User Roles & Adding Domains & Users

To Add a User to Match My Email:

1. Cloud Admin adds an email domain to which the User will be added, unless it already exists. By “domain”, we mean the email domain for a company. This is everything after the @ symbol in an email address. Some companies may maintain more than one email domain. Up to 10 email domains can be added within a MME account.

2. Cloud Admin adds User to list and gives them a MME role (described below).

3. Cloud Admin confirms Ignore rule is in place for domain.

4. User logs into MME (or Cloud Admin with User’s email and Salesforce passwords) to set up their own Salesforce Integration and Email import.

Match My Email User Roles

Cloud Admin

- The Cloud Admin is the person who signs up for a Match My Email (MME) account for their company. They should use an email address to which they have access, and will create a medium to strong complex password which complies with Salesforce.com security requirements.

- The Cloud Admin is someone who will manage Users and settings for the company’s MME account. This account can be used for user administration with or without matching own email communication.

- The Cloud Admin can see and act on all email communication of all Users across all Domains in the MME cloud upon login. It is possible to filter email in the cloud by User when desired.

- The Cloud Admin can create, delete, and modify Ignore rules that apply across each domain.

- The Cloud Admin can manage the Salesforce integration for other Users.

Domain Administrator

- A User that is a Domain Administrator is able to view and act on all email communication in and out of the MME cloud for all Users within only their email domain, not across other email domains. It is possible to filter email in the cloud by User when desired.

- Domain Administrators can add Users only under their domain, and only as End Users.

- Domain Administrators can create, delete, and modify Ignore rules for all Users in their email domain.

End User

- End Users can only see and act on their own email in the MME cloud.

- An End User can only create personal Ignore rules, though ignore rules established for their email domain will affect their email.

Passwords

All passwords are encrypted for MME support staff. Because Cloud Admins have a complex password for MME login that they enter during set up, they may use the password reset feature on the MME login page. However, Domain Admins and End Users login to MME with their email address and email password. If they forget this password, they must work through company policy or email client/host settings to reset their email password.
Domain Admin and End User roles are bestowed upon Users as they are added by the Cloud Admin. The table below indicates what entitlements or abilities these roles have.

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

1 Adding a Domain (Cloud Admin only)

1.1 In the black MME Menu Ribbon, hover over Settings and click Domains & Users. Or, when Settings tabs are showing, click the Domains & Users tab.

OR

1.2 Click on “Add Domain”
1.3 Fill in fields based on following guidance.

- For **Domain**: The email domain is everything after and not including the ‘@’ symbol in email address. (Ex. For email jane@acmecompany.com, the domain is “acmecompany.com”).

- For **IMAP server host, Connection**, and **To authenticate use**: these fields depend on where your email is hosted. Please refer to the table below or visit the Match My Email wiki [http://wiki.matchmyemail.com/index.php/Main_Page](http://wiki.matchmyemail.com/index.php/Main_Page) for more providers, or contact your IT staff.

- For **Connection** and **port**: IMAP is most often via Secure port 993, however it can be Regular port 143. This information is available for common hosts or ask your IT staff/email hosting company.

- For **To authenticate use**: Choose either “full email address” or “username only” based on the requirements of your email host. Most often this is “full email address” and information is available for common hosts. Confirm with IT staff/email hosting company.

- **Login with Google Apps**: For Google Apps Users, choose ‘Enabled’ to allow Users to login to MME by clicking Google button for convenience.

- For **Allow End-user to Import From**: “This IMAP server” restricts end-user to importing from the designated email domain. Checking “Any other IMAP server” enables flexibility for IMAP imports and is recommended. Google users should check “Gmail”

1.4 Click Save.

2 Adding Users (Cloud Admin, Domain Admin in controlled domain)

2.1 While still on Domains & Users screen, click the Add User button to the right of appropriate email domain. The screenshot below is an example. A domain is listed on the left – and users within that domain are on the right.
2.2 Fill in “Add User” details per following guidance:

- For **Username**: Everything in front of @ symbol in email address. In the example of jane@acmecompany.com, username is “jane”. The username entered should reflect authentication of server, so if authentication uses a different username format, AD structure or unique ID, then that should be what is entered in Username field.
- For **First Name** and **Last Name**: Simply enter User’s names.
- For **Role**: Choose a role in the dropdown list.

2.3 Click “Save”.

3 **Add Domain Ignore Rule**

*It is VERY IMPORTANT to add an ignore rule with type “just address” for an email domain.* This is a protective measure against unnecessary or unwanted matching of internal email into Salesforce.com records that might contain employee email addresses. If you followed an MME Set up Guide completely, or were guided through set up by MME support staff, then this ignore rule is likely already in place. It is recommended you confirm this before more Users begin to import.

3.1 Click Ignore in black menu ribbon.

3.2 Click the Domain tab (behind the Personal tab) and then click Add button.
3.3 Fill in the fields per guidelines below:

![Ignore List Entry](image)

- For **Address to Ignore**: type email domain which is everything after the @ symbol. In the example `jane@acmecompany.com`, the domain field should contain “acmecompany.com”.
- For **Ignore Type**: choose ‘just address’. **This is VERY important for this particular rule.**
- For **Direction of Address**: click the button by ‘any’
- **User to Apply to**: should be showing domain already.

3.4 Click Save.

4 **New User sets up their Salesforce Integration and Email Import**

4.1 Point your browser to [https://matchmyemail.com](https://matchmyemail.com)

4.2 Enter email address and email password.

4.3 Click Submit.

4.4 In the MME Menu Ribbon, go to Settings > Salesforce Integration.

*The following steps are similar for both roles of Domain Administrator or End User although some of the screen shots may not look exactly the same due to differing roles. The instructions will fully explain necessary steps.*

![Salesforce Integration](image)

4.5 Click “New”. **If your role is a Domain Admin, you may already see some integration settings for other Users listed as in screenshot below. As an End User, you will see no other settings.**
4.6 If you are a Domain Admin, you will see the Applies To: field on the right. If you do, use the drop down menu to choose your own email address. If you are an End User you will not have the option. For both roles, choose “Remote Access (OAuth)” for the Access type. This ensures future password changes will be automatically authenticated. Click Grant.

4.7 For Organization Type: choose Production. (Sandbox is only selected when MME has been installed in a Sandbox testing environment for Enterprise or Unlimited editions). Click Next.

4.8 You should be bounced to Salesforce.com for next steps. If you see the red text as in screenshot below, please enable pop-ups for https://matchmyemail.com and then click Next again.
4.9 You will be bounced to Salesforce where you login to your Salesforce account. This is the account into which email will be integrated. After logging in, click Allow.

4.10 The newly saved information will be listed in light grey text. Check the box for Override domain rules if it is not already checked. Once checked, you will be able to view and modify Matching rules, as well as Upload rules. Click the “+” sign to expand Matching Rules options.

4.11 For Matching Rules, we recommend you uncheck Match Users and, if you do not use Cases, Match Cases. You can also disable matching to any other objects you do not use as directed by the Match My Email Cloud Admin that set up your account.

- *If you are using Salesforce-Contact Manager edition, ONLY check Match Contacts.*
- *If you are using the SingleMatch version of MME, also uncheck Match Opportunities.*

Click the “+” sign to expand Upload Rules options.
4.12 Under Upload Rules, you may want to make use of options for uploading attachments. MME stores attachments in your Salesforce organization’s file storage. While more plentiful, you may want to manage what is stored there.

- If you uncheck the Upload Attachments box, then NO attachments and ONLY email will be uploaded into Salesforce on match.

- If you check the Upload Attachments box, but set it for 0 MB, actual attachments will not be uploaded but LINKS WILL be uploaded with email on match, and you will be able to click a link to view the attachment in the MME cloud for 45 days, after which email will be purged from cloud.

- If you check the Upload Attachment box, you can set the size in MB that can be uploaded. Attachments larger than limit will not upload to Salesforce, but as long as attachments aren’t larger than 30MB you will be able to view attachment for 45 days in MME cloud.

Then click SAVE.
4.13 In the black menu ribbon, click Import or the phrase “Please provide information”.

4.14 Click ‘+New’

4.15 In Import settings screen, fill in fields based on guidelines below:

- For Import Name: you can type in a descriptive name or leave it blank and it will default to the email address after saving.
- The Import From field will likely be filled in with Domain info.
- The User field will likely be filled in with the email address you used to login to MME.
- For Password: enter the email password for this email account.

4.16 Click “Refresh Folders” and the folder structure of your IMAP account will appear in ‘Available Folders’ box.

4.17 For Import Folders field, choose “Selected” from drop down.

Most users select “Inbox” and “Sent Items” for synchronization with Salesforce. There may be more than one outgoing folder, such as “Sent Messages” or “Sent”. . DO NOT select an option for All Mail, or Junk, Spam, Draft, etc. These additional selections will slow down processing of relevant emails.

*Please note: Account imports limited to 18 folders per account in basic subscription. For more details on folder selection, visit http://wiki.matchmyemail.com/index.php/Folder_Selection or email support@matchmyemail.com.
4.18 Click the top arrow button, the “<” button, to move your selected folders to the Selected Folders window on the left.

4.19 Status should be set for “Autorun my import by schedule”.

4.20 Click Save.

For Google Mail Users that would like to set up Google Mail integration, more information can be found in that section of the Quick Set up Guide on the Match My Email support page www.matchmyemail.com/support. The Quick Set up Guide also contains steps for adding Match My Email web tabs into Salesforce.

For assistance or for questions, reach out to support@matchmyemail.com.