



Set-Up Guide for Classic Salesforce.com

MultiMatch for Professional, Enterprise and Unlimited editions

This guide is for those with email hosting at Office 365 (without Global Admin role), Google or other providers. For those with Office 365 Global Admin role, please visit the Match My Email support page to obtain the correct setup guide.

Table of Contents

1.	Prior to installing package, Enable Chatter and Actions in Publisher	2
2.	Install MatchMyEmail Application Package in Salesforce.com	2
3.	Proceed with Match My Email account setup	2
4.	Add Email Domain	4
5.	Best Practice: Add Ignore Rule for Email Domain	5
6.	Set up Salesforce Integration for Domain (Team De-Duplication)	5
7.	Optional: Add Web Tab in Salesforce for Match My Email	7
8.	For Enterprise & Unlimited Editions Only: Change Email Message Page Layout	8
9.	Add MME Visualforce component to Page Layouts	9
10.	Optional: Add Mobile Cards for Salesforce Mobile	11
11.	Optional: Create Email Messages tab for Salesforce Mobile	12

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The purpose of this Set-Up Guide is to assist a Salesforce System Administrator. Its length is due to the inclusion of screenshots to provide clear instructions for each step. This guide is not intended for use by an End User. A brief descriptive is included in italics at the beginning of each main section to explain why those steps are required.

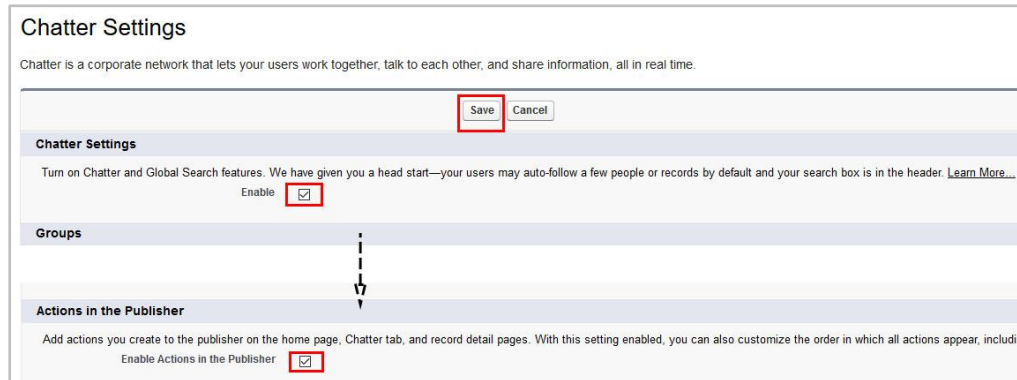
Prior to Set Up, the following information will be needed:

- IMAP Server hostname, port and authentication method. [Known host information is here.](#)
- Salesforce.com Login & Password for Salesforce Administrator

1. Prior to installing package, Enable Chatter and Actions in Publisher

1.1. Navigate to Salesforce Setup > App Setup/Build > Customize > Chatter > Chatter Settings

1.2. Confirm Enable is checked and farther down on the page that Actions in Publisher is also checked. If not, click Edit, check these boxes, and Save.



Chatter Settings

Chatter is a corporate network that lets your users work together, talk to each other, and share information, all in real time.

Save Cancel

Chatter Settings

Turn on Chatter and Global Search features. We have given you a head start—your users may auto-follow a few people or records by default and your search box is in the header. [Learn More...](#)

Enable ☒

Groups

Actions in the Publisher

Add actions you create to the publisher on the home page, Chatter tab, and record detail pages. With this setting enabled, you can also customize the order in which all actions appear, including

Enable Actions in the Publisher ☒

2. Install MatchMyEmail Application Package in Salesforce.com

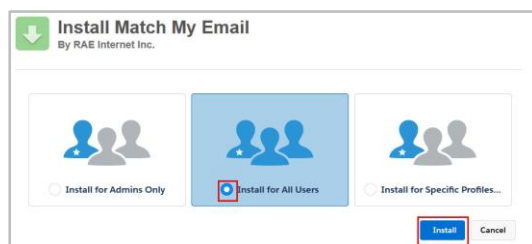
2.1. Click the following link or paste it into browser window:

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0P000000K9Yd>

*Those using Enterprise and Unlimited editions of Salesforce have the option of installing into Sandbox by using the link below. If MME is to be deployed into production later, all steps will need to be repeated at that time.

<https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0P000000K9Yd>

2.2. Choose Install for All Users and click Install. If you choose Admins Only, you may have additional steps to expand package to other profiles in the future. It is best to Install for All Users now, and utilize permissions to control access.



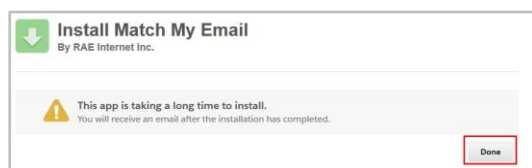
Install Match My Email

By RAE Internet Inc.

☐ Install for Admins Only ☒ Install for All Users ☐ Install for Specific Profiles...

Install Cancel

In some cases, you may get a message that the install is taking a bit longer than expected to install. Simply click Done and you will receive an email that the install is complete.



Install Match My Email

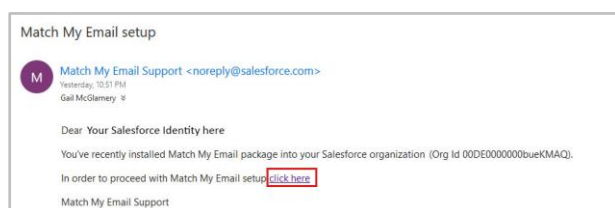
By RAE Internet Inc.

This app is taking a long time to install.
You will receive an email after the installation has completed.

Done

3. Proceed with Match My Email account setup

3.1. After install, you may see a screen with link to proceed with Match My Email setup. If the app took a long time to load, you will also have received an email message as is shown below. In either case, please use the Click Here link.



Match My Email setup

Match My Email Support <noreply@salesforce.com>
Yesterday, 10:51 PM
Gail McGlamery

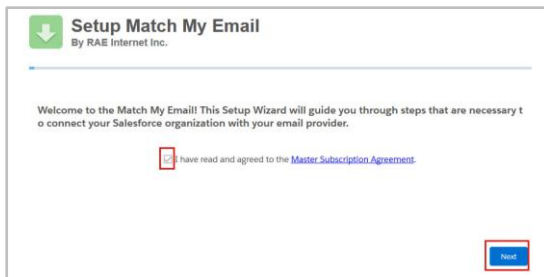
Dear Your Salesforce Identity here:

You've recently installed Match My Email package into your Salesforce organization (Org Id 00DE0000000buekMAQ).

In order to proceed with Match My Email setup [click here](#)

Match My Email Support

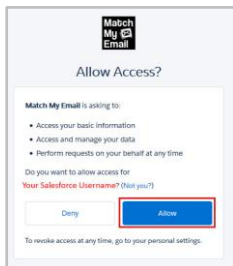
3.2. Agree to Master Subscription Agreement and click Next. You can click the link to read or open in a new tab.



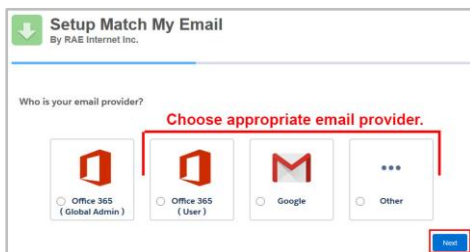
3.3. If you/your company is located within the European Union, please choose that option. Otherwise, choose the United States as location for your data storage and processing. Click Next.



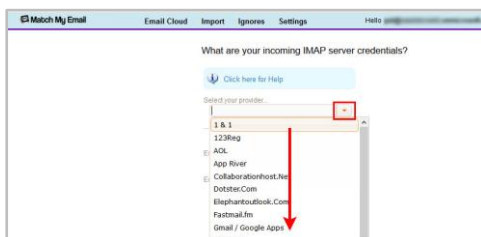
3.4. In next step, click Allow to allow access to your Salesforce organization. This will establish you as the Match My Email Cloud Admin who will manage the overall account.



3.5. Choose email provider. This guide is intended for Office365 users that are not Global Admins, or those that use Google or another email service provider



3.6. Those choosing Office 365 (User) or Google will next be prompted for email address and email password. If Other is selected, you will also be able to choose from a provider list of which IMAP information is already known.



If you do not see your provider in the list or have an onsite server for email, skip the Selection field and directly enter the IMAP server hostname and port, followed by email address and password. Click Next.

****Please note if you authenticate to your server with username only, please contact our support team for steps.**

3.7. MME will import copies of messages from folders in the Selected folders window. The Inbox and Sent folders are automatically added to Selected folders since those are the most common choices. It is possible to add/remove selected folders using arrow buttons, but do not add all folders or those such as Junk, Drafts, or non folder items like Calendar. Click Next.

3.8. Match My Email will begin running the first import, going back 24 hours in selected folders. ([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.

When import is complete, click Next. On next screen, click Finish.

You will then jump to a new browser tab in which you will be on the Email Cloud as seen from within the frame of Salesforce organization. You will be looking at a copies of emails imported from your selected folders to the MME server cloud. Matched or not, emails remain in the MME cloud for the maximum number of days set in Settings > Company (default is maximum of 45 days) and then purged. Matched emails are uploaded into Salesforce.com and remain there beyond cloud retention period.

4. Add Email Domain

4.1. In the MME Menu Ribbon, hover over Settings and click Domains & Users

4.2. Click on “Add Domain”

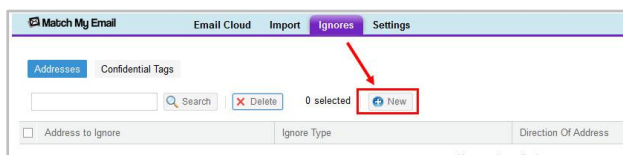
4.3. Fill in fields based on following guidance and then click Save.

- For **Domain**: The email domain is everything after and not including the '@' symbol in email address. (Example, in jane@acmecompany.com, the domain is acmecompany.com).
- For **IMAP server host, Connection, port, and To authenticate use**: these fields depend on where User email is hosted. Please [refer to our wiki for a list of IMAP service providers](#), or contact your IT staff.
- For **Sign In with Google Apps**: For Google Apps Users, choose 'Enabled' to allow Users to sign in to MME by clicking Google button for convenience. Non-google users can disregard.
- For **Allow End-user to Import From**: "This IMAP server" restricts end-user to importing from the designated email domain. Gmail should be checked if hosting is with Google. Checking "Any other IMAP server" enables flexibility for Users to import outside of designated domain.
- **Add Users automatically** is enabled by default. It allows additional Users to sign in and add themselves automatically to User list during setup, eliminating extra step for Cloud Admin.
- **Message size is less than (MB)**: Default is 30MB. This is maximum size of a single email and attachment that can be imported into Email Cloud. It can be reduced if desired.

5. 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.

5.1. Click Ignore in MME menu ribbon. Click +New



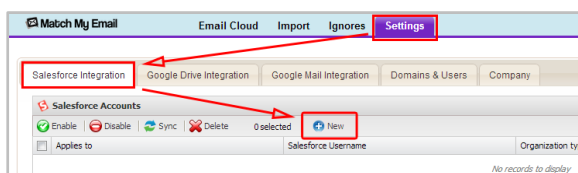
5.2. Fill in the fields per guidelines below and click Save.

- For **Address to Ignore**: type email domain which is everything after the @ symbol. In the example jane@acmecompany.com, the domain field would contain "acmecompany.com".
- For **Ignore Type**: confirm 'skip address' is showing.
- For **Direction of Address**: click the button by 'any'
- **User to Apply to**: choose your domain in drop down.

6. Set up Salesforce Integration for Domain (Team De-Duplication)

The following steps enable MME to upload email via one Salesforce.com login and eliminate duplicates when colleagues are cc'd and importing the same email message into Match My Email.

6.1. In the MME Menu Ribbon, click Settings > Salesforce Integration, then click New.



6.2. Fill in the fields as follows:

- Confirm box for Enabled is checked
- For Applies to: field, choose your email domain from the drop down menu.
- Underneath, you will note there are two options available:

- “Permit end-user to edit rules” if checked would permit end-user to edit personal settings
- “Use as default for end-user” if checked will provide integration for Users as a default until they integrate via their own Salesforce login. It is better for Users to set up their own personal integration in order for MME to follow appropriate roles and permissions.
- For Access Type: choose Remote Access OAuth
- Click Grant button

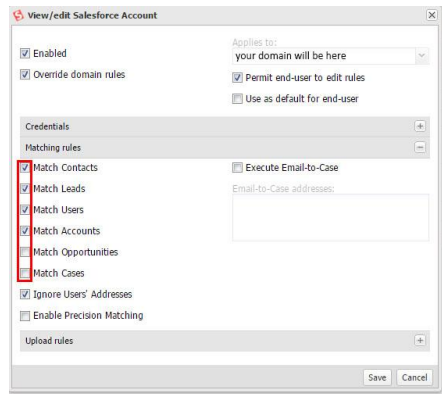
6.3. For Organization type, choose Production. (Sandbox is an option for Enterprise and Unlimited editions when MME is installed in a company’s Sandbox.) Click Next.

If red text appears about pop up windows, you need to adjust your browser setting to allow pop-ups, or at least allow a pop up from <https://matchmyemail.com>. Click Next again.

6.4. A jump to Salesforce will occur where User may login to Salesforce.com using the credentials for a Salesforce.com System Administrator. After logging in, click Allow.

6.5. The newly saved information will be listed in light grey text. Click the “+” sign to expand Matching Rules options.

6.6. By default, matching to Leads, Contacts, and Accounts is enabled, as well as Users. (Match Users is useful for future reporting of email activity per User.)



Uncheck boxes to disable matching to the object. To enable matching to Opportunities (by email address of Contact Role) or Cases, check those boxes.

To use Email-to-Case, please reach out to MME support staff at support@matchmyemail.com as this feature requires discussion about settings in both MME and Salesforce to work properly.

Click the “+” sign to expand Upload Rules options.

6.7. Under Upload Rules, it is possible to manage the way MME uploads attachments into Salesforce. MME stores attachments in Salesforce organization’s more plentiful file storage. In most cases, defaults can be left as is.

- By default, “Upload Email to Salesforce” and “Enable team dedupe” are enabled.

6.8. Under Upload Rules, it is possible to manage the way MME uploads attachments into Salesforce. MME stores attachments in Salesforce organization’s more plentiful file storage. In most cases, defaults can be left as is.

- By default, “Upload Email to Salesforce” and “Enable team dedupe” are enabled.

For Upload Attachments:

- If you leave the Upload Attachment box checked, you can set the size in MB that can be uploaded. The default is 5MB, the upper limit into Salesforce, but can be lowered. Attachments larger than MB limit will not upload to Salesforce.
- With Upload Attachments box checked, if size is set to 0 MB, actual attachments will not be uploaded but LINKS WILL be uploaded with email on match. Users will be able to click a link to view the attachment in the MME cloud while it is stored there for determined retention period (default is 45 days).
- If Upload Attachments box is unchecked, only email and NO attachments or links to attachments are uploaded into Salesforce on match.
- By default, MME blocks inline images up to 25 KB. Thus, inline images such as signature logos up to 25 KB will not be uploaded. This size may need to be increased if inline signatures are uploaded and not desired.
- Attachments can be uploaded to a Google Drive account if desired. All attachments entering Email Cloud will be sent to Google Drive root directory. Check the box and visit Settings > Google Drive Integration to add credential and make connection between Google Drive and MME.

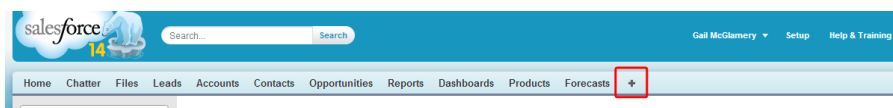
6.9. Click Save

This completes steps for Match My email account setup. You can now proceed with steps for app in Salesforce.com.

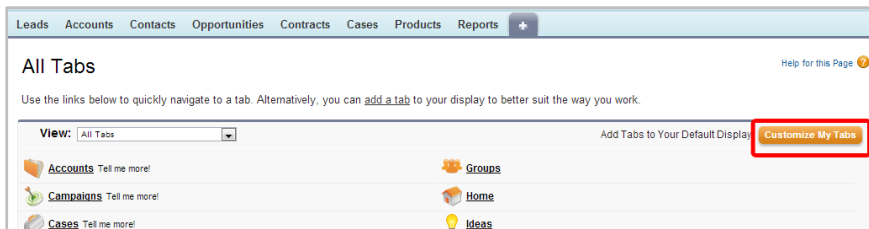
7. Optional: Add Web Tab in Salesforce for Match My Email

Adding our webtab allows quick access to the MME User Interface and to a view of all Email Messages that have been uploaded into Salesforce.com.

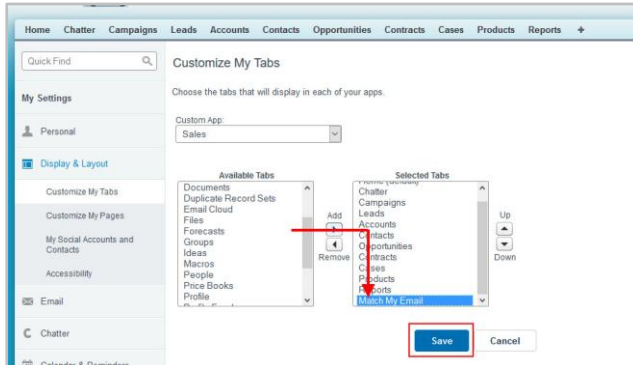
7.1. Click the “+” sign on web tabs bar (at right of Home, Leads, ...)



7.2. Click "Customize My Tabs" (button positioned in the right side)



7.3. Select "Match My Email" from Available tabs and use ">" to move to Selected tabs.

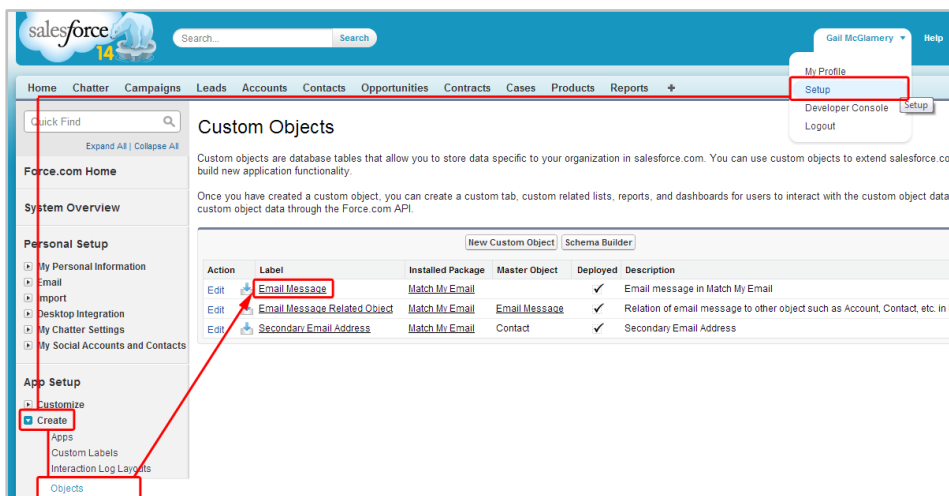


7.4. Click Save.

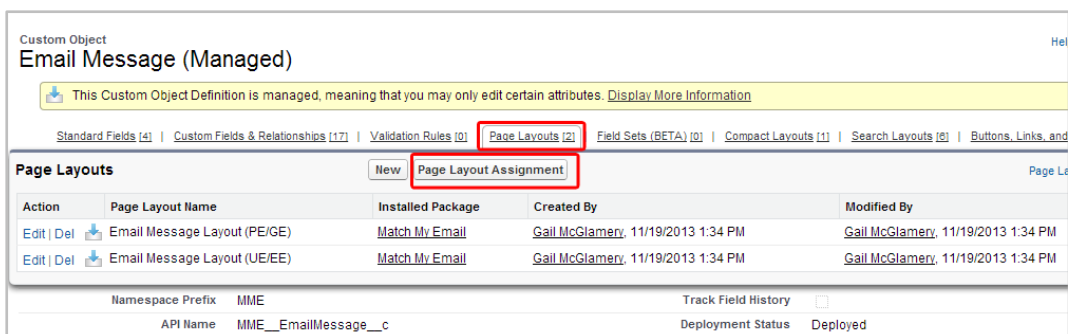
8. For Enterprise & Unlimited Editions Only: Change Email Message Page Layout

Enterprise/Unlimited/Non-Profit editions of Salesforce should change default layout for installed MME custom objects, Email Message and Email Message Related Objects.

8.1. Go to Setup > Build/App Setup > Create > Objects and click the label Email Message in list.



8.2. Hover over "Page Layouts" link at top or scroll down to that section, click "Page Layout Assignment" button.



8.3. Click "Edit Assignment"

Page Layout Assignment
Email Message
[Back to Custom Object: Email Message](#)

The table below shows the page layout assignments for different profiles.

Profiles	Page Layout
Chatter External User	Email Message Layout (PE/GE)
Chatter Free User	Email Message Layout (PE/GE)
Chatter Moderator User	Email Message Layout (PE/GE)
Contract Manager	Email Message Layout (PE/GE)

8.4. Select all profiles by clicking the top profile, hold the SHIFT key down, and click the last profile. With all profiles selected, click the drop down for Page Layout to Use and select Email Message Layout (UE/EE). Click Save.

Edit Page Layout Assignment
Email Message

The table below shows the page layout assignments for different profiles. Use SHIFT + click or click and drag to select a range of adjacent cells that are not adjacent. Then choose a new page layout from the drop-down.

Save Cancel

Page Layout To Use: -- Select Page Layout -- 16 Selected 0 Changed

Profiles

Profiles	Page Layout
Chatter External User	Email Message Layout (PE/GE)
Chatter Free User	Email Message Layout (PE/GE)
Chatter Moderator User	Email Message Layout (PE/GE)
Contract Manager	Email Message Layout (PE/GE)
Custom: Marketing Profile	Email Message Layout (PE/GE)
Custom: Sales Profile	Email Message Layout (PE/GE)
Custom: Support Profile	Email Message Layout (PE/GE)
Force.com - Free User	Email Message Layout (PE/GE)
Gold Partner User	Email Message Layout (PE/GE)
Marketing User	Email Message Layout (PE/GE)
Read Only	Email Message Layout (PE/GE)
Silver Partner User	Email Message Layout (PE/GE)
Solution Manager	Email Message Layout (PE/GE)
Standard Platform User	Email Message Layout (PE/GE)
Standard User	Email Message Layout (PE/GE)
System Administrator	Email Message Layout (PE/GE)

8.5. Repeat from 8.1 for "Email Message Related Object".

9. Add MME Visualforce component to Page Layouts

These steps place a visualforce component on object page layouts. This component is a custom object and is feature rich. If preference is to use a Related List, contact support@matchmyemail.com.

9.1. Click Setup in Salesforce (either next to username or in drop down menu)

9.2. On left sidebar, in App Setup section (may be called Build section), click Customize > Leads > Page Layouts.

9.3. Click Edit for the page layout used for Leads. Only one may be listed. For each of the page layouts used, Click Edit and perform the following steps.

Home Chatter Campaigns Leads Accounts Contacts Opportunities Contracts Cases Products Reports Email Messages Match My Email

Quick Find

Expand All Collapse All

Force.com Home

Administer

- Manage Users
- Manage Apps
- Company Profile
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Email Administration
- Google Apps

Build

- Customize
- Tab Names and Labels
 - Home
 - Activities
- Campaigns
- Leads
 - Fields
 - Related Lookup Filters
 - Validation Rules
 - Triggers
- Page Layouts
- Field Sets

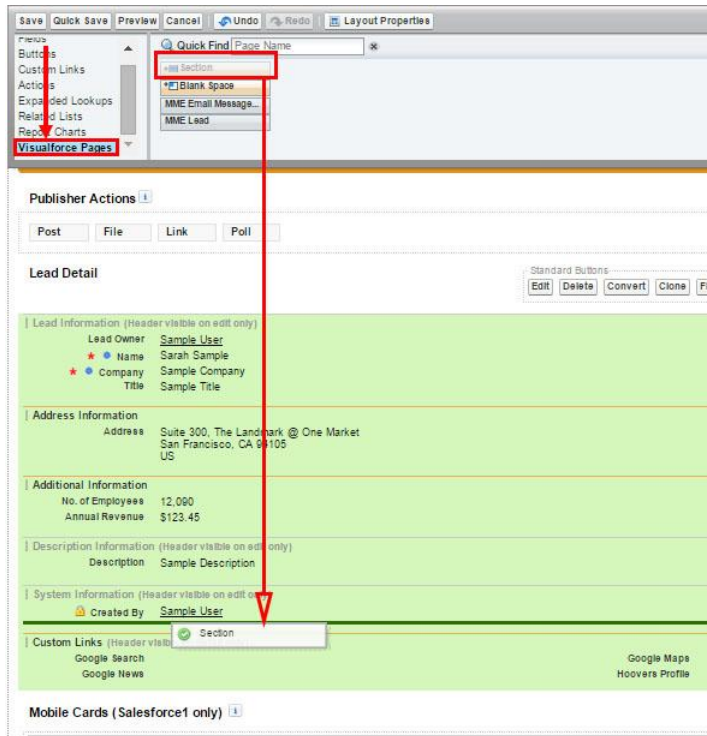
Lead Page Layout

This page allows you to create different page layouts to display Lead data. After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

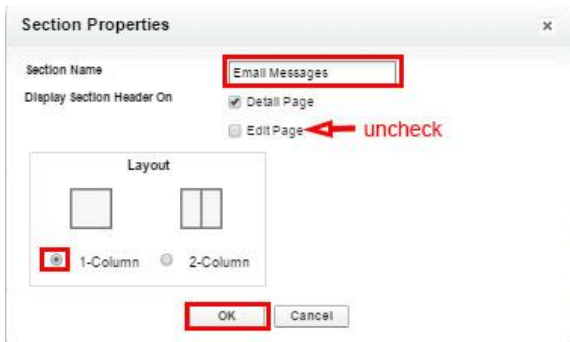
Lead Page Layouts

Action	Page Layout Name	Created By	Modified By
Edit Del	Lead (Marketing) Layout	Gail McGlameryEnt	8/13/2012 1:47 PM
Edit Del	Lead (Sales) Layout	Gail McGlameryEnt	8/13/2012 1:47 PM
Edit Del	Lead (Support) Layout	Gail McGlameryEnt	8/13/2012 1:47 PM
Edit Del	Lead Layout	Gail McGlameryEnt	8/13/2012 1:47 PM

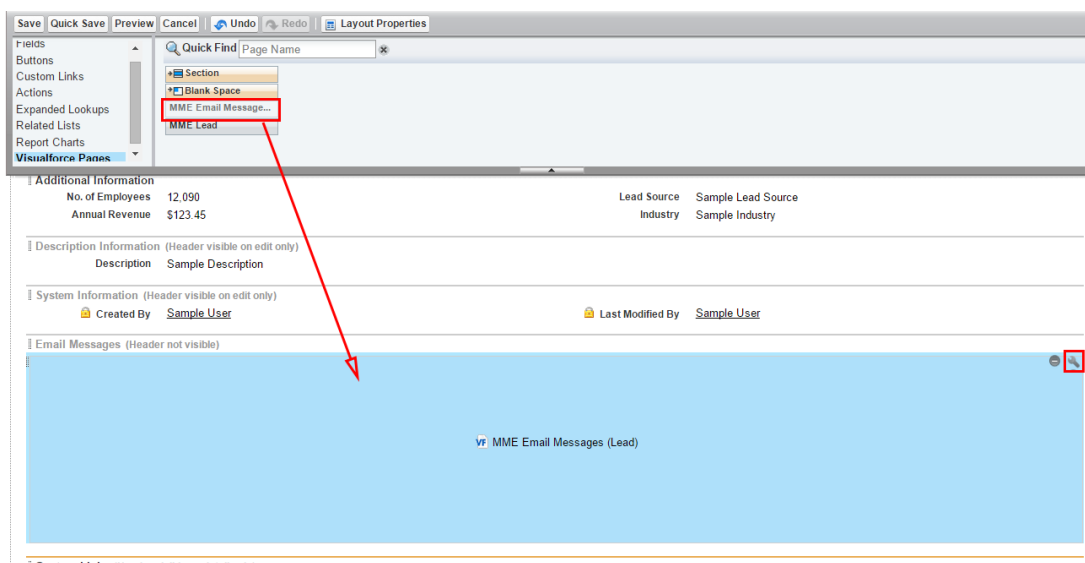
9.4. Scroll under Fields and click Visualforce Pages. Click and drag Section down onto page below, positioning where desired above Mobile Cards. The green line guides placement.



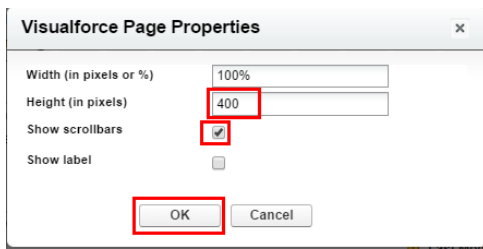
9.5. Once placed, a Section Properties window will appear. For Section Name type in "Email Messages". Leave Detail page checked. Uncheck Edit Page. Click the button for 1-Column. Click OK.



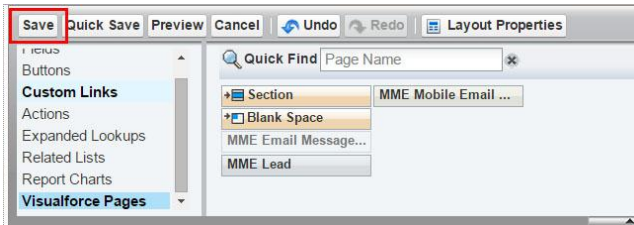
9.6. At top, find the component MME Email Messages. Click on it and drag down into the newly added section. A blue box will appear. Double click in the blue box (or click the wrench tool in the top right corner) to open properties.



9.7. In the Properties window, change Height to 400, check box for Show scrollbars and click OK.



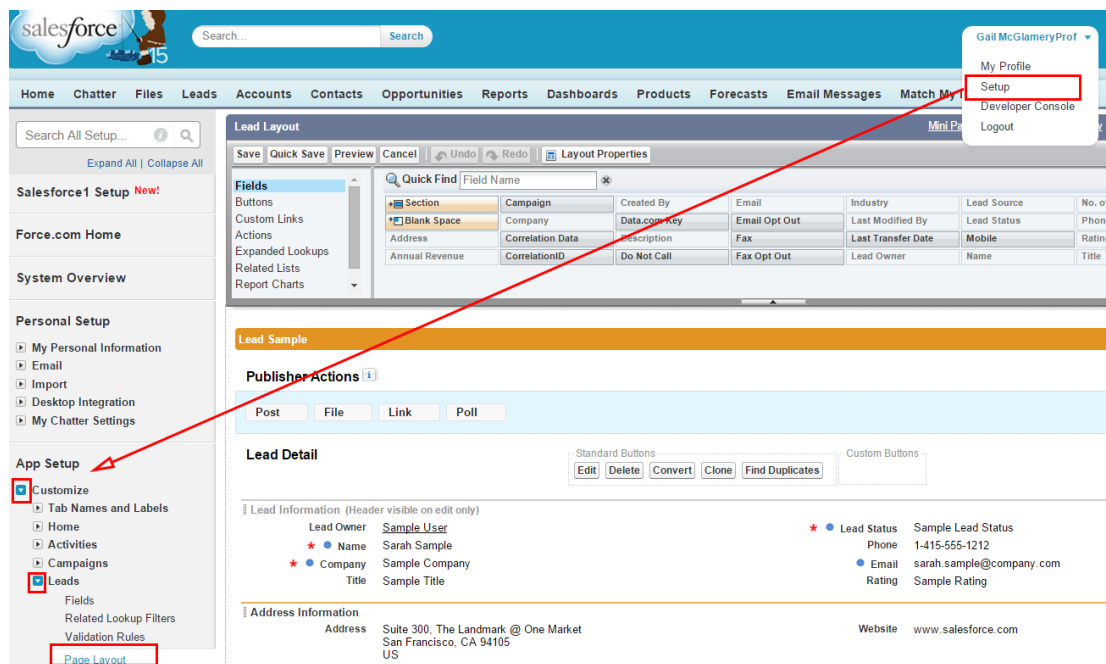
9.8. Click Save to save changes to the page layout being edited.



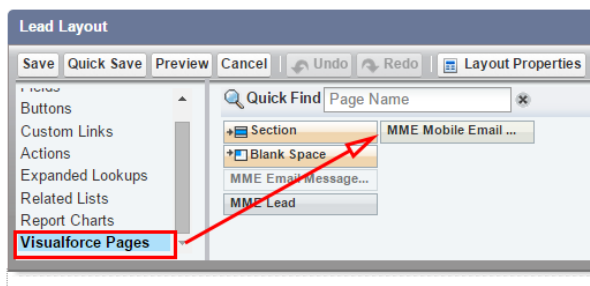
9.9. Repeat steps from 9.2 for all page layouts on that are used for each record type, and for all standard object types (Contacts, Accounts, Opportunities and/or Cases) that are used.

10. Optional: Add Mobile Cards for Salesforce Mobile

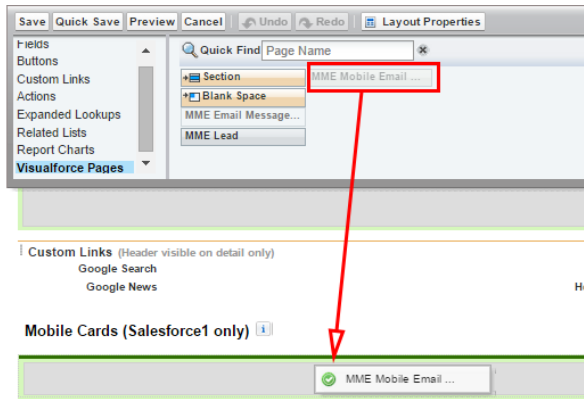
10.1. In Salesforce, navigate to Setup > App Setup > Customize. Expand options for record type to modify - in the example below, it is Leads - and choose Page Layout.



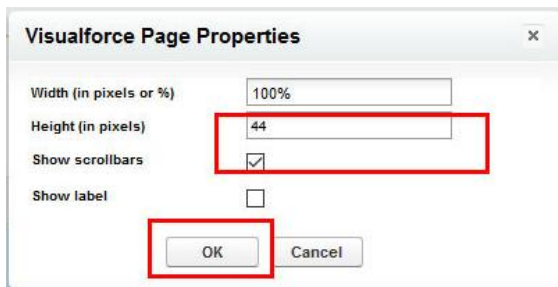
10.2. In the top left of the viewing area, scroll under Fields to find Visualforce Pages and click on it. Options to the right will change.



10.3. Click onto MME Mobile Email Messages, and drag it down into the Mobile Cards section. A dark green line will guide placement.



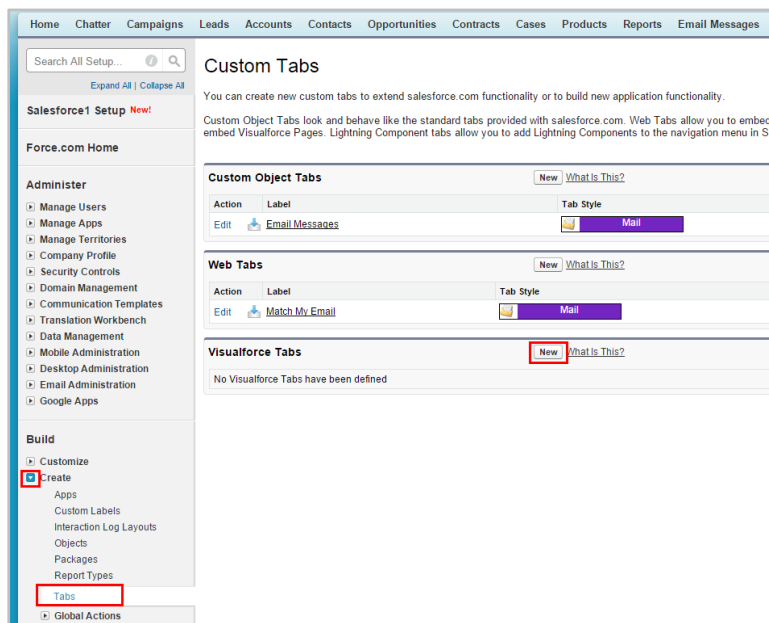
10.4. Double click in the blue box that appears for properties. Set height to 44 pixels, enable Scrollbars and click OK.



10.5. Repeat steps 10.1 to 10.4 for each record type (Contacts/Accounts/Opportunities/Cases) as desired.

11. Optional: Create Email Messages tab for Salesforce Mobile

11.1. To create an Email Messages tab for Salesforce Mobile, visit Setup > App Setup > Create > Tabs and under Visualforce Tabs click New.



11.2. Enter as follows:

- For Visualforce page: pick the option "MME Email Messages [MME_EmailMessages]"
- For Tab Label: type in Email Messages [Mobile]. (Tab name will auto-fill)
- For Tab Style: pick one preferred
- Click Next at bottom right, on next screen click Next, and then click Save.

New Visualforce Tab

Step 1. Enter the Details

Choose the page for this new tab. Fill in other details.

Select an existing page or [create a new page now](#).

Visualforce Page:

Tab Label:

Tab Name:

Tab Style:

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link:

11.3. Add Email Messages [Mobile] to Salesforce Mobile Navigation menu

- From Salesforce Setup, in Quick Find box enter Navigation, then click on Salesforce **Navigation**.
- In Available on left, click on Email Messages [mobile] and move to Selected on right with Add arrow button.

The top screenshot shows the 'Navigation Menu Items' configuration window. In the 'Available' list on the left, 'Email Messages [mobile]' is selected. A red arrow points to the 'Add' button between the 'Available' and 'Selected' lists. The 'Selected' list on the right contains 'Feed', 'Today', 'Dashboards', 'Tasks', 'Smart Search Items', 'People', 'Groups', and 'Reports'. The bottom screenshot shows the same window after the addition. 'Email Messages [mobile]' is now in the 'Selected' list, and a red arrow points to the 'Save' button at the bottom right.

11.4. Click Save.

This completes set up of Match My Email. For assistance with set up or for questions, contact support@matchmyemail.com.

To add colleagues as additional Users to the Match My Email account just created, please follow steps in our [Adding Users to Existing Match My Email Account guide](#).

If colleagues are unable to see matched email data, [enable custom object permissions at the profile-level or adjust permission set assignments at the user-level](#).