

Match My Email

Setting Up Match My Email (MME) for Salesforce.com using IMAP

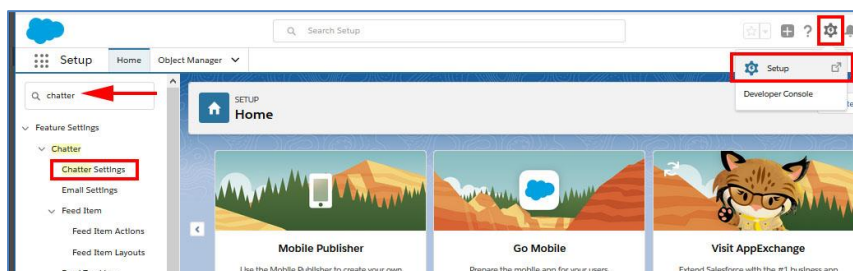
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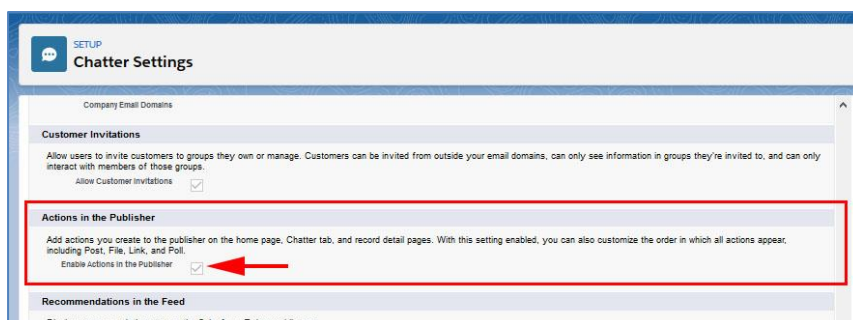
1. Prior to package install: Enable Chatter, Enable Actions in Publisher, and Confirm My Domain

Chatter & Actions in Publisher are required for Match My Email package. 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.](#)

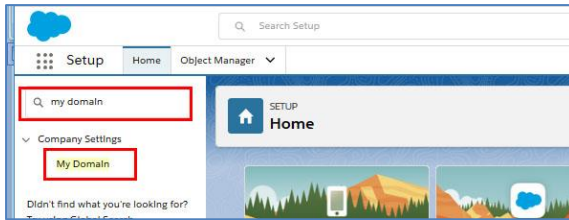
- 1.1. Click gear icon top right and choose Setup. In left sidebar, use Quick Find to search for chatter and then click on Chatter Settings.



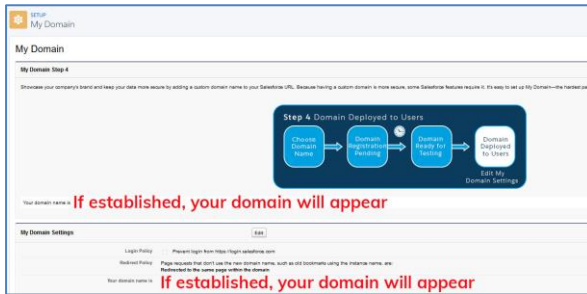
- 1.2. Scroll down on screen to Actions in the Publisher section and confirm that box Enable Actions in the Publisher is checked. If not, click Edit at top of screen, check this box, and Save.



- 1.3. Confirm that My Domain is set by using Quick Find to search for and click on My Domain.

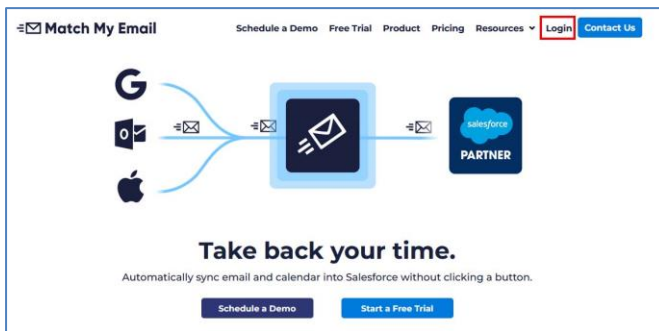


- 1.4. If My Domain steps have been completed, the screen will appear as below. Proceed to Step 2. If not completed, it is necessary to follow the instructions as presented by Salesforce.com. You must wait until steps are completed and domain is deployed to users before proceeding.



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

- 2.1. Navigate to www.matchmyemail.com. Click Login in top menu.

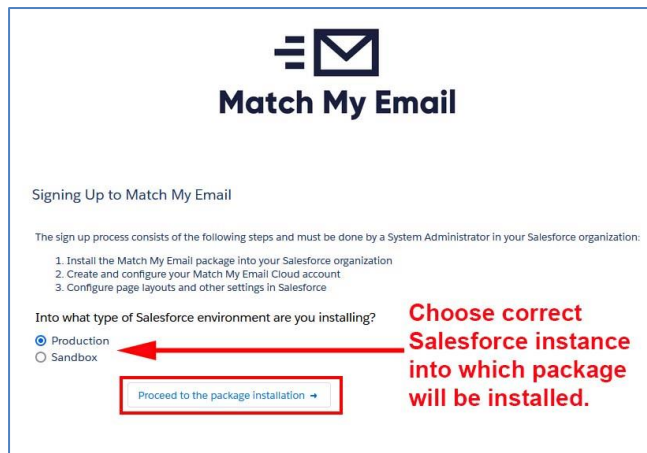


- 2.2. Choose the correct portal.

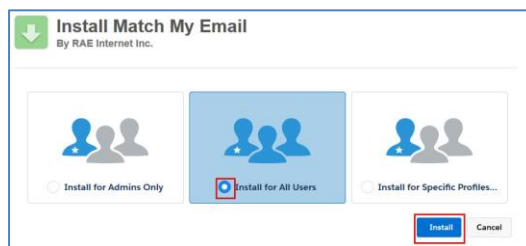


- 2.3. Choose the type of Salesforce environment into which you want to install the app and click the button Proceed to the package installation.

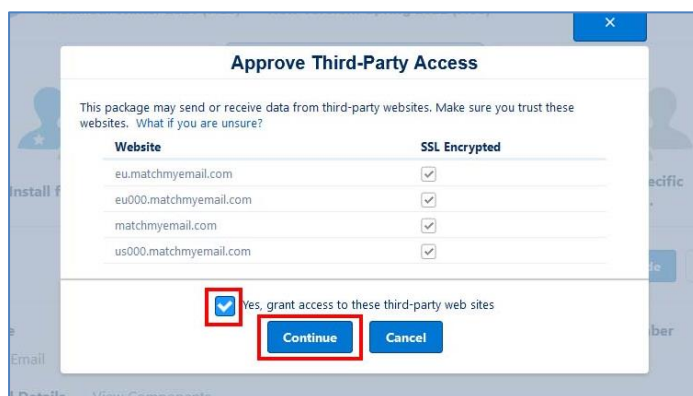
Those using Enterprise and Unlimited editions of Salesforce have the option of installing into a Sandbox environment for testing. To convert from a Sandbox to a Production environment, setup steps in this guide will need to be repeated and a new Match My Email account created.



- 2.4. Login to Salesforce if prompted. Choose **Install for All Users** and click Install. IMPORTANT: If you choose Admins Only, you will have to do a significant amount of extra work to expand app accessibility to other profiles in the future. It is best to Install for All Users now, and utilize permissions to control access.



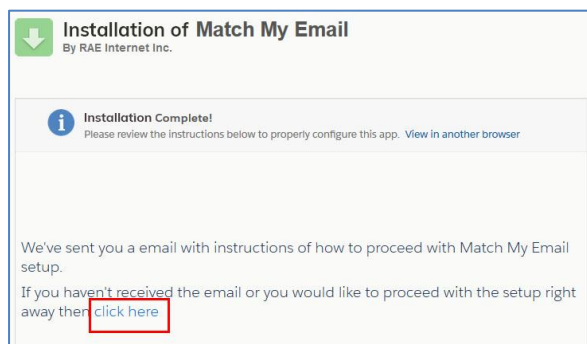
- 2.5. Check the box to approve third-party access and click Continue. Approving Third-Party Access adds four remote site settings and enables our Email Sync Assistant feature (Details in Section 13) to bring information about No Match messages into Salesforce.



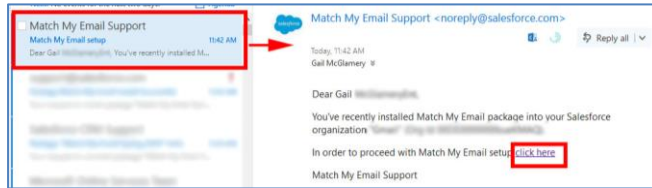
3. Proceed with Match My Email account setup

The install will either complete quickly or, in some cases, may take a bit longer to install.

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

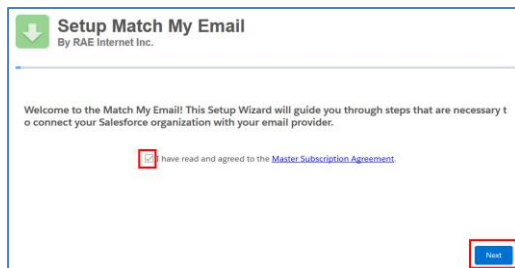


- 3.2. If the install is taking a bit longer, you can click DONE and will be taken to your list of installed packages. You will receive an email from Salesforce when the install is complete. You will also have received an email from Match My Email Support (as shown in image below) that contains the link 'click here' to proceed.



If you do not receive the email, for US cloud you can click <https://matchmyemail.com/install> or for EU cloud you can click <https://eu.matchmyemail.com/install>.

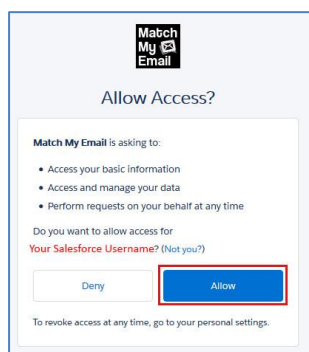
- 3.3. The first screen is about the Master Subscription Agreement (“MSA”). You can click the link to read the document or right click it to open the MSA in new tab and read it later. The MSA can also be found on the Match My Email web site at <https://www.matchmyemail.com/legal/>. You will need to check the box to confirm you have read and agreed to the MSA and then click Next.



- 3.4. If you/your company is located within the European Union, please choose that option to meet GDPR compliance. Otherwise, choose the United States as location for your data storage and processing. Click Next.



- 3.5. You will be taken to a screen to prompt you for login to Salesforce with your System Administrator credential, if you are not already logged into Salesforce on another tab. 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.

- 3.6. Since this guide is intended for users connecting via IMAP, choose email provider as Other.

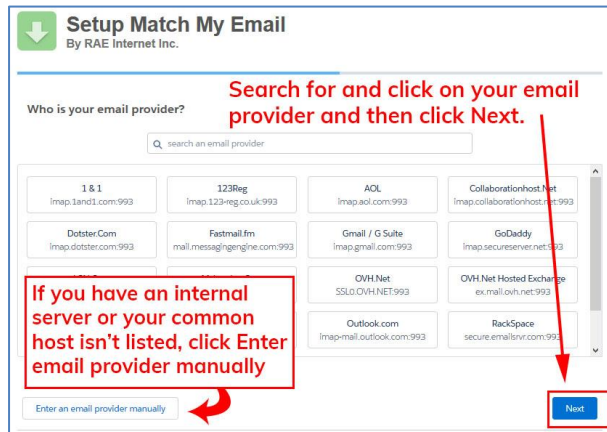


Please Note:

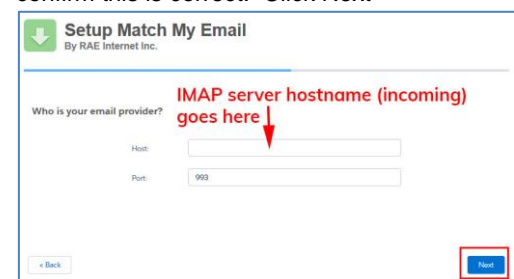
The choice for Microsoft 365 connects to Microsoft via an API, steps of which are included in a different setup guide. It is no longer possible to connect to Microsoft 365 using IMAP.

The choice for Google connects to the Google API and requires administrative steps in Google which are included in the setup guide for Google Workspace.

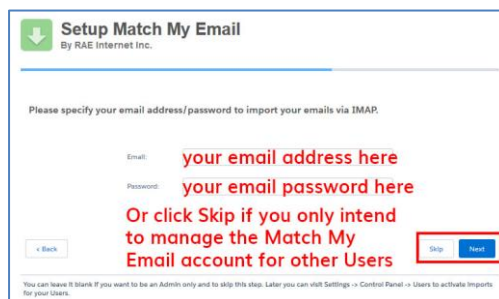
- 3.7. Many common email service providers are listed. Search or use scroll bar to select the host you use and click Next. If you use an internal server or do not see your provider listed, click the button bottom left to enter information manually.



If you click to enter manually, on next screen enter your IMAP server hostname (incoming). Most IMAP is routed through port 993, but you should confirm this is correct. Click Next



- 3.8. If you only want to manage the MME account and not use the app to sync your own emails to Salesforce, click Skip and on the next screen click Finish and go to Step 3.10. If you want to sync your emails to Salesforce and match your own email to Salesforce records, enter your email address and email password and click Next. This will enable email syncing by starting your first email import.



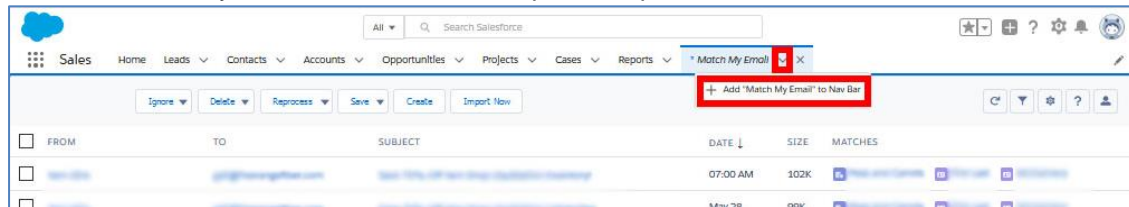
If the authentication fails, confirm you have the correct password for your email account. If the correct password is not accepted, it is likely that **two-factor or multi-factor authentication** is enabled for your email account. This added step of security on your email account means you will need to create an **app-specific password** for Match My Email. Navigate to your email account and look into the control panel or settings for password or security options. Once an app-specific password is created, you can paste that into the screen to continue with setup.

Match My Email will begin running the first import, going back 24 hours in the default folders of Inbox and Sent. ([Click here for information about importing older emails.](#)) User can choose to expand Details to view import log or wait until import is done. Allow the system to complete processing.

- 3.9. When import is complete, click Next. Upon completing setup, click Finish.

- 3.10. You will then jump to a new browser tab which is signed into Salesforce showing the Match My Email app in a SFDC web tab. If you skipped creating an import, you will not have email messages showing. If you did create an import, you will be looking at a 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 far right column have already been uploaded and linked to records as indicated in Salesforce.com 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.

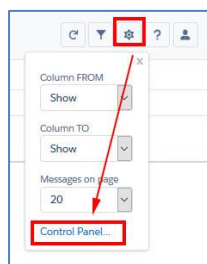
To add this tab to your Nav Bar, click the drop down option and then click Add to Nav Bar.



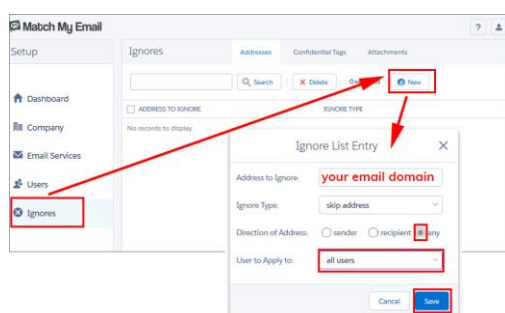
4. Best Practice: Add Ignore Rule for Email Domain

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 records that might contain employee email addresses.

- 4.1. When signed in to Match My Email account, click the gear icon at right and choose Control Panel.



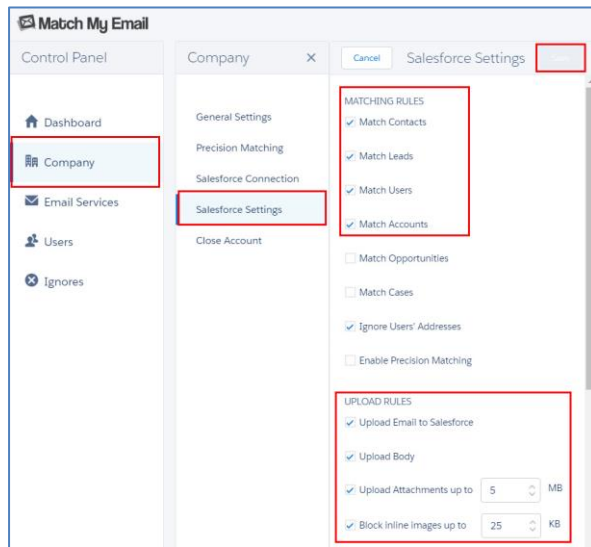
- 4.2. In the Control Panel, click Ignores on the left. Click +New button. Fill in the fields as described below and click SAVE.



- 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.

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

- 5.1. 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.

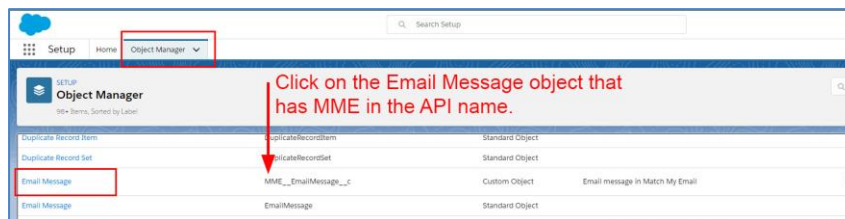
Customized matching to Opportunities by tag or words in Subject Line, or matching to Case by unique Case # is possible with custom programming. Contact our support team to inquire.

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](#).

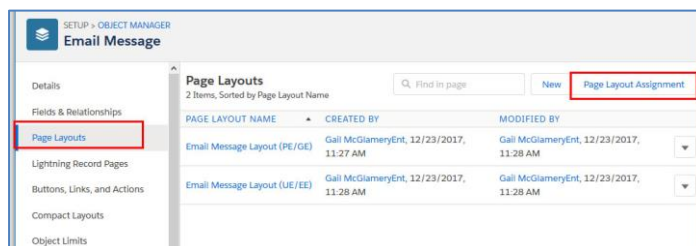
6. For Enterprise & Unlimited Editions Only: Change Email Message Page Layout

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 7.

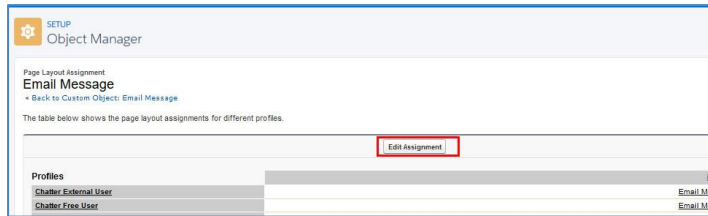
- 6.1. Go to Setup > Object Manager and click on the label Email Message where you see the API Name MME__EmailMessage__c.



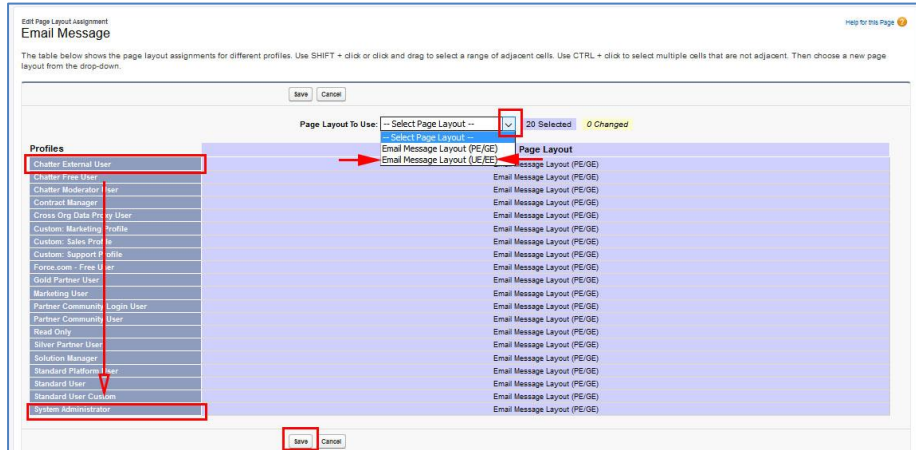
- 6.2. In left menu, click on Page Layouts and then click on Page Layout Assignment button top right.



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



- 6.4. 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.

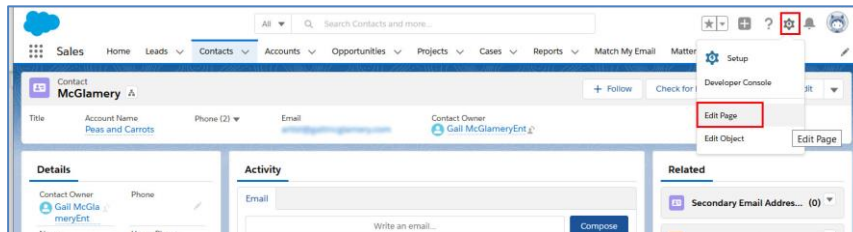


- 6.5. Repeat these steps from 6.1 for Email Message Related Object.

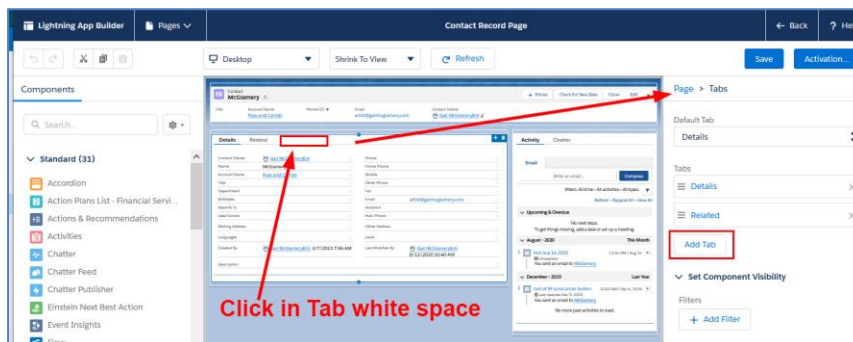
7. Add Email Messages component to Lightning Record Pages

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.

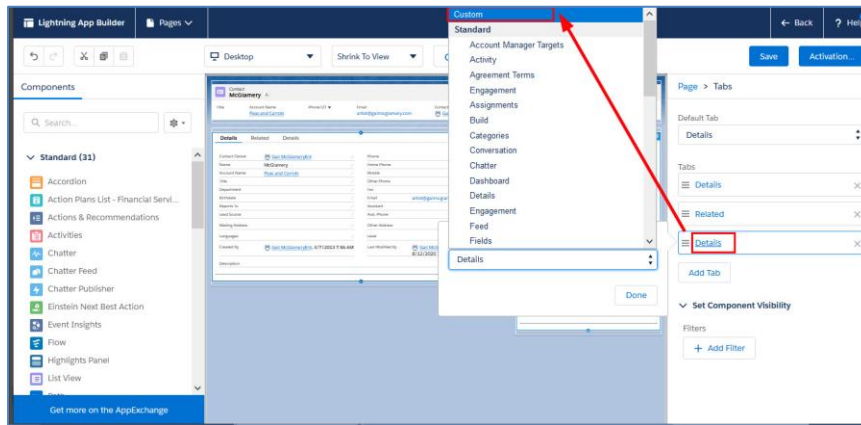
- 7.1. Navigate to a Contact record. Click the Settings button top right and choose the option Edit Page.



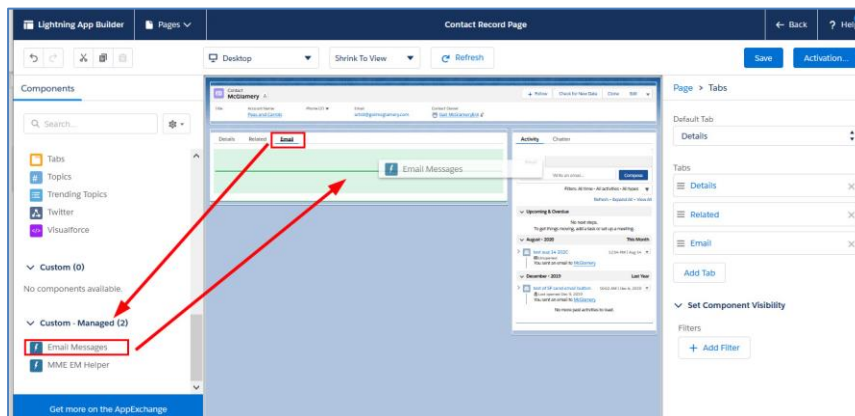
- 7.2. In the middle of the screen, click in the white space at the top of the main section. The right sidebar will change to information for this section. Click Add Tab.



- 7.3. 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.



- 7.4. 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.

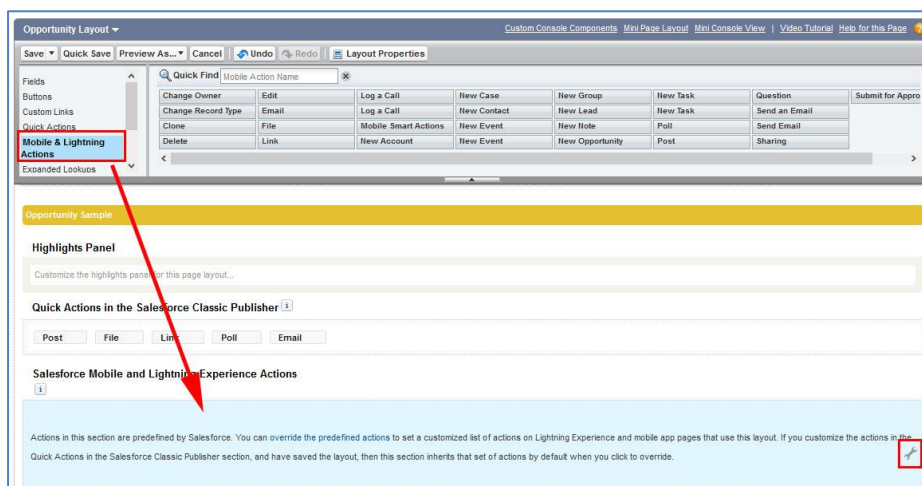


Repeat these steps for additional Lightning Record pages for each of the objects you use.

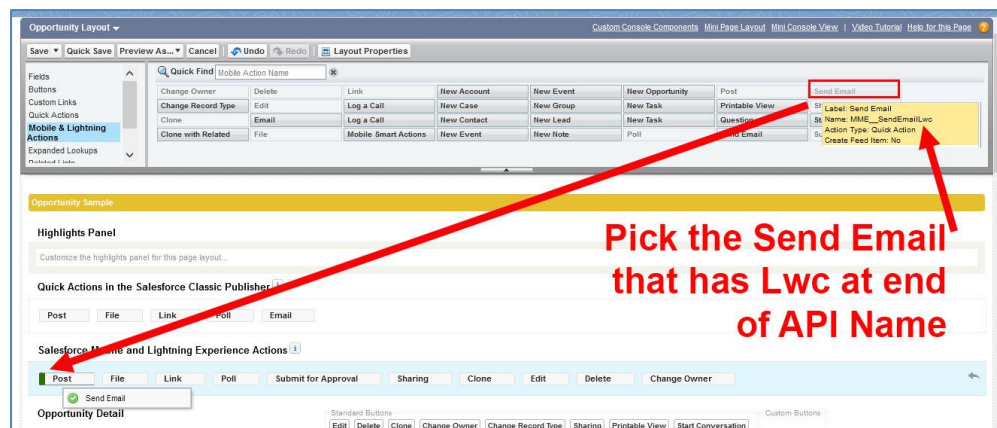
8. Optional: Convert to Match My Email's Send Email button

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.

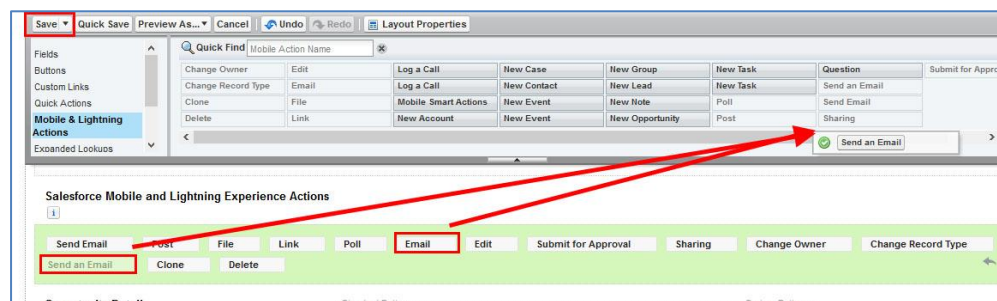
- 8.1. Navigate to Salesforce Setup > Object Manager > Opportunity (as an example). In left menu click on Page Layouts. In list, for the layouts you use click the name of layout to Edit.
- 8.2. At top left, click on Mobile and Lightning Actions. If the Salesforce Mobile and Lightning Experience Actions 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.



- 8.3. 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.



- 8.4. 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.

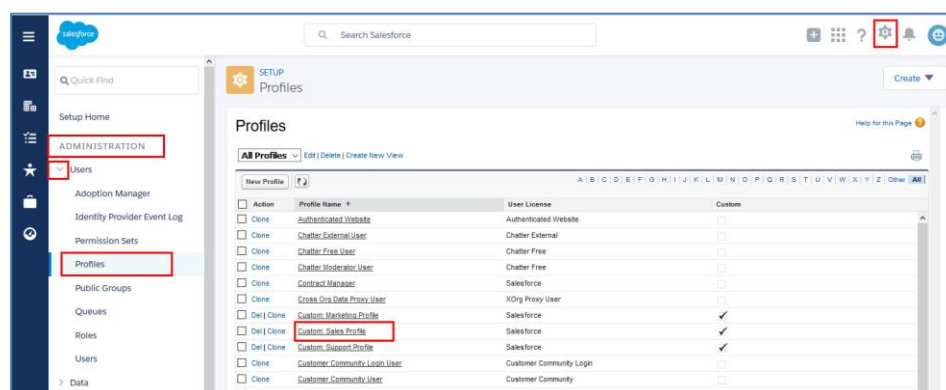


Repeat steps for other objects (Lead, Account, and Contact objects) used in Salesforce. For Sending Email from a Case object, please refer to <https://www.matchmyemail.com/wiki/using-send-email-button-on-cases/> for slightly different steps.

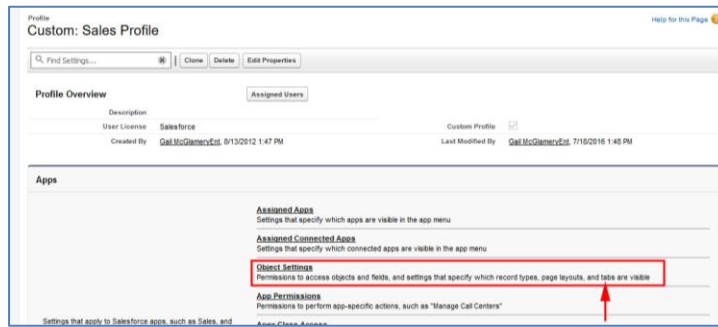
9. Optional: Turn on Email Messages tab visibility for desired profiles

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.

- 9.1. 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.)



- 9.2. 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.)



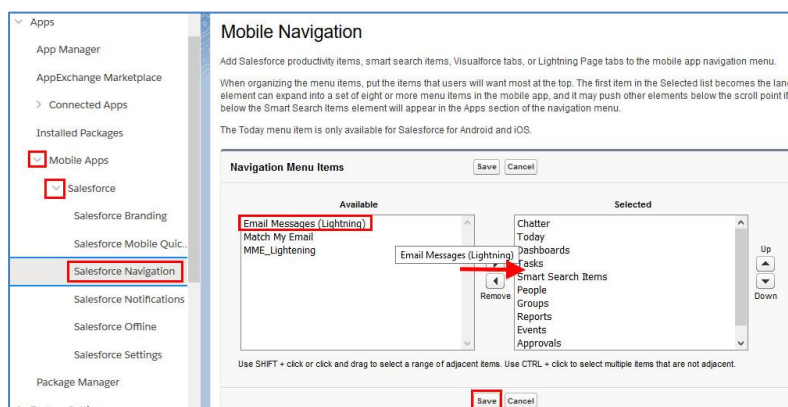
- 9.3. Find Email Messages (Lightning) in the list. The Tab Setting should be Default On. If it is hidden or Default Off, then click the label for Email Messages (Lightning). Click the Edit button, change to Default On, and click SAVE. Upon returning to Profiles > (profile name edited) > Object Settings,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

Object Name	Object Permissions	Total Fields	Tab Settings	Page Layouts
Accounts	Read, Create, Edit, Delete	31	Default On	Account (Sales) Layout
App Launcher	—	—	Default On	—
Assets	Read, Create, Edit, Delete	20	Tab Hidden	Asset Layout
Campaign Members	—	29	—	Campaign Member Page Layout
Campaigns	Read, Create, Edit, Delete	37	Default Off	Campaign Layout
Cases	Read, Create, Edit	33	Default On	Case (Sales) Layout
Chatter	—	—	Default On	—
Contacts	—	—	Tab Hidden	—
Contacts	Read, Create, Edit, Delete	29	Default On	Contact (Sales) Layout
Contracts	Read	22	Default On	Contract Layout
Dashboards	—	—	Default On	—
Data.com	—	—	Default Off	—
Documents	Read	—	Default On	—
Duplicate Record Items	—	7	—	Not Assigned
Duplicate Record Sets	No Access	7	Default On	Duplicate Record Set Layout
Email Cloud	—	—	Default On	—
Email Message Related Objects	Read, Create, Edit, Delete	28	—	Email Message Related Object Layout (PE/GE)
Email Messages	—	21	—	Not Assigned
Email Messages	Read, Create, Edit, Delete	27	Default On	Email Message Layout (PE/GE)
Email Messages (Lightning)	—	—	Tab Hidden	—
Events	—	20	—	Event Layout

- 9.4. Repeat from Step 9.1 for all desired profiles.

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

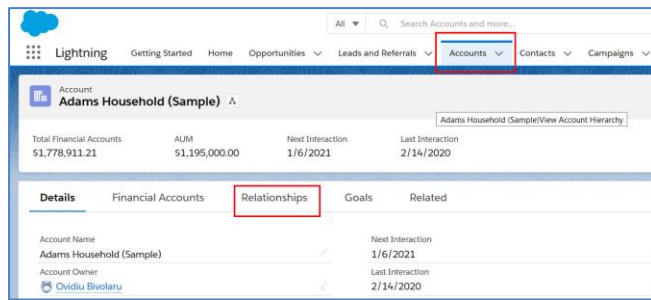
- 10.1. Go to Setup Home > PLATFORM TOOLS > Apps > Mobile Apps > Salesforce > Salesforce Navigation.
- 10.2. Move Email Message (Lightning) from Available to Selected on right. Click Save.



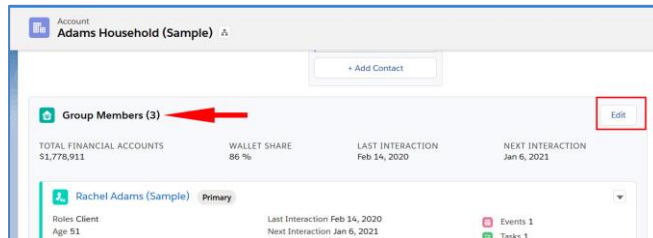
11. Optional: Match to Household in Financial Services Cloud

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 object as indicated in Step 7 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 upon match, roll up to the Referral Account.

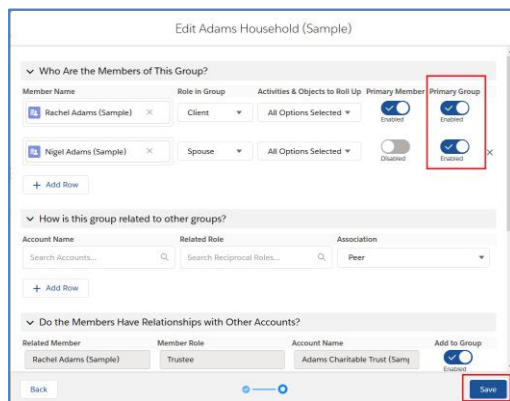
11.1. From an Account record, as in screenshot below, click on Relationships.



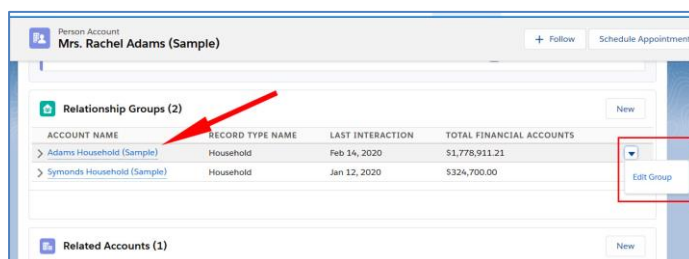
11.2. Scroll down to the Group Members and click Edit.



11.3. 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 by email address also matching to the Household record.



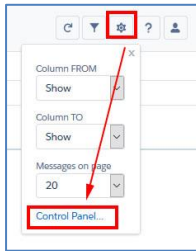
11.4. From a Person Account record, the quick way to this same “Members of Group” view is to scroll to Relationship Groups, find the Household and click Edit in drop down to right. This will take you to the above screenshot.



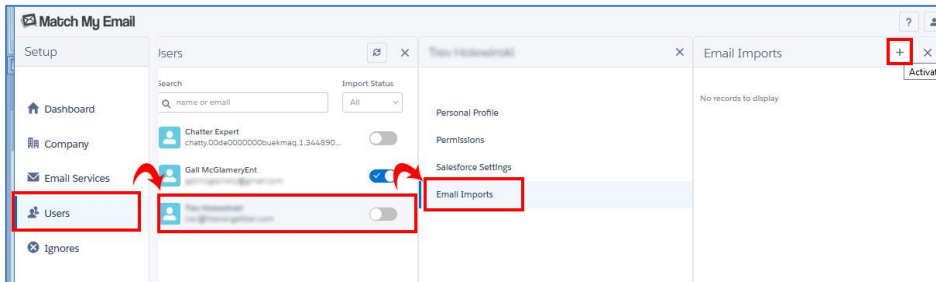
12. Optional: Remotely add and/or activate End Users to a Match My Email account

Adding and Activating Users to a Match My Email account is a two-step process. First, the User needs to be (1) activated and (2) then their account confirmed based on their email username and password. The first step can **only** be done by the Salesforce Admin who setup the Match My Email account. The second step can be done either by the Salesforce Admin or by the End User. In order for the Salesforce Admin to activate an End User, the admin must have the End User's email username and password.

- 12.1. If you are the Salesforce Admin managing the Match My Email account, navigate back to your view of the Email Cloud. (Click the web tab in your Salesforce Nav Bar.)
- 12.2. Click the Match My Email Gear, the middle icon button top right, and click Control Panel.

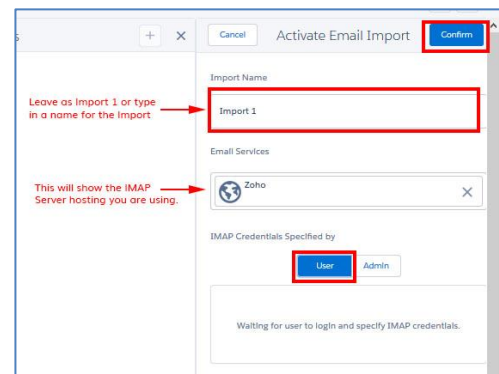


- 12.3. On the left, click Users. In next panel, the list will show Salesforce Users in the organization. Click on the User's name to be activated. In next panel, click on Email Imports. Click + to Add or Activate an import.

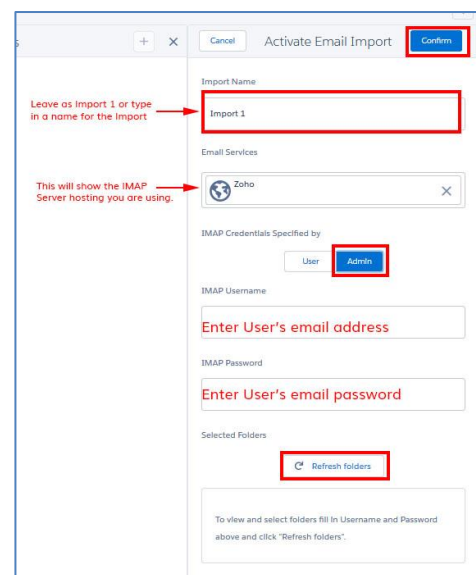


- 12.4. By default the first email import is labeled Import 1, you can leave the default label or enter a new name. Don't change the Email Service as it represents the IMAP email server where your company's email is hosted.

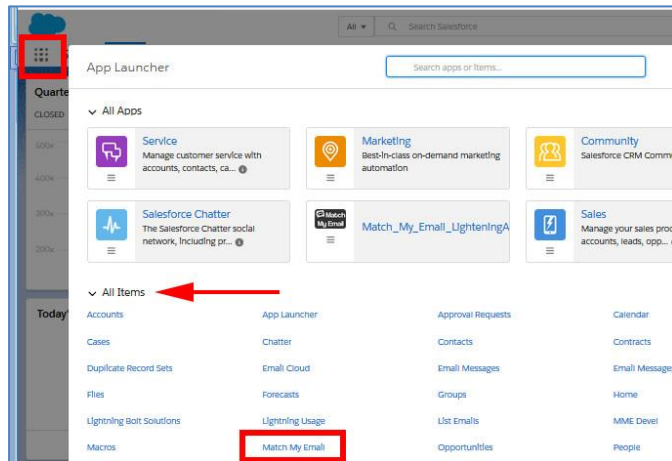
- 12.5. You now have two options. By clicking User (as shown at right) and Confirm, you will be adding the End User as an active user to the Match My email account. IMPORTANTLY, the End User will need to complete the steps in 8.5.1 to login and enter their own email address and password.



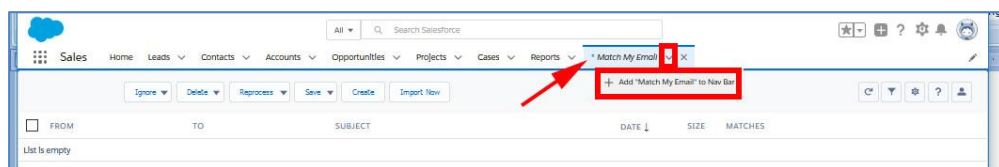
If you click Admin (as shown at right), you can remotely activate the End User if you have their email address and password. To check if the username and password are correct, click Refresh Folders. If the folder structure of the End User appears then the credentials are correct. INBOX and SENT should already be selected. (If not, then there is an issue with either the username or password or the user has two-step authentication enabled so you will need to use an application-specific password.) You can check any other folder or subfolder on the list to activate import from it was well. Once you are finished selecting folders for import, click Confirm at the top. Jump to Step 8.6.



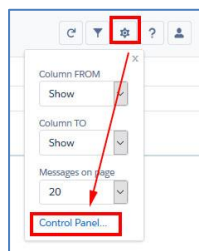
- 12.5.1. If you selected User on the Activate Email Import screen, then the End User must log into Salesforce separately. On main Salesforce screen, they must click the App Launcher (the grid of 9 dots at left). Look in the All Items section for Match My Email and click on it.



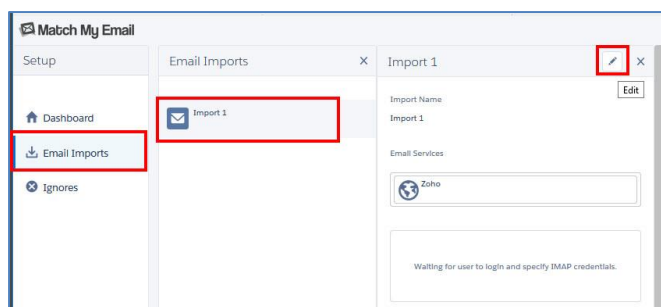
- 12.5.2. The Match My Email web tab will launch and bring the user to a view of the Email Cloud that is empty. If they want to add Match My Email to their Nav Bar which is recommended, they can click the drop down arrow and choose that option.



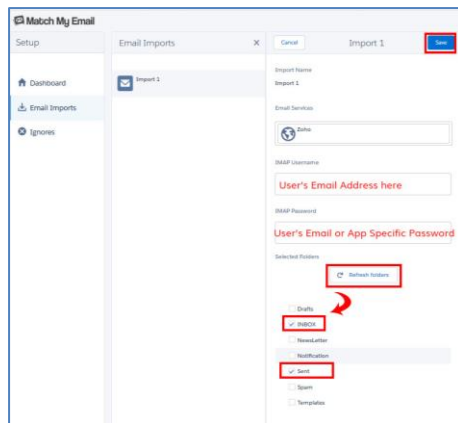
- 12.5.3. The User will click the MME gear icon at right and choose Control Panel.



- 12.5.4. The User sees a Personal Control Panel which does not include many of the controls visible in the Admin Control Panel. At left, the End User clicks Email Imports, then Import 1, and the pen to Edit.



- 12.5.5. User enters email address and email password (or app-specific password if multi-factor authentication is enabled). Then clicks Refresh Folders and then checks the boxes next to the folders desired for import. This means MME will bring copies of emails from these selected folders to Email Cloud and work to match them into Salesforce.



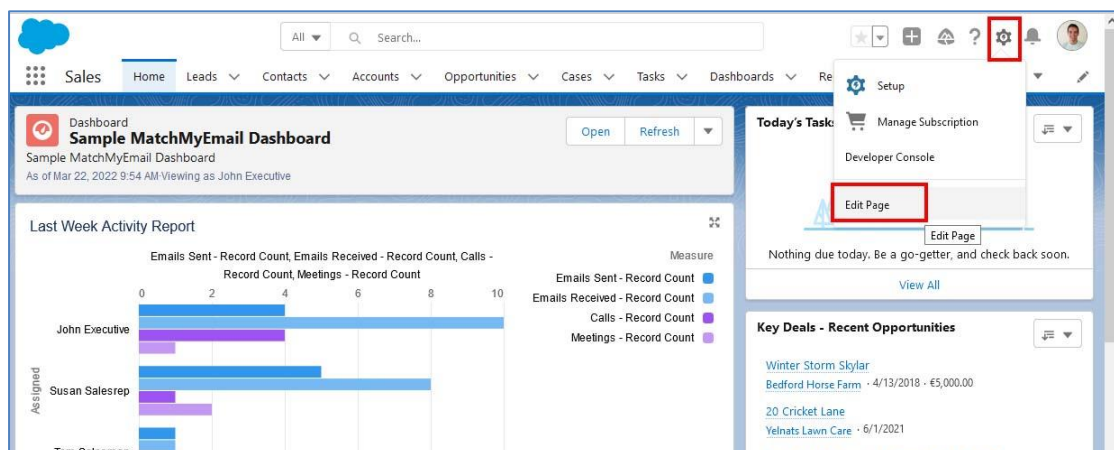
- 12.6. Import will begin within 20 minutes for this new User. As an Admin, you can click back to left menu and choose Users and repeat the steps to activate another User.

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](#).

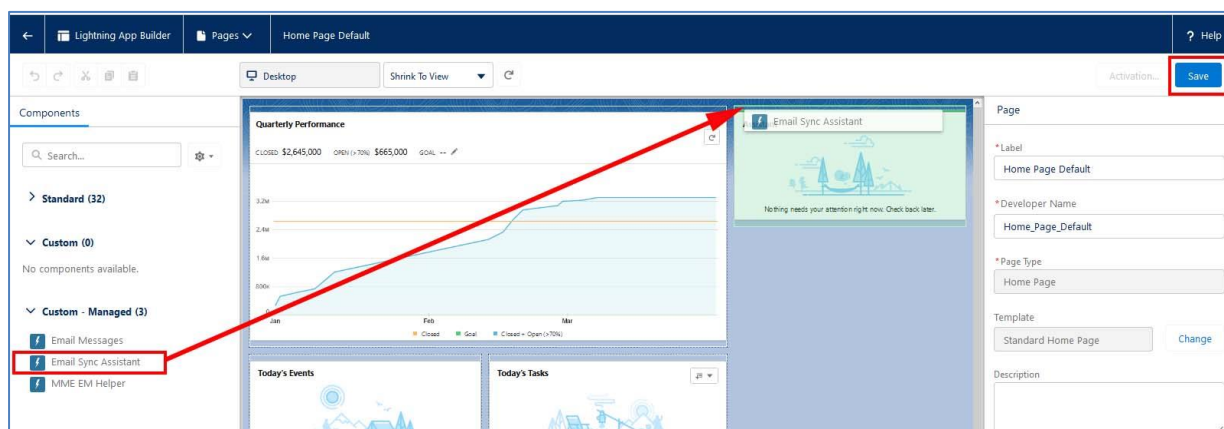
13. Optional: Add Email Sync Assistant to Salesforce Home Page

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.

- 13.1. Navigate to your company's main Salesforce Home Page. Click the Salesforce setup icon and choose Edit Page in the drop menu.



- 13.2. 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 find a User Guide and wiki posts for frequently asked questions.

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