

Setting Up Match My Email to upload as Salesforce Enhanced Email

Start Setup with Steps in Salesforce

This is the [first of two documents](#) a Salesforce System Administrator needs for a complete setup of Match My Email (MME). The Enhanced Email option will mean:

- Emails uploaded as native Salesforce Email Message objects visible in the Activity Timeline in Lightning, and visible as Tasks in Activity History in Classic.
- Each email can be related to multiple Leads or Contacts (WhoID records). On Contact match, emails will be visible on Account records but will only be officially Related to one WhatID object (Person Account, Account, Opportunity, etc.) for reporting.

Please Note: Those using Financial Services Cloud and Person Accounts will initially have a match to the Person Account. If matching to the Household instead of the Person Account is desired, contact the MME support team for custom rule assistance. If matching to both Households and Person Accounts, Opportunities, or other custom objects is desired, we recommend uploading data to the MME custom object which requires a different setup guide.

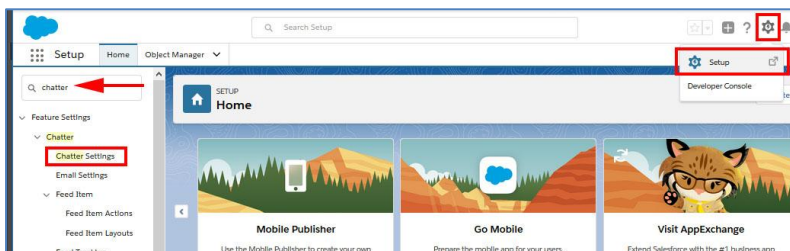
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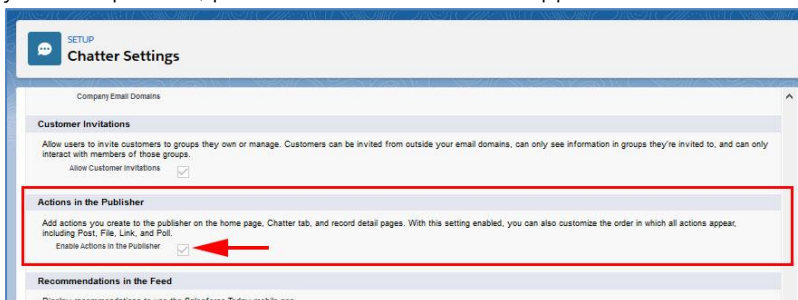
1. Prior to package install: Enable Chatter and Enable Actions in Publisher

Chatter & Actions in Publisher must be enabled to install the MME managed package. To confirm:

- 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. Confirm Chatter is enabled.



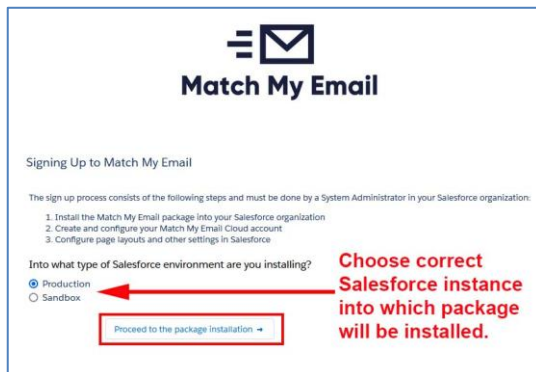
Scroll down on screen to Actions in the Publisher section and confirm that box Enable Actions in the Publisher is checked. If not, click Edit at top of screen, check this box, and Save. If you are unable to find Chatter in your Setup menu, please contact Salesforce support.



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

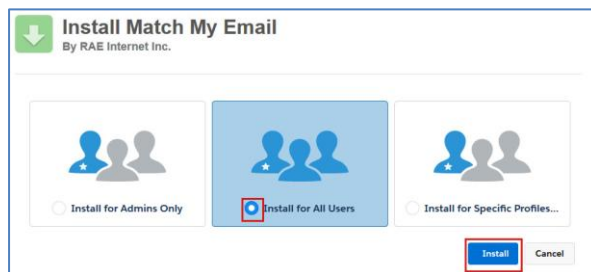
- 2.1. Navigate to <https://matchmyemail.com/signup/> . Choose correct type of Salesforce instance – Production or Sandbox.

Those using Enterprise and Unlimited editions of Salesforce have the option of installing into their Sandbox environment for testing. At a later date, if it is desired to have MME in Production, the setup steps in this guide will need to be repeated and a new MME account created that connects to the Production instance.



The image shows the Match My Email signup page. At the top is the Match My Email logo. Below it, the text 'Signing Up to Match My Email' is displayed. A list of steps for the sign-up process is provided: 1. Install the Match My Email package into your Salesforce organization, 2. Create and configure your Match My Email Cloud account, and 3. Configure page layouts and other settings in Salesforce. A question asks 'Into what type of Salesforce environment are you installing?' with two radio button options: 'Production' (selected) and 'Sandbox'. A red arrow points from the 'Production' option to a red text box that says 'Choose correct Salesforce instance into which package will be installed.' Below the radio buttons is a button labeled 'Proceed to the package installation ->'.

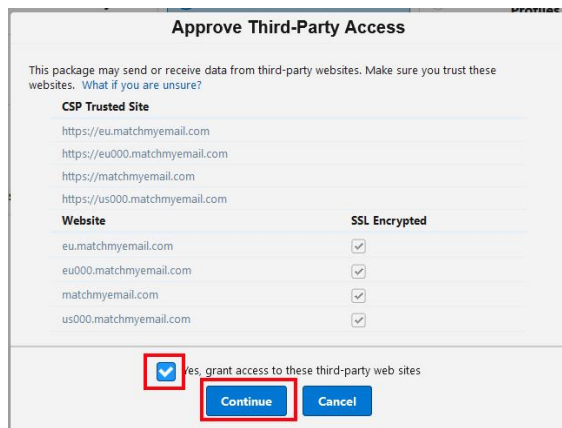
- 2.2. Login to Salesforce if prompted. Choose **Install for All Users** and click Install. This does not activate all Users for the app, but rather it ensures permissions are available for non-Admin Users.



The image shows the 'Install Match My Email' screen. It features three radio button options: 'Install for Admins Only', 'Install for All Users' (which is selected and highlighted with a red box), and 'Install for Specific Profiles...'. At the bottom right, there are 'Install' and 'Cancel' buttons, with the 'Install' button highlighted by a red box.

IMPORTANT: If you choose Admins Only, you may need to do back track on permissions to expand app accessibility to other profiles in the future. It is best to Install for All Users and utilize permissions to control access.

- 2.3. Check the box to approve third-party access and click Continue. Approving Third-Party Access adds remote site settings. This enables our Email Sync Assistant feature, if you choose to use it, to communicate with the User's MME cloud and aid in creating records or ignore rules from unmatched email addresses.



The image shows the 'Approve Third-Party Access' screen. It contains a warning message: 'This package may send or receive data from third-party websites. Make sure you trust these websites. What if you are unsure?'. Below this, there is a table of 'CSP Trusted Site' URLs and a table of 'Website' entries with 'SSL Encrypted' checkboxes. At the bottom, there is a checkbox labeled 'Yes, grant access to these third-party web sites' which is checked and highlighted with a red box. Next to it are 'Continue' and 'Cancel' buttons, with the 'Continue' button highlighted by a red box.

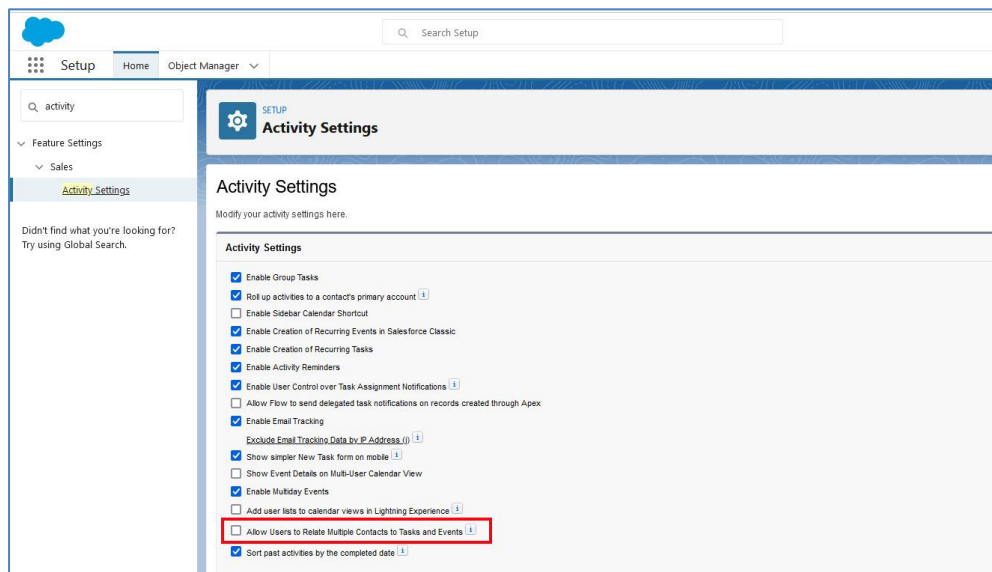
Website	SSL Encrypted
eu.matchmyemail.com	<input checked="" type="checkbox"/>
eu000.matchmyemail.com	<input checked="" type="checkbox"/>
matchmyemail.com	<input checked="" type="checkbox"/>
us000.matchmyemail.com	<input checked="" type="checkbox"/>

The installation will either be completed quickly, or you may see a message that the installation will take a bit longer to fully install into Salesforce. On that screen, click DONE and you will be taken to your list of installed packages. You will receive an email from Salesforce when the installation is complete. You will also receive an email from MME support with a link. You will be directed to use that link in your second setup document.

While you are waiting for a successful installation, you can complete sections 3 and 4. Once the app appears in the Installed Packages list, you will be able to complete sections 5 and 6.

3. Confirm Enhanced Email Enabled and Activity Settings

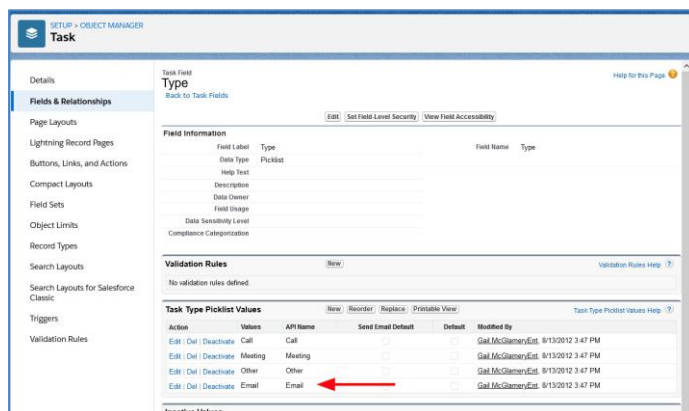
- 3.1. Go to Salesforce Setup. Use the Quick Find to find and select Enhanced Email. If you see a button for Enable, click to do so. If it is already enabled, you will see a button to Disable and don't need to do anything.
- 3.2. Use the Salesforce > Setup > Quick Find to find and select Activity Settings. Confirm that the choice “Allow Users to Relate Multiple Contacts to Tasks and Events” is enabled. It is typically highlighted in yellow. If it is not, check the box and submit this request. A message will note that it may take time for the feature to be fully activated.



4. Adjust Picklists for Tasks and Events

When MME uploads and matches an email and/or calendar event to the Activity timeline, the Salesforce Email Message object will have a related Task for reporting and Classic compatibility. MME can set the value of the Task > Type field and/or Event > Type field to Email or Event, respectively, if these are active picklist values. This is not required for matching to occur, but it is helpful for future reporting of Activity data.

- 4.1. Navigate to Salesforce Setup > Object Manager > Task
- 4.2. Click on Fields and Relationships and then click on the Type field. Check that “Email” is a Picklist value. It may be present as an Inactive value which you can activate. If it is not present at all, click New and enter it as a picklist value and Save the change.

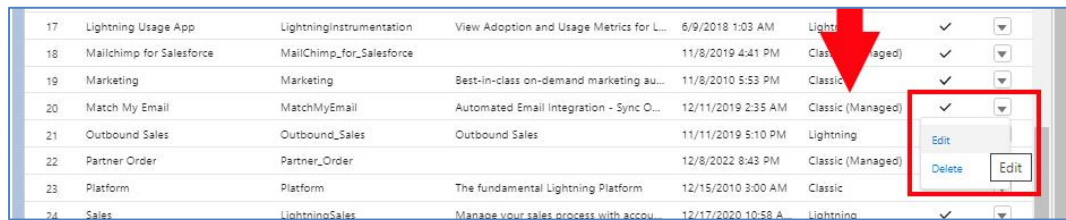


- 4.3. Similarly, if you plan to use MME for syncing calendar events, navigate to Salesforce Setup > Object Manager > Event
- 4.4. Click on Fields and Relationships and then click on the Type field. Check that “Event” is a Picklist value. If it is not, click New and add it. Click Save.

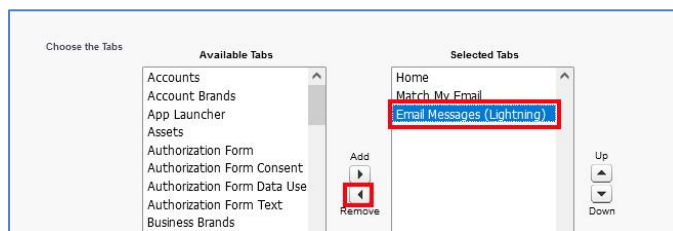
5. Removing Custom Tab from App

When uploading as Enhanced Email, there is one custom app tab that is not relevant. The tab aggregates matched messages only when uploading to the MME custom object. Despite it being empty, the presence of the tab might cause confusion among Users. It is our suggestion that it be removed from view.

- 5.1. In Salesforce Setup > Quick Find search for the App Manager. Find MatchMyEmail (Managed) app. Click the drop menu on the right and choose Edit.



- 5.2. Scroll to the Selected Tabs window. Select Email Messages (Lightning) and Remove it (bottom arrow). Save.



NEXT STEP

The steps for Salesforce are complete. You are halfway through the setup of MME. You will be able to access Match My Email through the App Launcher. However, trying that now will likely result in the following alert. This means you have not yet created your MME account.



To do so, please open the appropriate document for Part 3 based on your email hosting and authentication choice.

OTHER RESOURCES

Please visit [our support page](#) for documentation including:

- How to deploy and use the Email Sync Assistant
- Guidance on Managing Users and Imports
- Match My Email User's Guide

For assistance, contact support@matchmyemail.com or look for help in [our knowledge base](#). You can also visit [our support page](#) and use the scheduler to book a free support session.

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