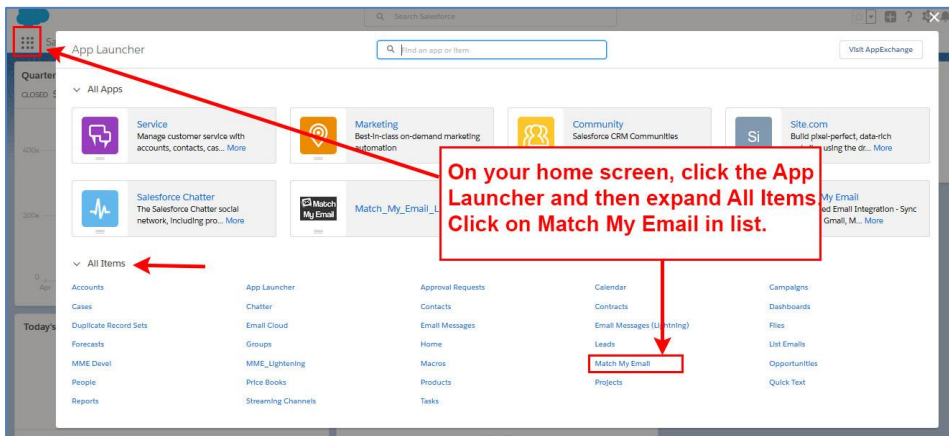


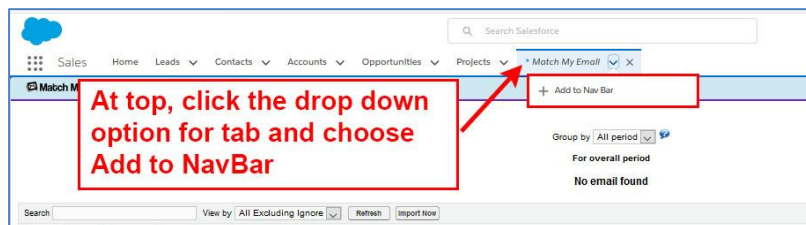
# Quick Setup Steps for Newly Added Match My Email Users (IMAP Accounts)

This guide is for those that need to complete the activation of their Match My Email import. This means an Administrative User has already confirmed you as an addition to the account, but needed you to sign in and enter your own email address and password.

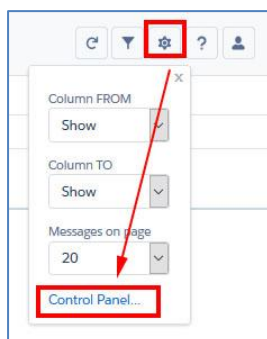
1. Sign in to Salesforce. Click on the App Launcher, scroll to All Items, and click on Match My Email.



- 1.1.1. This will sign you into your portion of Match My Email and also temporarily add it to your Nav Bar.
- 1.1.2. (NOTE: If you want it added permanently to the Nav bar, click the drop down and choose that option as shown here.

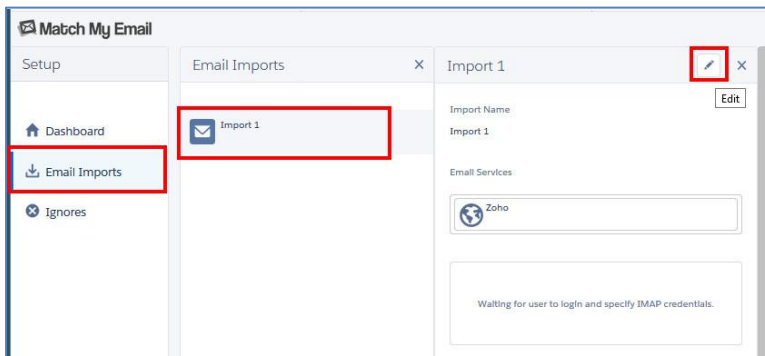


2. Click the Match My Email Gear, the middle icon button top right, and click Control Panel.

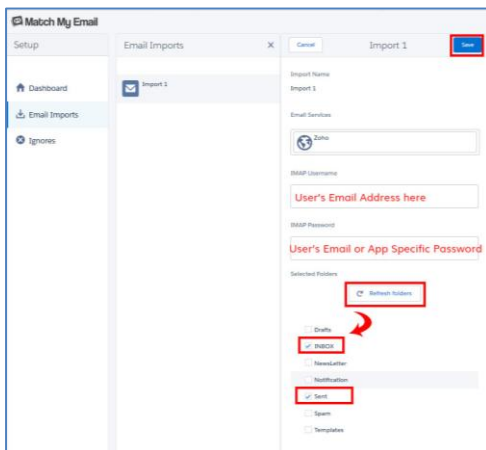


If you are an Administrative User in Salesforce, you have Administrative permissions in Match My Email and should skip to step 4.0. Otherwise, as a non-Administrative User, follow the steps at 3.0.

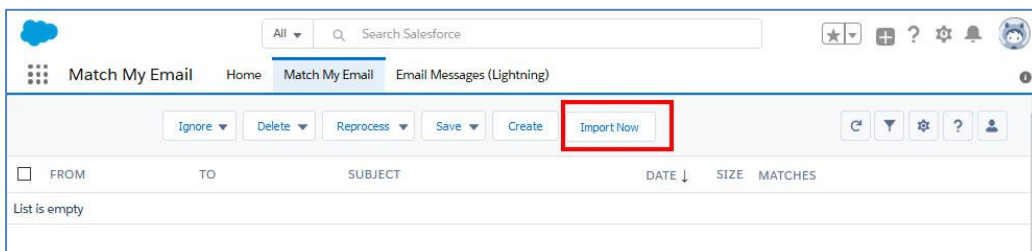
3. As an End User, You will see a Personal Control Panel that includes a left menu of Dashboard, Email Imports, and Ignores.
  - 3.1. Click on Email Imports. In next panel, click the Import listed. It might be named Import 1 or another name given to it by your Admin. Next, click the pen button to Edit.



- 3.2. Enter your email address and email password (or app-specific password if multi-factor authentication is enabled) and click Refresh Folders. Folders from your email account will be listed and the folders for Inbox and Sent will be checked. This means MME will bring copies of emails from these selected folders to Email Cloud and work to match them into Salesforce. You can change the selection if desired, then click Save at top.

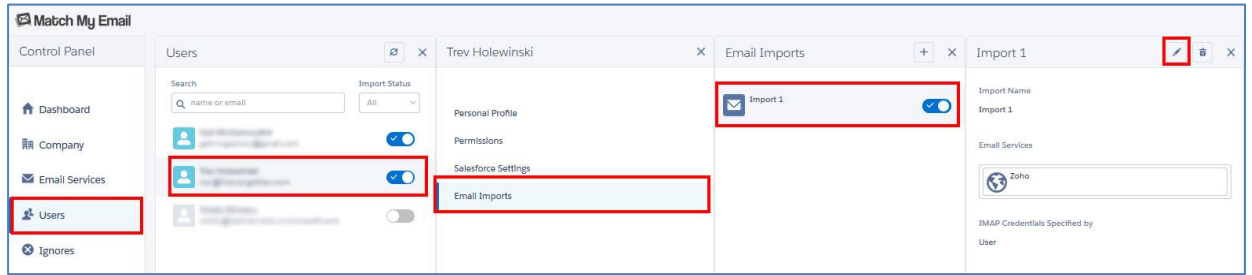


- 3.3. Import will begin within 20 minutes for this new User. If you want to speed this first import up to see data quickly, you can go back to the browser tab where you initially signed in to Match My Email and click Import Now. Allow the import to complete.

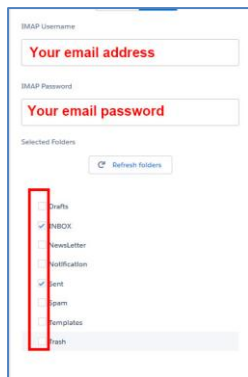


As an End User, you are setup in Match My Email.

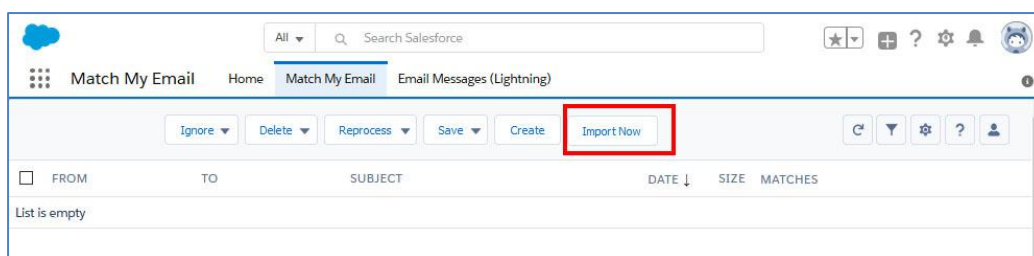
4. As an Administrative User, you will see the full Admin Control Panel with a left menu that shows Dashboard, Company, Email Services, Users, and Ignores.
  - 4.1. Click on Users. In next panel, the list will show Salesforce Users in the organization. Find your name in the list (a search box is available at top) and click on your listing. In next panel, click on Email Imports and then on the named Import. In the last panel, click on the pen icon at top to Edit.



- 4.2. Enter your email address and then email password. Click Refresh Folders to see folders from your email account. Inbox and Sent folders are already checked. This means MME will bring copies of emails from these selected folders to Email Cloud and work to match them into Salesforce. You can change the selection if desired, then click Save at top.



- 4.3. Import will begin within 20 minutes for this new User. If you want to speed this first import up to see data quickly, you can go back to the browser tab where you initially signed in to Match My Email and click Import Now. Allow the import to complete.



For assistance with set up or for questions, contact [support@matchmyemail.com](mailto:support@matchmyemail.com). You can also visit [our support page](#) and use the scheduler to book a free support session, as well as find a User Guide and wiki posts for frequently asked questions.