

Match My Email

Setting Up Match My Email (MME) to upload into custom Email Message object in Salesforce.com using Microsoft 365 Graph API

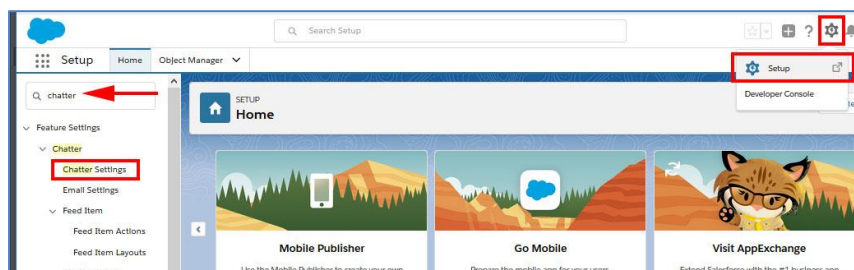
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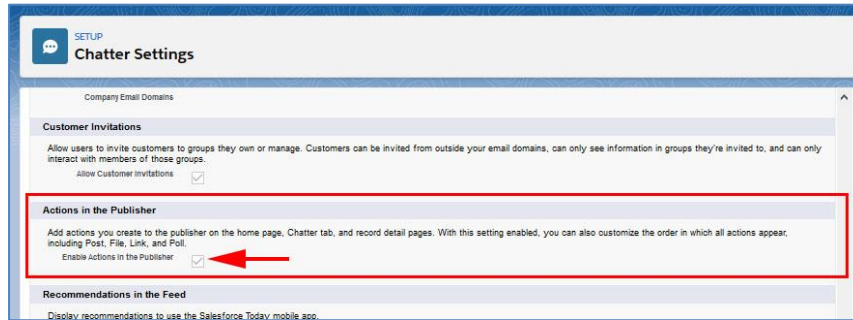
1. Prior to package install: Enable Chatter, Enable Actions in Publisher, and Confirm My Domain

Chatter & Actions in Publisher are required to use the Match My Email 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.](#)

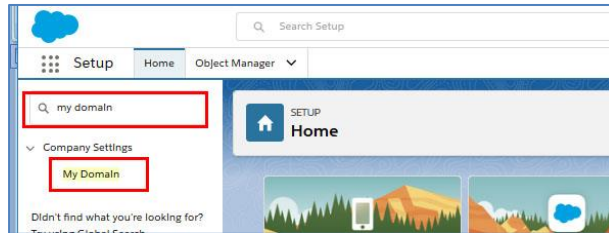
- 1.1. Click gear icon top right and choose Setup. In left sidebar, use Quick Find to search for chatter and then click on Chatter Settings.



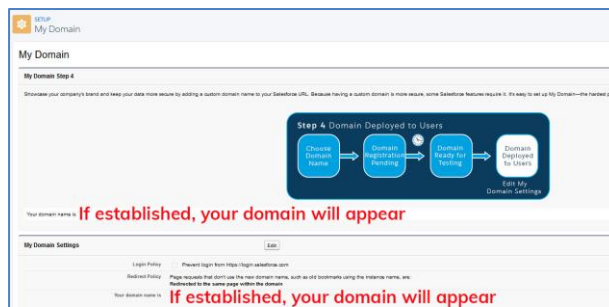
- 1.2. Scroll down on screen to Actions in the Publisher section and confirm that box Enable Actions in the Publisher is checked. If not, click Edit at top of screen, check this box, and Save.



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

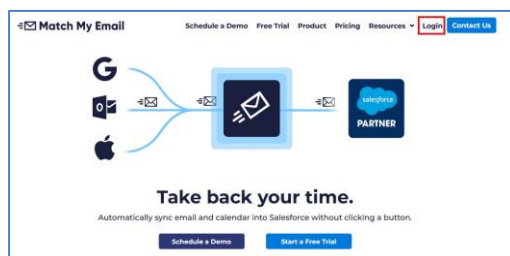


- 1.4. If My Domain steps have been completed, the screen will appear as below. Proceed to Step 2. If not completed, it is necessary to follow the instructions as presented by Salesforce.com. You must wait until steps are completed and domain is deployed to users before proceeding.



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

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

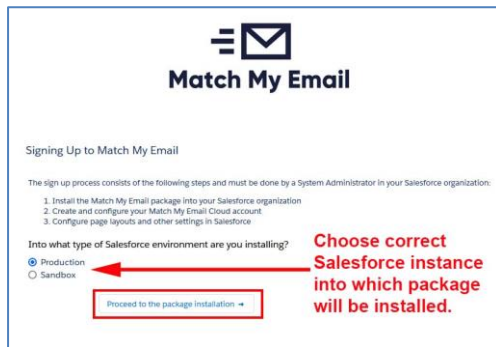


- 2.2. Choose the correct portal.



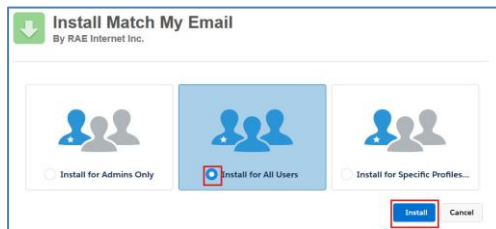
- 2.3. Choose the type of Salesforce environment into which you want to install the app and click the button Proceed to the package installation.

Match My Email



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 15) to bring information about No Match messages into Salesforce.

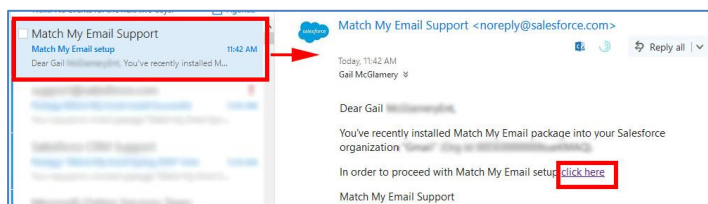


The install may complete quickly though in most cases you will see a message that the install will take a bit longer. On that screen, click DONE, and you will be taken to your list of Salesforce installed packages. You will receive an email from Salesforce when the install is complete.

Refresh the Installed Packages list in Salesforce. Once Match My Email is a listed package, you can proceed.

3. Set up Match My Email Account

- 3.1. After you receive an email from Salesforce that the install is complete, you will receive an email from Match My Email Support (as shown in image below) that contains the link 'click here' to proceed.

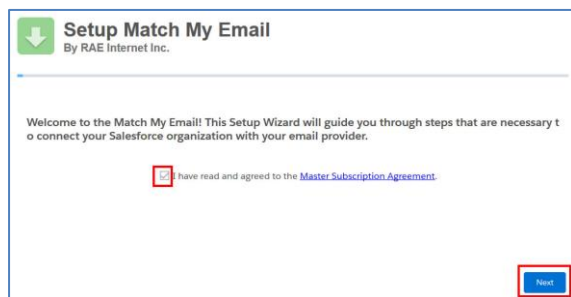


If you do not receive the email, click the following appropriate link:

For account/data on U.S.-based server, click <https://matchmyemail.com/install>

For account/data on E.U.-based server (GDPR compliance), click <https://eu.matchmyemail.com/install>.

- 3.2. The first screen is about the Master Subscription Agreement (“MSA”). You can click the link to read the document or right-click on 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.

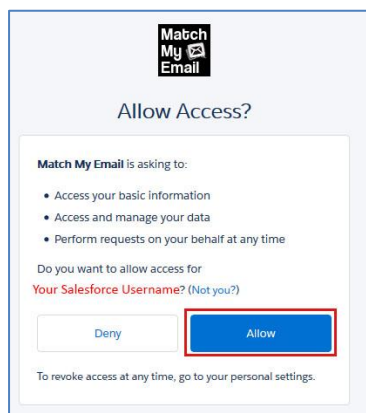


- 3.3. If you used just the link above, you may be asked to reinforce your choice of Production or Sandbox. If you received the email and clicked that link provided, our system should anticipate the correct environment.

If you/your company is located within the European Union, reinforce your cloud choice that meets with GDPR compliance. Otherwise, choose the United States as the location for your data storage and processing. Click Next.

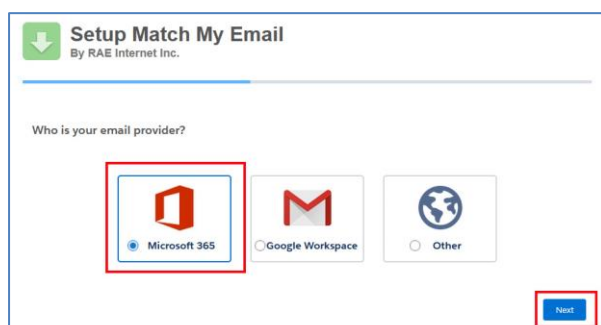


- 3.4. You will be taken to a screen to prompt you for login to Salesforce with your System Administrator credential, if you are not already logged into Salesforce on another tab. Match My Email is requesting access to connect to your Salesforce organization. Click Allow.



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.

- 3.5. Choose Microsoft 365 as the email provider.

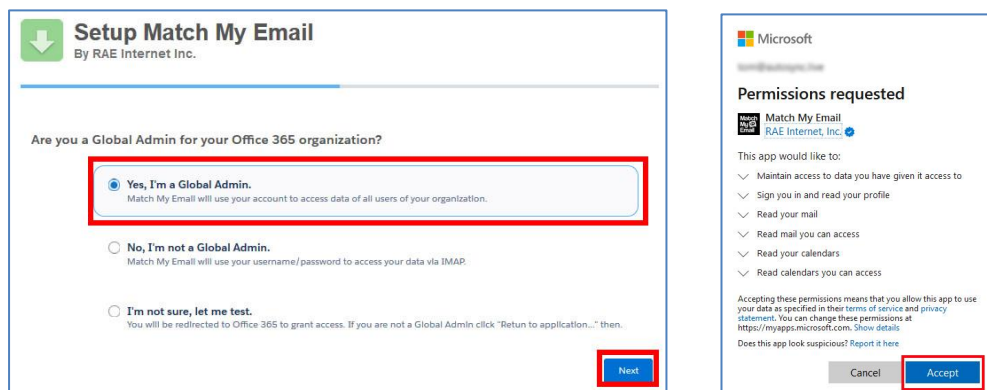


3.6. Make appropriate choice based on your role with Microsoft 365.

If you are, or have the participation of, a Global Admin, leave this as the default and preferred choice. This will setup an Email Service Connection for your entire team that will allow you to remotely activate your Users. Click Next.

***If you are unable to use a Global Admin credential, Choose “No, I’m not a Global Admin” and you may proceed in connecting an individual API connection to Microsoft 365. Jump to Step 10 where these steps are outlined*

3.7. You will be prompted to login to Microsoft 365 with a Global Administrator credential. Accept permissions that will allow you to activate Users within the Match My Email account

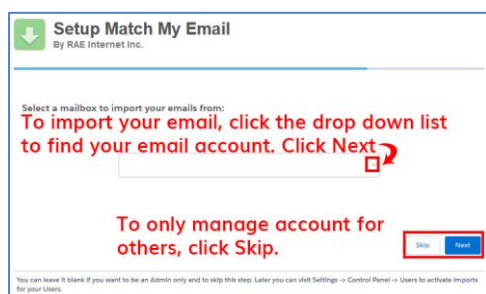


**** Please note that you may not have success in making the connection to Microsoft 365 on the first attempt. If you receive a red box alert, the steps to make the connection simply need to be repeated once more. However, since the flow of the setup wizard has been interrupted, please do the following:**

- Click <https://matchmyemail.com> (US cloud) or <https://eu.matchmyemail.com> (EU cloud) to login to your newly created account.
- On the right, click the middle Settings button and in drop menu choose Control Panel.
- In Control Panel, in left menu choose Email Services and then click the + button at top to add a service.
- Choose Microsoft 365 and proceed through the screens beginning with Step 3.5.
- Once the service is saved, skip to Step 3.12 and continue.

3.8. If you only want to manage the MME account as an administrator and do not need to import and match your own email, click SKIP and on next screen click Finish and go to Step 3.11.

3.9. If you want to import and match your own email immediately, find your email account and click Next. This will start your import.

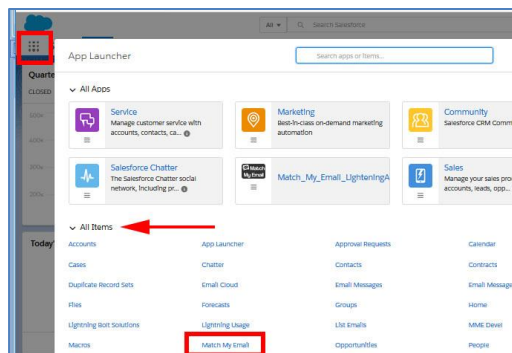


Match My Email will begin running the first import automatically, going back 24 hours in the default folders of Inbox and Sent. ([Click here for information about importing older emails.](#)).

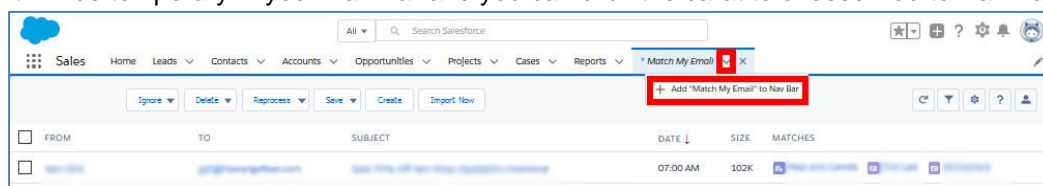
- 3.10. When import is complete, click Next. Upon completing setup, click Finish.
- 3.11. You will then jump to Salesforce and be viewing the Match My Email web tab. If you skipped creating an import, you will not have email messages showing. If you did create an import, you will be looking at copies 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.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.

- 3.12. To access Match My Email from within Salesforce, click on the App Launcher. You can click the App and then, in the App Menu click Match My Email. To add a tab to your Nav Bar, from the App Launcher click View All. Instead of clicking the App image, in the lower section find and click on the label for Match My Email.



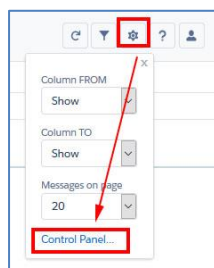
It will be temporary in your Nav Bar and you can click the carat to choose Add to Nav Bar.



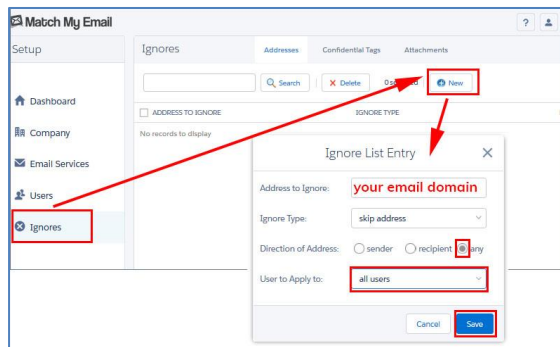
4. Best Practice: Add Ignore Rule for Email Domain

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.



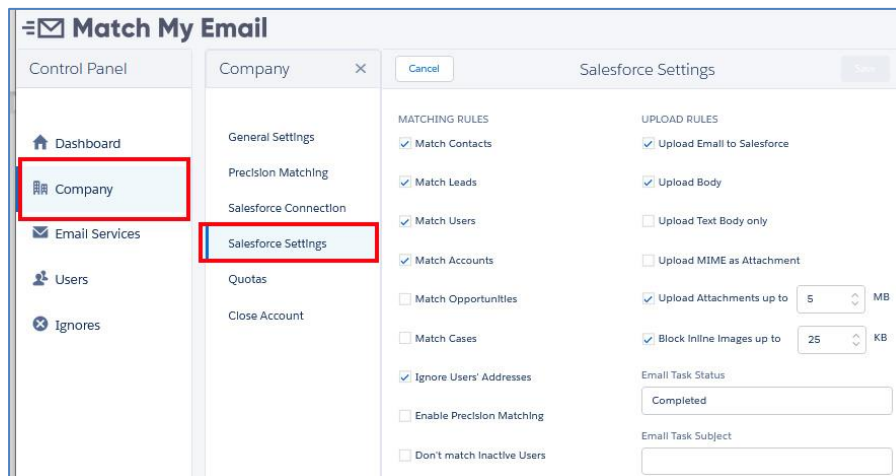
- 4.2. In the Control Panel, click Ignores on the left. Click +New button. Fill in the fields as described below and click SAVE.



- 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 app 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.

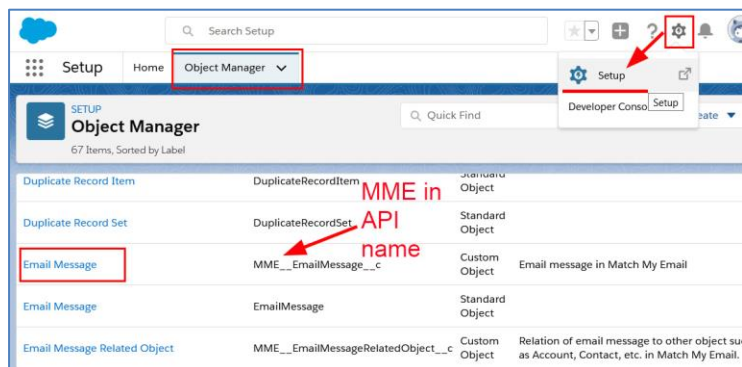
Customized matching to Opportunities by tag or words in Subject Line or matching to Case by unique Case # is possible with custom programming. However, with Enhanced Email we can only match to one What record. Contact our support team to inquire.

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](#).

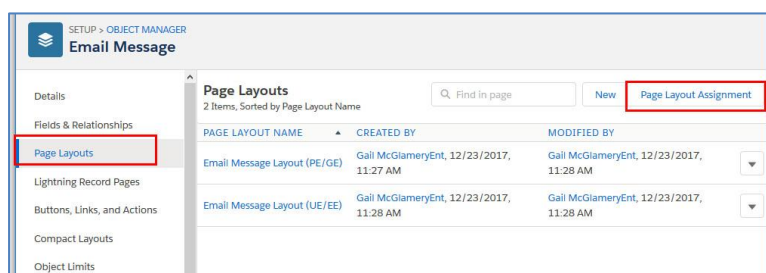
6. For Enterprise & Unlimited Editions Only: Change Email Message Page Layout

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. Look for the field Organization Edition which is typically in the right column. Essentials and Professional editions can skip to Step 7.

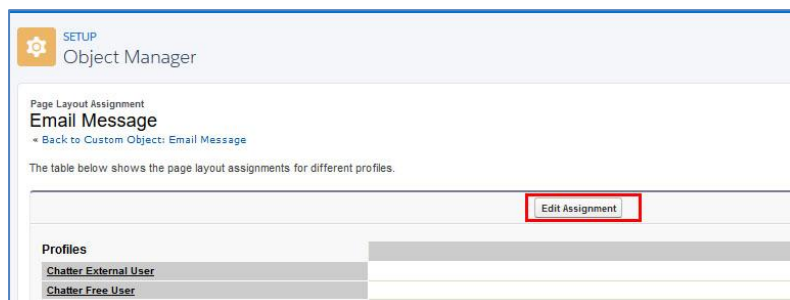
- 6.1. Go to Salesforce > Setup > Object Manager. Click on the label for Email Message with an API Name beginning with MME.



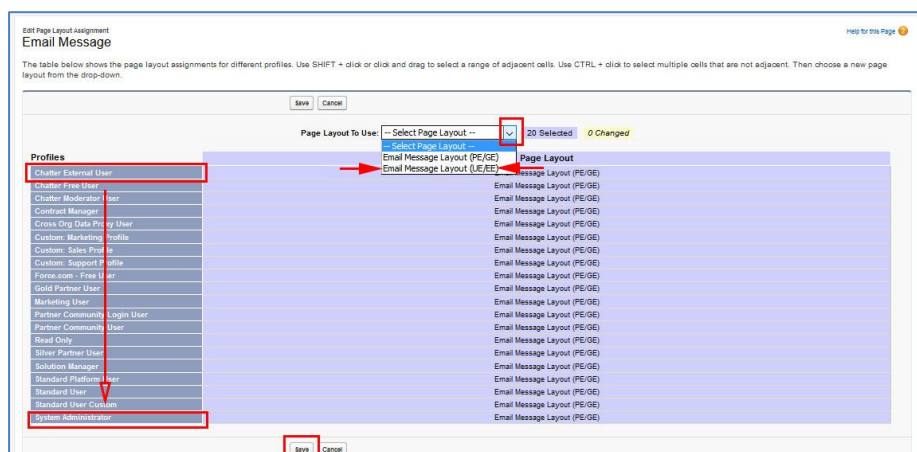
- 6.2. In left menu, click on Page Layouts and then click on Page Layout Assignment button top right.



- 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.

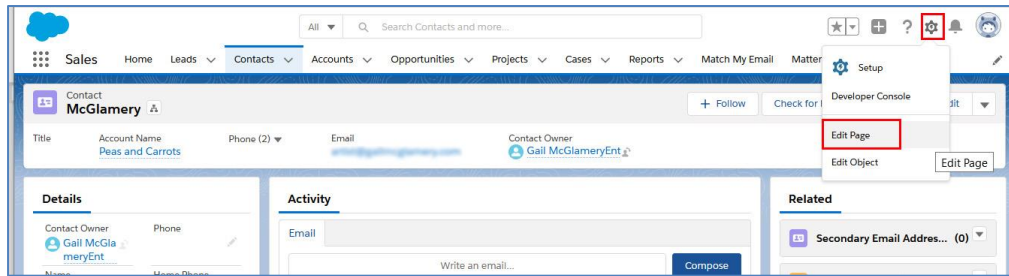


- 6.5. Repeat these steps from 6.1 for Email Message Related Object.

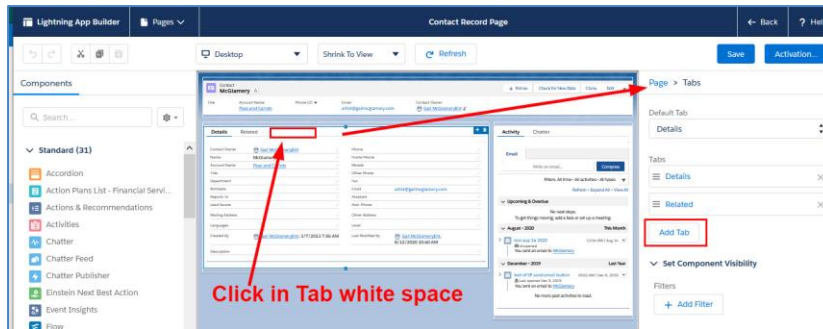
7. Add Email Messages component to Lightning Record Pages

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.

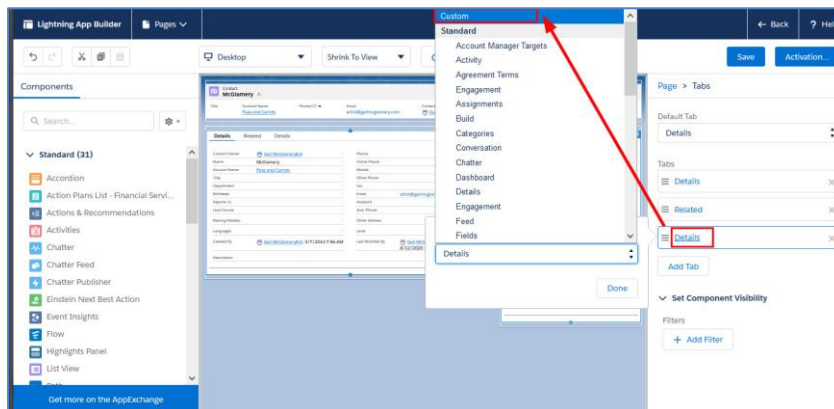
- 7.1. Navigate to a Contact record. Click the Settings button top right and choose the option Edit Page.



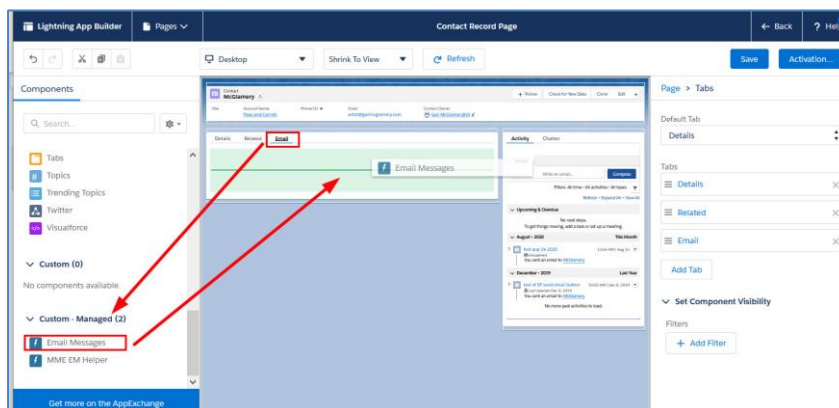
- 7.2. In the middle of the screen, click in the white space at the top of the main section. The right sidebar will change to information for this section. Click Add Tab.



- 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.

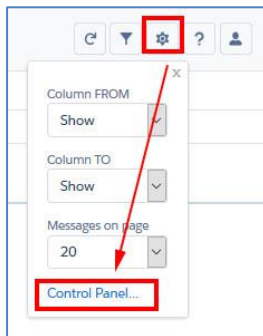


Repeat these steps for additional Lightning Record pages for each of the objects you use.

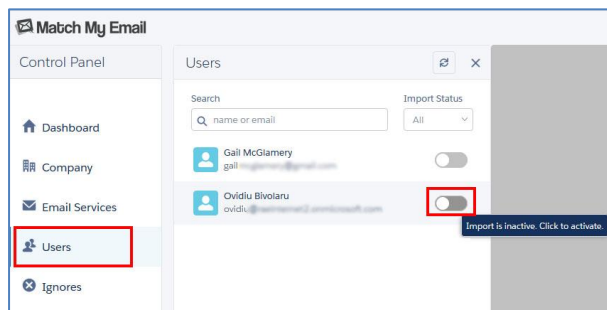
8. Remotely activate End Users for email importing & matching

Adding and Activating Users to a Match My Email account can be completed remotely by the Admin through the Email Service connection via the Global Admin credential previously created.

- 8.1. Navigate back to your view of the Email Cloud. (Click the web tab in your Salesforce Nav Bar.)
- 8.2. Click the Match My Email Gear, the middle icon button top right, and click Control Panel.



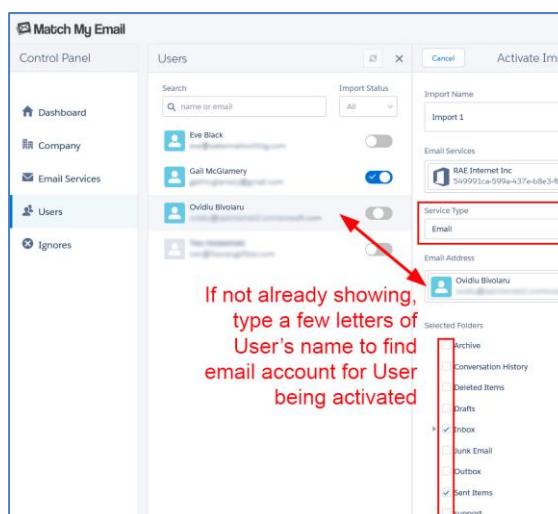
- 8.3. On the left, click Users. In next panel, the list will show Salesforce Users in the organization. Find the correct User and click on the toggle.



- 8.4. In the panel to the right, under Service Type, confirm if reads Email service. If the User's email account is not already showing under Email Address, enter a few letters in the Quick Find to search for and then click on their account.

Folders selected by default are Inbox and Sent Items. Additional folders can be selected, and these can be deselected as desired. Please note that Match My Email is only importing copies of messages from those folders selected with a check. If a User moves emails to a subfolder either immediately with a rule or manually in between 20-minute processing cycles), you would want to expand the Inbox to select desired subfolders.

Click CONFIRM at top right to confirm activation.

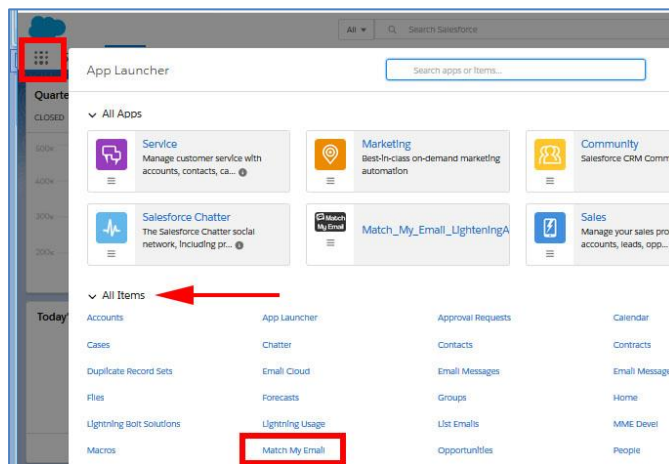


Within 20 minutes, Match My Email will begin to import and match for the new User. No further action is required by you or the End User. .

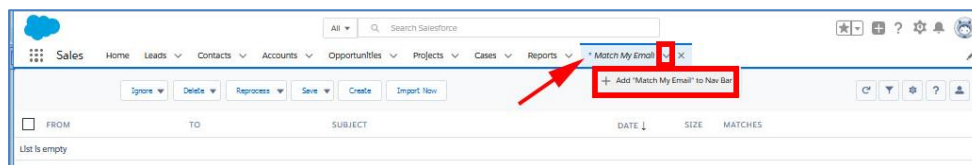
To add a Calendar Sync for this User, jump to Step 9.0.

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

- 8.5. 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.



- 8.6. 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.



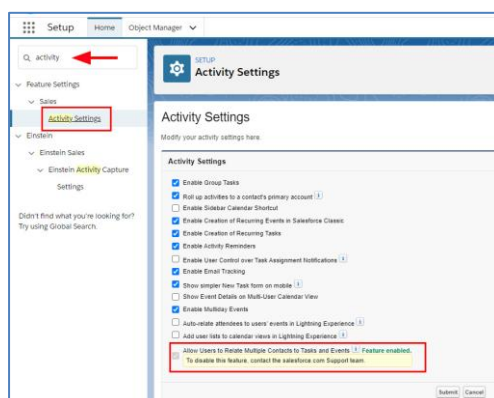
Once imports have begun, the new User will have a view to their portion of the account where copies of their emails from selected folders will arrive.

- 8.7. 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](#).

9. Optional: Remotely activate Users for Calendar synchronization

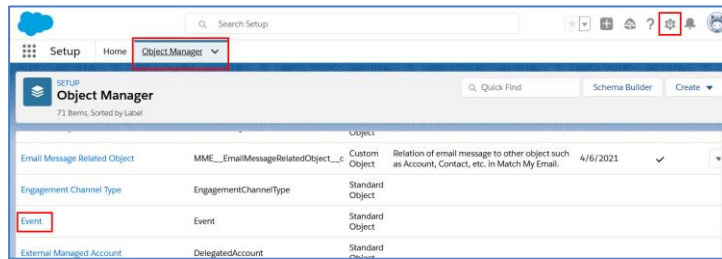
Please disable any other Salesforce calendar syncing tool, such as Einstein Activity Capture, Lightning Sync, or Calendly, before adding an MME Calendar import. Otherwise, you may encounter duplication of events and emails or other issues.

- 9.1. 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.

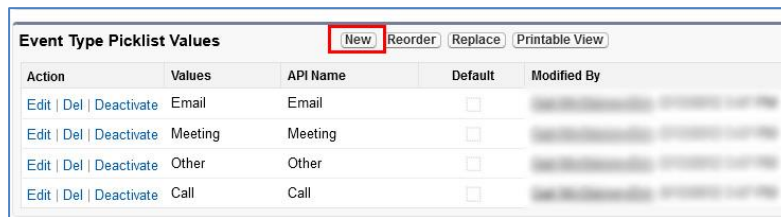


- 9.2. When Match My Email matches and uploads an event to the Activity timeline, it can also set the value of the Type field in the Event object correctly as an Event. This is important for future reporting on Events. To adjust the picklist for Events:

9.2.1. Navigate to Salesforce Setup > Object Manager > Event



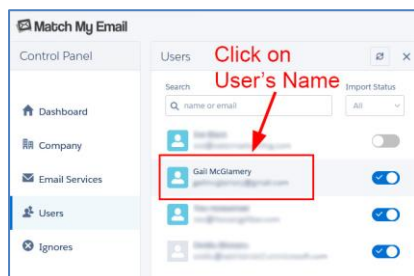
- 9.2.2. Click on Fields and Relationships and scroll down to find and click on the label for Type field. In the Event Type Picklist Values section, if Event is not yet listed as in the screenshot below, click New. If Event is already listed as a value, skip to section 9.3.



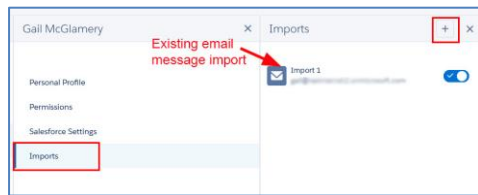
9.2.3. Type in Event in the box and click SAVE.



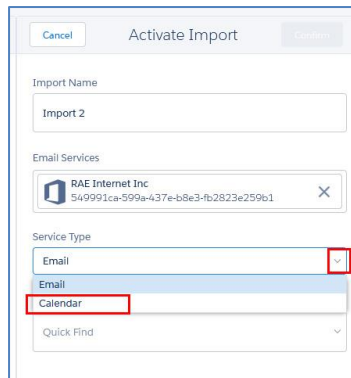
- 9.3. Sign into the Match My Email Control Panel and click on Users. Calendar synchronization is activated per User and appears as an additional import. We assume an email import was already confirmed for your Users per Step 8. The toggle will already be blue for Users you have activated. Do not click the toggle, as that will suggest to the system you want to deactivate the import. Click the Name of the User needing a Calendar sync.



- 9.4. 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.

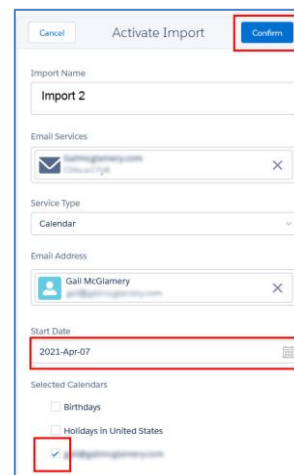


- 9.5. Below the Email Services field, expand the Service Type option to choose Calendar.



- 9.6. 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.

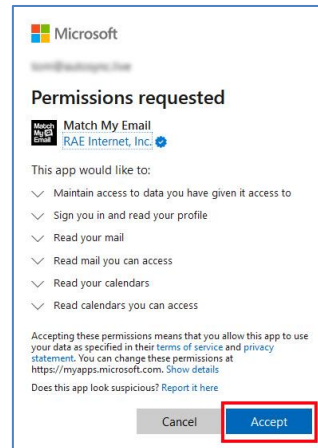
The Start Date field will default to a date one week prior to the day you are activating this import. If you want to go back further, you can use the calendar icon to choose a date farther back in time up to one year. Please note that once activated, the start date cannot be altered. Click Confirm at the top to save the import.



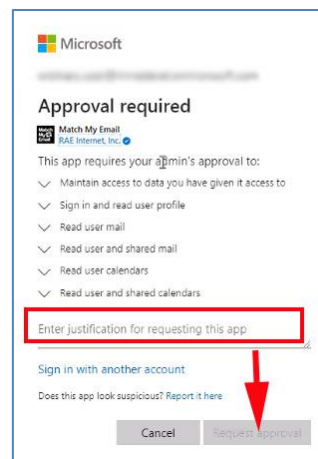
10. Optional: Create Individual API Connection

- 10.1. Coming from the step 3.6, you would have selected the middle option “No, I’m not a Global Admin” and clicked Next. You will be prompted to login to Microsoft 365, first entering your email address and then entering your email password.
- 10.2. You will then see a list of permissions required.

- 10.2.1. You may be presented with the option to Accept these permissions. This means your Microsoft 365 Administrator has pre-approved your ability to accept permissions. Click Accept. You will see folder options as represented in Step 8.4. Choose and click Confirm. Return to step 3.12.



- 10.2.2. If your Microsoft Administrator has restricted Users' ability to accept permissions, then you will see language indicating approval is required. Fill in the field with justification for request. We suggest "Match My Email (Salesforce) application access". Click Request approval.

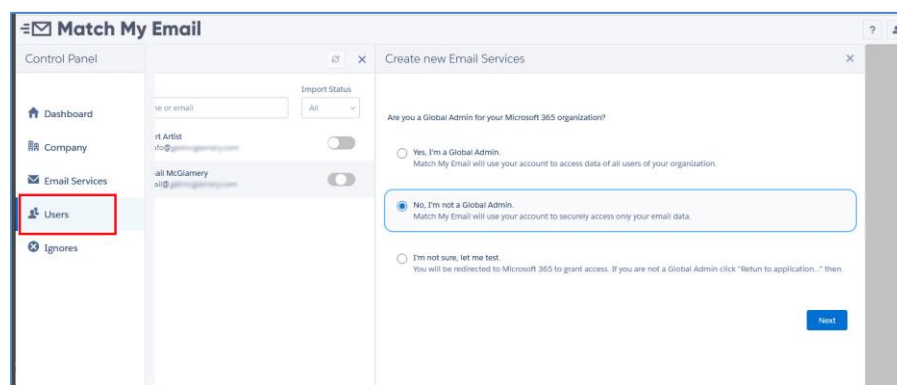


- 10.2.3. You will receive a confirmation your request has been sent with a button to click Back to App. You need to wait until your Microsoft Admin has approved the access request before you can activate your import. However, you can adjust other settings. Please jump back to Step 5.12.

Once access is approved by your Microsoft Administrator, you will need to do the following to complete your personal setup.

- 10.3. As in steps 8.1 and 8.2, navigate to the Match My Email Control Panel. Menus are different depending on what kind of Salesforce User you are.

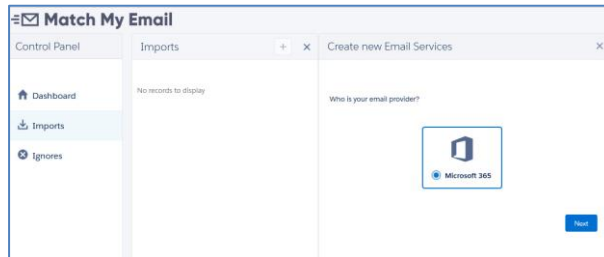
- 10.3.1. If you are a Salesforce Administrative User, you will click Users on the left, find your name in the list and click the toggle. Then choose "No, I am not a Global Admin" and click Next.



You will then be prompted to login and complete your personal import, reviewing folders before confirming your import.

- 10.3.2. If you are not a Salesforce Administrative User, you will click on Imports on the left. Click the + sign at the top to add an import.

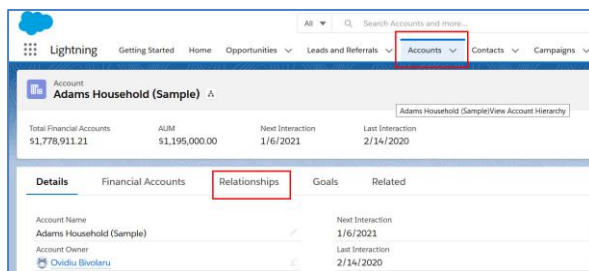
Choose Microsoft 365 as your email provider and click Next. Login to your Microsoft Account and proceed through screens to accept permissions, review folder selection, and confirm your import.



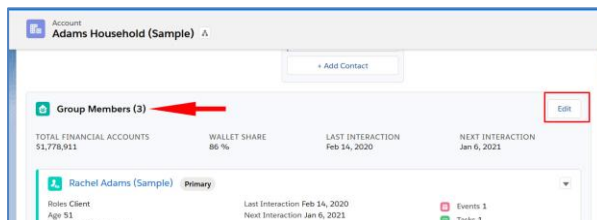
11. Optional: Match to Household in Financial Services Cloud

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.

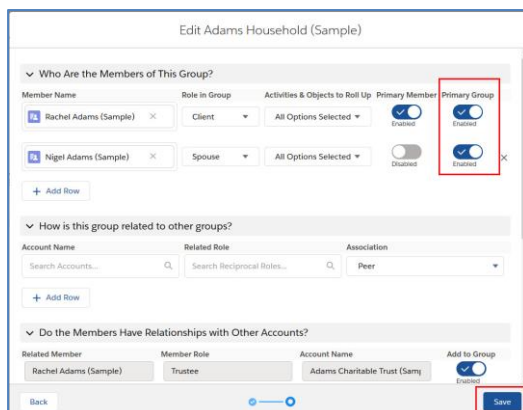
- 11.1. From an Account record, as in screenshot below, click on Relationships.



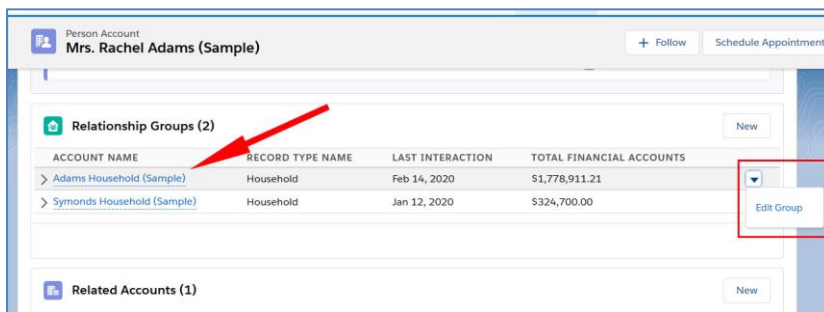
- 11.2. Scroll down to the Group Members and click Edit.



- 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 Primary Group individuals by email address also matching to the Household record.



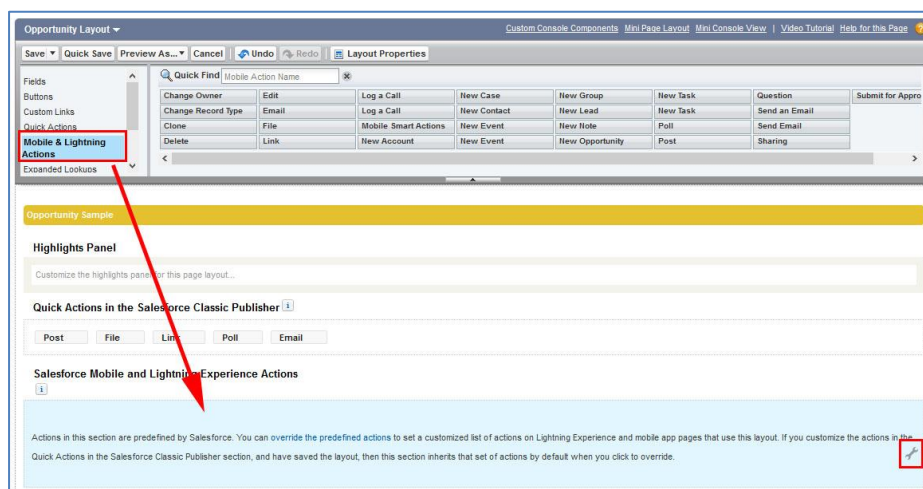
- 11.4. From a Person Account record, the quick way to this same “Members of Group” view is to scroll to Relationship Groups, find the Household and click Edit in drop down to right. This will take you to the above screenshot.



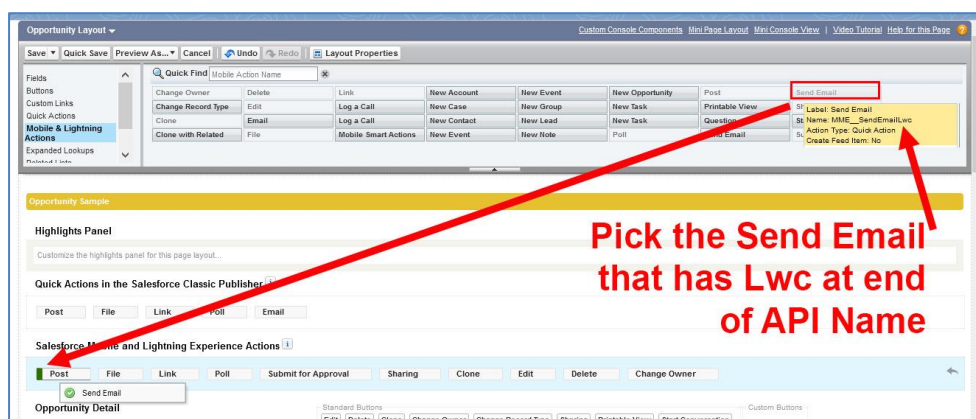
12. Optional: Convert to Match My Email's Send Email button

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.

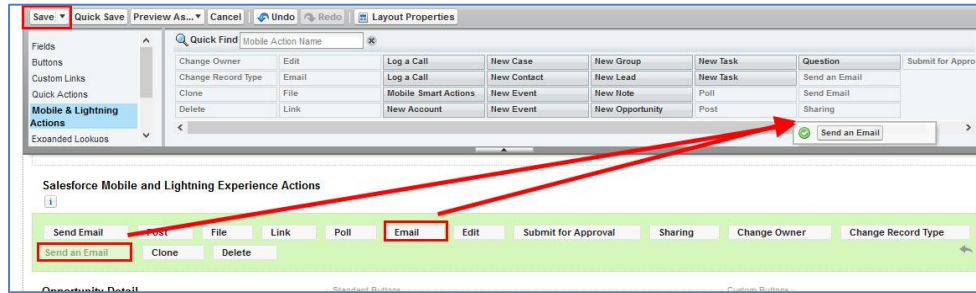
- 12.1. While still in Object Manager > Opportunity, in left menu click on Page Layouts. In list, for the layouts you use click the name of layout to Edit.
- 12.2. At top left, click on Mobile and Lightning Actions. If the Salesforce Mobile and Lightning Experience Actions section below does not already show items it contains, hover over grey area. It will highlight as blue, click the wrench icon to open the section for edits.



- 12.3. 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.



- 12.4. 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.

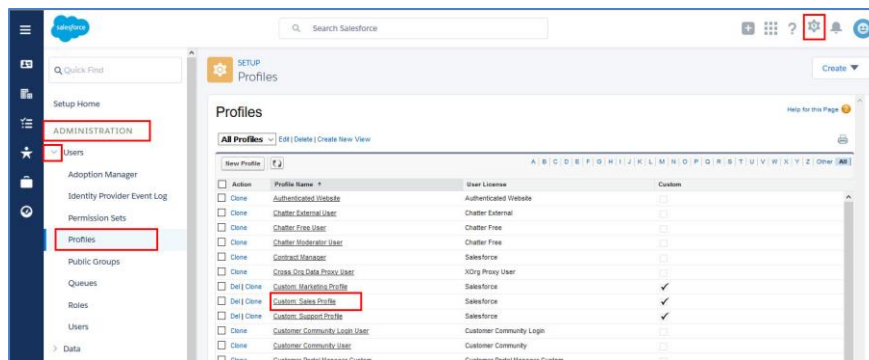


Repeat steps for other objects (Lead, Account, and Contact objects) used in Salesforce. For Cases, you will need to add a Dynamic Action as described at <https://www.matchmyemail.com/wiki/using-send-email-button-on-cases/>.

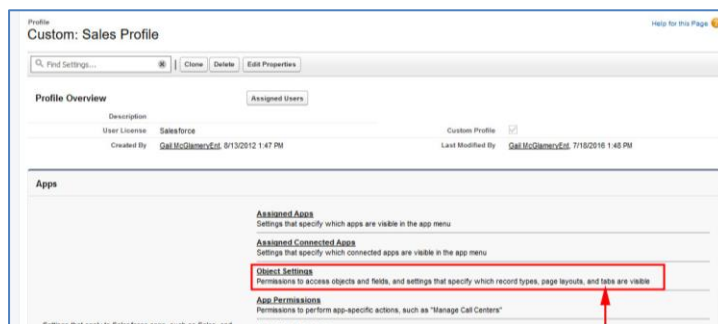
13. Optional: Turn on Email Messages tab visibility for desired profiles

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.

- 13.1. 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.)



- 13.2. 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.)



- 13.3. 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

Profiles
Custom: Sales Profile

Find Settings... Clone Delete Edit Properties

Profile Overview > Object Settings

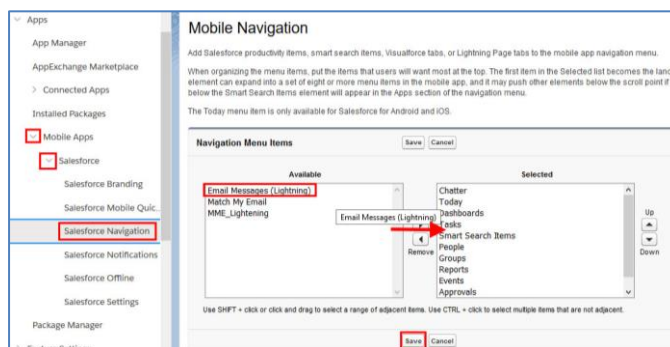
All Object Settings

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	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 (FE/GE)
Email Messages	--	21	--	Not Assigned
Email Messages (Lightning)	Read, Create, Edit, Delete	27	Default On	Email Message Layout (FE/GE)
Events	--	20	Tab Hidden	--
Events	--	20	--	Event Layout

- 13.4. Repeat from Step 13.1 for all desired profiles.

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

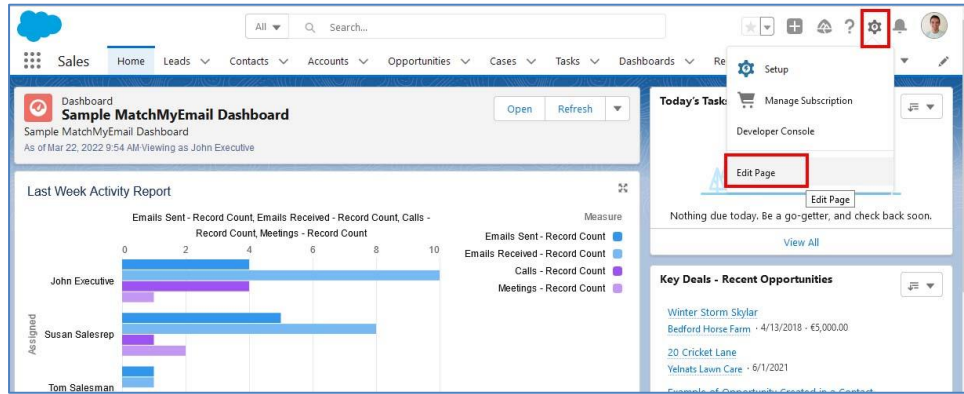
- 14.1. Go to Setup Home > PLATFORM TOOLS > Apps > Mobile Apps > Salesforce > Salesforce Navigation.
- 14.2. Move Email Message (Lightning) from Available to Selected on right. Click Save.



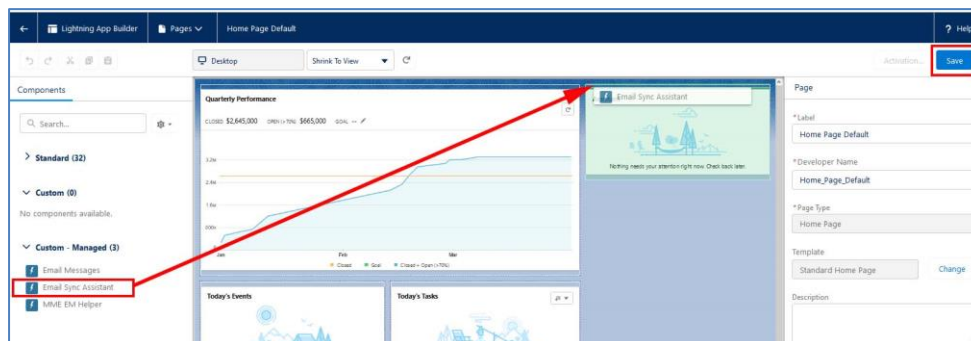
15. Optional: Add Email Sync Assistant to Salesforce Home Page

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.

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



- 15.2. 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.

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