꞊✉ Match My Email

Setting Up Match My Email (MME) in Salesforce.com using Google Workspace

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Email Service Connection Choices for Google

If you are, or have the participation of, a Google Super Admin, you can establish a company-level connection to Google Workspace through a JSON key connected to a Service Account, scope authorizations, and APIs. This type of Email Service connection will allow a Match My Email Administrator access to email accounts within the Google Workspace. They can activate any Salesforce User remotely and End Users do not need to take any action. Proceed to Section 1.
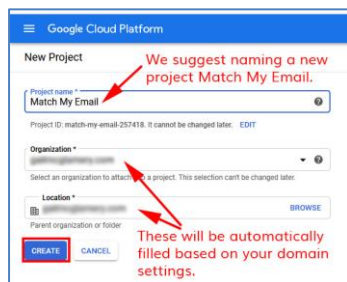
If you would prefer to have each End User individually authenticate themselves, a Google Super Admin will need to make Match My Email a trusted app. Proceed to Section 2.

1. Perform Steps in Google Workspace for API Connection

1.1. Click https://console.developers.google.com/iam-admin/serviceaccounts and login if prompted to arrive at the Google Developer Console on the Service Accounts page.

1.2. Select or Create a project. In our example, we are creating a new one.
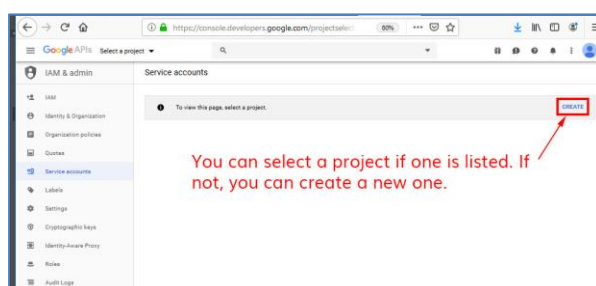
1.3.   A suggested name for the Project will appear. We suggest naming the project Match My Email so that it is more evident why this project exists. The Organization and Location should autofill to reflect your Google Workspace. Click CREATE.
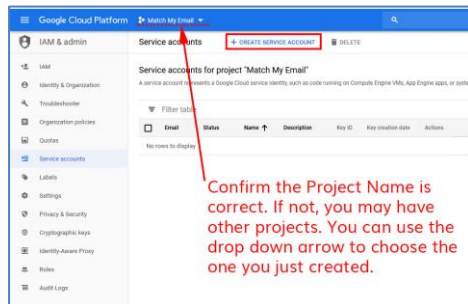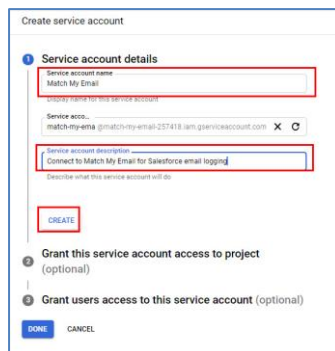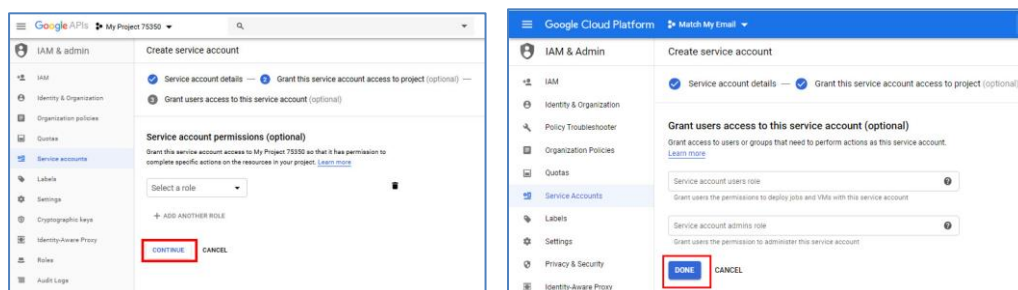

1.4.   Confirm you are working on the Project you just created. Click CREATE SERVICE ACCOUNT.
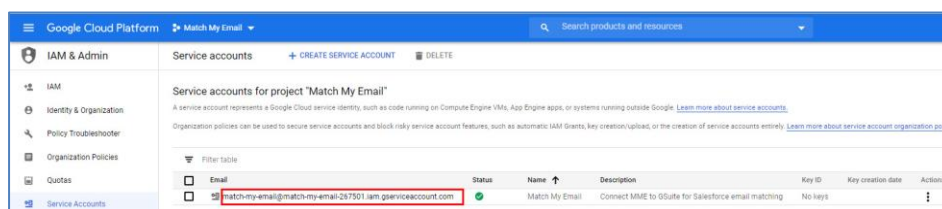
1.5.   Enter a Service Account name. In our example, we have entered Match My Email. Also enter a Service account description such as "Connection to Match My Email for Salesforce email logging". The service account will allow the Match My Email Cloud Admin to activate additional Users. Click CREATE.

1.6.   It is not necessary to select a role, just click CONTINUE and on next screen click Done.

1.7.   Upon returning to the Service Account list, click on the Service Account that was just created.

1.8.   Highlight and copy the Unique ID number for a subsequent step. Click Keys at the top.

1.9.   Click the button to Add Key and then choose Create New Key

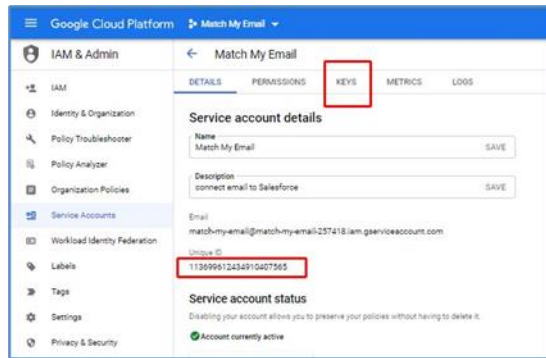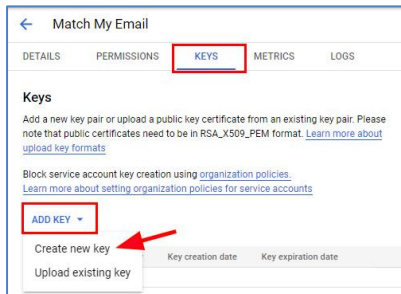1.10.   In pop-up window, confirm the JSON option is selected and click CREATE. A window will pop up indicating the Private Key was saved in your Downloads folder. Click Close. Do not close this browser tab as you will return to the developer console.
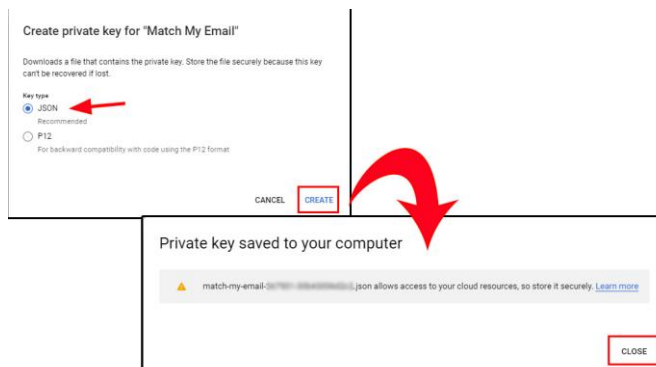
1.11.   Leave the developer console open for a later step. Right click http://admin.google.com/ to open the Admin Console in a new browser tab. Once signed in, click on Security.
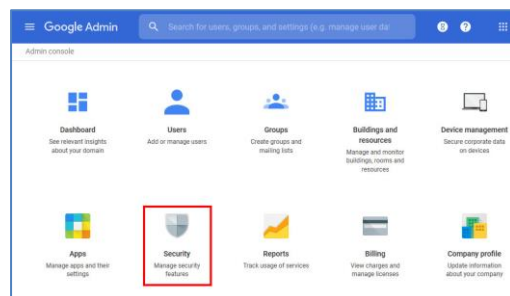
1.12.   Scroll down to API Controls. We found it at the bottom of the list.
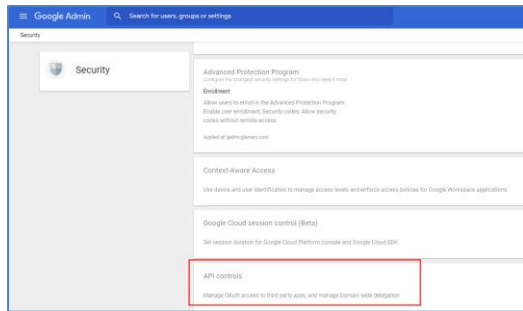
1.13.   Scroll to bottom and click on Manage Domain Wide Delegation

1.14.   Click Add New.
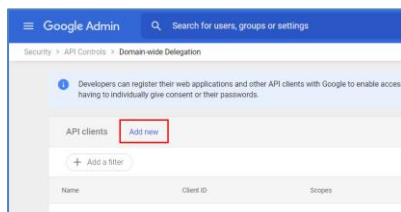
1.15.   In the pop-up window, for Client ID paste the ID you copied in Step 1.8 that should still be held in your computer clipboard. For the OAuth Scopes (comma delimited), highlight and copy all the API scope text listed below as one selection. Paste into the OAuth scopes field as shown in screenshot. Click Authorize.
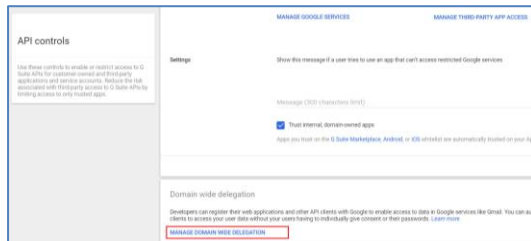
https://www.googleapis.com/auth/admin.directory.customer, https://www.googleapis.com/auth/admin.directory.user, https://www.googleapis.com/auth/admin.directory.group, https://mail.google.com/, https://www.googleapis.com/auth/calendar.readonly, https://www.googleapis.com/auth/calendar.events.readonly
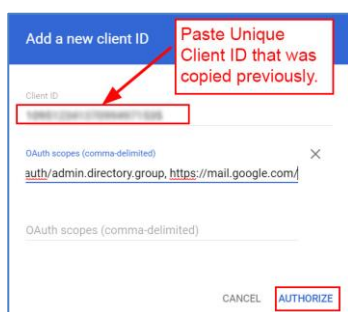
1.16. Click back to the browser tab for your Developer Console. It will likely still be showing Service Account Details. Click the three lines at top left for the menu, click on APIs & Services and follow the submenu to click on Library.
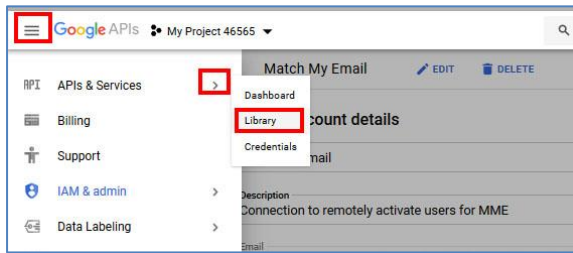
1.17. In the search at the top, enter SDK and below click on the option for Admin SDK.

1.18. Click on ENABLE.

1.19. Repeat step 1.16 to arrive at the API Library. In the search, type in gmail and click on the Gmail API. On the next screen, click ENABLE.

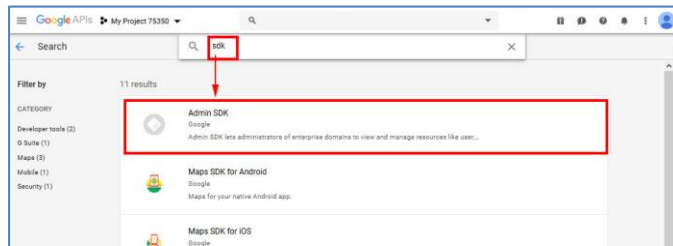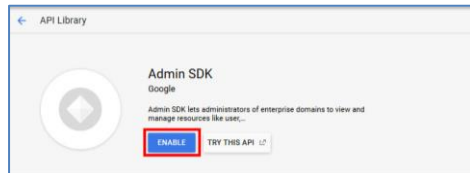1.20. If you would like to use Match My Email to sync calendar events, return again to the API Library. Enter calendar and search for and select the Calendar API. On the next screen, click ENABLE.

You have completed steps preparing for the API connection. You can close your browser tabs for Google Workspace Admin and Developer consoles. If the Google Super Admin performing these steps is not a Salesforce Admin, the former will need to send the latter the JSON file and the Google Admin's email address. Both will be used by the Salesforce Admin to establish the Email Service connection in the Match My Email Control Panel.

2. Optional: Google Super Admin Adds Match My Email as a Trusted App

If you performed the steps in Section 1, you do not need to also complete this section and can skip to Section 3. This section is for those that want End Users to activate their own individual imports through their own login actions. For this to be possible, a Google Super Admin must first add Match My Email as a Trusted App.

2.1. A Super Admin for Google should navigate to admin.google.com. Go to Security > Access and data control > API Controls.
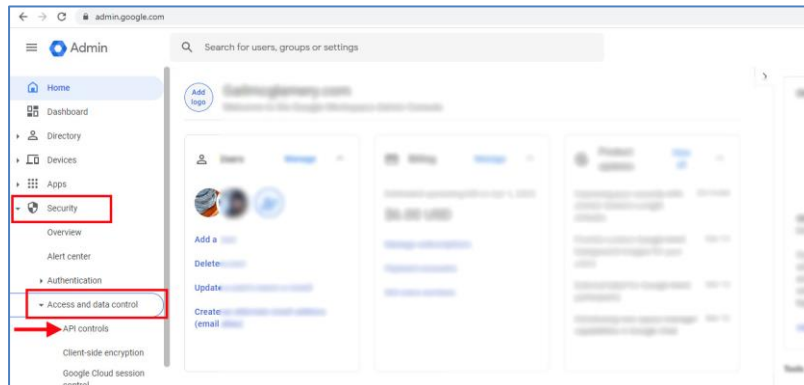
2.2. Click Manage Third-Party App Access.
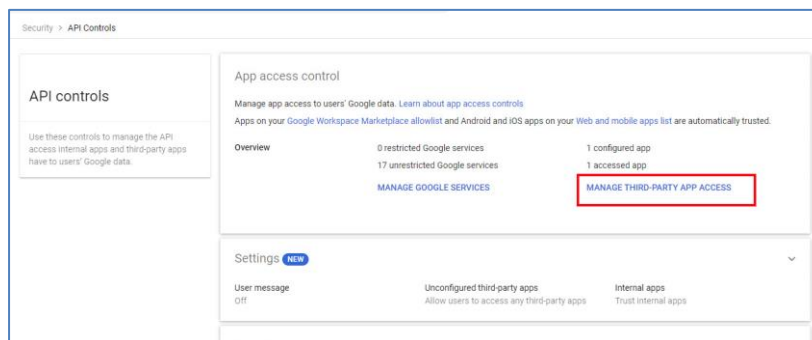
2.3. Click Add app and select option OAuth App Name Or Client ID
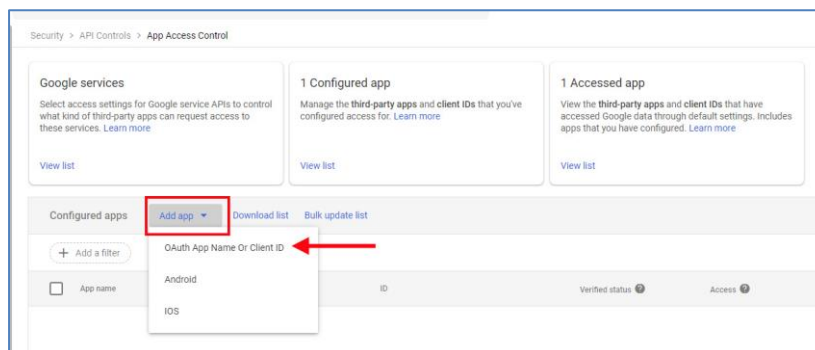
2.4. Copy and paste this Match My Email's App ID.

681791469055-lmpqo740urdb03gs14i8cr9kaqvjslr9.apps.googleusercontent.com

Confirm there are no leading or trailing spaces. Click Search. Hover over the listing that appears and click Select.

2.5.   Select the listing by checking the box and clicking Select.
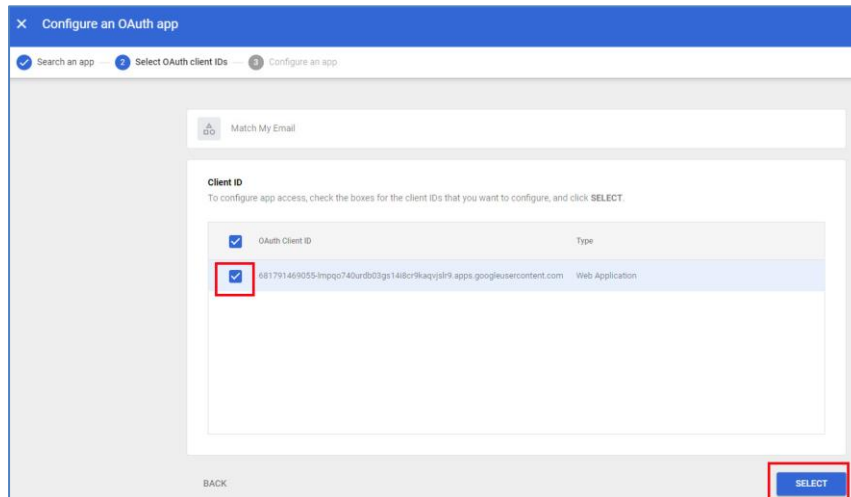
2.6.   Check the option for Trusted. Click Configure.
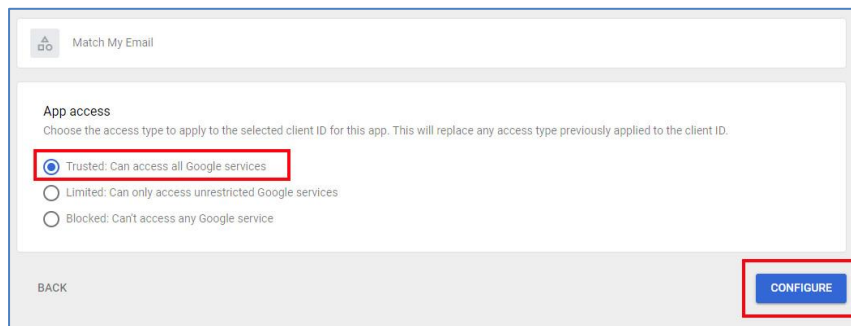
Steps for End Users, to be performed after app setup is complete, can be found in Section 16.

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

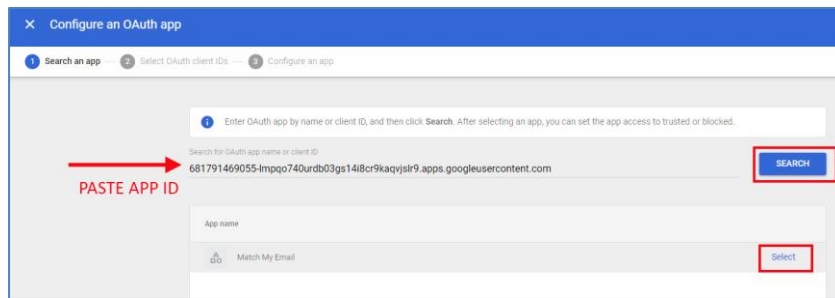*Chatter & Actions in Publisher are required for Match My Email package. Salesforce.com requires users of Lightning to set up My Domain to have access to custom managed apps and components. Click here for more about this Salesforce.com requirement.*

3.1.   Click gear icon top right and choose Setup. In left sidebar, use Quick Find to search for chatter and then click on Chatter Settings.
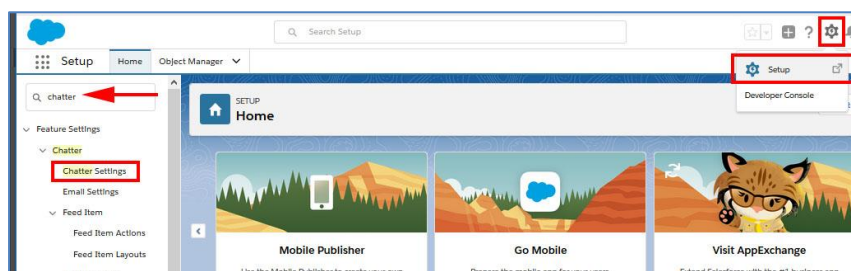
3.2.   Scroll down on screen to Actions in the Publisher section and confirm that box Enable Actions in the Publisher is checked. If not, click Edit at top of screen, check this box, and Save.
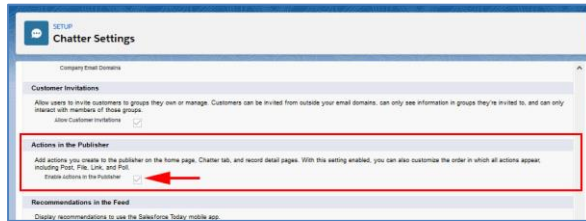
3.3.   Confirm that My Domain is set by using Quick Find to search for and click on My Domain.
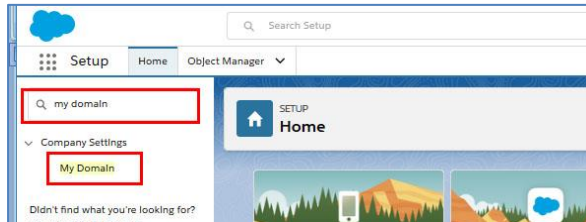
3.4.   If My Domain steps have been completed, the screen will appear as below. Proceed to Section 4. If not completed, it is necessary to follow the instructions as presented by Salesforce.com. You must wait until steps are completed and domain is deployed to users before proceeding.
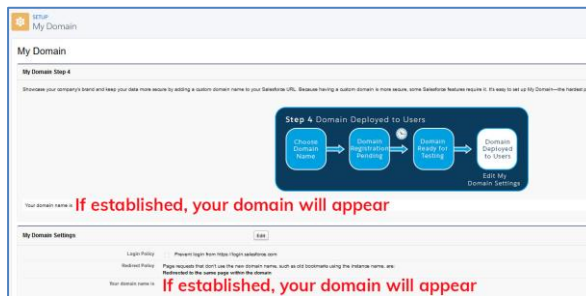
4. Install Match My Email AppExchange Package in Salesforce.com

4.1.   Navigate to www.matchmyemail.com. Click Login in top menu.
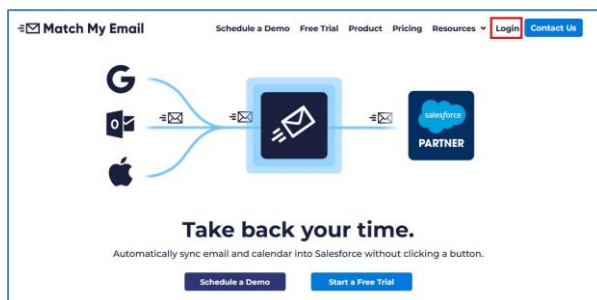
4.2.   Choose the correct portal.

4.3.   Choose the type of Salesforce environment into which you want to install the app and click the button Proceed to the package installation.

Those using Enterprise and Unlimited editions of Salesforce have the option of installing into a Sandbox environment for testing. To convert from a Sandbox to a Production environment, setup steps in this guide will need to be repeated and a new Match My Email account created.
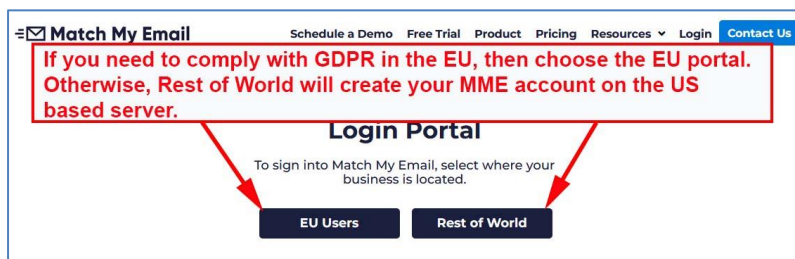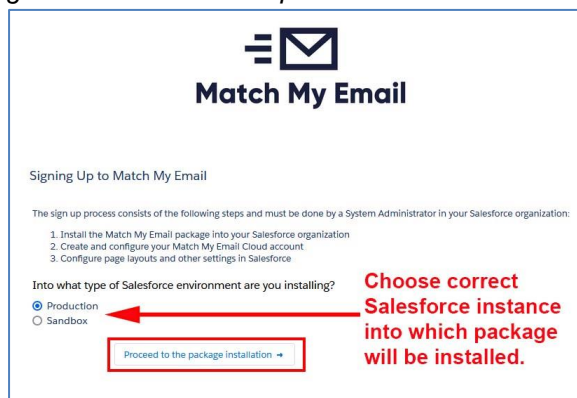

4.4.   Choose **Install for All Users** and click Install. This does not activate all Users for the app, but rather it ensures permissions are available for non-Admin Users in the future. IMPORTANT: If you choose Admins Only, you will have to back track on permissions to expand app accessibility to other profiles in the future. It is best to Install for All Users now and utilize Salesforce profile- and user-level permissions to control access.
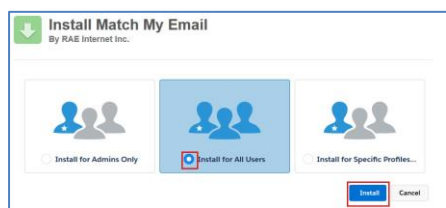
4.5.   Check the box to approve third-party access and click Continue. Approving Third-Party Access adds four remote site settings and enables our Email Sync Assistant feature (Details in Section 17) to bring information about No Match messages into Salesforce.
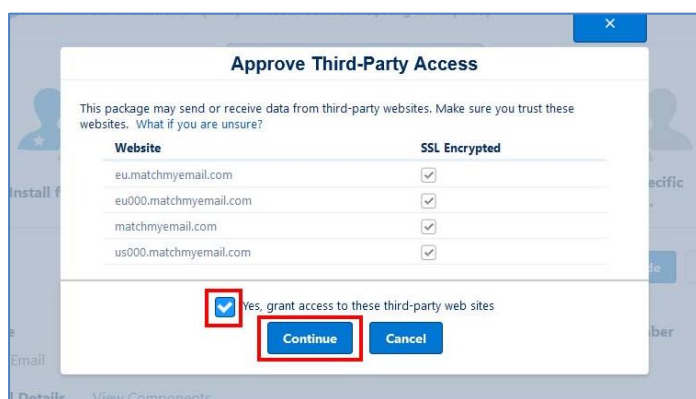

The installation will either be completed quickly or you will be alerted that it will take a bit more time. If the latter, simply click DONE and you will jump to your installed packages list in Salesforce. You will receive an email from Salesforce when the installation is complete.

Wait for the package to show up in the Installed Packages list before proceeding.

5. Proceed with Match My Email account setup

5.1.   If the install completed, you will be notified as such and provided a link 'click here' to proceed with Match My Email account setup.
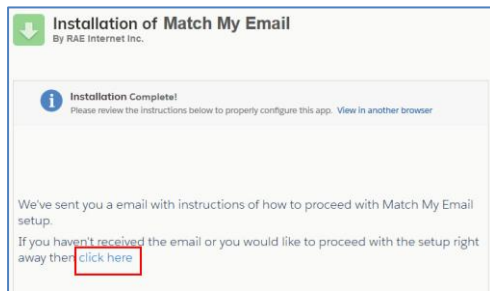

5.2.   If the install is taking a bit longer, you can click DONE and will be taken to your list of installed packages. You will receive an email from Salesforce when the install is complete. You will also have received an email from Match My Email Support (as shown in image below) that contains the link 'click here' to proceed.
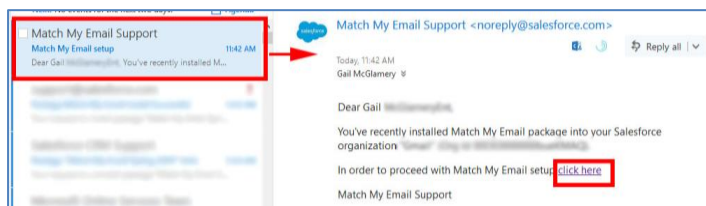
If you do not receive the email, click the following appropriate link:
https://matchmyemail.com/install to have your Match My Email account and data on our US server, or
https://eu.matchmyemail.com/install to have your Match My Email account and data on our EU server.

5.3.   The first screen is about the Master Subscription Agreement ("MSA"). You can click the link to read the document or right click it to open the MSA in new tab and read it later. The MSA can also be found on the Match My Email web site at https://www.matchmyemail.com/legal/. You will need to check the box to confirm you have read and agreed to the MSA and then click Next.
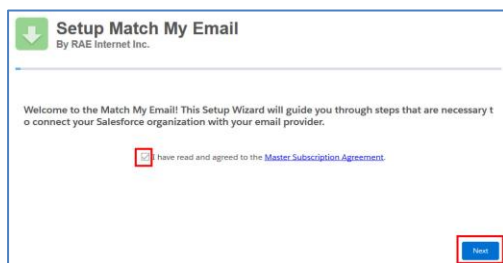
5.4.   If you/your company is located within the European Union, please choose that option to meet GDPR compliance. Otherwise, choose the United States as the location for your data storage and processing. Click Next.

5.5.   You will jump to a screen prompting a login to Salesforce with your System Administrator credential if you are not already signed in. Match My Email is requesting access to connect to your Salesforce organization. Click Allow.
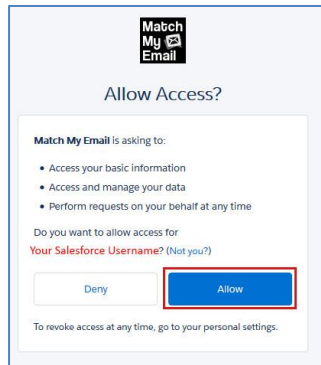
A Match My Email account has now been created and you are able to manage the account. Proceed to next step to connect the account to your email server.

5.6. If you completed Section 2 above for Individual Authentication, you do not need to establish an email provider for the entire account. You can close this current browser tab and open one where you are logged into Salesforce. Open the App Launcher and go to View All. Below the app section, click the label for Match My Email. Skip to 5.14.

5.7. If you completed Section 1 and obtained a JSON key, choose email provider as Google.
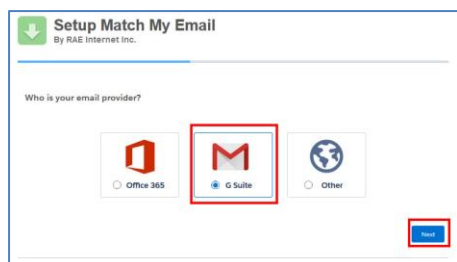

Please Note:

The choice for Other is for connecting to a variety of email servers using an IMAP connection to Google. However, completion of those steps is covered in another setup guide.

5.8. The next screen outlines the steps you already accomplished in Section 1. At the bottom, check the box confirming all required steps were completed. Click Next.
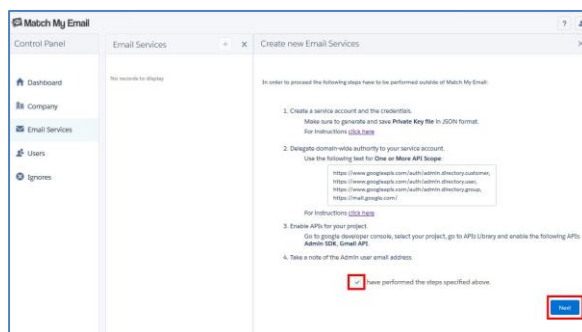
5.9. In the Admin Email field, enter the email address of the Google Workspace Super Admin. Click the Browse button to find the JSON key that was downloaded in step 1.10, normally to your Downloads folder. Find the file in that folder. The file extension is .json with today's date. Double click to select it.
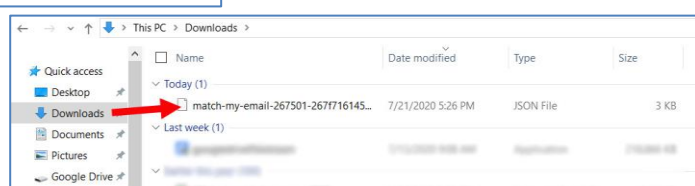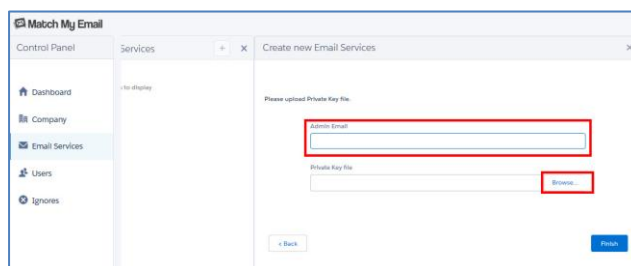
5.10.   With the file name filled in, click Finish.
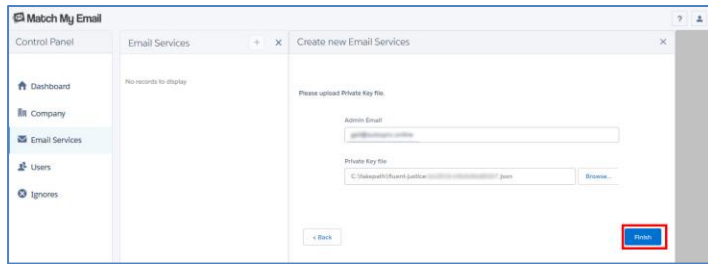
5.11.   If you only want to manage the MME account as an Administrative User and do not need the app to sync your own emails to Salesforce, click Skip and on the next screen click Finish and go to Step 5.13..

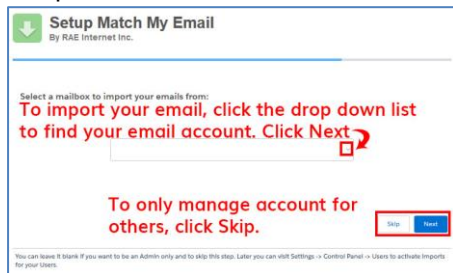If you want to match your emails into Salesforce, find your email address/account using the drop down arrow from within your Google group. Click Next. This will start your first import. Allow import to run and complete. When done, click Next.

Match My Email will begin running the first import automatically, going back 24 hours in the default folders of Inbox and Sent. (Click here for information about importing older emails.).

5.12.   When import is complete, click Finish.

5.13.   You will then jump into Salesforce on a web tab for Match My Email. If you skipped creating an import, you will not have email messages showing. If you did create an import, you will be looking at copies of emails imported from your selected folders to the MME Email Cloud.

You are the only person who has access to this view. Emails showing a match in the right column have already been uploaded and linked to records as indicated in Salesforce and remain there 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.

5.14.   To add this tab to your Nav Bar, click the drop-down option and then click Add to Nav Bar.
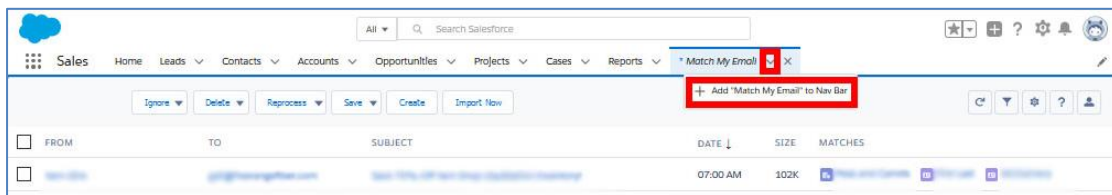
6. Best Practice: Add Ignore Rule for Email Domain

We strongly recommend as a best practice that you add an ignore rule for an email domain. This is a protective measure against unnecessary or unwanted matching of internal email into Salesforce.com Lead and Contact records that might contain employee email addresses.

6.1.   When signed in to Match My Email account, click the gear icon at right and choose Control Panel.
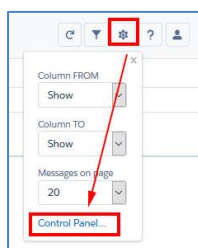
6.2. In the Control Panel, click Ignores on the left. Click +New button. Fill in the fields as described below and click SAVE.
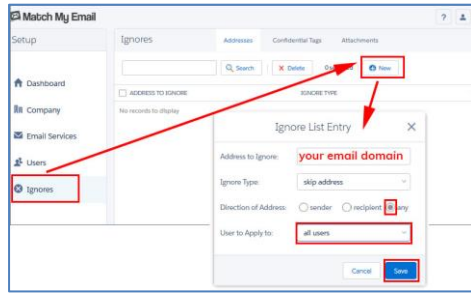
- For Address to Ignore, type your email domain, which is everything after the @ symbol. If a company email address is Jane@acme.com, the domain is acme.com.
- For Ignore Type, confirm 'skip address' is showing.
- For Direction of Address, click the button by 'any'
- User to Apply to, choose all users
- Click Save.

7. Confirm company-wide settings for Matching and Upload Rules

7.1. In account Control Panel, go to Company > Salesforce Settings.
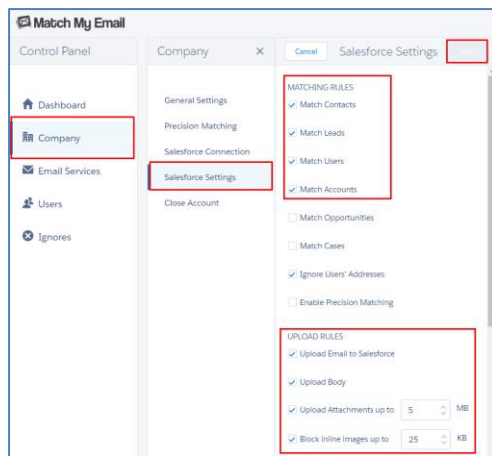
By default, Matching Rules are enabled for Contacts, Leads and Accounts as well as Salesforce Users (for future reporting).

Uncheck boxes to disable matching to an object you do not use. Check a box to enable matching to Opportunities or Cases.

The algorithm will match all Opportunities with Status Open (not Closed) where Contact matching by email address has a Contact Role. Alternatively, it will match all Opportunities with status Open for parent Account when a Contact is matched by email address with NO Contact Role.

For Cases, it is similar.

Customized matching to Opportunities by tag or words in Subject Line, or matching to Case by unique Case # is possible with custom programming. 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.

8. For Enterprise & Unlimited 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. In the Organization Detail section at top, look for the field Organization Edition which is typically in the right column. Editions other than Enterprise and Unlimited can skip to Step 8.
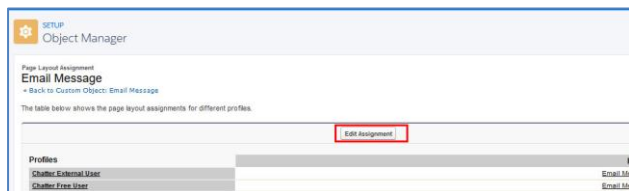
8.1. Go to Setup Home > Object Manager and click on the label Email Message where you see the API Name Email Message (MME__EmailMessage__c).
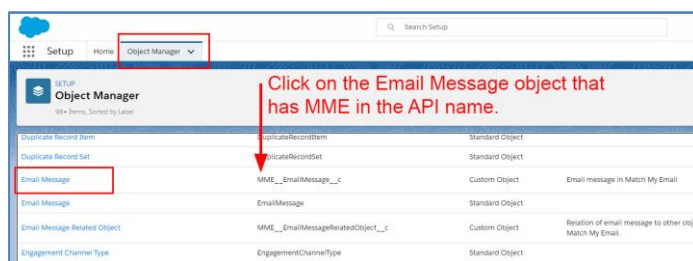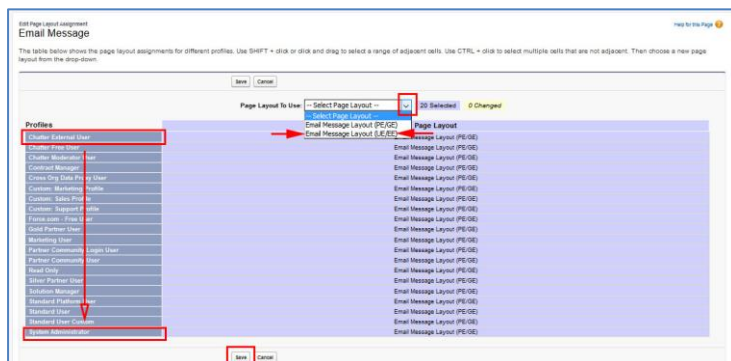
8.2.   In left menu, click on Page Layouts and then click on the Page Layout Assignment button at top right.
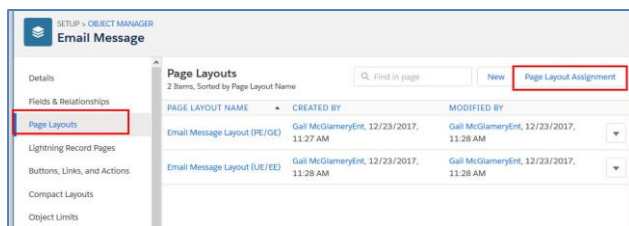
8.3.   On the next screen, click Edit Assignment.

8.4.   On the left, select all Profiles (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.


8.5.   Repeat these steps from 8.1 for Email Message Related Object.

9. 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. Some organizations may not use all of these objects. The below example is for Contacts.

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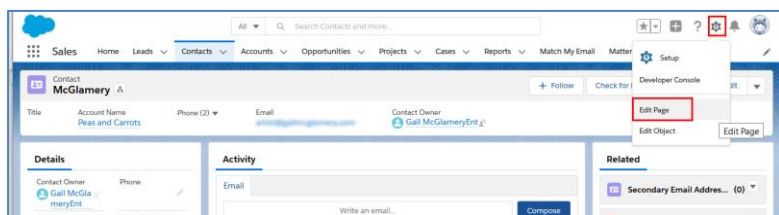

9.2.   In the middle of the screen, click in the white space at the top of the main section. The right sidebar will change to information for this section. Click Add Tab.
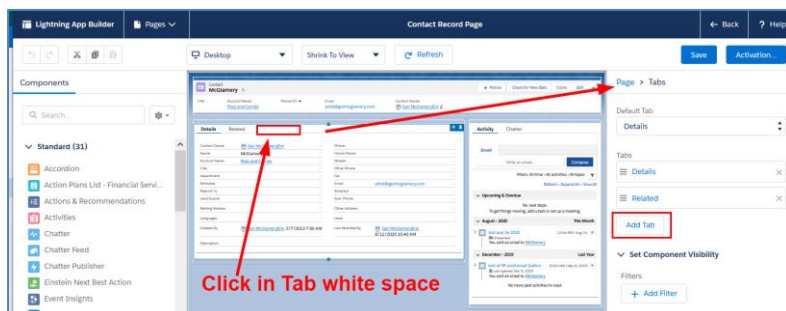
9.3.   By default, the tab added is Details. Click on that name and in the pop up window scroll to the top to click on Custom. In the field that appears, type in Email and click Done.
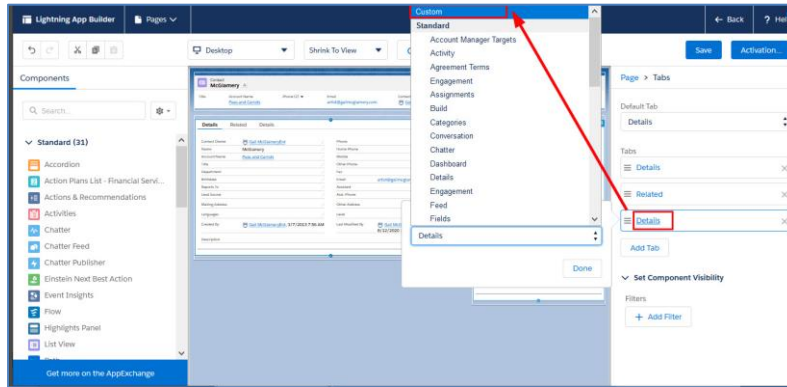
9.4.   Click on the new tab in the middle of the screen. Then scroll to the bottom of the left sidebar to find Custom Managed components. Click on Email Messages and drag it into the new tab. Click Save.
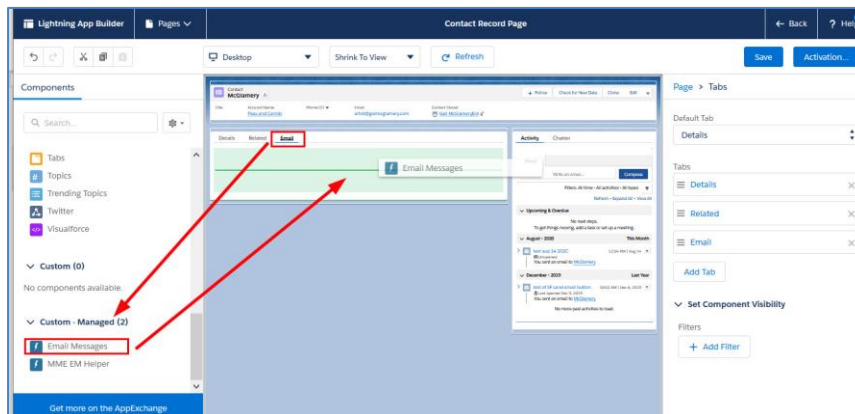

Repeat these steps for additional Lightning Record pages for each of the objects you use.

10. Optional: Convert to Match My Email's Send Email button

Match My Email's Send Email button will appear at top of screen when viewing email in Lightning and in bottom menu in Salesforce Mobile. It provides the ability to send, reply, reply all and forward email from within Salesforce.

10.1.   Navigate to Salesforce Setup > Object Manager > Opportunity (as an example). In left menu click on Page Layouts. In list, for the layouts you use click the name of layout to Edit.

10.2.   At top left, click on Mobile and Lightning Actions. If the Salesforce Mobile and Lightning Experience Actions section below does not already show items it contains, hover over grey area. It will highlight as blue, click the wrench icon to open the section for edits.
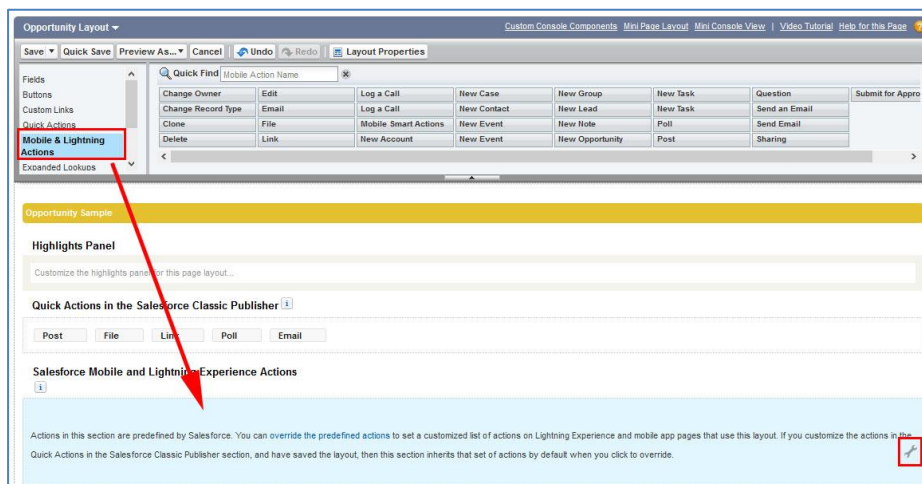
10.3.	There may be two actions for Send Email. Hover over each to find the MME custom button named MME__SendEmailLwc. Note, you want to use the button with Lwc at the end of Name. Drag it into the Salesforce Mobile and Lightning Experience Actions section. We recommend placing first, with green indicator appearing as in screenshot below.

Pick the Send Email that has Lwc at end of API Name
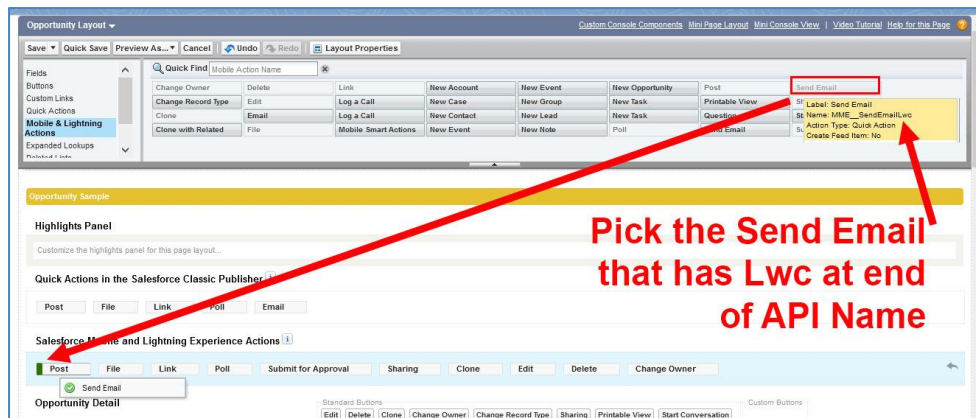
10.4.	Click on any pre-existing Send Email and Send an Email buttons, one at a time, drag to the top Fields area to remove them from layout. Click Save at top left to save changes.
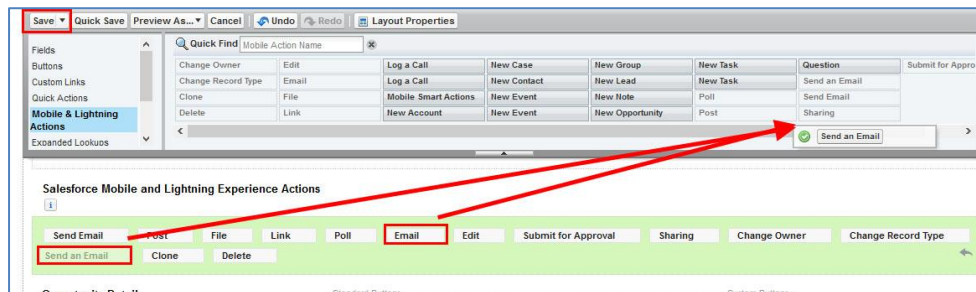

Repeat steps for other objects (Lead, Account, Contact, and Case objects) used in Salesforce.


11. Optional: Turn on Email Messages tab visibility for desired profiles

The Email Messages (Lightning) tab will show a full list of all matches made into Salesforce records. It will only be visible and available to profiles for which the setting is Default On.

11.1.	Go to Setup Home > ADMINISTRATION > Users > Profiles and click on a profile name. (If you are unable to edit the profile this way, click Edit to left of profile name instead.)
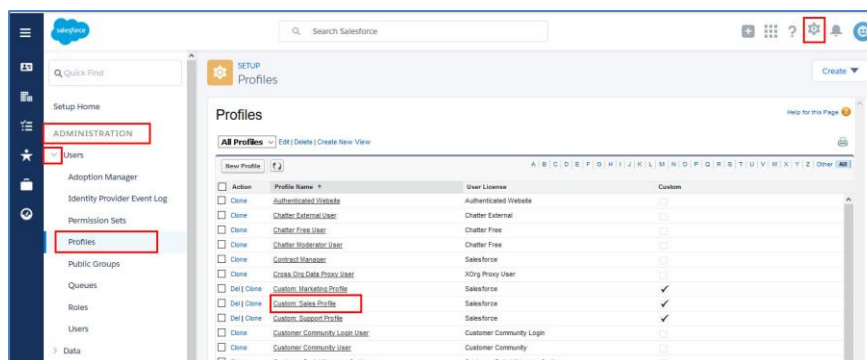
11.2.   Click on Object Settings within which Custom Tab Settings can be found. (This assumes the view is Enhanced Profile User Interface. If not, scroll down on screen to Custom Tab Settings.)
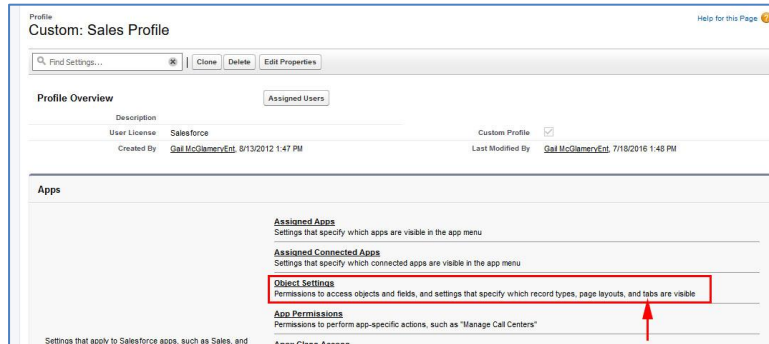

11.3.   Find Email Messages (Lightning) in the list. The Tab Setting should be Default On. If it is hidden or Default Off, then click the label for Email Messages (Lightning). Click the Edit button, change to Default On, and click SAVE. Upon returning to Profiles > (profile name edited) > Object Settings, the Tab Settings for Email Messages (Lightning) will reflect the change made

11.4.   Repeat from Step 11.1 for all desired profiles.

## 12. Optional: Add Email Message (Lightning) to Salesforce mobile navigation

12.1.   Go to Setup Home. In the Quick Find type navigation and click on Salesforce Navigation in the list.

12.2.   Move Email Message (Lightning) from Available to Selected on right. Click Save.
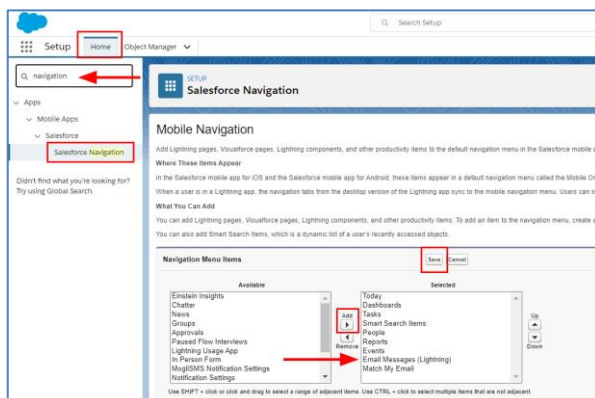
13. Optional: Match to Household in Financial Services Cloud

Match My Email can share a match to Household records as long as the Client is part of the Primary Group. The Email Messages object can be added to the Household Lighting Record Page as indicated in Step 9 above. Follow steps below to confirm that a Client is part of the Primary Group for the Household Relationship. Please note, for the Lead and Referral record, we will match to this record if an email address is present and roll up to the Referral Account.
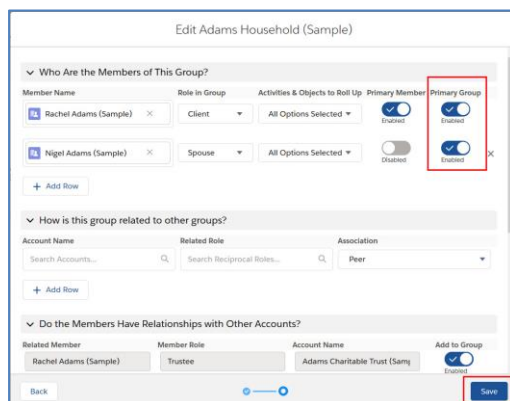
13.1.   From an Account record, as in screenshot below, click on Relationships.
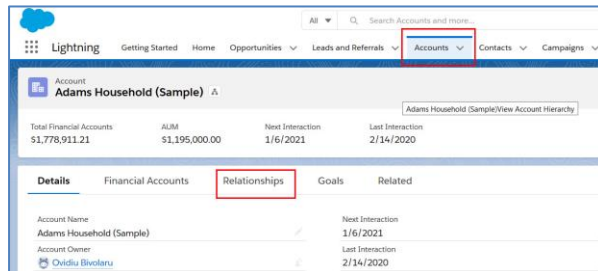
13.2.   Scroll down to the Group Members and click Edit.
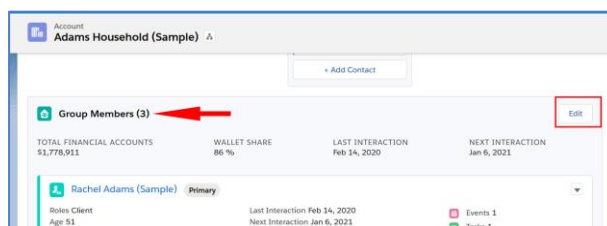
13.3.   In the section "Who are the Members of This Group?", you will want to Enable by clicking the toggle for Primary Group. This will result in a match to this individual also matching to the Household.


13.4.   From a Person Account record, the quick way to this same "Members of Group" view is to scroll to Relationship Groups, find the Household and click Edit in drop down to right. This will take you to the above screenshot.
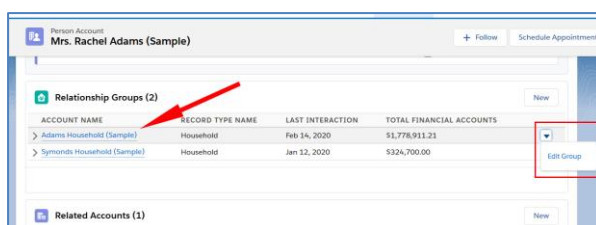
14. Remotely activate additional Users with company-level authentication to Google

Adding and Activating Users to a Match My Email account can be completed remotely by the Admin through the Email Service connection created earlier by Super Admin.

14.1.   Navigate back to your view of the Email Cloud. (Click the web tab in your Salesforce Nav Bar.)

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

14.3.   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.
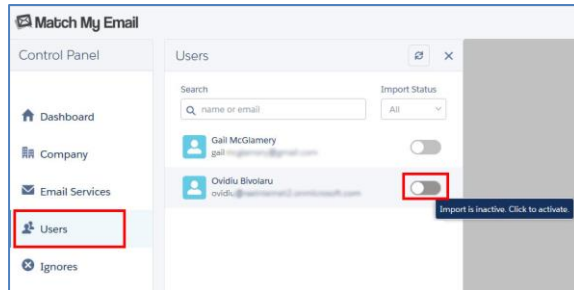
14.4.   Through the Google Workspace service, Match My Email should be able to display the User's email account. If it does not automatically load, click into the Quick Find field and begin typing the User's email address. You can then choose it from a list. The folders in the account will appear.

By default, the import is named Import 1 and Inbox and Sent folders are selected. The import name can be changed to something more descriptive as desired. Additional folders, such as subfolders into which User quickly move emails (within 20 minutes of receiving them) can also be selected for import. We do not recommend choosing All Mail or all folders, as this can bring in spam, drafts/duplicates, and undesirable email. Click Confirm at the top.
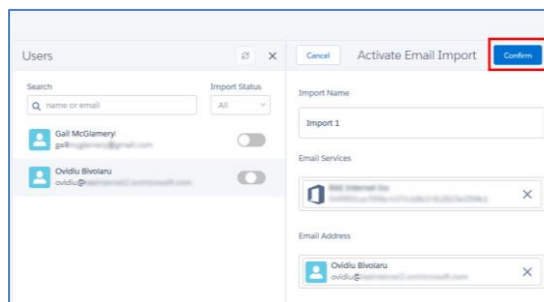

Within 20 minutes, Match My Email will begin to import and match for the new User. No further action is required by you or the End User. .

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

14.5.   The new user can then add the Match My Email tab to their Nav Bar for easy sign in. On main Salesforce screen, the new User would click the App Launcher (the grid of 9 dots at left). Look in the All Items section for Match My Email and click on it.
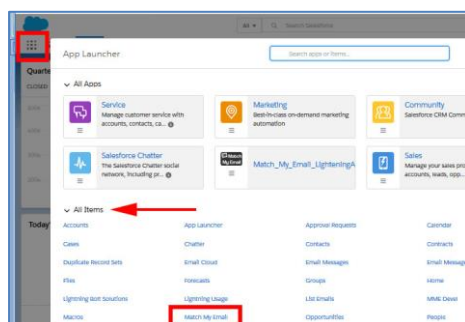
14.6.   The Match My Email web tab will launch. If they want to add Match My Email to their Nav Bar which is recommended, they can click the drop down arrow and choose that option.
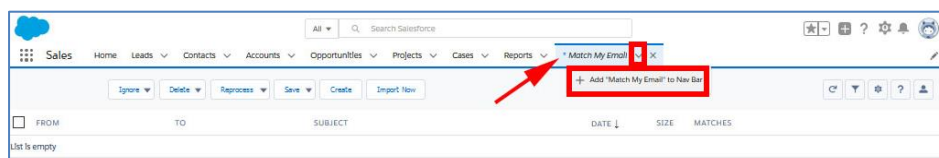
Once imports have begun, the new User will have a view to their portion of the account where copies of their emails from selected folders will arrive.

14.7. If new Users are unable to see matched email data in the Email Messages section on Salesforce page layouts, [enable custom object permissions at the profile-level or adjust permission set assignments at the user-level.](#)

## 15. Optional: Remotely activate additional Users for Calendar synchronization

Please disable any other Salesforce calendar syncing tool, such as Einstein Activity Capture, Lightning Sync, or Calendly, before adding an MME Calendar import. Otherwise, you may encounter duplication of events and emails or other issues.

15.1. To use Calendar Syncing, you must enable an option for Salesforce Activities. 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. If it is not, check the box and click Submit. You may have to wait for Salesforce to fully enable this.
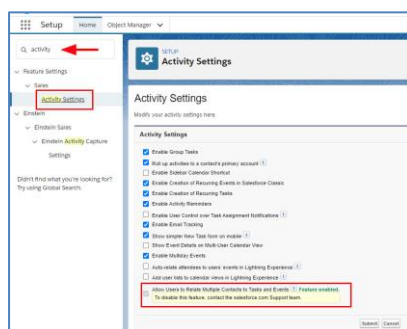
15.2. When Match My Email matches and uploads an event to the Activity timeline, it can also set the value of the Type field in the Event object correctly as an Event. This is important for future reporting on Events. To adjust the picklist for Events:

15.2.1. Navigate to Salesforce Setup > Object Manager > Event
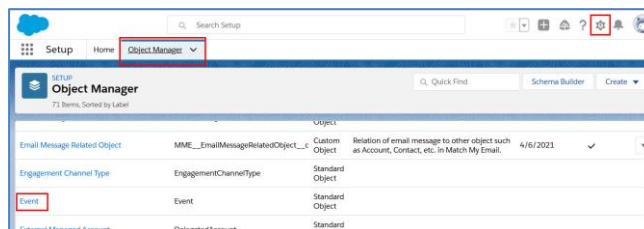
15.2.2. Click on Fields and Relationships and scroll down to click on Type. In the Event Type Picklist Values section, if Event is not yet listed as in the screenshot below, click New. If Event is already listed as a value, skip to section 15.3.


15.2.3. Type in Event in the box and click SAVE.

15.3. Sign into the Match My Email Control Panel and click on Users. Calendar synchronization is activated per User and appears as an additional import. We assume an email import was already confirmed for your Users per Section 14. The toggle will already be blue for Users you have activated. Do not click the toggle, as that will suggest to the system you want to deactivate the import. <u>Click the Name of the User needing a Calendar sync</u>.
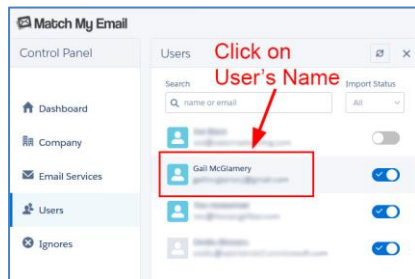
15.4. In the User Details panel that opens, click Imports. In the Imports panel that opens to the right, click the + sign at the top to add an import.
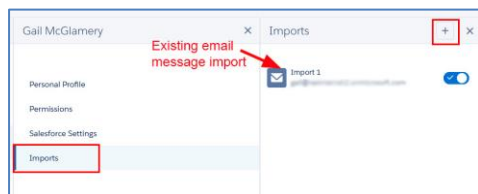

15.5. Below the Email Services field, expand the Service Type option to choose Calendar.
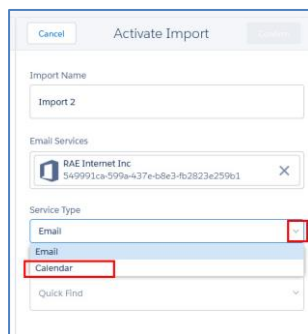
15.6. In most cases, the Email Address field will automatically fill in based on the system matching up the User with what is available. However, if it does not, simply type a few letters of the User's name or email address into the Quick Find and select the correct account.

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.
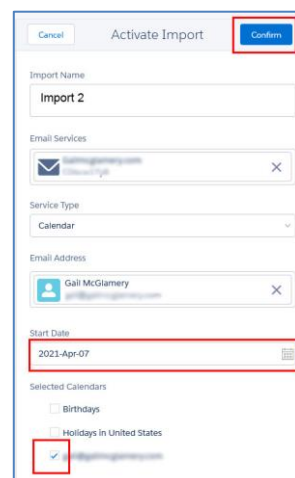
### 16. Optional: For Individual Google Authentication: End User Actions

16.1. In Salesforce, User can use the App Launcher to find Match My Email. Choose the app which launches the App Menu and click Match My Email again. Alternatively, click the Item Match My Email to immediately launch the app and temporarily add the tab to your main Navigation menu.
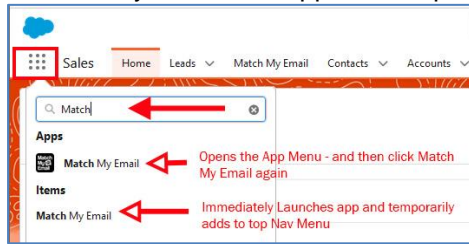
16.2. Click Match My Email in the app menu and then go to Settings > Control Panel.
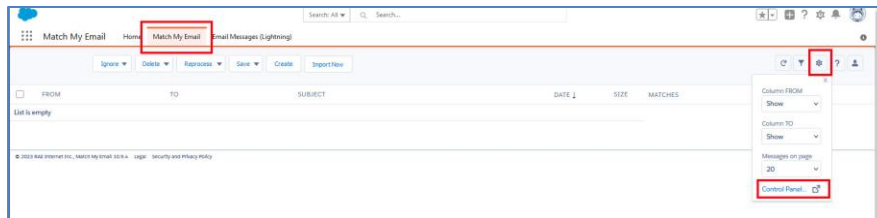
16.3. When Users are not Administrators in Salesforce, they will have a limited menu in Control Panel. Administrative Users can skip to 16.4. They will click Imports and then click the + sign to add an import. When prompted for Individual Email Service, choose Google Workspace and click Next.
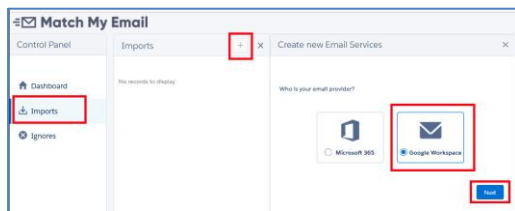

Skip to 16.7.

16.4. Administrative Users will have a full menu in Control Panel and more choices. First, click Users, find their name, and click the Toggle next to it.

16.5. Click the choice for Google Workspace and Next.
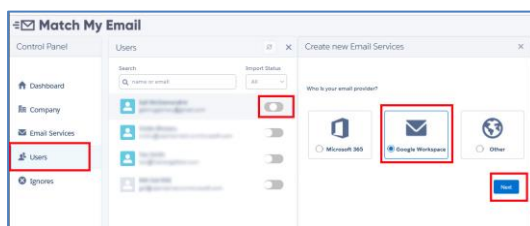
16.6. This document is presenting steps for setting up individual authentication that does not use or require Super Admin involvement. Therefore, on next screen choose "No, I'm not a Super Admin" and click Next.
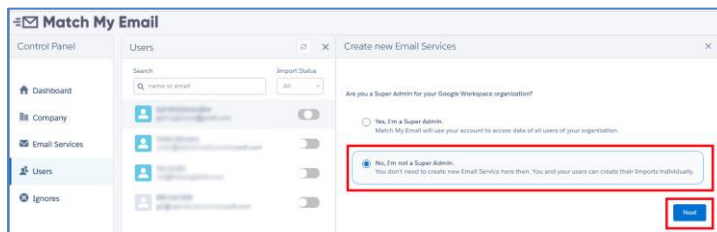
16.7. Upon jump to Google, User will be prompted to login to email account. Click Allow to allow Match My Email access. User will return to the Control Panel and will have a choice for folders. Click Confirm.

Important points about new activations:
- Inbox and Sent folders will be selected by default. These can be deselected, or additional folders selected.
- Match My Email will only import copies of messages from the folders selected when it runs every 20 minutes.
- It will also only go back 24 hours initially in these folders. To import email history, contact Match My Email support about Legacy importing.
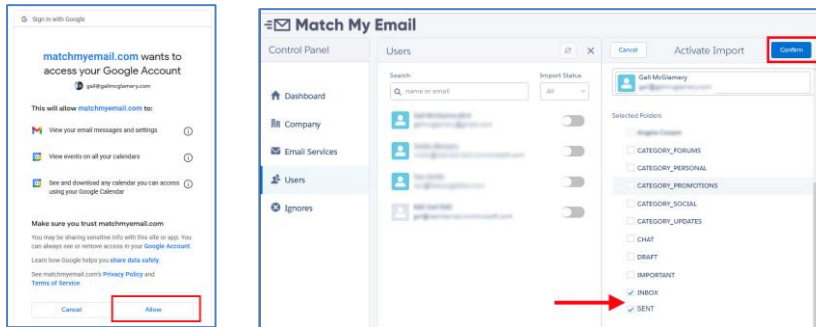

16.8. For Users that want to also activate a calendar import for event syncing, they would click to add an import, choose Google, and in Import Details, change the Service Type to Calendar. They can reference Section 15.6 for guidance on Start Date before clicking Confirm.

17. Optional: Add Email Sync Assistant to Salesforce Home Page

The Email Sync Assistant allows Users to evaluate email addresses for which Match My Email did not find a match. They can create Leads, Contacts or Ignore Rules from those addresses or choose to dismiss them for a later decision. The recommendation is to place the component on the home page for easy access, as is described below.

17.1. Navigate to your company's main Salesforce Home Page. Click the Salesforce setup icon and choose Edit Page in the drop menu.
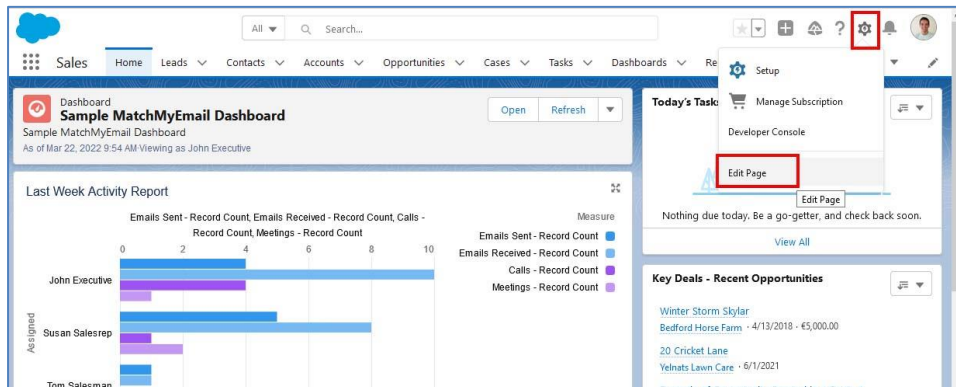
17.2. Decide where on the home page you would like to place the Email Sync Assistant component. We suggest placing it at the top of the right column as shown below. On left sidebar, scroll to Custom Managed components. Click and drag Email Sync Assistant to the chosen location using the green line to guide placement. Save the change to the Home Page.
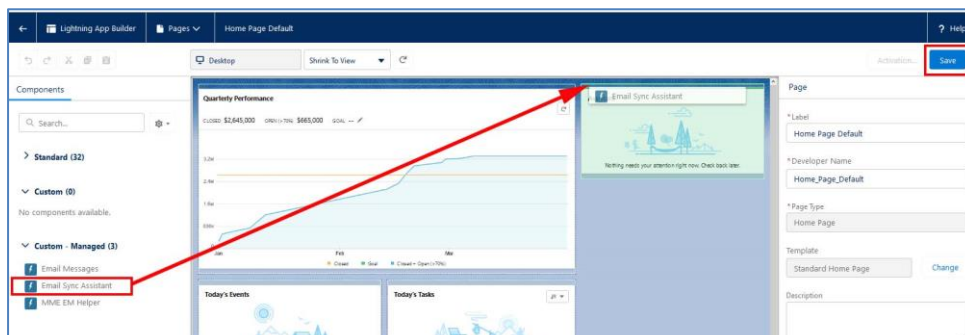
[Click here for guidance on how to customize and use the Email Sync Assistant](#).

For assistance with set up or for questions, contact support@matchmyemail.com. You can also visit [our support page](#) and use the scheduler to book a free support session as well as Resources > Wiki to find our knowledge base of articles and online User Guide.