

User Roles & Adding Domains & Users

1. MME User Roles

During the set-up of Match My Email, a MME account is created. That account is for the company, set up by an individual that has administrative privileges within the company's Salesforce.com account. The individual whose credentials are used becomes the "Account Owner". This Account Owner may or may not be someone who wants to have emails imported from their own communication. The Account Owner does need to be associated with an email account that is monitored by someone in the company.

The Account Owner uses an email address as their username, but creates a secure (or complex) password. This complies with Salesforce.com requirements that account owners of third party applications use a strong or complex password. Other users, once added, can log in to MME with their email username and email password. It is only the Account Owner that has this unique complex password for logging in to MME.

In addition to the Account Owner, within MME users can be designated as Domain Admins or End Users. The type of user dictates what entitlements or abilities those users have as presented in the diagram below.

Account Owner	Domain Admin	Individual End User	Ability To:
✓	✓	✓	Log-in
✓	✓	✓	Control Salesforce and email credentials
✓	✓	✓	Select email Folders to import
✓	✓	✓	Import email from designated Folders
✓	✓	✓	View and act upon his or her own email stream
✓	✓	✓	Control 'Ignore' list of personal emails
✓	✓	✓	Full-text search of all emails and attachments
✓	✓	✓	Assign or re-assign email to specific accounts
✓	✓	✓	Create RSS feeds to Chatter, browsers and mobile devices
✓	✓		View and act upon imported email stream for entire domain
✓	✓		Control 'Ignore' list for entire domain
✓	✓		Add /delete end-users in controlled domain(s);
✓	✓		Control all domain-side settings
✓			Manage Match My Email account
✓			Add/delete domains
✓			Add/delete/assign domain admins

These different types of user-ship allow different levels of privacy controls. End Users can only see their email communication when viewing Salesforce objects or the MME cloud. Domain Admins can see all email communication within their domain. The Account Owner (there is only one) can view the entire email stream related to all users in the MME account (within the MME Web Tab in Salesforce.com).

It is important to note that passwords are not visible to anyone other than the individual. This is also true of MME support staff, who do not have access to passwords or credentials. Therefore, it is important for the Account Owner to remember the complex password they set for the MME account. Otherwise, they can use the Reset Password feature which will require access to the email account associated with the Account Owner to perform a reset.

2. Adding a Domain (Account Owner only)

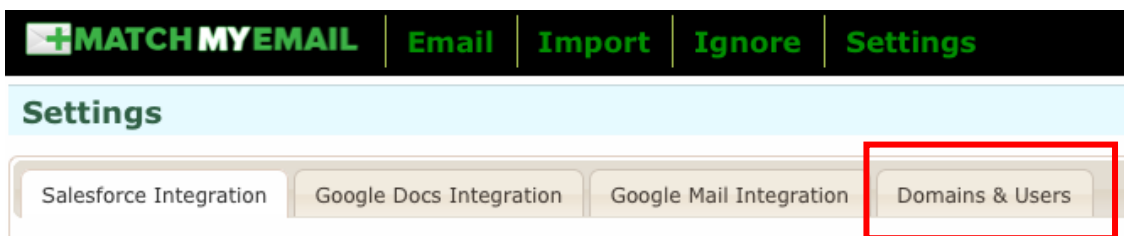
When an MME account is set up, importing is typically though not always set up for the Account Owner. In order to have emails of other company employees processed by MME, a domain and additional users needs to be added to MME account. Only the Account Owner can add users, logging into MME with their email address and the complex password. For this reason, only the Account Owner will be able to view the Domains & Users tab on the Settings page. (**If a MME user cannot see the Domains & Users tab, it means they are not the Account Owner.)

Account Owner can set up as many as 10 email domains for email import.

- 2.1.** In Salesforce, Click the Match My Email webtab. In the black MME Command Ribbon, go to Settings



- 2.2.** Open “Domains & Users” tab



2.3. Click on “Add Domain”

The screenshot shows the Match My Email interface. At the top, there's a navigation bar with 'MATCH MY EMAIL' and links for 'Email', 'Import', 'Ignore', and 'Settings'. The user is logged in as 'demoexec@demo.matchmyemail.com'. The 'Settings' page has tabs for 'Salesforce Integration', 'Google Docs Integration', 'Google Mail Integration', and 'Domains & Users'. The 'Domains & Users' tab is active, showing the configuration for 'demo.matchmyemail.com'. The 'IMAP server host' is 'demo.matchmyemail.c', 'Connection' is 'Regular', and 'port' is '143'. 'To authenticate use' is set to 'full email address'. 'Allow end-user to import from' has 'This IMAP server' checked. A red box highlights the 'ADD DOMAIN' button at the bottom left.

2.4. Fill in “Add domain” pop-up per following guidance.

The 'Add domain' pop-up form has the following fields highlighted with red boxes: 'Domain', 'IMAP server host', 'Connection' (set to 'Secure to dedicated port (TLS)'), 'port' (set to '993'), 'To authenticate use' (set to 'full email address'), 'Allow end-user to import from' (with 'This IMAP server' checked), and the 'Submit' button.

- For **Domain**: This is the domain of the email addresses from which importing will occur. For example, if the company has employee emails as employee@acmecompany.com then the domain would be entered as "acmecompany.com" without the "@" symbol.
- For **IMAP server host**: the IMAP address of the email domain. For example, "imap.companyname.com" is a typical address. Depending on where email is hosted, the following may provide some guidance:
 - Microsoft Exchange Mail Server type "exchange.hostname/IP"
 - Yahoo Mail Server type "imap-ssl.mail.yahoo.com"
 - Gmail/Google Apps Server type "imap.gmail.com"
 - Rackspace Mail Server type "secure.emailsrvr.com"
 - Go Daddy type "imap.secureserver.net"
- For **Connection**: Choose "Secure to dedicated port (TLS)" and fill in the Port number as "993". In some instances, if it is not a secure port connection, the other options provided in drop down menus can be selected.
- For **To authenticate use**: Choose either "full email address" or "username only" based on the following guidance for email hosts. "Full

email address” works with most LDAP directories while “username only” is typical of an Active Directory associated with an Exchange server.

- Microsoft Exchange Mail Server choose Full email address
- Yahoo Mail Server choose Full email address
- Gmail/Google Apps Server choose Full email address
- Rackspace Mail Server choose Username only
- Go Daddy choose Full email address
- For **Allow End-user to Import From**: check boxes for both “This IMAP server” and “Other IMAP server”. “This IMAP server” restricts end-user to importing from the designated email domain. By checking “Other IMAP server” enables imports from any IMAP server.
- Click “Submit”

3. Adding Users (Account Owner, Domain Admin in controlled domain)

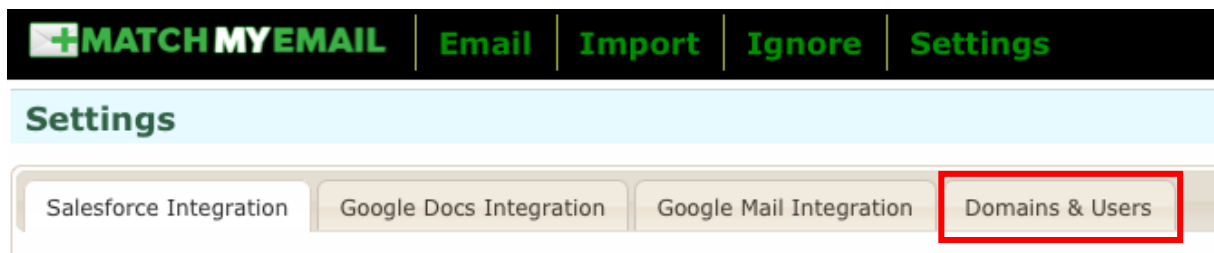
Each user is a paying “Seat” for MME. The Account Owner can add users and designate them as Domain Admins or End Users. To do so, the Account Owner logs in to MME with their email address and the complex password. A user that is designated as a Domain Admin may add users within their controlled domain.

For these reasons, only the Account Owner and Domain Admins will be able to view the Domains & Users tab on the Settings page. (**If a MME user cannot see the Domains & Users tab, it means they are classified as an End-User.)

- 3.1.** In Salesforce, Click the Match My Email webtab. In the black MME Command Ribbon, go to Settings

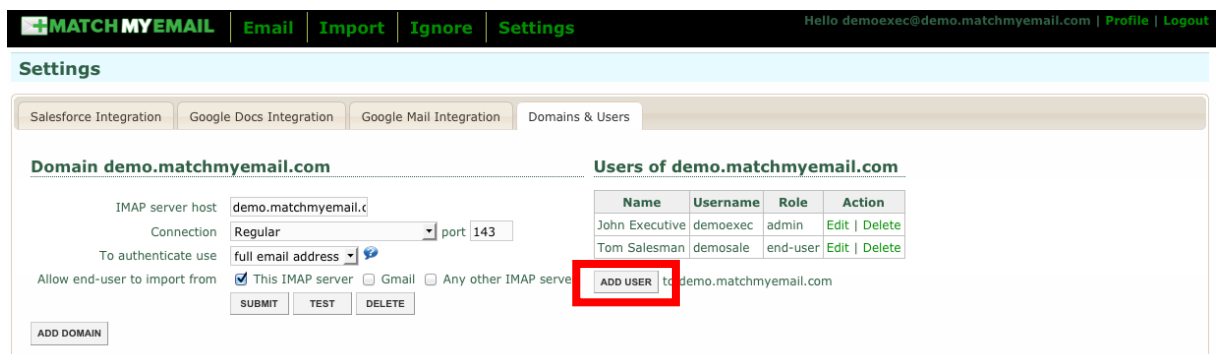


- 3.2.** Open “Domains & Users” tab

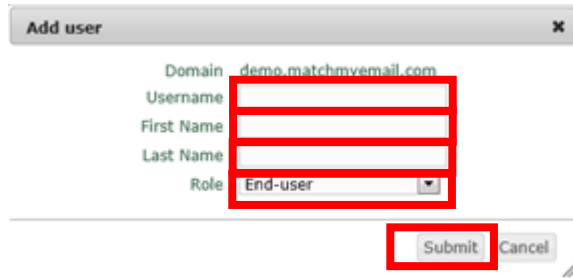


The screenshot below shows an example. A domain is listed on the left – and users within that domain are on the right. It is important to note the Role each user has, as that pertains to what level of email communication they will be able to view. As stated previously, End Users can see only their emails when viewing Salesforce objects. Domain Admins can view all emails incoming and outgoing from emails within that domain. The Account Owner can see emails for the entire MME account, which may include up to 10 domains and associated users.

3.3. Click on “Add User”.



3.4. Fill in “Add User” pop-up per following guidance.



- For **Username**: It will be either “full email address” or “username only” depending on how your IMAP, LDAP or Active Directory is configured. Check the ‘To authenticate use’ field for the domain or see section 2.4.
- For **First Name** and **Last Name**: Simply type in the user’s information that is being added.
- For **Role**: Choose a role in the dropdown list. An “End-User” can only see their email in the Match My Email Email Tab; while “Admins” can see all the emails imported into Match My Email by all users in the domain group.
- Click “Submit”.

3.5. Considerations for newly added Domain Admins & End Users

Once added as a user, either in the role of Domain Admin or End User, an employee can log in to the company's Match My Email account with their email address and email password. It is only the Account Owner that has a complex password for logging in to the MME account.

Being added to the account provides users with access to the MME account but does not mean they will be able to import yet. Newly added users will need to follow the steps in the End User Quick Set-Up Guide to enable Salesforce Authentication and Folder Importing.

Match My Email allows each user to import from up to five email addresses. To add these email accounts, a user would go to the Import tab and click "+New" and follow the steps in End User Quick Set-Up Guide-Section 2: Setting Up Email Imports.

New users may also want to add the Email Messages and Match My Email web tabs to their Salesforce Account as are documented in the MultiMatch Set up Guides for Salesforce editions - Section 2.

All guides can be found at <http://www.matchmyemail.com/support/>.

For assistance or for questions, users may contact support@matchmyemail.com.