indicated in screenshot.



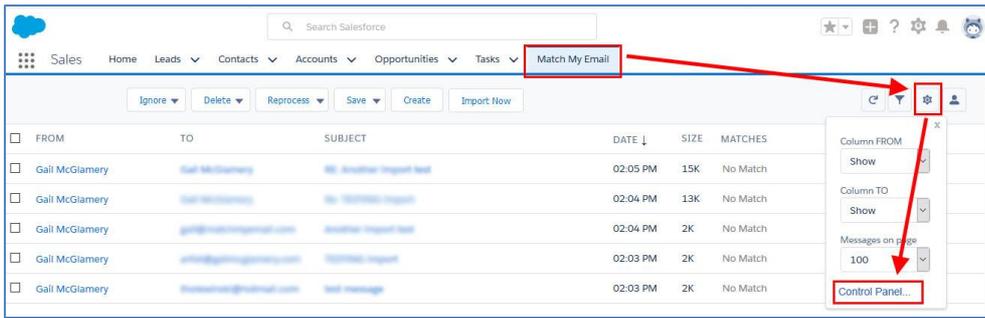
- In panel to right, click Confirm at top to deactivate User and all imports.



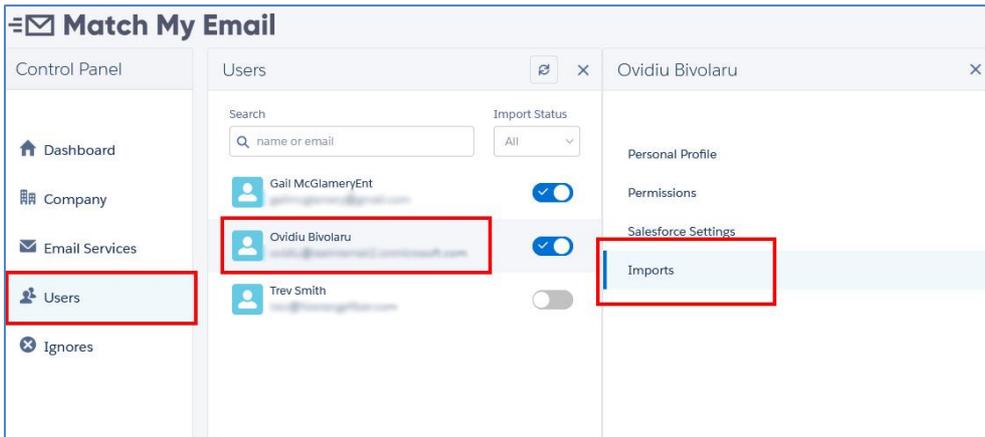
Deleting Users

If an employee leaves your company, or if an employee will no longer be using Match My Email, you will want to delete their previous import in the MME account. Please know that the employee's emails matched into Salesforce WILL REMAIN in Salesforce. However, all emails in the MME cloud, matched or with No Match status will be deleted. Thus, please review No Match status messages for this User (by signing into MME as that User) for manual matching or creating new Leads/Contacts prior to deleting.

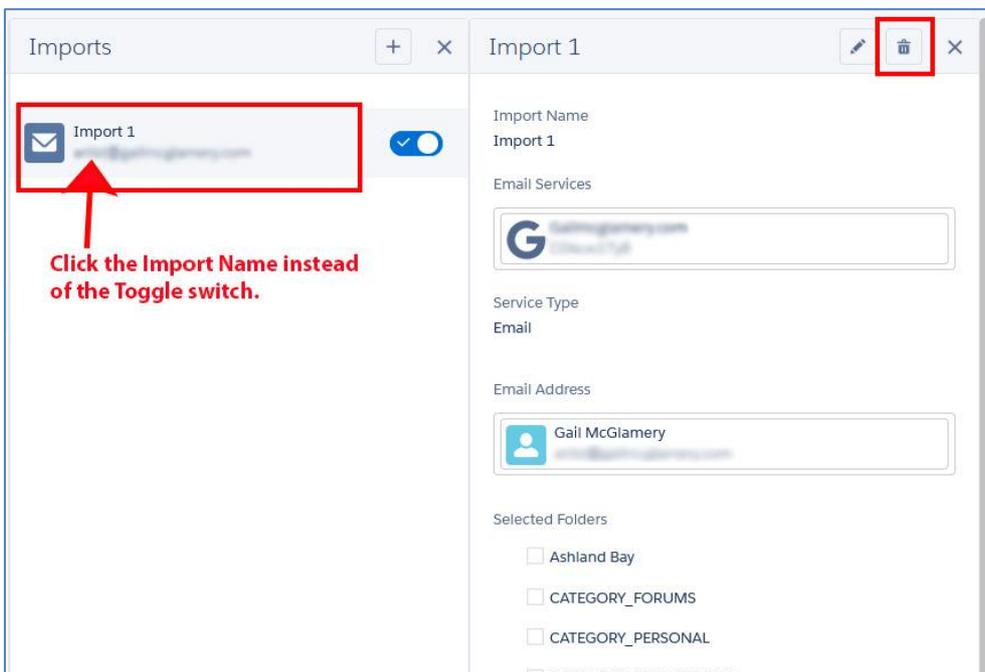
8. In Salesforce, the Cloud Admin clicks on the Match My Email tab to open the interface. At top right, click the Settings icon and then Control Panel.



9. On the left sidebar, click Users. In the list of Users, click on the Username, not the toggle, and then click Imports.



10. Click on the import to be deleted, not the toggle, and in right panel, click the Trash Can to remove it.



For assistance or for questions, please contact support at support@matchmyemail.com.