

Integrate Office365 Email with your Salesforce.com Lightning Experience

(for Office 365 Global Admin and Salesforce System Administrators)

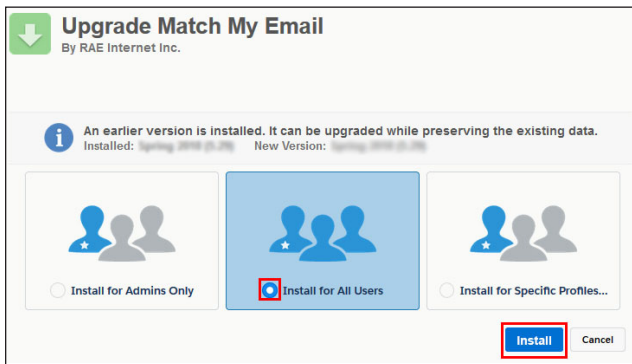
Here is what you'll be doing.

1. Install our app.
2. Create your Match My Email account
3. Add the app to your Nav Bar and 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

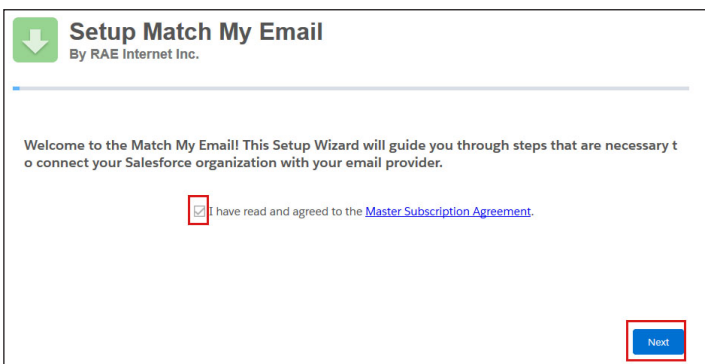
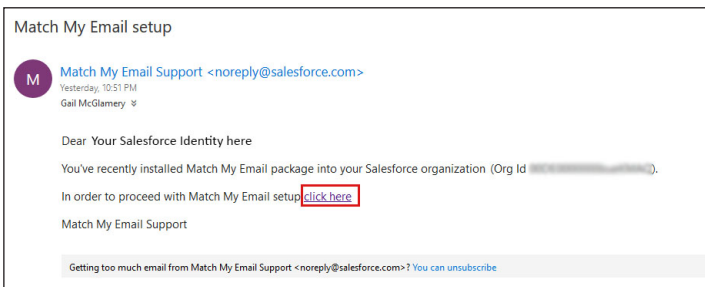
- Click the Cog for Setup
- In Quick Find, type My Domain
- Salesforce guides you through the steps on this screen.

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, in Lightning Experience these are required settings.

CREATE 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.



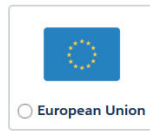
Setup Match My Email

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.



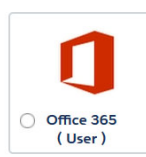
Setup Match My Email

By RAE Internet Inc.

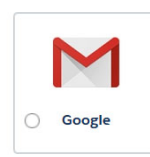
Who is your email provider?



☒ Office 365
(Global Admin)



☐ Office 365
(User)



☐ Google



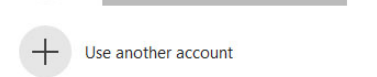
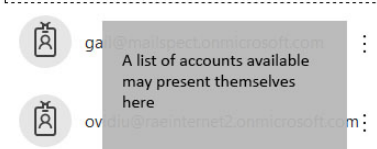
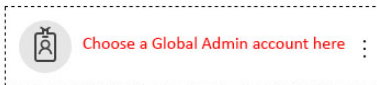
☐ Other

Next

Choose Office 365 (Global Admin). (If you do not have access to a Global Admin credential, please follow different guide at [Match My Email support page.](#))



Pick an account



Upon jump to Microsoft Office 365 login, login with a Global Admin credential.

- ✓ Read and write user and shared mail
- ✓ Read user and shared mail
- ✓ Read and write calendars in all mailboxes

This app will be granted the specified application permission(s) to resources belonging to all users in your organization.

Accepting these permissions means that you allow this app to use your data as specified in their terms of service and privacy statement. **The publisher has not provided links to their terms for you to review.** You can change these permissions at <https://myapps.microsoft.com>. [Show details](#)

Cancel

Accept

Scroll to bottom of list of permissions requested and click Accept.



Setup Match My Email

By RAE Internet Inc.

What is your email address?

Your email address will be here

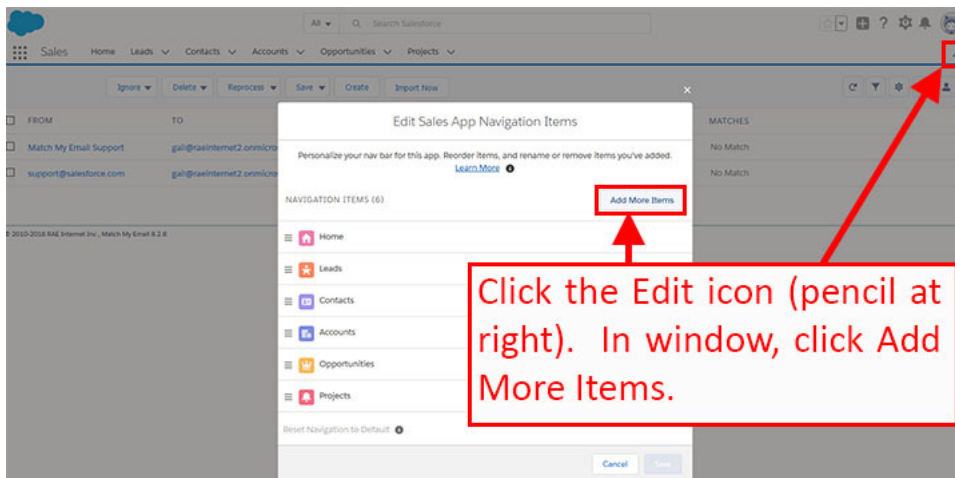
Next

If difficulty is experienced with initial setup of Office365 using Global Admin credentials, you may need to [delete/redo the Email Service connection with steps via this link](#).

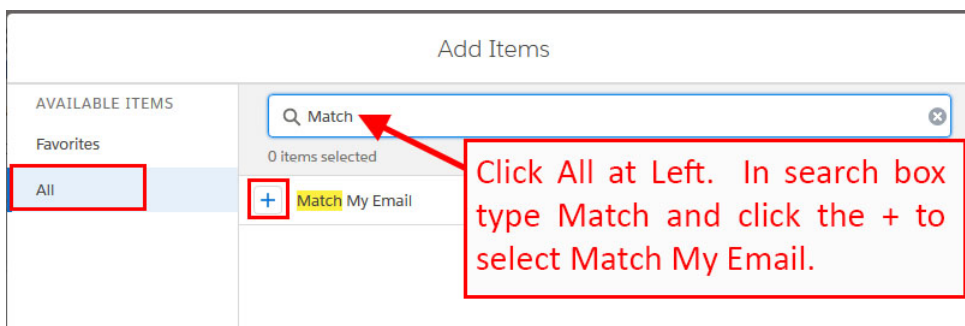
Proceed to setup your email account for import. Click NEXT. It will automatically connect to Inbox and Sent folder. Allow the import to run and when complete click NEXT and then FINISH.

If, as Office365 Global Admin, you DO NOT want to import and match your email, you can delete out the address shown. You will ONLY MANAGE the Match My Email account. Click Next and on next screen click FINISH. You will jump to a view of Match My Email Cloud within Salesforce.

ADD THE APP TO YOUR NAV BAR AND RECORD PAGES



Click the Edit icon (pencil at right). In window, click Add More Items.

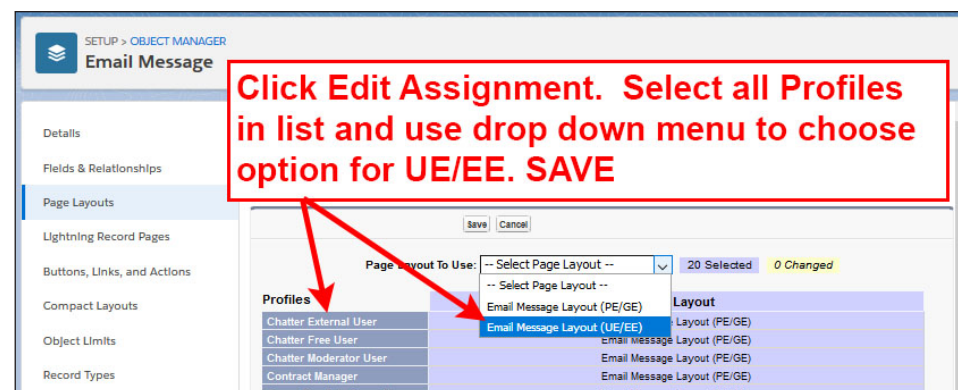
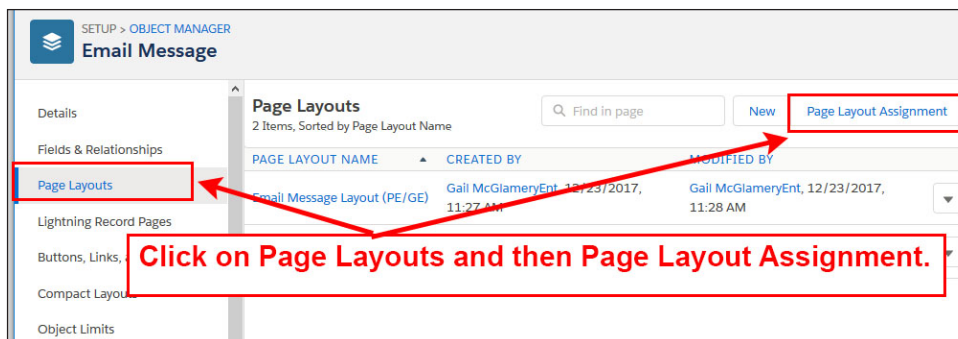
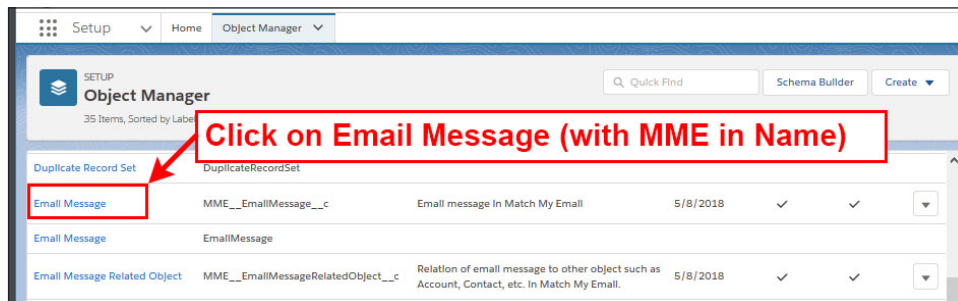
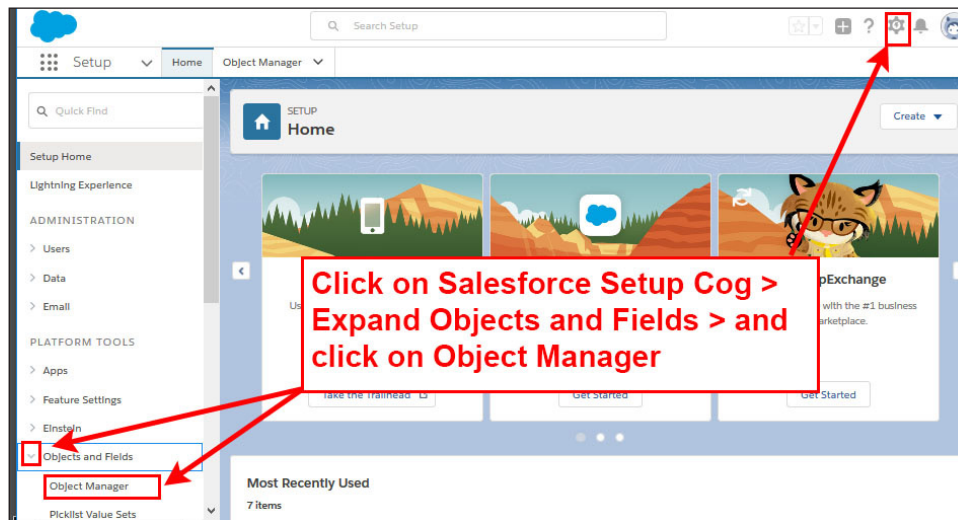


Click All at Left. In search box type Match and click the + to select Match My Email.

Click the button Add 1 Nav Item button. You can then move it in your Nav Bar order and SAVE.

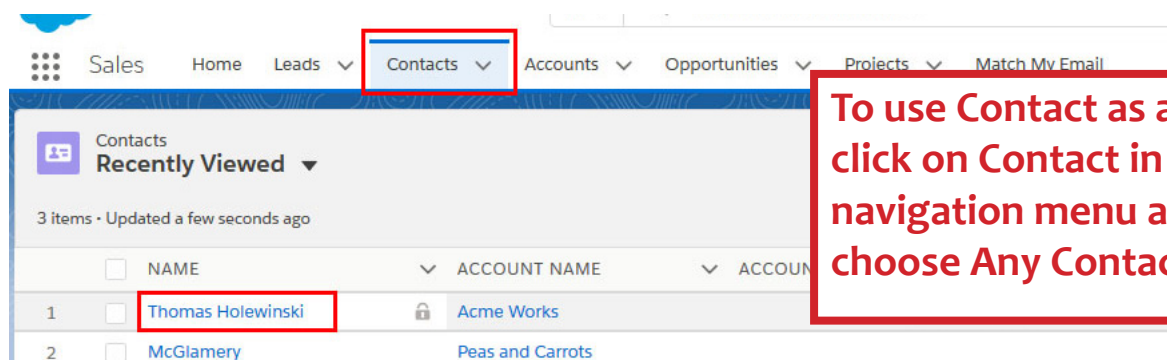
You now will see Match My Email in your Navigation Bar. At any time you can click on it to see again your Match My Email account and Email Cloud view. If you did not add your own email for importing, continue with the following steps in Salesforce and then follow links at end of this guide for activating Users and other options.

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.

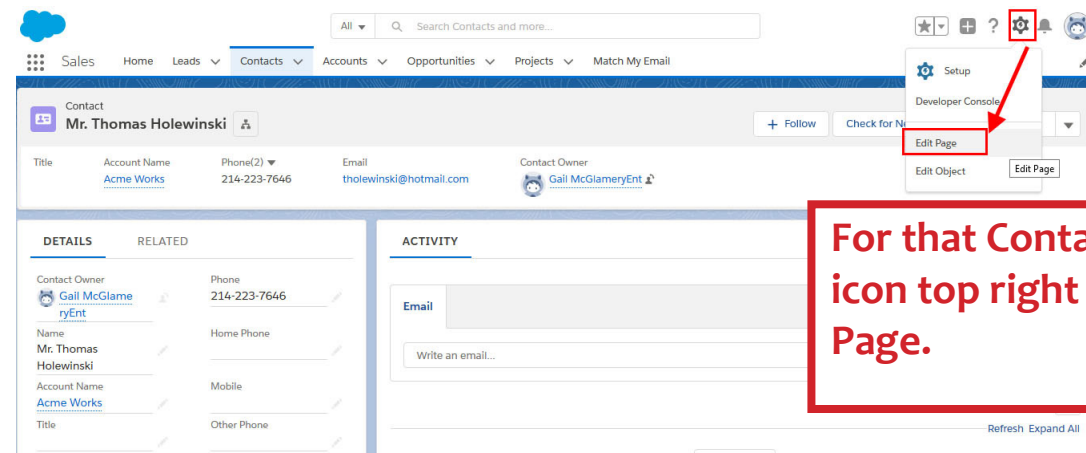


Repeat the steps from top of this page for object Email Message Related Object.

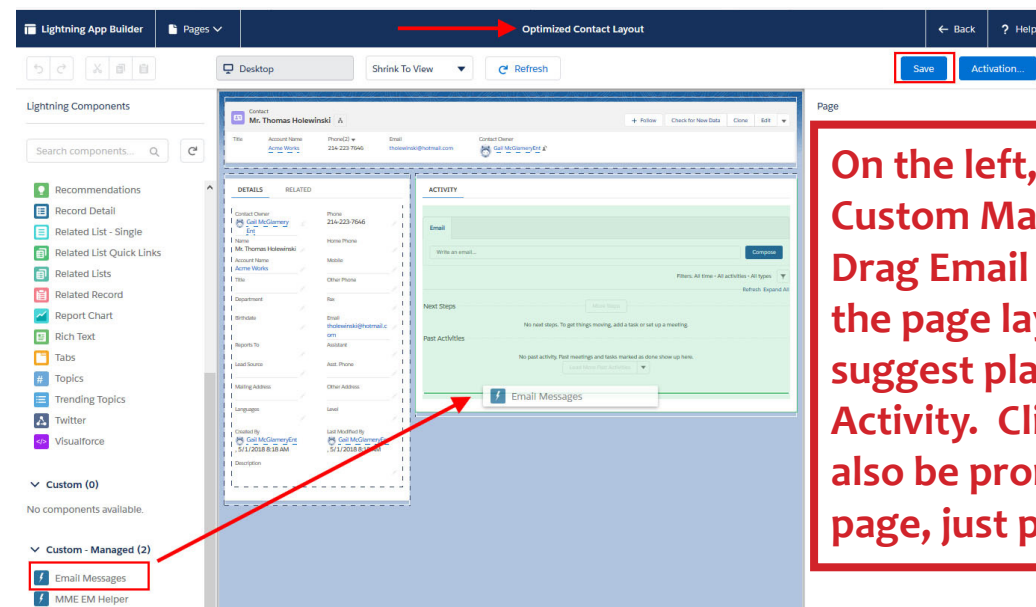
Now, let's move on to placing the component on the page.



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.

- [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:

- [Activate Salesforce Users for Match My Email](#)
- [Keep internal emails from matching to Contact records for employees](#)
- [Expand matching to Opportunity and Case records](#)

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

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