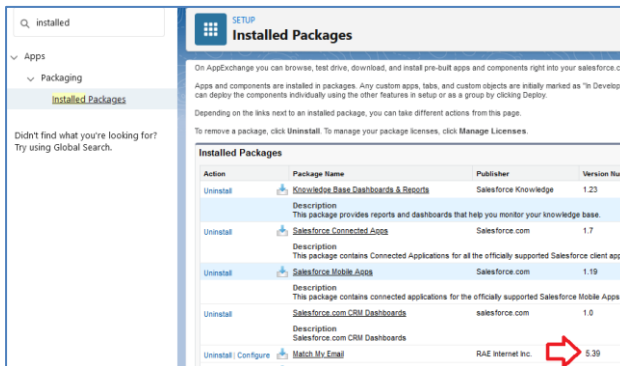# ≡☑ Match My Email

Upgrade Match My Email Installed Package for Email Sync Assistant

Match My Email packages 7.32 or higher provide a new feature, the Email Sync Assistant. This feature lives within the Salesforce home page and makes it easy to identify individuals that need to be added to Salesforce as Leads or Contacts. With only a few clicks, Users can decide to add someone as a Lead, a Contact to an existing or new Account, or even create an ignore rule. Fields to be filled in can be customized by a Salesforce Administrator.

This new product is only available for those using Salesforce Lightning and that have a Match My Email account authenticating via Salesforce.
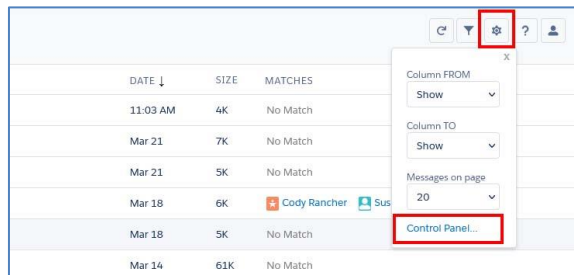
1. Confirm Self-Upgrade is Possible

    1.1   Go to Salesforce Setup > Installed Packages. Find Match My Email in the list and <u>confirm the version of Match My Email installed is 5.39 or higher</u> to continue with this guide. Those with earlier packages should visit https://www.matchmyemail.com/support/ to schedule a support session and obtain assistance with an upgrade.

    1.2   The Email Sync Assistant may only be used in Salesforce Lightning. If you would like to use this new product and have not yet enabled Lightning, you will need to do so.

    1.3   Since this component is only available for Salesforce-authenticating accounts, please follow guidance below to check your Match My Email account.

If you sign in to Match My Email and have the option of going to Settings > Control Panel, you have a Salesforce authenticating account and can proceed.
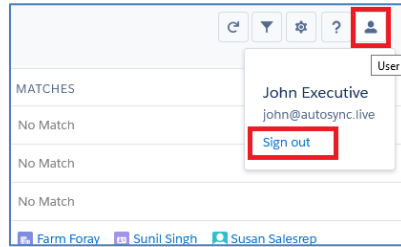

If you sign in to Match My Email and have a blue menu bar at the top (as pictured on the right), you need to contact support about converting your Match My Email account if you would like to use Email Sync Assistant.

A blue menu bar at the top indicates an older Match My Email account that is IMAP-authenticating. If you want to use the Email Sync Assistant feature, you will need to contact our support team about converting your account.

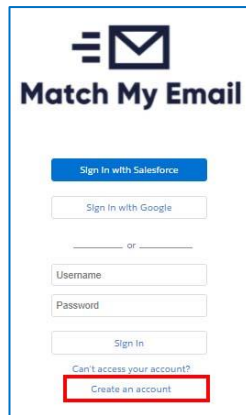## 2. Upgrade Match My Email

2.1 If you signed into Match My Email
to check your type of account,
you will need to sign out to
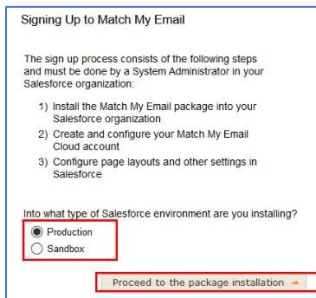proceed with the next step.

2.2 Open a new browser tab. Use the appropriate link below for the correct portal for your Match My Email
account. This was the choice you made at setup between "Rest of the World", which is the US server, and
the EU server for GDPR compliance. Click Create Account.

https://matchmyemail.com
(US and World Customers)
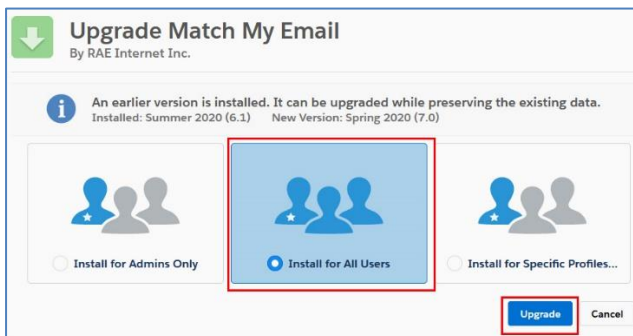
https://eu.matchmyemail.com
(European Union Customers)

2.3 Leave choice as Production and click Proceed to Package Installation
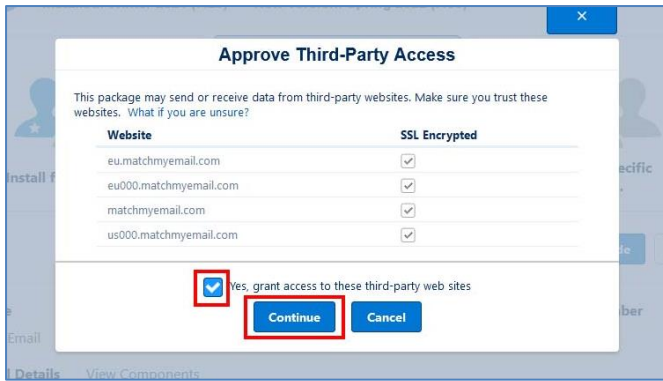

2.4 Sign into Salesforce. IMPORTANTLY, choose Install for All Users and click Upgrade.

You may see the message it is taking a long
time to install. If so, click Done and you will
jump to the Installed Packages list. Wait until
you receive an email from Salesforce that the
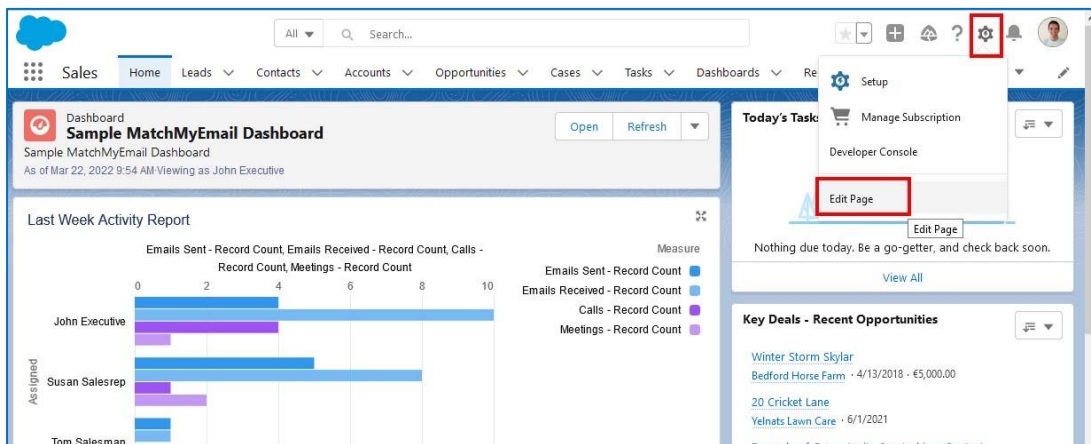upgrade is complete and then Refresh the
browser tab.

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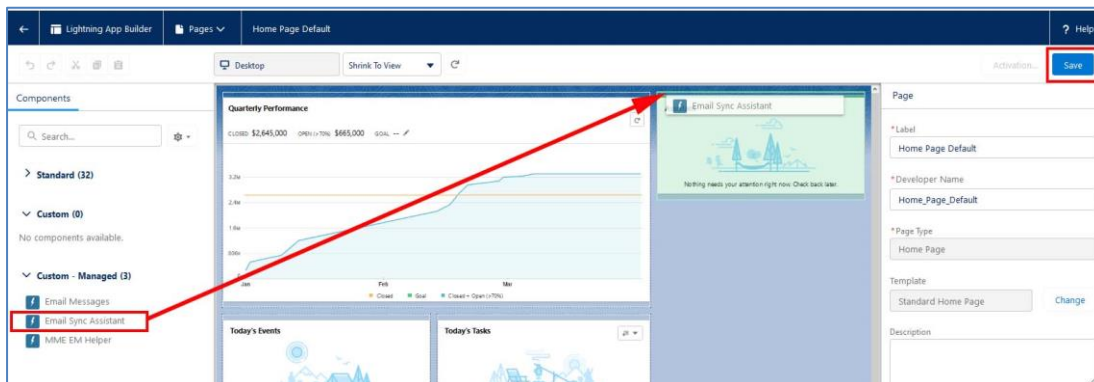

3. Place component on Home Page

Our recommendation is to place the component on the Home Page so Users have easy access to it.

3.1 In Salesforce, from your main Home Screen, click Salesforce Settings > Edit Page

3.2 In the left menu, scroll down to Custom Managed Components. Click on and drag Email Sync Assistant onto the design area. We suggest placing the component at top right. Placement is, of course, dependent on your preferences at your company. Click SAVE.

[Click here for guidance on how to customize and use the Email Sync Assistant](#).