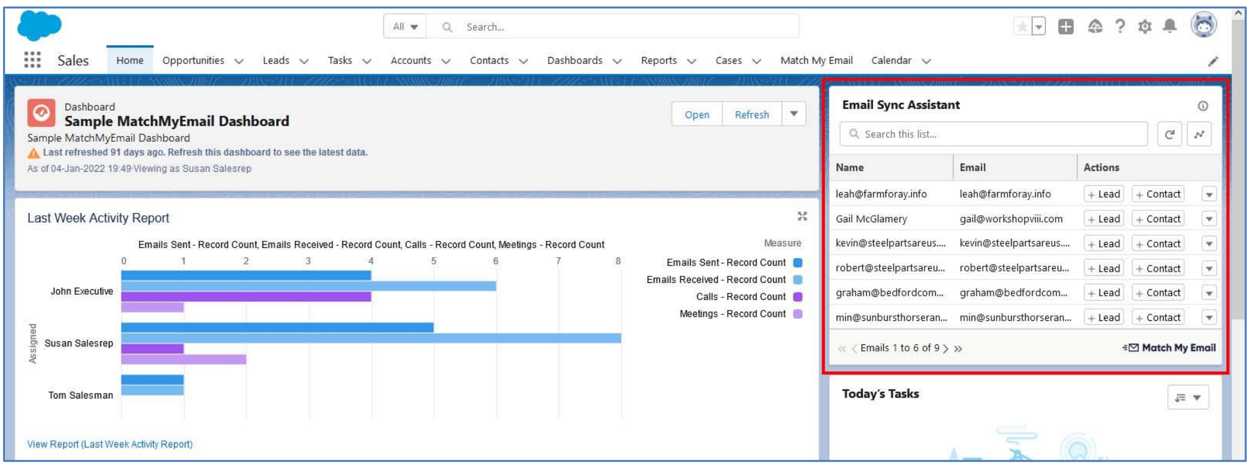
Using the Email Sync Assistant

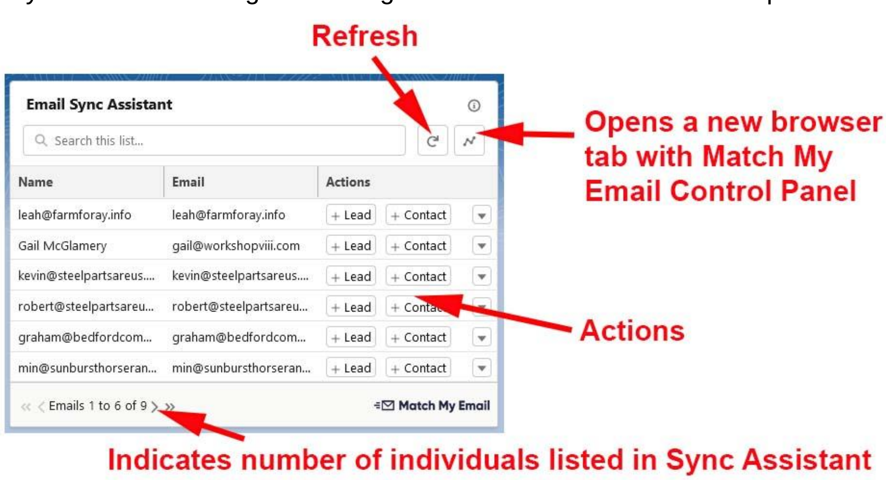
The Email Sync Assistant will present a list of individuals to which Match My Email has not made a match. The addresses come from email messages in the Email Cloud. In most cases, the status of the message to or from the individual was a No Match. However, if an email is sent to three individuals and two match, the third individual's name will show up in the list.

Previously, Users needed to sign into the Email Cloud to view messages and create new Leads and Contacts or ignore rules. The Email Sync Assistant brings the identities of unmatched individuals into Salesforce to make it easier for Users to accomplish these tasks and ensure their Salesforce database is as complete as possible.

The Email Sync Assistant component is installed with the managed package into Salesforce by a System Administrator. Setup guides, or an Upgrade Guide, provide steps on how to place the component on the Home page, which is our recommendation. By placing it prominently, it makes it easier for Users to see the component and make use of the feature.

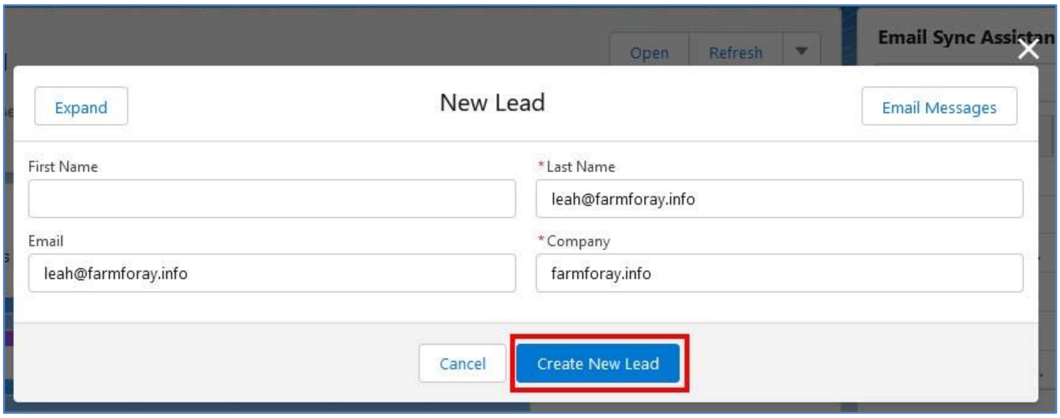


Taking a closer look at the component, it is possible to create a Lead, create a Contact for an existing account, create a Contact and a new Account, create an Ignore rule for the email address or dismiss the listing for later consideration. A User can refresh the list or quickly jump to the Control Panel to check the Ignore list. There is a search option if needed and the ability to advance through the listings when there is more than the space allows on the first screen.



1. Creating a Lead

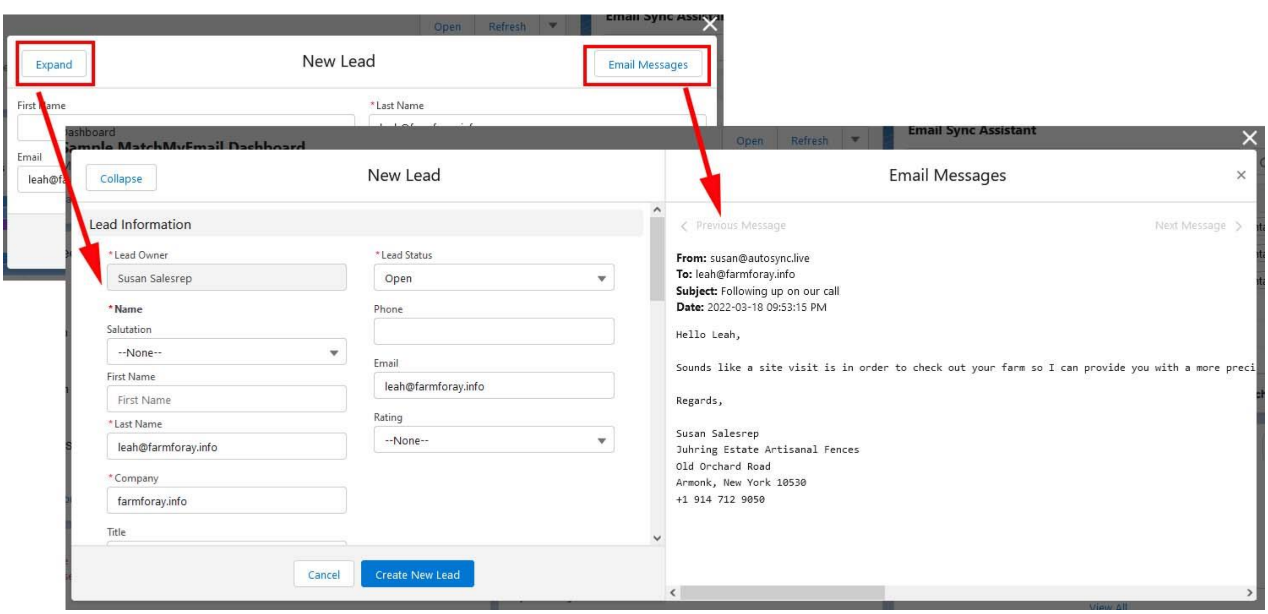
To add someone as a Lead, click + Lead button. You will see a collapsed view of fields. Fields that are required by Salesforce as well as those required by the Salesforce System Administrator will appear in this view. (More about requiring fields in Section 6).



Confirm that the email address is filled in to ensure any No Match message in the Email Cloud will get matched to the new record upon automatic reprocessing. If you are content with the data in these few fields, you can click Create New Lead.

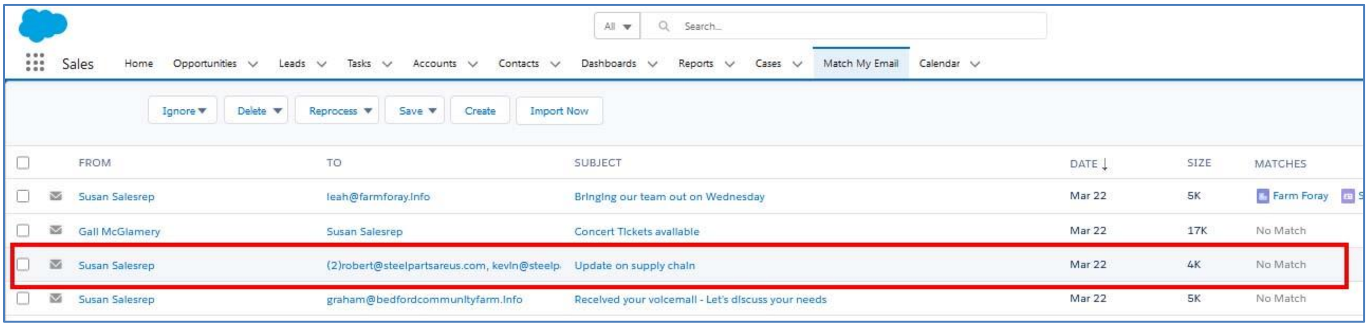
You will notice in the above example that the First Name and Last Name are not specified. If a customer or contact of yours has not created a display name in their email client, then Match My Email does not have the correct data to know these two names. We then put the email address in the Last Name field and leave the First Name blank. You can always correct this before creating the new Lead or do so at a later date. When someone has created a display name, the correct First Name and Last Name will be assigned.

If you want to fill in information beyond the fields in this view, click the Expand button at the top left. This expands the form to show all fields present in the page layout for this Lead. You can scroll to view those fields. (More on customizing what fields show upon Expand in Section 7). You can also click Email Message on the top right, and a side-by-side view of the email will appear. This provides you with the data you can drag/drop, copy/paste, or just type to enter in the form.

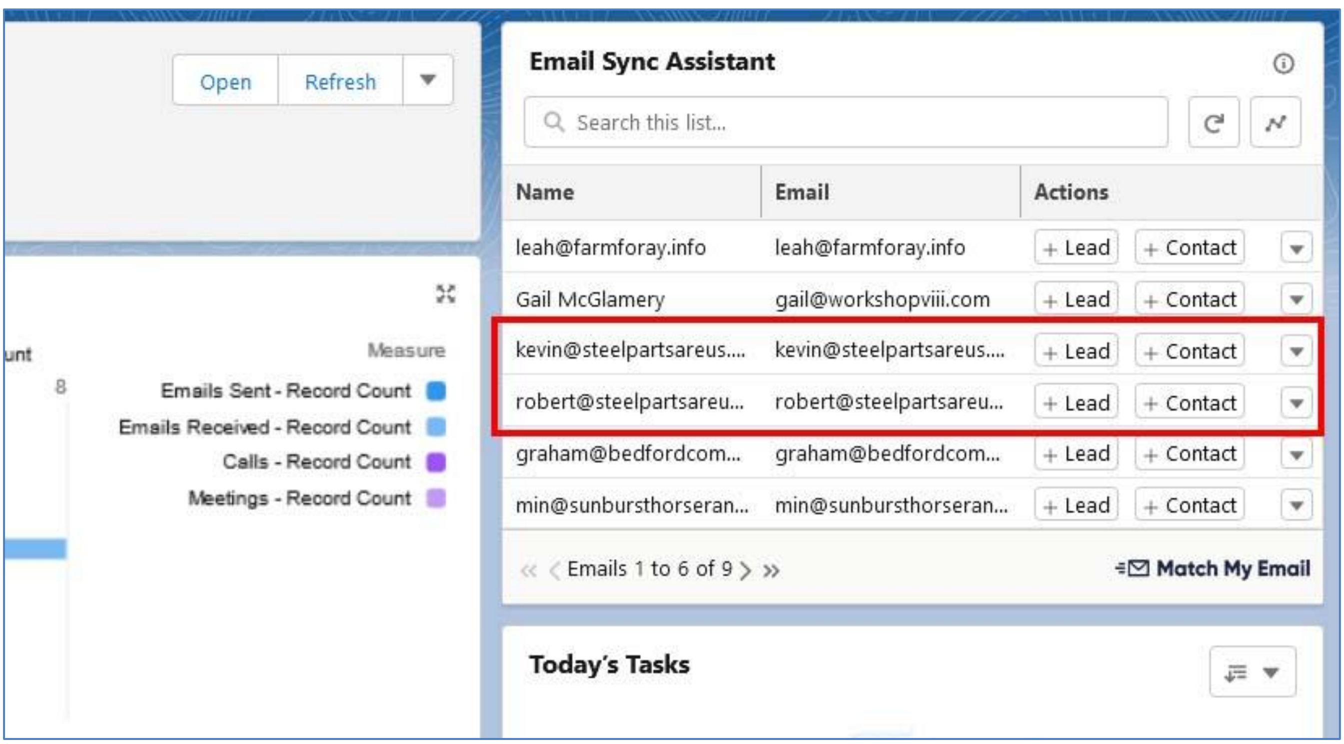


2. Creating a Contact and a new Account

When someone appears in the list that represents a new person and new company, you can create both a new Contact and new Account easily. As an example, we will focus on a message that was sent to two people at the same company, Kevin and Robert, at the company Steel Parts Are Us. You can see below in the Email Cloud view there are two email addresses in the To column and the status is No Match.

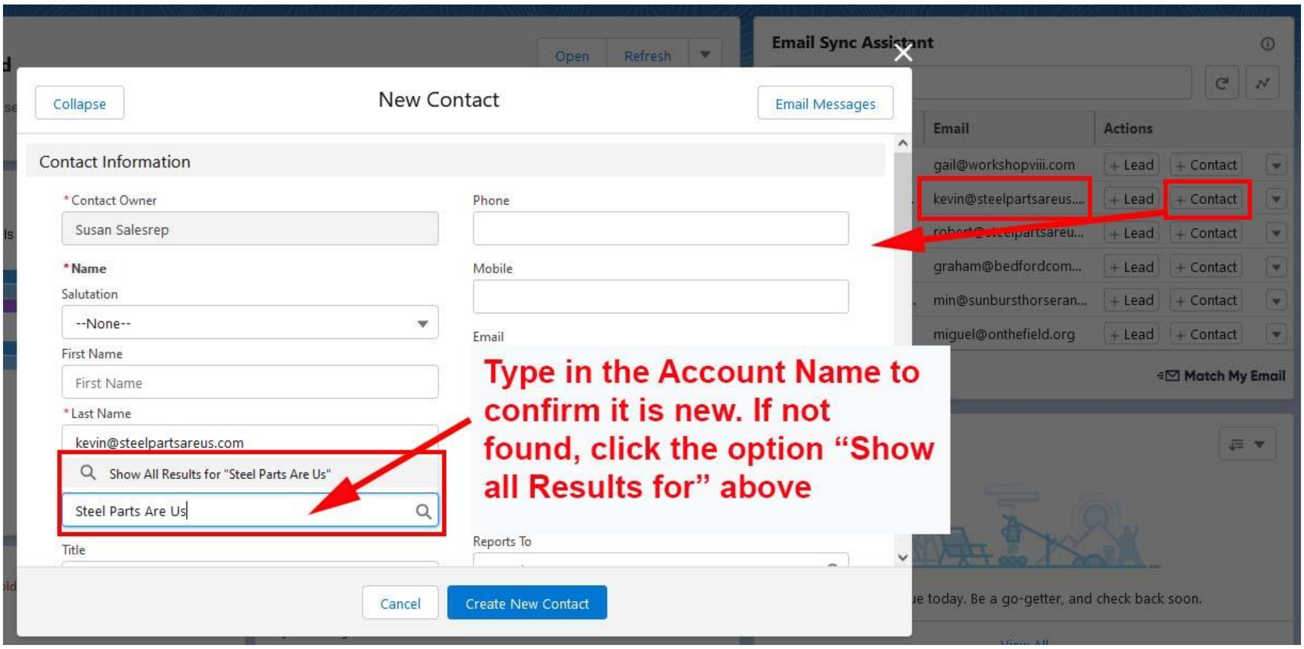


Since neither email address resulted in a match, the Email Sync Assistance is showing both individuals in the list.

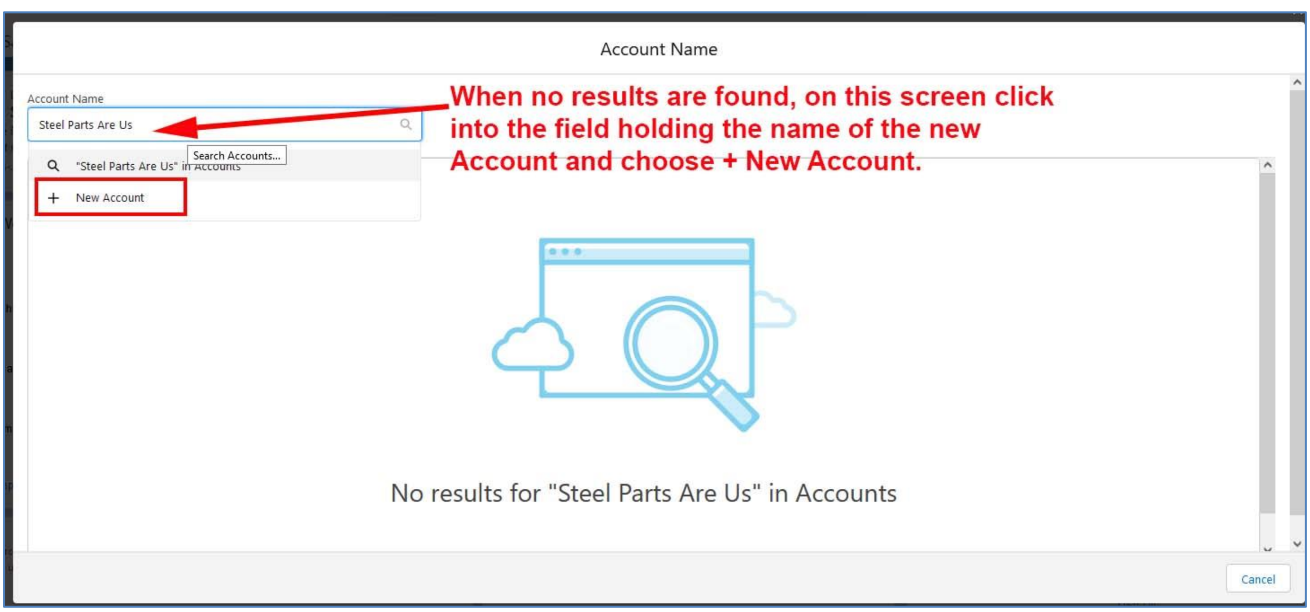


To create a Contact for Kevin first, click the +Contact button. You will initially see a collapsed view of fields but can click Expand to reveal more fields as described for Leads above. If Match My Email finds a Contact record for an Account with the same email domain, it would determine an Account already existed and auto-fill in the name. However, since in this example this was not the case, it is necessary to type in the Account name in the field.

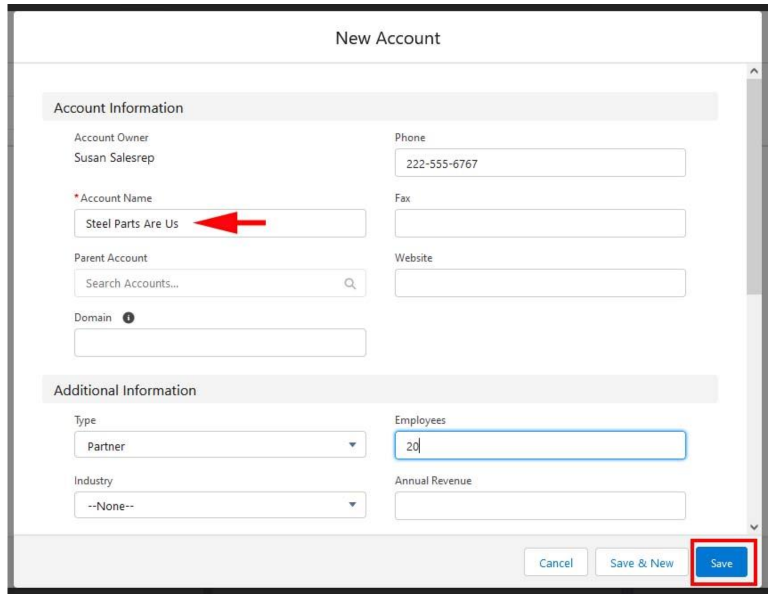
When it is not found, above the field is an option to Show All Results for the entered Account name. Click this option.



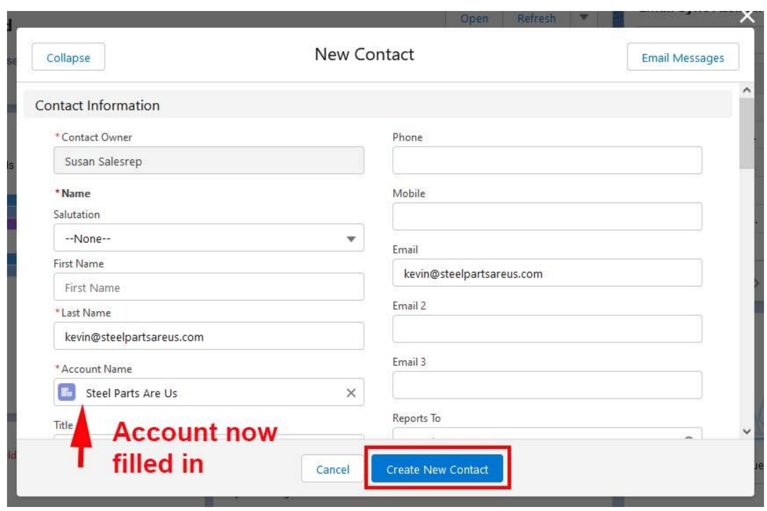
The next window will reinforce the fact that there are no results found for this Account in Salesforce. By clicking into the Account Name field as indicated in screenshot below, you then have an option for +New Account. Click here.



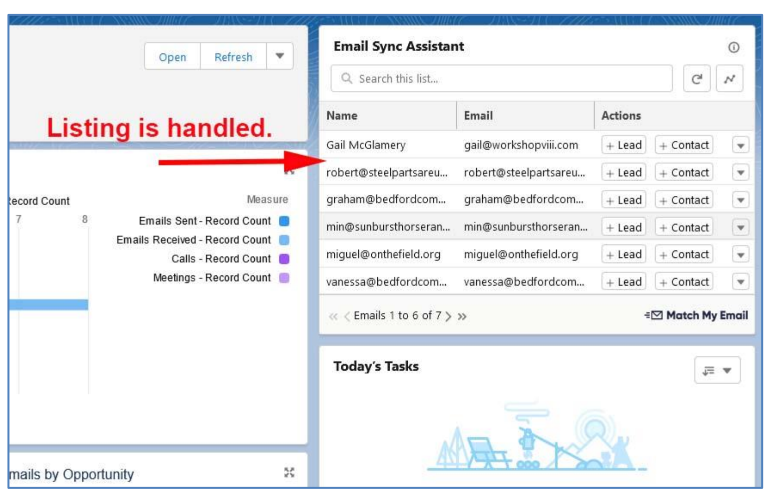
Fill in the fields as desired for the New Account. You can use the scroll bar to move down the list. Click Save.



Immediately, you return to the New Contact window. The Account name will be filled in. Complete filling in fields as desired and click Create New Contact.

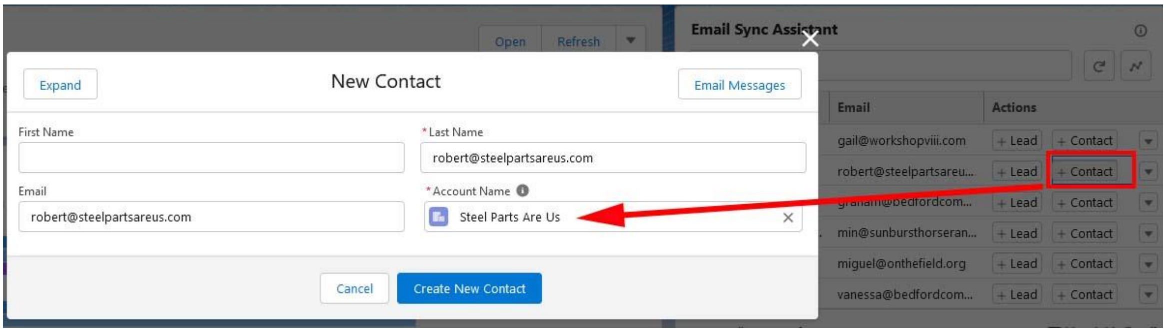


Returning to the Home Page, you can see in the Email Sync Assistant the listing for Kevin is no longer there.



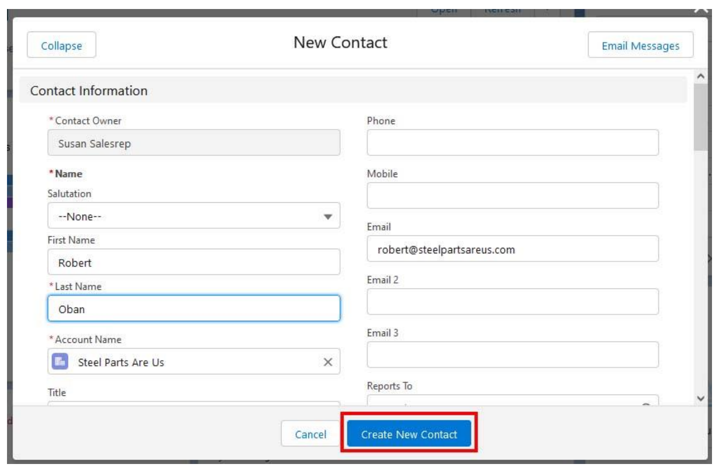
3. Creating a Contact for an existing Account

If we return to our example, we still have a second person showing in the Email Sync Assistant that needs to be added as a Contact. For the listing for Robert, click the +Contact button. Again, we get the New Contact form. The below screenshot shows what it would look like in the collapsed form view. Because Match My Email is detecting there is already a contact with the same email domain (the one we just created for Kevin), it anticipates this Contact will belong to the same Account and auto-fills that value.

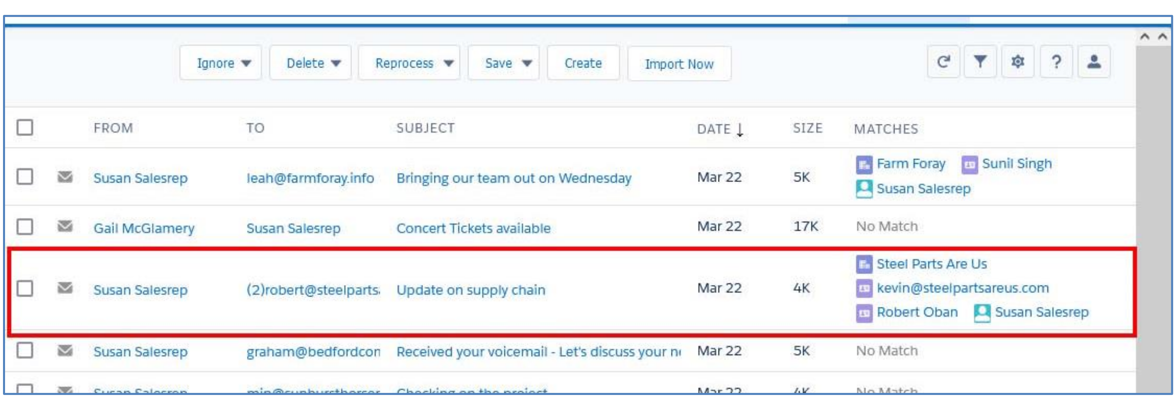


Again, it is possible to expand the form. As described above for Lead creation, if this individual has not established a Display Name in their own email client, only the email address would be available to Match My Email. In that case, the address would fill in as the Last Name.

In screenshot to the right, we show it is possible to type in the First Name and Last Name if they are not automatically coming over through a Display Name.

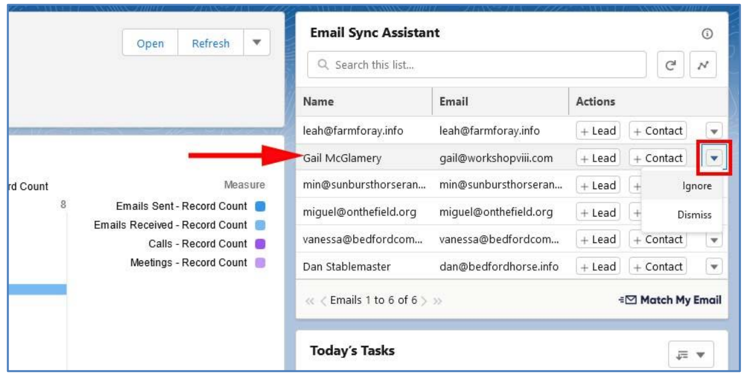


When Create New Contact is clicked, it will create the Contact on the existing Account record. Robert will be removed from the Email Sync Assistant. Within 20 (twenty) minutes, the auto-reprocess of the No Match message in the Email Cloud will result in the message being matched to both Contacts as shown in the below screenshot.

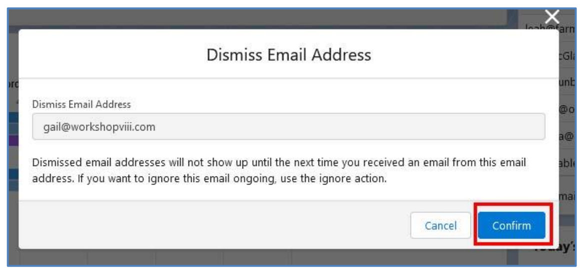


4. Using the Dismiss Option

For a listing in which you want to defer a decision, you can use the Dismiss option. Click the caret button and click on the Dismiss option.

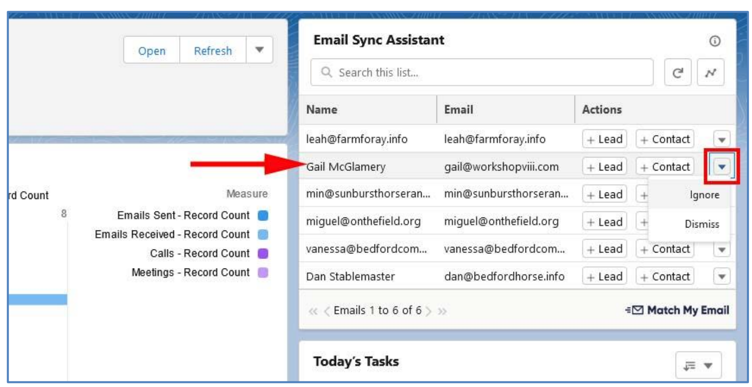


In the pop-up window, we will display the email address on which you are deferring action. As is stated in the help text, this individual will not show up again in the Email Sync Assistant until you receive another email from this person. At that time, you can dismiss again, or perhaps choose to go ahead and create an Ignore rule, which is mentioned in the next section.

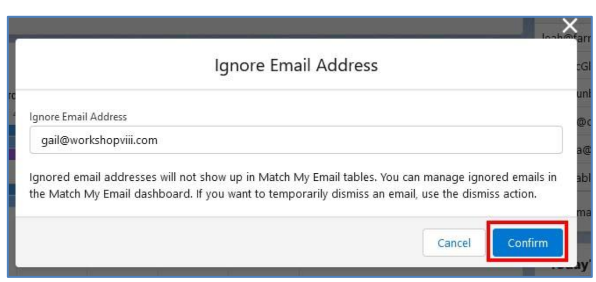


5. Creating an Ignore Rule

If the individual is someone you will never want to match into Salesforce, you can create an ignore rule. As above, you would click the caret and choose Ignore.



In the pop-up window, we will display the email address for which you are creating an ignore rule. Ignore rules tell our system to ignore matching to a particular record. The ignore type given is "skip email address" in any direction and it will apply only to the User taking action in the Email Sync Assistant.

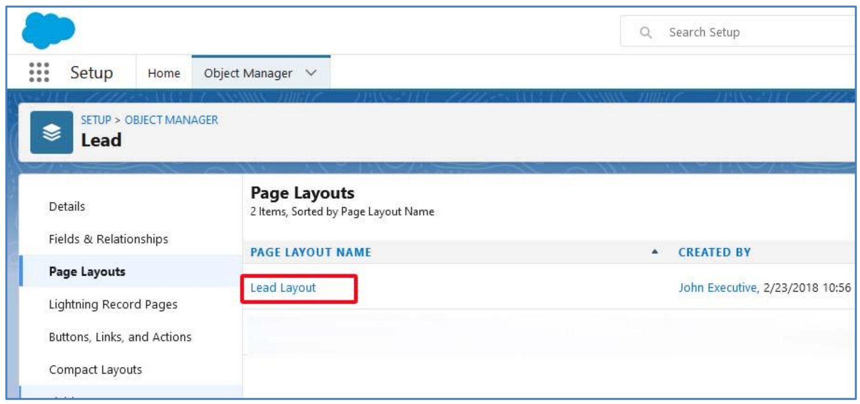


To view or modify ignore rules, such as changing the Ignore Type or the scope of the ignore to include all Users (Admins only), you can click into the button that opens a new browser tab in the Match My Email Control Panel. This can be found by referencing the map of the Email Sync Assistant on page 1.

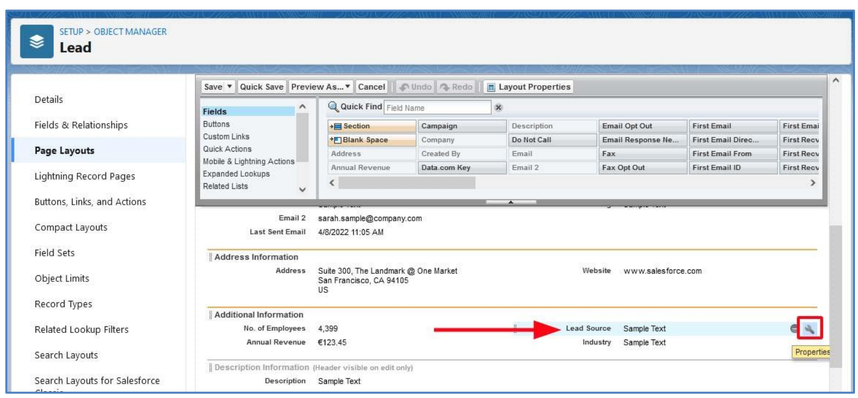
6. Requiring Fields for Collapsed form

If you want to require certain fields to be completed when a record is created, you can designate those fields as required in Salesforce. Those fields will appear on both he Collapsed and Expanded form for the Email Sync Assistant.

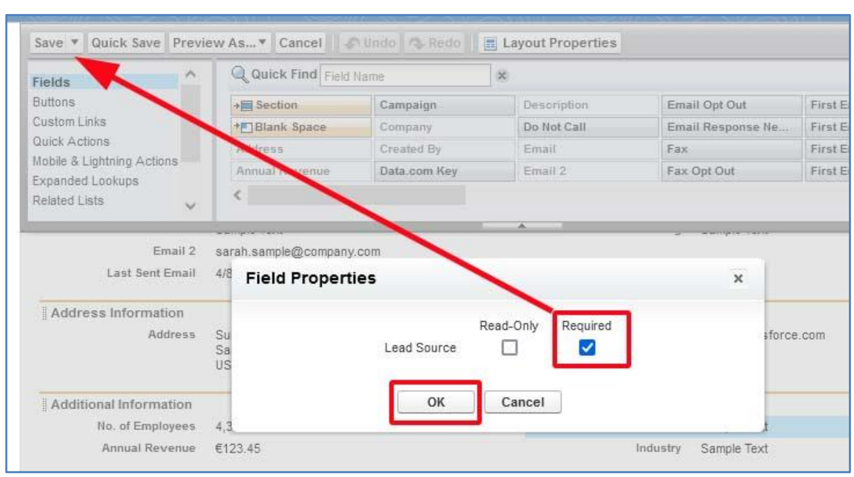
To illustrate, let's say we want to require Users to fill in the Lead Source field when they create a new Lead. The first step is to make sure the field is required for Users based on their Salesforce profile. Navigate to Salesforce > Setup > Object Manager > Lead > Page Layouts > Lead Layout.



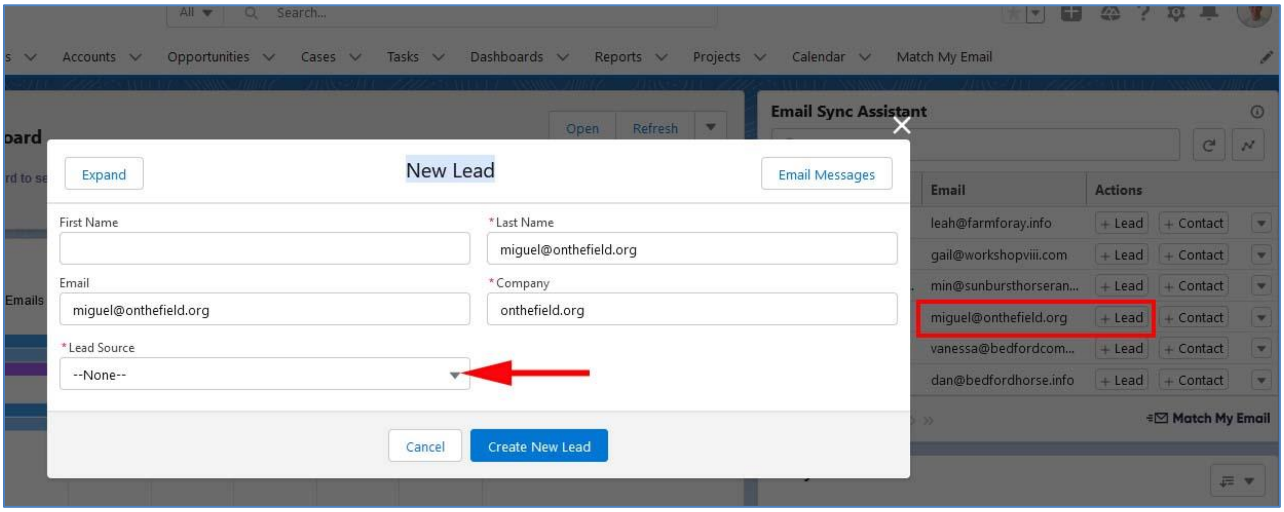
Scroll down to find the field that you want to require. Hover over the field, in this example Lead Source, and click the wrench tool that appears to open field Properties.



In the window, check the box for Required and Save the change. Save the change to the Page Layout using top left Save button.



Now, from the Email Sync Assistant if one then uses the +Lead, in this example it is for Miguel, the New Lead collapsed form will now include this newly required field.

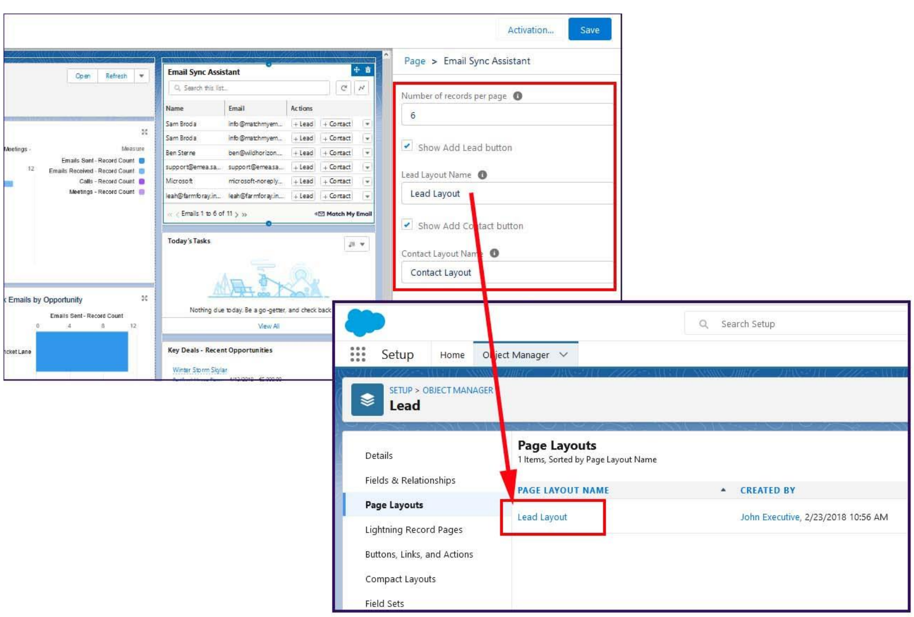


7. Customizing aspects of the Email Sync Assistant

When viewing records in the Email Sync Assistant, the default number of rows is 6. This can be changed when editing the home page. When on the Home Page, click the Salesforce Settings icon and choose Edit Page. Click on the Email Sync Assistant component to view details about this component in the right side bar.

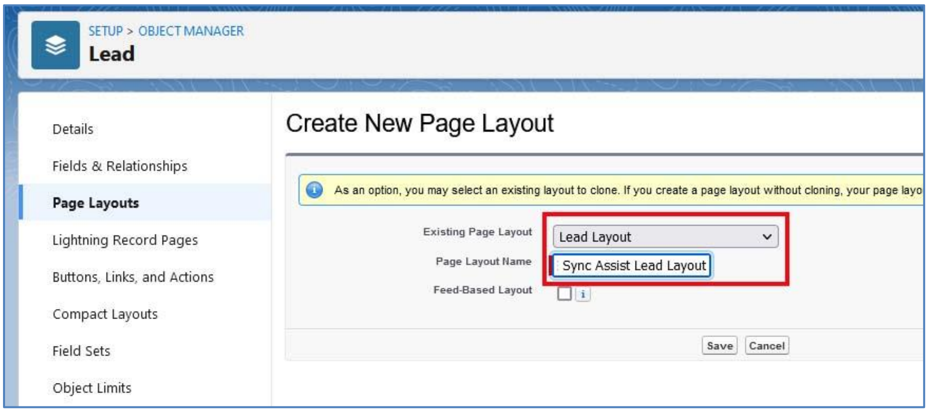
Here, it is possible to change the number of records showing, whether you want the +Lead or +Contact button showing, and the object's layout page that is used when expanding the entry form.

The page layout name entered in the Email Sync Assistant is the page layout used when displaying all the fields in the Expanded form that can be filled out. In the above screenshot, the layout referenced is "Lead Layout". Below, if we navigate to Salesforce > Setup > Object Manager > Lead > Page Layout, it is clear this is the name of the Lead Layout available, in this case the only one.

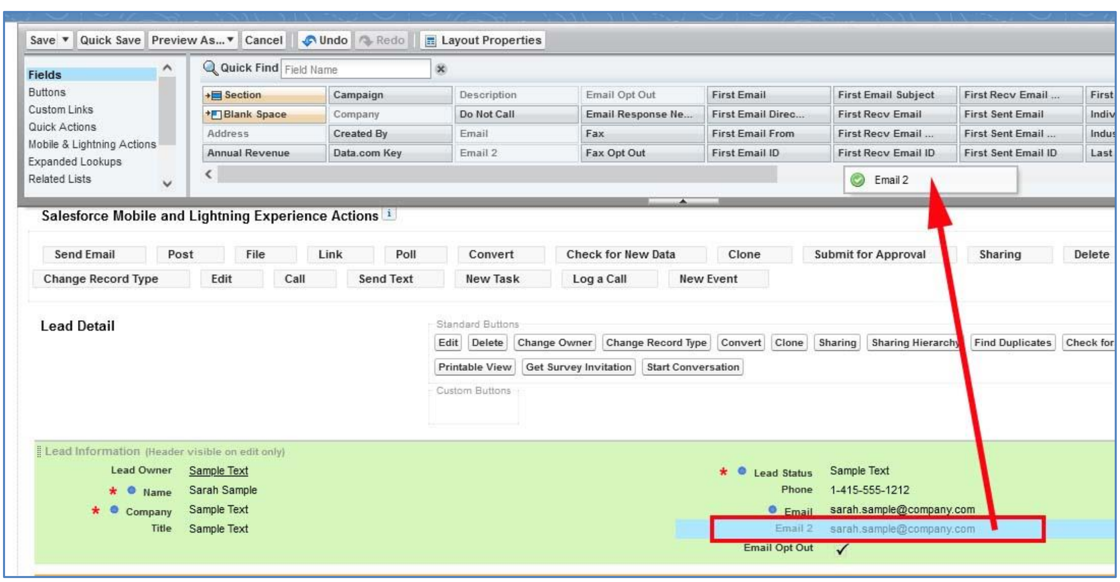


If this layout contains many fields, it may be beneficial to create a page layout specifically for the Email Sync Assistant that will display more fields than would be required in the Collapsed Form but less than are available on the full Lead record page.

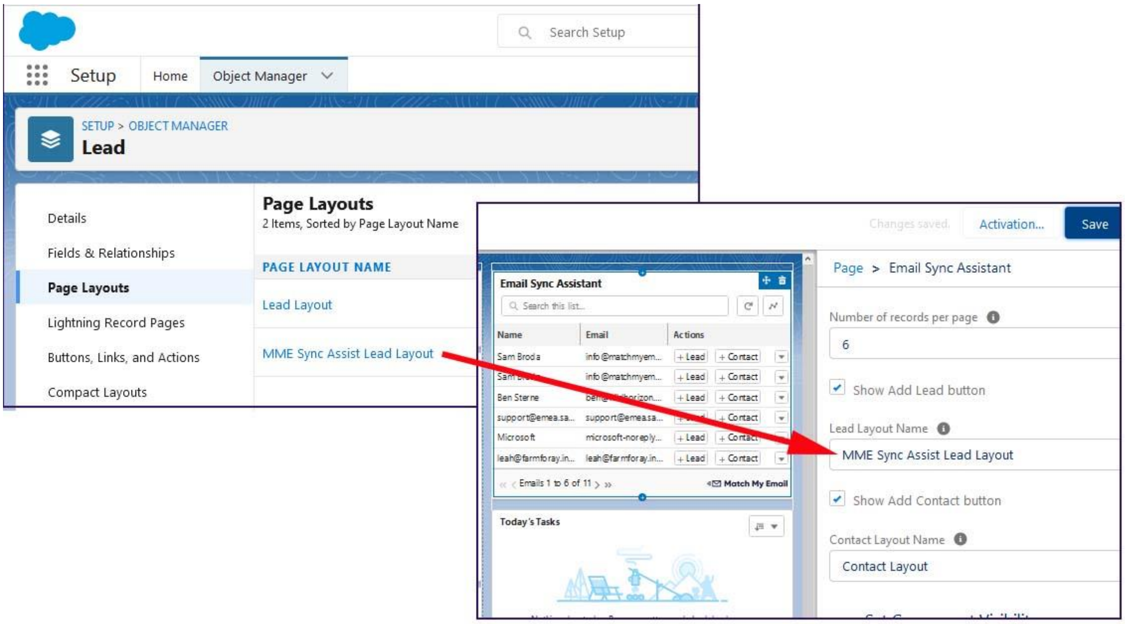
When on the Object Manager > Lead > Page Layouts screen, click New at top left. To make it easier, you can use the Lead Layout page as the Existing page you want to clone. For Page Layout Name, you may want to provide a descriptive name to indicate this is specifically for the Email Sync Assistant. In this example, we are calling it the MME Sync Assist Lead Layout. Click Save.



You can then edit the page as desired. In this example, we are scrolling down to the fields showing on the page, clicking and dragging them up to the top to remove them. When you have the desired fields and sections available for the Expanded New Lead form, click Save at the top left.



You want to then highlight and copy the name of this special page layout. Navigate to the Home Page, edit the page, select the Email Sync Assistant component, and paste the name into the field for Lead Layout Name. Save the change.



Now, when choosing to create a new Lead from the Sync Assistant, if you expand the form you have a more concise number of fields into which to enter data.

