

Connect Match My Email & Lightning Salesforce.com

(for Salesforce System Administrators)

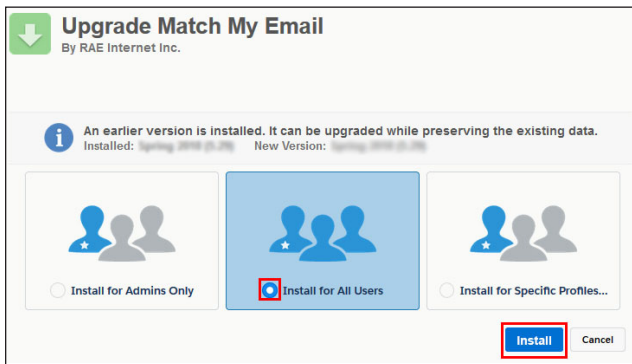
Here is what you'll be doing.

1. Install our app.
2. Create & Activate your Match My Email account
3. Add our component to your record pages

INSTALL

Install [Match My Email in Production for All Users](#).

To install into a Sandbox, [click here](#).



New to Lightning?

Here are some helpful hints for your Salesforce organization.

Complete My Domain steps

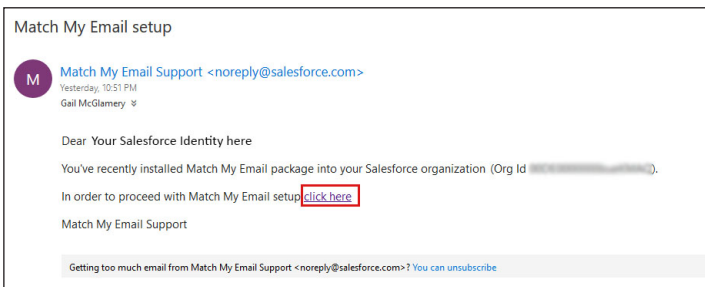
- Click the Cog for Setup
- In Quick Find, type My Domain
- Salesforce guides you through the steps on this screen.

Enable Chatter & Actions in Publisher

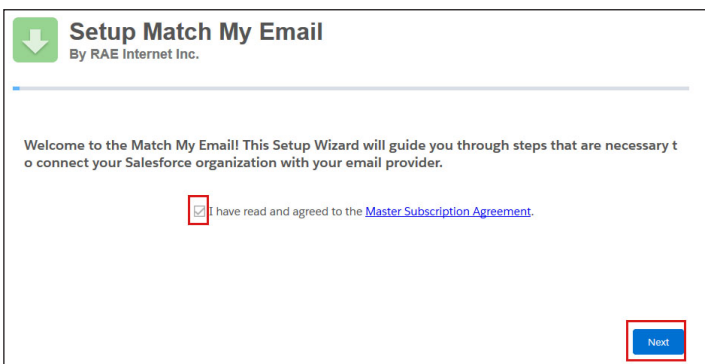
- Click the Cog for Setup
- Quick Find: Chatter Settings
- Check the box for Enable
- Scroll to Actions in the Publisher Section & Check Enable
- SAVE those changes.

To make full use of Match My Email, these are required settings.

CREATE & CONFIGURE YOUR MATCH MY EMAIL ACCOUNT



After the package installs, [click here](#). If you see message saying it will take a bit longer, don't worry. You will receive an email when complete and can click the link in that email message.



Confirm you've read our Master Subscription Agreement.

Setup Match My Email
By RAE Internet Inc.

Where your data will be processed and stored?

☒ United States ☐ European Union

Next

European Union customers should choose that option, but otherwise choose the United States.

Click Next, and login to Salesforce and Allow Access.

Setup Match My Email
By RAE Internet Inc.

Who is your email provider?

Choose appropriate email provider

☐ Office 365 (Global Admin) ☐ Office 365 (User) ☐ Google ☐ Other

Steps found in different guide.

Next

Choose your email host. (If you are an Office 365 Global Admin, the steps that follow are different. Please visit the [Match My Email support page](#).)

Step 4: What are your incoming IMAP server credentials?

[Click here for Help](#)

Select your provider...

1 & 1
123Reg
AOL
App River
Collaborationhost.Net
Dotster.Com

If you pick Other, find your provider in list. If it isn't there, choose 'my provider isn't in list' at the bottom and then enter the IMAP information for your email system.

What folders would you like to import from?

Selected folders

INBOX
Sent Items

Available folders

Archive
Calendar
Calendar/Birthdays
Calendar/United States holidays
Contacts
Conversation History
Deleted Items
Drafts
Journal
Junk Email
Notes

Previous Next

Click NEXT to connect the Selected Folders Inbox and Sent/Sent Items to the app. You can move folders in and out of Selected.

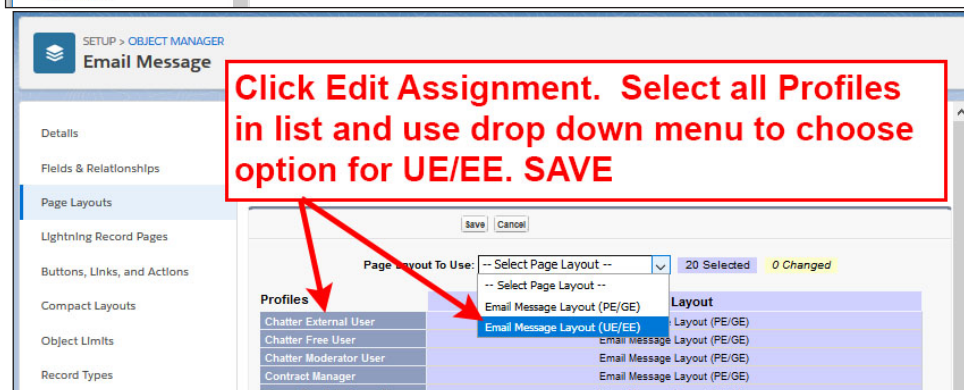
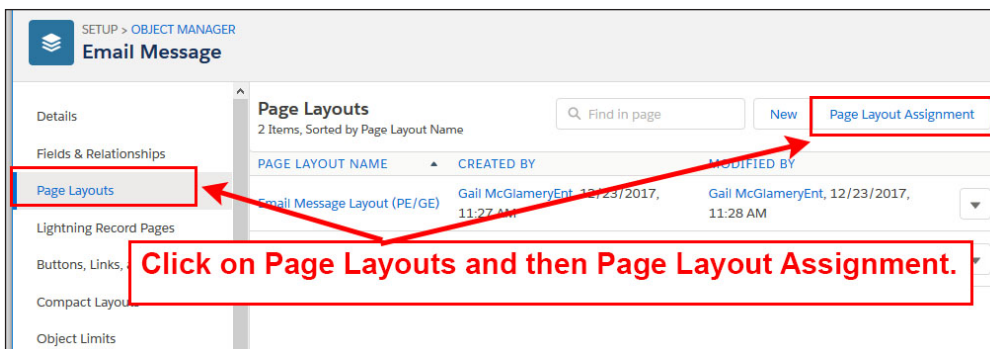
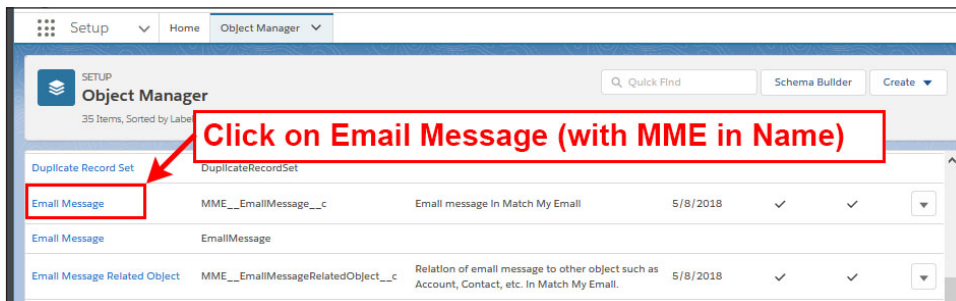
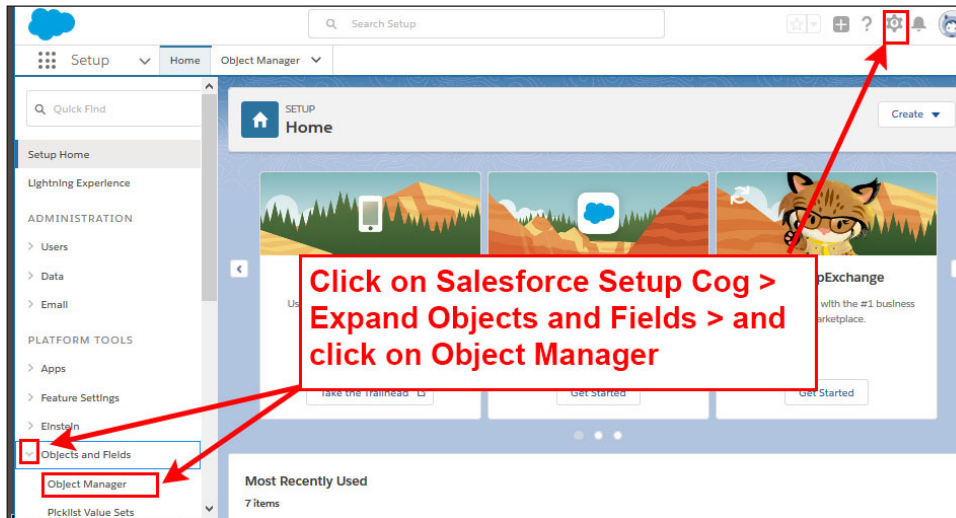
Allow the first import to run completely. Click NEXT when finished.

You now have a Match My Email account that is importing and matching email. You should now see your Email Cloud within the Salesforce view. To easily come back to this view in Salesforce, refer to Optional Steps at end.

Now you need to place a component on lightning record pages to see the matched messages.

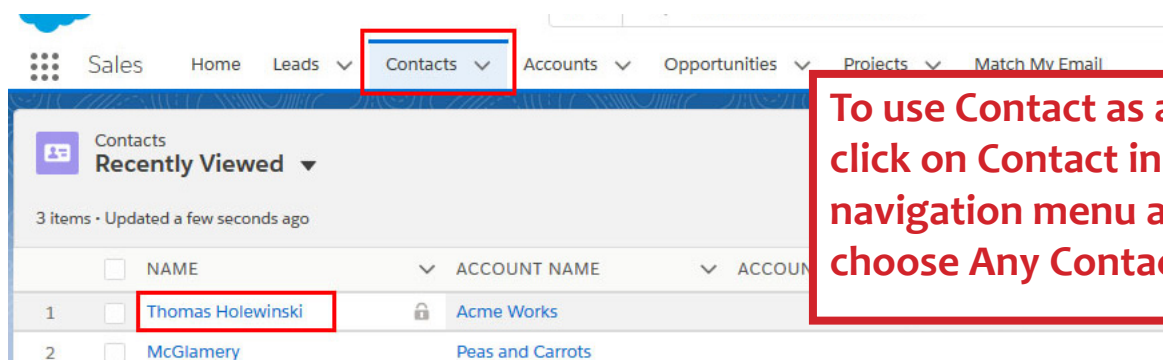
ADD MATCH MY EMAIL COMPONENT TO LIGHTNING RECORD PAGES in Salesforce.com

If you use Essentials or Professional edition, skip this section and go to next page. Otherwise, for Enterprise or Unlimited editions adjust page layout assignment for our custom objects.

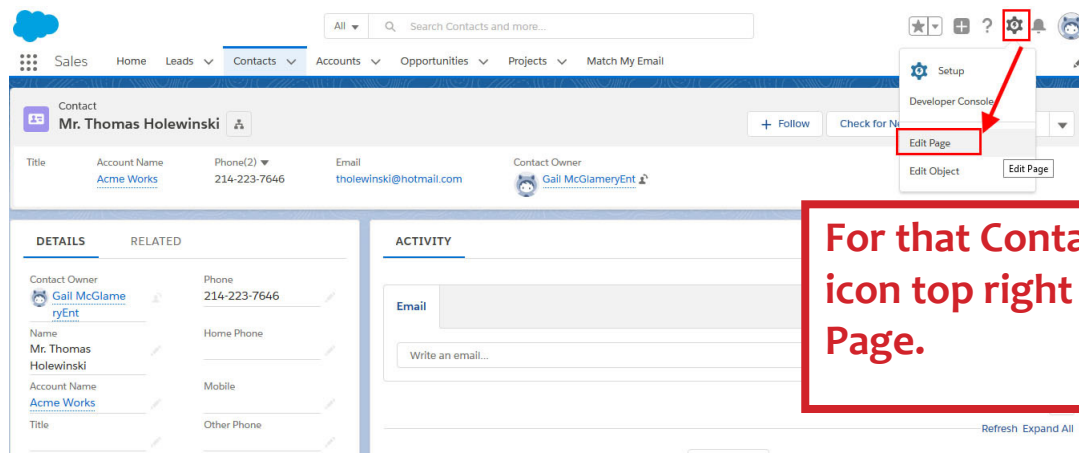


Repeat the steps from top of this page for object Email Message Related Object.

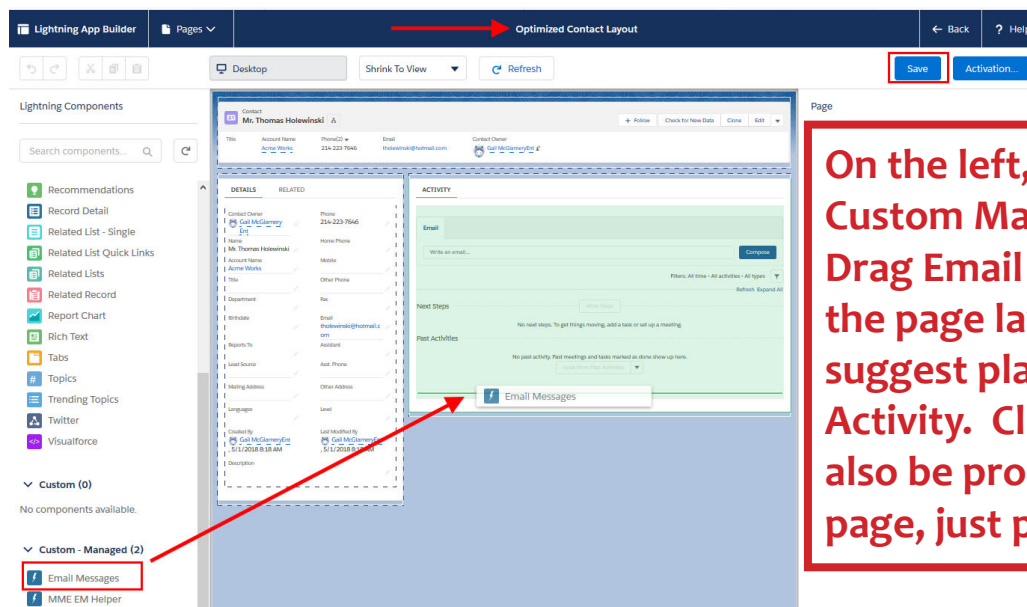
Now, let's move on to placing the component on the page.



To use Contact as an example, click on Contact in your navigation menu and then choose Any Contact in list.



For that Contact, click the Cog icon top right and choose Edit Page.



On the left, scroll to find Custom Managed options. Drag Email Messages over to the page layout. We typically suggest placement under Past Activity. Click SAVE. (You may also be prompted to Activate page, just proceed.)

This component allows you to see the matched emails in a section called Email Messages on the page. **Repeat for Account, Opportunity or other objects you use.** You only need to do these steps for the objects you use. If you use custom objects on which you need to see matched emails, [please contact support](#).

Any emails from your first import (going back 24 hours) that matched to records will now be visible on those record pages.

Beyond the basics of this setup, there are many options you can add on to get more out of our app.

- [Easily access Match My Email by adding it to Salesforce Navigation Bar](#)
- [Add us to your Salesforce Mobile functionality](#)
- [Convert to Match My Email's Send Email button, allowing you to Reply, Reply All, and Forward](#)

And within your Match My Email account , you can:

- [Add colleagues to your company's Match My Email Account you manage](#)
- [Keep internal emails from matching to Contact records for employees](#)
- [Expand matching to Opportunity and Case records and ensure cc'd emails aren't duplicating](#)

For info or assistance, go to our [support page](#) or email us (support@matchmyemail.com)

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