

Match My Email User Guide

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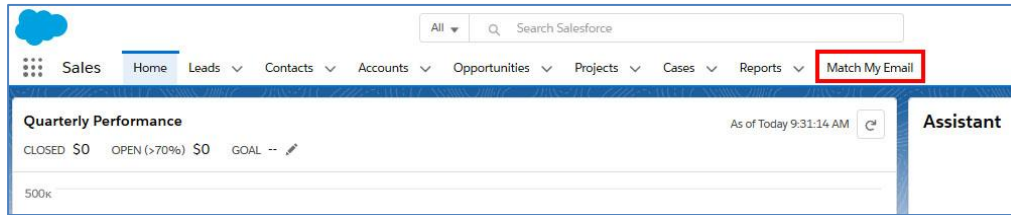
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1. Signing in to access Match My Email Cloud

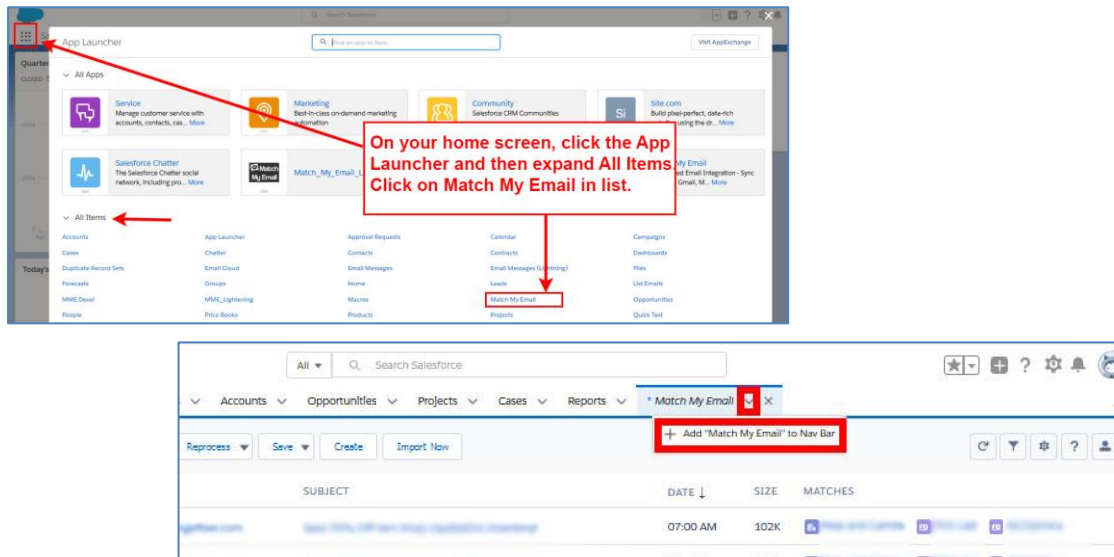
A User can sign in to MME by:

1.1. Clicking the web tab in Salesforce.

The web tab is a quick link found in the Nav Bar in Salesforce.



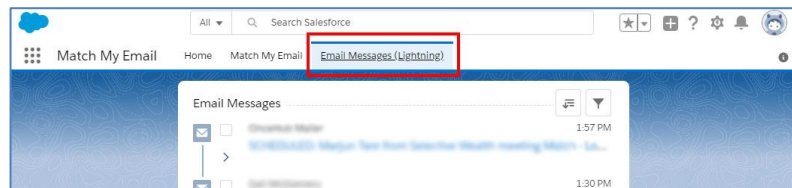
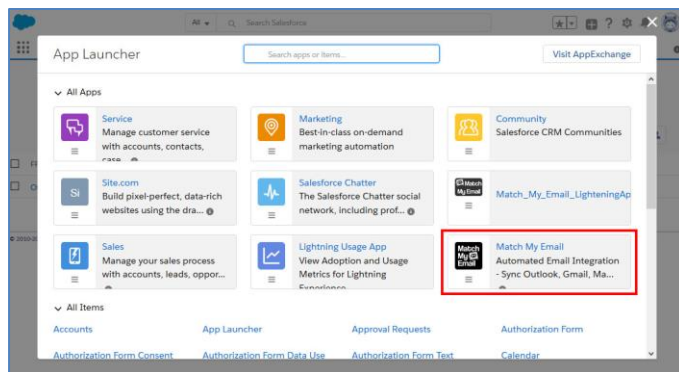
If the web tab is not yet in the Nav Bar, add it. Click the App Launcher (the grid of nine dots at left), look down into the All Items section and click on Match My Email. After it appears in the top menu, click the drop down to add to Nav Bar.



Clicking the **Match My Email** web tab will sign in the current SFDC User to MME and show them their Email Cloud view. The Email Cloud is where emails initially arrive from selected import folders. Some will show match information on the far right which means the data is also already in Salesforce. Some messages will have a status of No Match which means they are only in the Email Cloud and have not been matched. Messages are held in the Email Cloud for 45 days and then purged to make room for more. The list may be empty if a User is not yet activated for import by an MME account admin or if for IMAP connection the import was confirmed but the User still needs to enter credentials.

Alternatively, a User can click the App Icon. This opens two tab options in the App

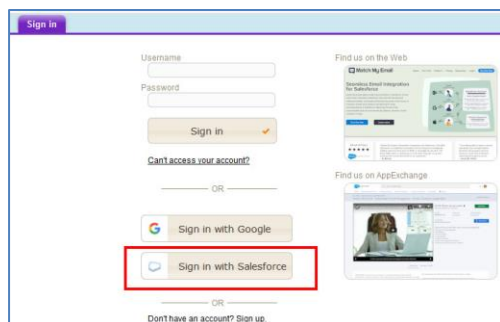
- Match My Email – which is the same as described above and
- Email Messages (Lightning) – which shows all matches into Salesforce across all Users (based on the permission a User has to see emails other than their own)
- Home will take you to your Home Salesforce content.



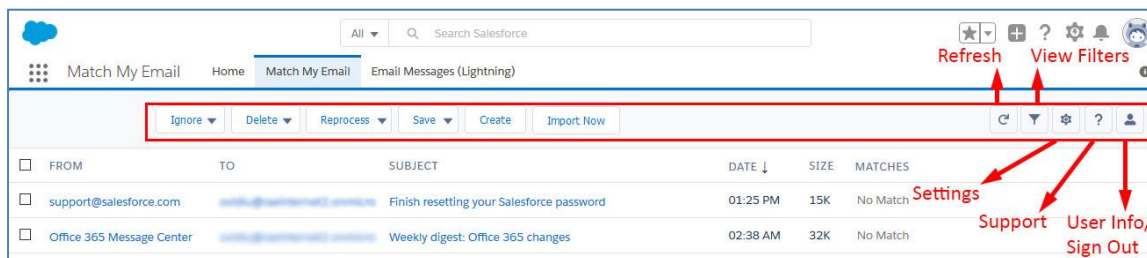
- 1.2. Going to <https://matchmyemail.com>
(or <https://eu.matchmyemail.com> for European Union Customers).

Users can click the Sign in with Salesforce button.

******Those with accounts prior to June 2019 using an IMAP connection could also enter email address and email password. Google mail Users should use the Sign in with Google button.



2. Match My Email Navigation Menu



Command Buttons are on the left for:

- [creating ignore rules](#)
- [deleting messages](#)
- [manually reprocessing](#)
- [saving messages for troubleshooting](#)
- [creating or manually matching SFDC records](#)
- [forcing an import cycle to begin](#)

The icons at right (described above) are for:

- Refreshing view
- [Showing Filter options](#)
- Settings (and Control Panel)
- Linking to support page
- User Info

3. Helpful Tips on Email Cloud View

- Details regarding an email message are shown in the Email List: From, To, Subject, Date, Size (with paperclip indicating attachment), and match status. Hovering over the subject of a message will bring up a window for quick reading of a message, with a scrolling option.
- Clicking on the line or subject of an email message, the user can open and view the email. This opens a window in which the user can view the email and see the header (From/To/CC/ and BCC fields) and find options to Show Headers, Show Source, Hide Message, Show Attachment and Print Message.
- Hovering over the match status in the Matches column will show a Match Details box. Processing date and time (in GMT), why it was matched if it was matched, or a reason for error if Reprocess status. The record's name shown as a match in this box is a hyperlink. When clicked, it will open a new browser tab and take User to that SFDC record.
- Clicking on the Import Now button, in the command buttons line and in about center of screen, will start an import processing cycle. Match My Email automatically runs processing cycles every 20 minutes. Periodically, a User may want to force an import to run, to confirm a particular email is imported and matched or while troubleshooting an issue.
- The headings for columns in the Email List exist also as a Sorting Ribbon. A User can click the column header to change the order of viewed emails by alphabetical, date, or by size. Clicking on the column header once will sort the column alphabetically or in date order. Clicking on a column header a second time will sort it in the opposite order. An arrow will appear to help indicate the direction of the sort. The default sort is by date with most recent message at top of list. To return to default view, click the Date column header until arrow points up.

4. Understanding and Using Ignore Rules & Confidential Tags

Ignore rules allow the User to keep a match into Salesforce from happening. By creating an ignore rule for a specific email address or an overall email domain, a User will direct MME to not attempt matching of an email message to a SFDC record with the same email address. When MME processes emails, the first step executed by the algorithm is to check Ignore rules. All Users can create ignore rules as personal rules applied to "myself". Admin-level MME Users can establish ignore rules that apply to all MME Users.

There are two types of ignore rules available: 'skip address' and 'skip email containing address':

- **"Skip Address"**: means that MME will skip matching for just that address or domain. This is useful if there is more than one email address in the email header. The message will be processed for the other email addresses in the email header. If all email addresses in the header are 'covered' by an ignore rule, then the message status becomes 'Ignore' and the email is not shown in the default cloud view of 'All Excluding Ignore'. However, if not all email addresses in the header are 'covered' by an ignore rule, then MME will either show a status of No Match or Match information, depending on if matches can be made to records in SFDC.
 - **"Skip Email Containing Address"**: means that if the email address or domain is found in the email header, MME will skip the entire email for processing. Thus, any other email address in the header will not be considered, even if they represent a match. This is a much stronger rule of Ignore and it is important to apply this type of ignore carefully. The resulting status for this message will be "Ignore". One benefit of this ignore type is to ignore spam, marketing, or email blast addresses.
 - Ignore rules can be created from the Email Cloud view or in Settings > Control Panel > Ignores
- 4.1. Create Ignore Rule from messages in Email Cloud:
Check the box next to the email message to ignore and click the Ignore command button to show a box of options.

The “Apply To” field will default to “1 selected message” or the appropriate number of selected messages based on how many boxes are checked.

The Ignore Type field has a drop-down menu in which to choose appropriate type as described above.

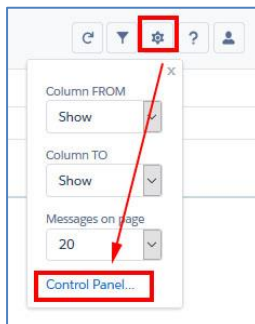
Addresses will automatically show the email address in the From field and have the box checked. If User wants to create the same type of ignore rule for other email addresses in the header, click “add other”. The other email addresses will be visible and those desired can be checked. **Be careful to uncheck User's personal email address** if choosing 'skip email containing address', or User could accidentally create an ignore rule for their own address.

For Users will only show for an MME Administrator. An Admin User can create this ignore rule for just themselves or apply it to all users of the email domain(s) within which User has authority.

Clicking apply will add this ignore rule to Ignore List and affect future emails that come into the Email Cloud

4.2. Create in Settings > Control Panel > Ignores:

If a User does not have an email from a particular person but knows they want an ignore rule for that email address, you can create it directly on the User's Ignore List. Click the Settings Icon as shown in screenshot below and at bottom choose Control Panel. A new browser tab will open for backend account settings.



On the left, each User will see Ignores as an option. (Administrative Users will see more options.) Click Ignores to see a list of current ignore rules for this User. Click +New for a pop up window that can be filled out as follows:

- Address to Ignore: can be specific email address or just an email domain (everything after @) for all users within a certain email domain.
- Ignore Type: Choose either Skip Address or Skip Email Containing Address (see above for explanation)
- Direction of Address: Should this ignore occur in any direction, or only when the address/domain is the sender or recipient of an email messages.
- Click SAVE.

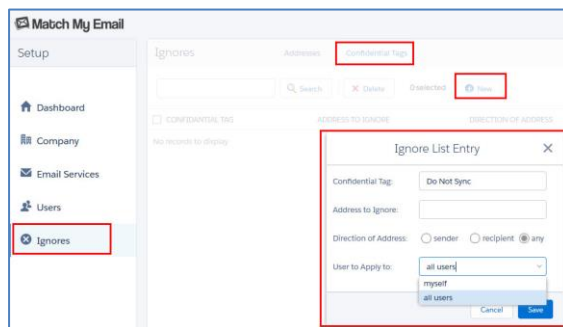
If an email message is already in the Email Cloud and a new Ignore rule is created that would affect it, it would be necessary to manually reprocess the message. [See Section 6.0.](#)

4.3. Create Confidential Tags in Settings > Control Panel > Ignores:

Only Administrative Users can create Confidential Tags. This feature is different than ignores in that if conditions of a rule are met, a message is purged from the Email Cloud. This means a message will not have a status of Ignore but still be available in the Email Cloud for 45 days. Therefore, these should be crafted carefully so that messages desired for matching in Salesforce still arrive in the Email Cloud.

Click the Settings Icon as shown in screenshot above in 4.2.

On the left, click Ignores. At the top of screen, click Confidential Tags and then click New.



In the pop up window, fill in using the following guidelines:

- Confidential Tag: Type in the word(s) that will appear in subject line or email body to indicate a message is confidential and be discarded. Tags are not case sensitive and can include symbols or spaces. Do not start a tag with “mme” as this can conflict with other app features. If you leave the tag blank, all email in direction indicated with address entered will be discarded.
- Address to Ignore: Type email domain or email address to or from which the confidential emails will be coming. If you leave this blank, the system will apply tag to all imported emails.
- Direction of Address: If a domain or email address was entered in Address to Ignore, then you can choose whether this rule applies to when that address/domain is the sender, the recipient, or in any direction.
- User to Apply to: choosing “myself” will make this rule only apply to you as the Administrative User signed in. If you choose “all Users”, the rule will be working for all activated Match My Email Users.

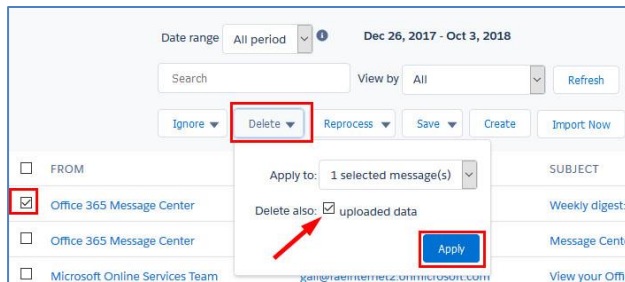
5. Deleting Emails

5.1. Deleting Emails from the Email Cloud

The Delete command allows users to delete an email from the MME cloud, and also SFDC if that is desired. Delete is a powerful command and should be used carefully. From the Email Cloud view, a user will click the Check Box next to the messages desired for removal. Clicking the ‘Delete’ command

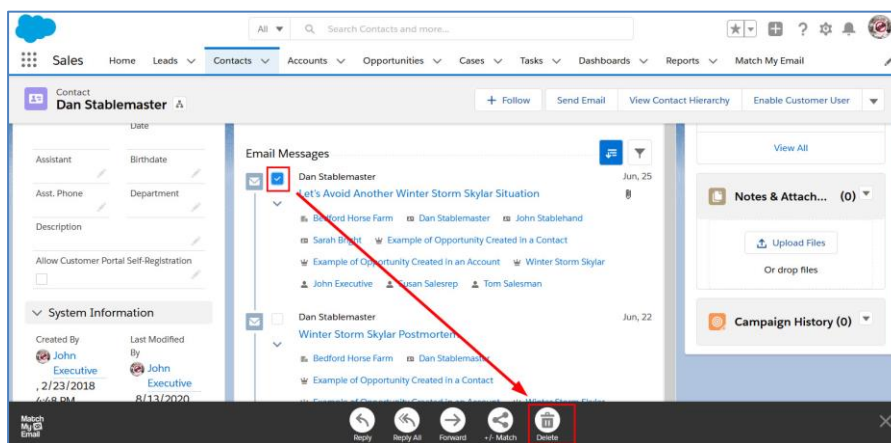
button opens a drop window in which the user is asked to apply Delete to the selected number of messages or all messages. “All messages” means all messages in the cloud and is never recommended. Users should usually leave choice as number selected.

The Delete command window contains the option of checking a box for uploaded data. No check in the box means the emails are deleted from the Email Cloud in MME, but if the message was matched the uploaded data will remain in SFDC. However, **if the box is checked** as in the screenshot below, then the email **will be deleted from BOTH** the Email Cloud and from all matched records in SFDC upon clicking Apply.

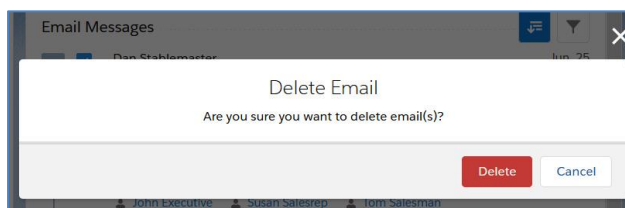


5.2. Deleting an email from within Salesforce.

In order to delete an email from within Salesforce it would be required that the message was already matched to a record. Thus, a User would need to navigate to a Salesforce record. In the Email Messages component, select the message to be deleted. A black menu bar will appear at bottom presenting a button for Delete (see screenshot below).



The User will be asked to confirm the action.



6. Manually Reprocessing Emails

While automatic reprocessing occurs on emails with a ‘No Match’ status every 20 minutes, this is for making matches to new Leads and Contacts in SFDC and does not take into account changes in Ignore Rules or Matching Rules. Thus, Users may want to select and manually reprocess message(s). To reprocess an email is to ask MME to again analyze the email message as if it is arriving in Email Cloud

for the first time. Messages can be manually reprocessed using the Reprocess command button (individually or in bulk) or individually using the Matches Hover option.

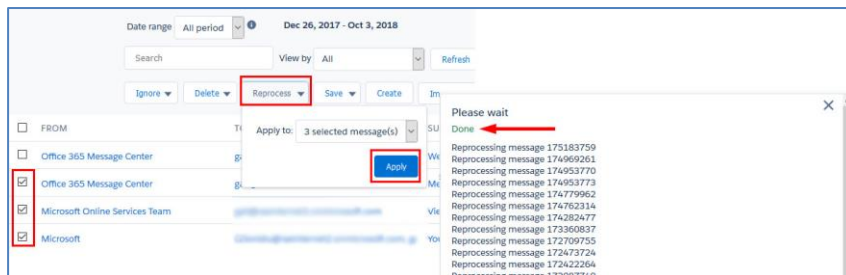
Manual reprocessing is useful when changes are made to Ignore Rules or Matching Rules and these changes need to be applied to a message already in the Email Cloud. It is also useful when an incorrect ignore rule resulted in emails ignored that should have been matched. Once the incorrect ignore rule is deleted, messages it affected can be selected and manually reprocessed (**no more than 500 messages per day is recommended due to SFDC API call limits**).

While a User has the option to manually reprocess as many emails as desired in the MME Cloud, it is never recommended that Users frequently perform bulk manual reprocessing or do so to all emails. Reprocessing uses API calls in addition to those used for normal 20-minute processing. Due to SFDC limits for API calls in a 24-hour period, reprocessing of extensive numbers of emails could reach this limit. If significant reprocessing is desired, check API call usage in Salesforce and/or do smaller groups of emails such as 50 to 100 at a time, and no more than 500 messages per 24-hour period. A User can filter the view of email in the Email Cloud ([See Section 9.3](#)) and then check the boxes next to multiple emails, or check the box to the left of the From column to select all emails on the page being viewed.

6.1. Reprocessing Using Reprocess Command Button:

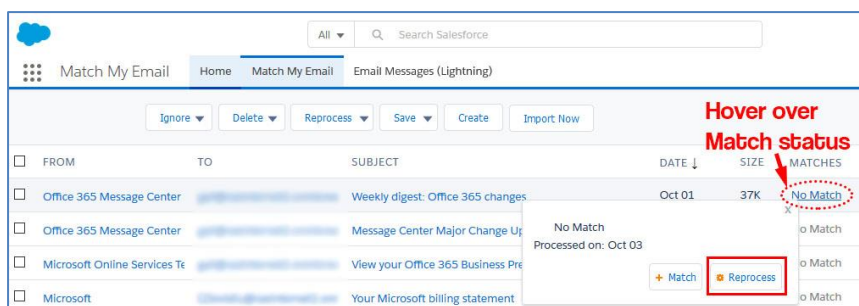
As shown in screenshot below, check the box next to one or several emails desired for reprocessing. After selecting messages, click the Reprocess command button. In the drop window, the choice will be to apply the reprocess to the selected message(s) or all messages. In almost all cases, simply leave it as selected. Click Apply to execute the process.

A pop up window will appear to show the progress of manual reprocessing. Wait until complete, when the word “Done” will appear in green at the top. Scroll down to close the pop up window and click Refresh to update the view. When reprocessing many email messages, it is important to wait until the ‘Done’ appears at the top.



6.2. Reprocessing Using Matches Hover option:

An email can be individually reprocessed by hovering over the match status in Matches column and in the pop-up box click the Reprocess button. After reprocessing is complete, the change in status of the message will be indicated in Type:Matches column.



7. Creating and Manually Matching SFDC Records

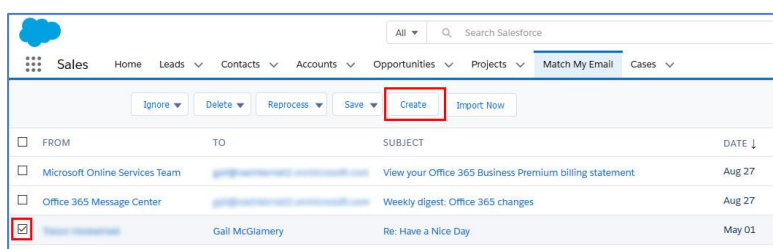
If a message was sent to, or received from, a Lead or Contact that isn't yet in SFDC, their record can be created from the Email Cloud if desired. This is true for a No Match or even a message that may have already matched to other addressees that were already in SFDC. A message can also be manually matched to any record in SFDC. While manual matching doesn't create 'memory' for future messages being matched, it can be useful in giving the User the ability to upload and match any message, or a few messages in bulk, to a specific SFDC record.

The Create command button is meant for bulk creation or manual matching of emails to SFDC records, though it can be used for single messages. It is also possible to use the Matches Hover option to create or manually match a single message. Unmatching is described in the next section, [Section 8](#).

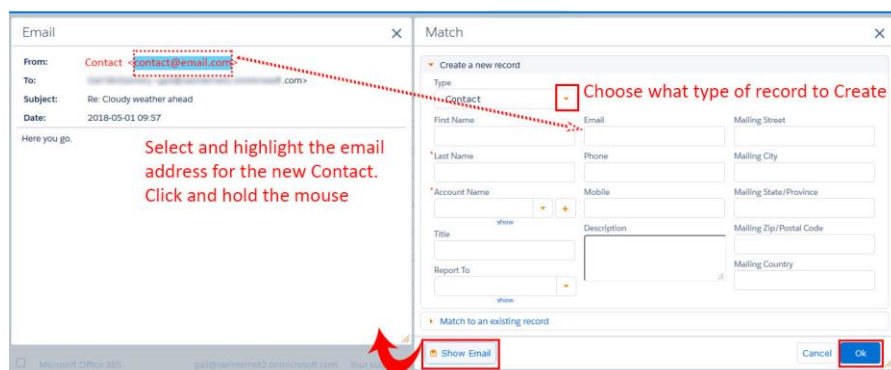
7.1. Create Records (or Manually Match) Using Create Command Button:

To Create New SFDC Record

Select one or more messages in the Email Cloud that need to be matched upon record creation. Click the Create Command Button.



In the pop up Match window, click the top bar to expand Create and Match to a New Record as indicated in screenshot below. Choose what type of record is to be created – in this example it is a Contact. Clicking the Show Email button at bottom left of pop up window will open a side-by-side view of the email. It is possible to highlight and drag/drop data from the email message over to populate the form, or alternatively one can just type in the information in the form.



When creating a Contact, an Account must already exist for it or User will create a new one. If this is a new Contact for existing Account – as shown at right - type a few letters of the Account name in the box and choose the correct Account from

list. Complete the rest of the form as desired, then click OK.

Click the +New button and a blue frame will appear, meaning when you click OK both a Contact and new Account record will be created.

If this is a new Account, type the name of the Account as shown at right. If you wait, though not necessary, you may see a red frame around the Account Name with wording 'not found'.

To Manually Match

Select one or more messages in the Email Cloud that need to be matched upon record creation. Click the Create Command Button.

In the pop up Match window, the default option is typically the Match to an Existing Record, which is the 2nd bar. This would be the desired option if the record already exists in Salesforce. In the Records field, begin typing the name of the SFDC record to be matched and choices will appear in a list. SFDC icons to the left of the items listed will differentiate records as Leads, Contacts, Accounts, Opportunities, or Cases. Click on the correct record. If more than one record is to be matched, in the additional Records field that appears, again type in letters for the next record and choose. Once all selections have been made for manual match, click OK.

Please note that manual matching doesn't create 'memory'. In this moment, the email(s) was matched to the records selected. Future messages will not be automatically matched based on one manual match. To achieve automatic matching where email address is not sufficient, please contact support@matchmyemail.com to discuss matching to custom fields or customized precision matching.

7.2. Create Records or Manually Match Using Matches Hover option:

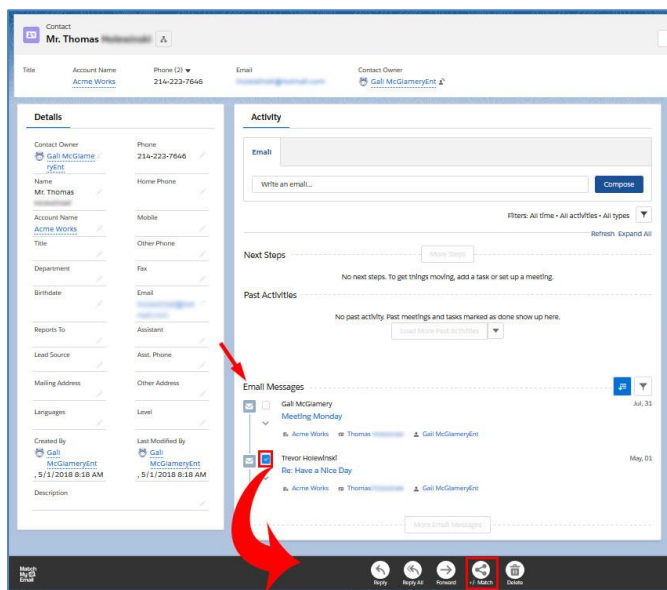
Using the Matches column and doing a hover over the match status of an email allows a User to create or manually match that specific message. Upon hover over, click the +Match button. This will bring up

the same window as shown above. Users can open the Create a New Record bar or the Match to and Existing Record bar and proceed as described above.

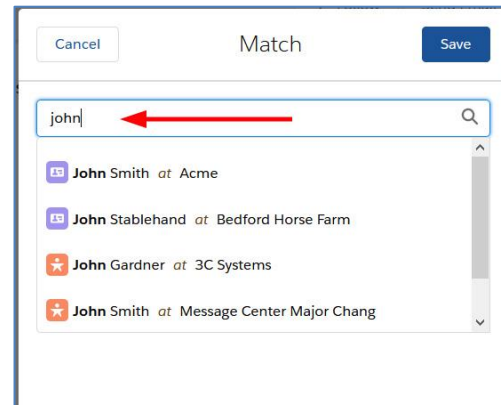
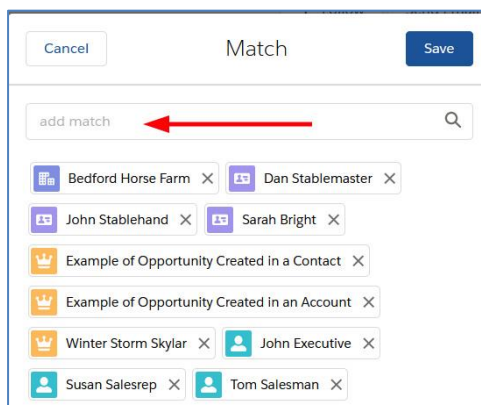
<div> <div>Ignore</div> <div>Delete</div> <div>Reprocess</div> <div>Save</div> <div>Create</div> <div>Import Now</div> </div>						
<input type="checkbox"/>	FROM	TO	SUBJECT	DATE ↓	SIZE	MATCHES
<input type="checkbox"/>	Microsoft Online Services Te	gail@raeinternet2.onmicros	View your Office 365 Business Premium billing statement	Aug 27	24K	No Match
<input type="checkbox"/>	Office 365 Message Center	gail@raeinternet2.onmicros	Weekly digest: Office 365 changes			No Match Processed on: Oct 03
<input type="checkbox"/>	Theror Hovew/rad	Gali McGlamery	Re: Have a Nice Day			Match
<input type="checkbox"/>	Office 365 Message Center	gail@raeinternet2.onmicros	Message Center Major Update Noti			Match

7.3. To Manually Match from Salesforce record:

To manually match a message from within Salesforce, the message would have already been matched to some record. Navigate to that record and scroll to find the Email Messages list. Check the box to the left of the message for which manual matching to another record is desired. A black bar will appear at bottom with actions from which to choose. Click on the +/- Match button.



In the pop up window, you will be able to see the existing matches and have a field into which to type info to add a match. Click there and begin to type a name. A lookup will occur and User can choose the correct record needing the manual match.

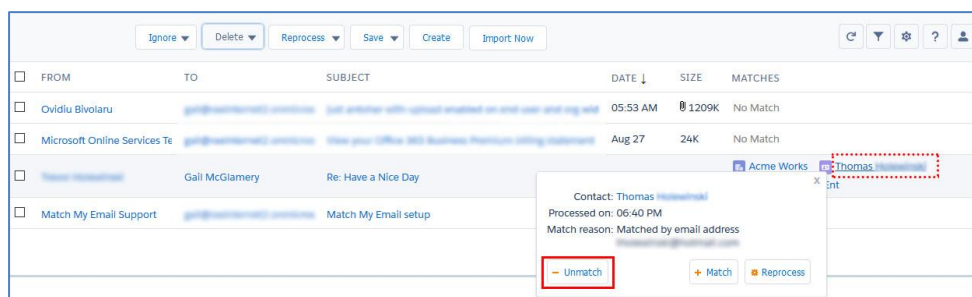


8. Undoing a Match

When a message matches to SFDC, the message is uploaded as a data object and related object links are used to connect that object to the different records to which it should link, or match. If a User would like to undo a match, or Unmatch, a message, they can remove the link between the email and a particular record. This removes just that link, but the email remains in SFDC and other matches remain. If a User wants the message unmatched from all related records, they would not Unmatch all these links, but rather delete the message, [see Section 5.0](#).

8.1. To Unmatch from Email Cloud:

Hover over the match status of a message and click the Unmatch button. This will remove the link between the selected email message and the particular Salesforce record. It only removes the link between the email and that record, but links to other records showing a match remain.

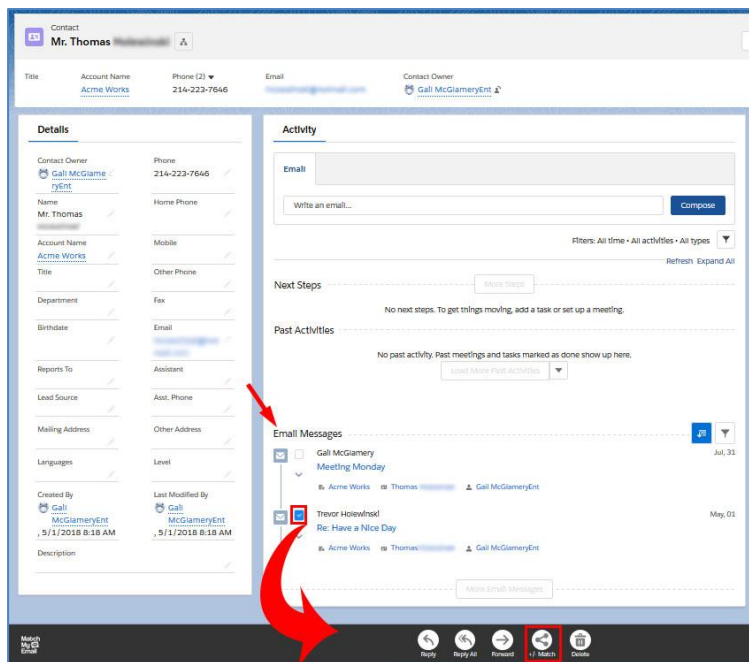


Thus, in the above screenshot, hovering over the match “Thomas “ brings up the details of the match. When clicking the Unmatch button, the system processes the request. Then, the line will refresh and show the remaining matches (screenshot below).

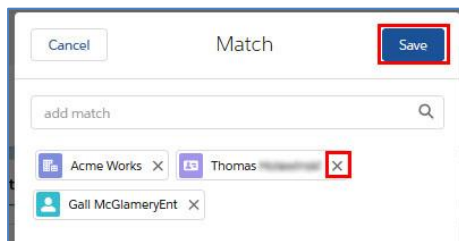
DATE ↓	SIZE	MATCHES
05:53 AM	1209K	No Match
Aug 27	24K	No Match
May 01	17K	Acme Works Gail McGlameryEnt
Jan 08	11K	No Match

8.2. To Unmatch from Salesforce record:

In the below example, from the Contact record scroll to find the Email Messages list. Check the box to the left of the message for which unmatching is desired. A black bar will appear at bottom with actions from which to choose. Click on the +/- Match button.

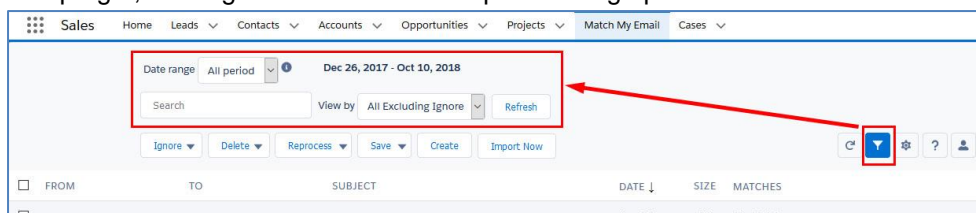


In the pop up window, click the X for the record to be unmatched, then click SAVE. The message will be removed from the Email Messages object for that record, but remain for other records.



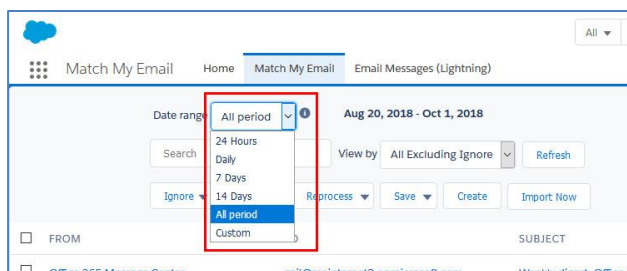
9. Filtering Email Cloud View

At top right, clicking the funnel icon will open filtering options above the command buttons.

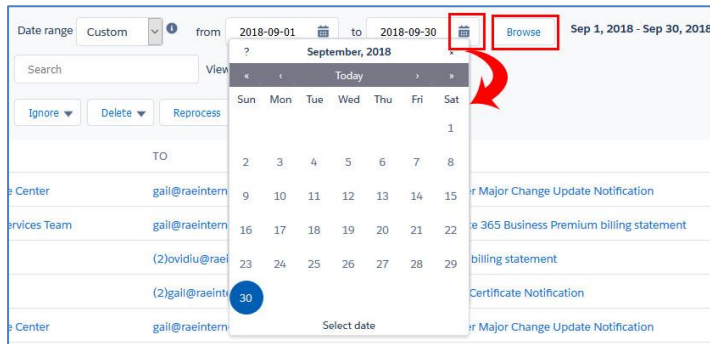


9.1. Date Range

The default date range is All period (which is 45 days by default in MME). The Users can change the date range to the last 24 hours, Daily, 7 Days, 14 Days or a Custom date range.



Choosing the Custom time period presents beginning and ending date fields with calendar icons. It is possible to type in the date, but they must be entered in the format of YYYY-MM-DD, thus it is easier to use the icons.



Clicking on the Calendar icon opens a calendar in which the user can select a date by toggling back and forward through the calendar months/years. Once the data range is selected the user clicks on the Browse button to show the messages in the selected date range.

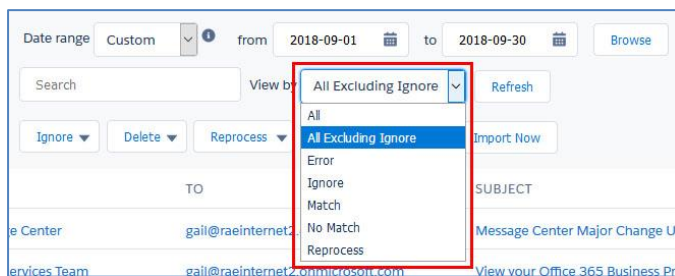
9.2. Search Options

In the Search box, User can type in phrase, email address, or name of interest and hit Enter, or click Refresh button to the right. To reset the cloud to default settings, delete what is in Search box and hit Enter or click Refresh again.

Please remember that the view of the Email Cloud contains, at a maximum, 45 days of email imported by User from selected folders.

9.3. View By

MME categorizes imported emails by their Match state. Shown in the far right Matches column, an email will be a No Match, or have a status of Match, Ignore, or Reprocess. The default view of the Email Cloud is "All Excluding Ignore". When a User creates Ignore rules, the status of message can be Ignore. The assumption is that a User would not want messages of Ignore status to clutter the view of email messages in the cloud.



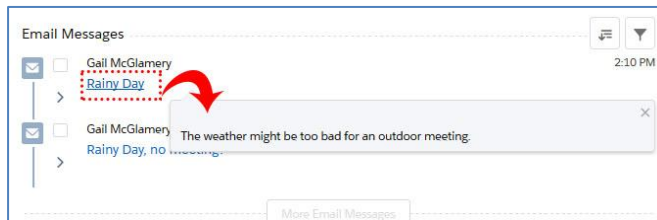
It is possible to adjust the 'View by' filter to show All email (in which the list will include Ignore status email), only No Match, only Ignore, only Match or other options as indicated in screenshot below. This filter option is available to all Users. After selecting a status, click Refresh to apply filter and table of email will change as desired. This is very useful if manual reprocessing is needed, as a User can filter to just matched email, or ignored email, so API calls for reprocessing are targeted to specific emails and used in the most efficient manner.

10. Helpful Tips working from Salesforce Records

The following are some helpful tips found in the Email Messages object.

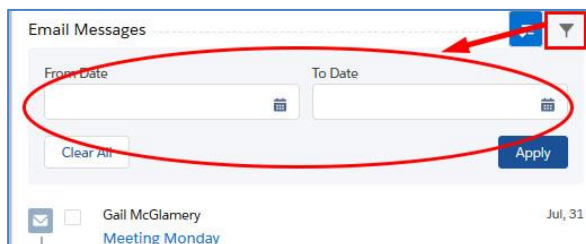
10.1. Hover Over Subject

Hover over the subject of any email message to get a reading window. If the body of the message is large, a scroll bar at the right of the window will allow scrolling. Clicking the subject will open a new screen with a detailed view of email including full header, body and link to attachments if also uploaded.



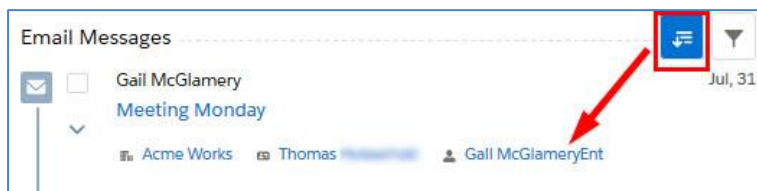
10.2. Filter Icon

Click the Filter Icon to expand the options to select dates. Then click the date icons to choose a start and stop date and click Apply. This will filter the matched emails for this record to the date range selected.



10.3. Show/Hide Details Icon

Click the Show/Hide Details icon to see full matching information about the message. To have a more compact view of emails, a User can click this icon to compress the information.

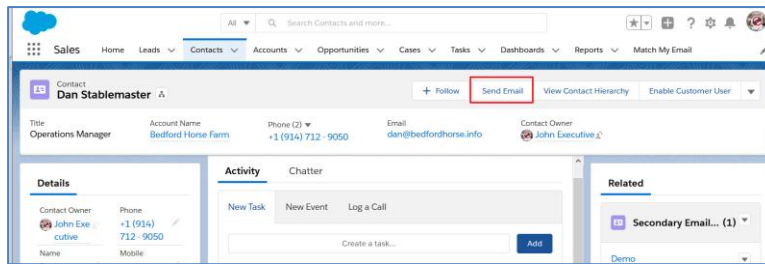


With Details expanded and all the matched records visible, clicking on any of those record names – which are links to those records – will take you to that record in SFDC.



10.4. Sending, Replying to, and Forwarding Emails within Salesforce

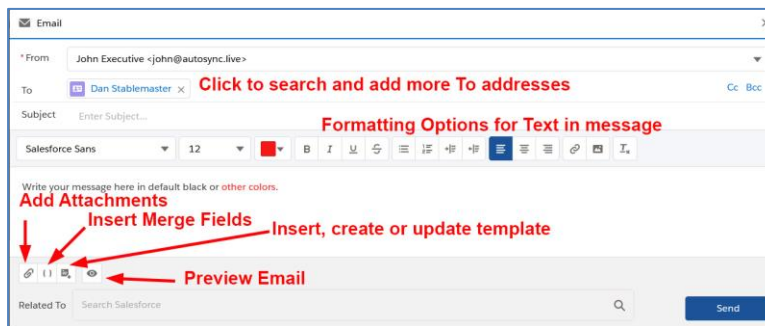
If a Salesforce Administrator has placed Match My Email's Send Email button on the page layout, Users can Send an original email from records such as a Contact or Lead. The button would appear at top right on a record as in screenshot example below.



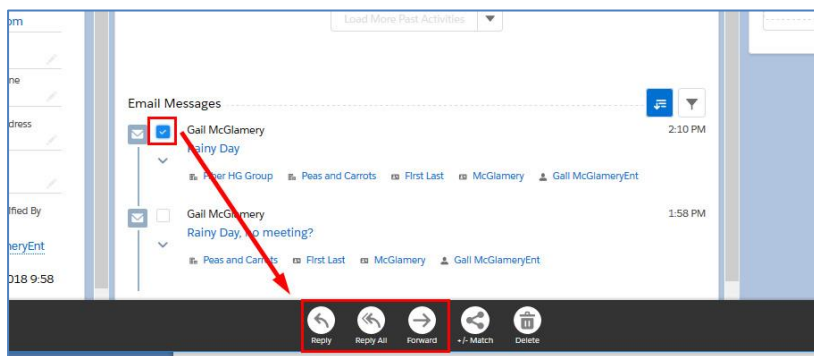
In the email composer, the From will autofill with Salesforce User. The To field will autofill with Lead or Contact. If more individuals should be sent the message, click into the white area to search for and find additional Leads, Contacts or Users.

If Send Email is clicked from the Account, Opportunity or Case, the Related To will autofill and the User will need to click into the To field to search for the appropriate individual in Salesforce to which to send the message.

The composer has formatting options for text, allows for adding attachments, inserting merge fields, making use of templates as well as the ability to Preview the Email before sending.



In order to Reply, Reply All or Forward, one must select a message from the Email Messages component. Clicking the box to the left of a message to select it will open a menu of actions toward the bottom of the screen. These options will continue the thread and allow the user to make use of the composer, as described above. Additional actions from within Salesforce of matching (7.3), unmatching (8.2) and deleting (5.2) are described elsewhere in guide.



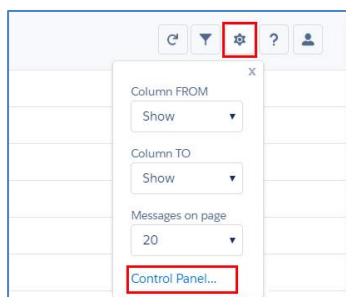
11. Save Command, Troubleshooting, and Support

The Save command exists as a mechanism for troubleshooting assistance. A user can save a particular email, or emails, by clicking the Check Box next to the emails in question and clicking the Save button. The emails will be saved in the location on the local computer where downloaded files normally reside. These email files can be attached to an email being sent to support@matchmyemail.com for viewing by support staff.

As a reminder, the ? icon in the Email Cloud view is a [link to our support page](#). From this page, you can go to Resources > Wiki. MME maintains a wiki for frequently asked questions and reference information. Free online support is available 8:00 a.m. to 5:00 p.m. Eastern U.S. time Monday through Friday. Emails should be sent to support@matchmyemail.com. Phone calls can be made to the number on our support page. Please do leave a message if we are busy with another customer and we will contact you back.

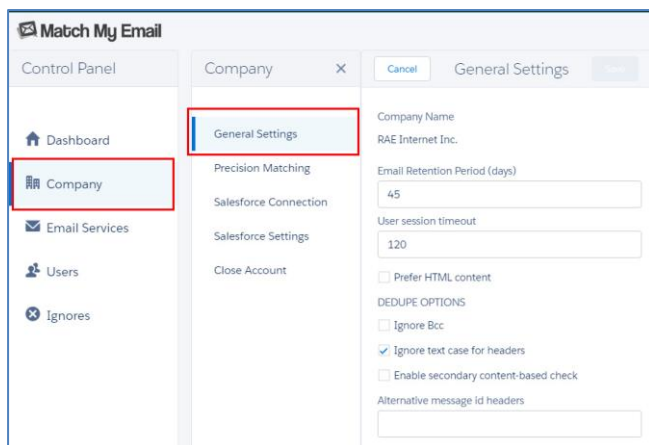
12. Helpful Settings for Account Administrators

Those that are administrators in the Match My Email account have access to the full suite of options in the Control Panel. Access to the Control Panel is through the Settings icon and then choosing Control Panel.



The master menu of the control panel allows an administrator to address Company-wide settings, manage Email Services, Activate/Deactivate Users, and add Ignore rules.

12.1. Company – General Settings



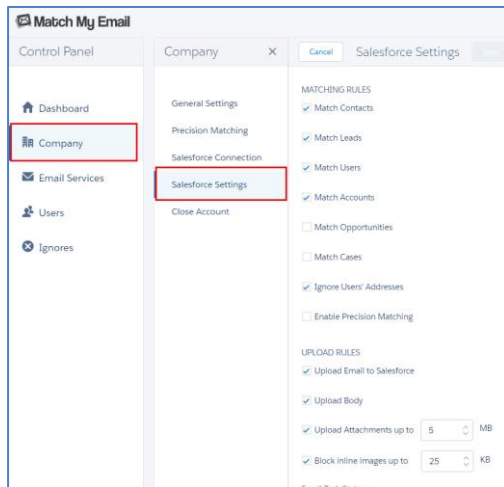
In General Settings, an Administrator can change the Email Retention period. This is the number of days emails will be held in the company's Match My Email - Email Cloud, whether they are matched or not. The maximum number of days is 45, but this can be reduced to any number of days down to the minimum required of at least 1 day.

The User session timeout is the number of minutes that a User can have a session open without any activity. After a Match My Email session times out, a User would simply need to sign in again. This setting does not affect background processing and is merely a convenience setting if Users visit the Email Cloud, move to another tab periodically, and then return to Email Cloud and want to remain signed in.

Prefer HTML content is an option that will instruct MME to prefer HTML content over text for email bodies. This option may be useful to support mailers that do not put all necessary data into text alternatives and improve the readability of matched messages in Salesforce.

Dedupe Options are modified with the help of MME support staff in the event that duplicate messages are reaching Salesforce and additional strategies are needed.

12.2. Company – Salesforce Settings



Matching Rules that are checked (enabled) instructs MME to use email addresses in the header of a message to match against email addresses in Salesforce to determine when a message is a match. The Ignore Users' Addresses option keeps matches from happening to Salesforce Users no matter the email domain and will ensure proper counting of messages for reports. Enable Precision Matching is a feature enabled only when custom rules have been deployed by MME support staff that look for tags in the body of an email message.

Upload Rules instruct MME how to upload data to Salesforce. Normally, the defaults shown will mean emails will be uploaded on match to Salesforce with their email body and attachments up to the MB limit. Attachments larger than this limit will not be uploaded and there may be limitations in Salesforce that do not allow MME to upload attachments larger than the default 5 MB. MME will also block inline images up to the limit set. Inline images are those that are added inline to the email and are typically signature images such as logos and social media icons. For more detail on Upload Rules [visit our wiki post on the topic](#).

12.3. Managing Users

As referenced in the appropriate Setup Guide found at <https://www.matchmyemail.com/support/> on the left under Setting up the App, Administrators can remotely activate Users for Match My Email. By clicking on Users, an Administrator can see which Salesforce Users are activated for Match My Email. This User list is generated from active Salesforce.com Users with a Salesforce License. (If you need to map other Community / Partner Users as Match My Email Users, please check the options under Company > Salesforce Settings > ADDITIONAL Users Types and Save.)

From the User list, Administrators can activate, deactivate, or change the permissions. Accounts with global email service established (not IMAP) allow Administrators to change folder selections for each User. Accounts with an IMAP email service require Administrators to obtain User email passwords if they want to complete full activation including selection of import folders. Otherwise, Administrators for IMAP connections can confirm an import and, as described in the [IMAP Set up Guide](#) section 12, followed by the User inputting their password.

12.4. Additional Administrative options

Email Services is the location where the connection to the company's email server is established. There can be more than one Email Service added.

Ignore rules are described in detail in section 4.0 above. In section 4.2 specifically, it describes how to create Ignore rules from the Control Panel view. For Administrators, they would have the option when creating a rule to choose to apply it to 'myself', meaning a personal ignore rule for them, or for 'all users' which creates a blanket ignore rule for all activated users.

13. Limitations

In Match My Email (MME):

MME Automatic Imports File Size Limit: There is a limit of 200 MB of emails imported per day per account into the Match My Email cloud. The daily import can be temporarily raised in increments of 200MB per day. If the limit is raised permanently, there is an extra monthly charge.

Message Size Limit: The message size limit is a default of 30 MB. This can be lowered by the MME Cloud Admin within account settings. Messages < 30MB are imported into MME cloud. If attachment is < 5MB (Salesforce limitation), it is uploaded into Salesforce with email by default (this Salesforce import limit can be reduced by Users or attachments can be excluded from Salesforce.com.) Attachments exceeding Salesforce limit are replaced with link to MME cloud where attachment is available for email retention period (default of 45 days but can be modified by MME Cloud Admin in Settings > Company), after which it is deleted.

MME Import Count Limit: One (1) import is available per MME License. Additional imports are offered for extra fees.

MME import timeout Limit: Each MME import has 110 seconds timeout. Next automatic import will pickup emails from last check point of each folder, if timeout occurred on previous import.

MME Legacy Imports Limits: Any folder that receives more than 1,000 'new' emails since last import is processed using a metering algorithm to avoid violating Salesforce daily processing limits. The metering algorithm is 25 emails every twenty-minute import cycle, 1,800 per day, and 54,000 per month per user. Legacy importing must be set up in coordination with MME support staff.

Limits in Salesforce that affect MME Operations:

Salesforce API Usage Limits: Salesforce limits an organization on total API calls within a 24 hour period. Minimum limits are established at 15,000 API calls for most editions, which is the number used in strategizing import operation for MME. [Click here for Salesforce.com reference page.](#)

Salesforce Limits on Custom Apps: Salesforce limits the number of custom apps available from the AppExchange based on the Organization Edition. [Click here for Salesforce.com reference page.](#)
*Please note: Grandfathered Group edition organizations had a limit of 1 installed app. New Group edition organizations are no longer offered by Salesforce.

Salesforce File Size Limit: [File size and sharing limits in Salesforce](#) may impact Match My Email's ability to upload attachments into Salesforce. Initially, the maximum Salesforce attachment upload limit is 5 MB but may be larger than that for some organizations. Match My Email has an attachment upload limit of 30MB. If the size of an attachment uploaded to Match My Email exceeds a user's Salesforce attachment upload limit, Match My Email uploads the attachment name, but not its contents.

Salesforce Data & File Storage Limit: Salesforce provides a standard amount of 10GB of Data Storage (+ incremental increases per users) and 10 of File Storage (+ incremental increases per User license). [Click here for Salesforce.com reference page.](#) Match My Email uploads emails as Data Storage but will upload email attachments as File Storage.

Salesforce Custom Limits: Salesforce limits the number of custom objects, custom tabs, custom fields per objects and other aspects of customization. Custom objects and custom tabs limits can affect MME deployment.

14. Master Services Agreement

Contact Match My Email support for a PDF of the Master Services Agreement or click on <http://www.matchmyemail.com/legal/>

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