∃⊠ 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</u> <u>version of Match My Email installed is 5.39 or higher to continue with this guide</u>. Those with earlier packages should visit <u>https://www.matchmyemail.com/support/</u> 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.





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.

		♂▼ ‡ ? 🛓
MATCHES		User John Executive
No Match		john@autosync.live
No Match		orginout
No Match		
Farm Foray	🚥 Sunil Singh	Susan Salesrep

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	-⊒∑ Match My Email
(US and World Customers)	Sign in with Salesforce Sign in with Google or
https://eu.matchmyemail.com (European Union Customers)	Username Password Sign In Can't access your account? Create an account

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.

An earlier version is ins	talled. It can be upgraded while	preserving the existing data.
Installed: Summer 2020 (5.1) New Version: Spring 2020 (7.	0)
202	202	909
Install for Admins Only	Install for All Users	Install for Specific Profiles

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.

	Approve Th	ird-Party Access	
	This package may send or receive data from thi websites. What if you are unsure?		
	Website	SSL Encrypted	
	eu.matchmyemail.com		ecific
stall f	eu000.matchmyemail.com	\checkmark	
	matchmyemail.com	\checkmark	
	us000.matchmyemail.com		fe
nail	Yes, grant access	to these third-party web sites	ber

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

Sales Home Leads V	All ▼ Q Search Contacts ∨ Accounts ∨ Opp	ortunities 🗸 Cases 🗸 Tasks 🗸 Dashboards 🗸 R	★
Dashboard Sample MatchMyEmail Sample MatchMyEmail Dashboard As of Mar 22, 2022 9:54 AM Viewing as John Last Week Activity Report	Dashboard Executive	Open Refresh v 22	C Manage Subscription Developer Console Edit Page Edit Page
Emails Sent - Reco Reco	ord Count, Emails Received - Record Count, C ord Count, Meetings - Record Count	Emails Sent - Record Count	View All
John Executive		Calls - Record Count Calls - Record Count Key Deals - Meetings - Record Count	Recent Opportunities 🖉 🐙 💌
Susan Salesrep	_	Winter Stor Bedford Hon 20 Cricket L	m Skylar e Farm - 4/13/2018 - €5,000.00 ane

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.

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Click here for guidance on how to customize and use the Email Sync Assistant.