



Match My Email

User Guide

Multi-Match Version

Version 2.7.3



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Please direct any recommendations or comments to support@matchmyemail.com

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1. Introduction

The purpose of Match My Email (“MME”) is to integrate your email account or accounts with Salesforce.com (SFDC). MME is designed to be fully automatic, 24/7/365, always on and operate with little or no end-user intervention. MME is a cloud service that is accessible via a browser using a username and password. MME is platform-independent and leverages open standards such as IMAP for email and OAuth for authentication. The service syncs and logs email and its attachments to standard Salesforce.com objects like Leads, Contacts, Accounts, Person Accounts, Opportunities and Cases.

MME’s goal is to make email syncing as seamless and automatic as possible while creating a 100% complete and accurate email log inside of Salesforce.com. Its goal is to do all the work associated with email syncing for the end-user. Time studies show that MME saves the average user 100 hours of manual labor per year.

The service is designed to be “set up and forget” and operate completely in the background. Once an end-user has set up his or her credentials, the service works with no user intervention, including password authentication.

MME allows the user to focus on his or her work, not email syncing and logging, and get the most value out of the organization’s technology investment.

1.1. Design Goals

The design objective of MME is to put all customer email communications into the right object(s) in Salesforce.com with no user activity required.

- **Fully Automatic**

In contrast to other solutions, MME is fully automatic. It imports emails and their attachments from an end-user’s email account(s), processes the email in the MME cloud and then uploads ‘matched’ emails to Salesforce.com objects.

MME analyzes email headers looking for email addresses in the TO:, FROM:, CC: and BCC: lines and matches those emails addresses to ‘email address fields’ extracted from Salesforce.com objects such as Leads, Contacts, Accounts, Opportunities, Person Accounts and Cases. When an email address in an email matches an ‘email address field’ in Salesforce.com, MME declares a “Match” state and uploads the email and its attachments to the relevant object(s) in Salesforce.com.

- **MultiMatch**

MultiMatch is a game-changing technology that syncs an email address contained in an email to every object in Salesforce.com with the same email address. MultiMatch ensures that the email record or log in Salesforce.com is 100% complete and accurate.



Match My Email

- **Set Up and Forget**

MME is a cloud connector. It integrates data from the email cloud with the Salesforce.com cloud. For MME to work it requires three sets of credentials, i.e., usernames and passwords to the (a) email cloud, (b) MME cloud and (c) Salesforce.com cloud. MME contains an authentication layer that authenticates these usernames and passwords only once and then maintains communication between the email cloud, MME cloud and Salesforce.com using open standards after the initial set up. MME's authentication layer is based on open authentication or OAuth and IMAP.

- **Always On**

MME is on 24/7 365 days per year. It syncs your email in the cloud, not at the laptop, desktop or mobile device level, so it is always on and working – whether you are logged into your email account or not.

- **Drudgery Free**

Time studies have shown that the end-user of a manual email syncing tool will click his or her mouse 25,000 per year to log email to Salesforce.com. Semi-manual solutions require the end-user to frequently log into a screen and resolve ambiguous and junk emails. MME saves the average user 100 hours of manual, unproductive labor per year.

- **Zero Mistakes or Omissions**

Neither manual nor semi-automatic tools can guarantee that the email log in Salesforce.com is up-to-date and 100% complete and accurate. Because MME is always on, all email communications are logged to Salesforce.com in a timely manner. Due to MultiMatch, the end-user can be 100% confident that all email communications are displayed in every Salesforce.com object that he or she opens and views

- **Reprocessing**

The MME cloud can be viewed as quarantine. Imported email is held in the MME cloud for 45 days. By putting imported email in a 'holding bin', MME can guarantee that no viruses, spam, malware, junk mail, personal emails or confidential content can ever get uploaded into Salesforce.com. While in quarantine, MME reprocesses the email that is in a 'No Match' state every twenty minutes looking for new email address matches in Salesforce.com. If a new match is found, the email is uploaded to the new object in Salesforce.com. This solves the 'early bird' email issue -- an email arriving before an object has been created in Salesforce.com. Early bird emails are automatically uploaded to a new Salesforce.com object shortly after it is created by the user.

- **Privacy Controls**



Match My Email

The MME cloud maintains privacy and confidentiality at three levels. During email import, the end-user has full control over which email folders are designated to sync with Salesforce.com. Within the MME cloud, there is the Ignore command that acts like a 'black list' and blocks the processing of emails containing specified email addresses. Within Salesforce.com, MME complies with all Salesforce.com sharing and profiling rules and entitlements.

- **Reactive Controls**

Sometimes an end-user will want to change the email log after it has been uploaded into the MME cloud or Salesforce.com. MME provides reactive controls for that purpose. Users can Delete, Manually Match, and Unmatch emails.

- **Platform Independent**

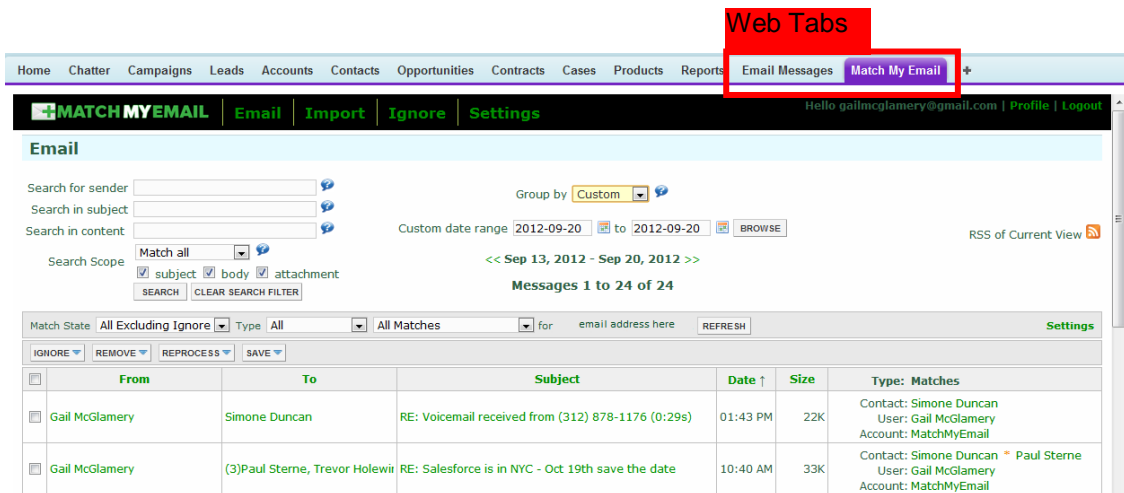
Since no software or plug-ins is needed, MME is platform independent. It works on the email server or service connected any device like iPad, PC, MAC, smartphone or tablet and any email client like Outlook, Gmail etc. All an end-user needs to use the system to work is a username and password.

2. Match My Email Web Tabs in Salesforce

The web tabs “Email Messages” and “Match My Email” are typically added after the MME package has been installed in Salesforce and during MME set up. The web tabs appear in the light blue command ribbon within Salesforce and enable easy access in the SFDC environment to MME information.

[in SFDC click “+” > Customize My Tabs > move these two to available tabs]

Clicking the ‘Match My Email’ web tab will open the MME screen for login. Once logged in, the default view is the Email Page, or cloud view, containing a table of emails, matching status, and a number of options for searching, filtering, and acting on those emails. Below, the components of this web tab are described in detail.



Web Tabs

Home Chatter Campaigns Leads Accounts Contacts Opportunities Contracts Cases Products Reports **Email Messages** **Match My Email** +

MATCHMYEMAIL Email Import Ignore Settings Hello gailmcglamery@gmail.com | Profile | Logout

Email

Search for sender Search in subject Search in content

Group by **Custom**

Custom date range: 2012-09-20 to 2012-09-20 BROWSE

RSS of Current View

Match all subject body attachment

SEARCH CLEAR SEARCH FILTER

<< Sep 13, 2012 - Sep 20, 2012 >>

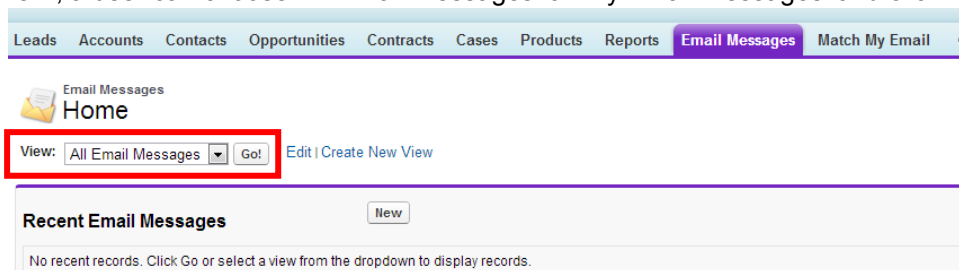
Messages 1 to 24 of 24

Match State: All Excluding Ignore Type: All All Matches for email address here REFRESH Settings

IGNORE REMOVE REPROCESS SAVE

	From	To	Subject	Date ↑	Size	Type: Matches
<input type="checkbox"/>	Gail McGlamery	Simone Duncan	RE: Voicemail received from (312) 878-1176 (0:29s)	01:43 PM	22K	Contact: Simone Duncan User: Gail McGlamery Account: MatchMyEmail
<input type="checkbox"/>	Gail McGlamery	(3)Paul Sterne, Trevor Holewii	RE: Salesforce is in NYC - Oct 19th save the date	10:40 AM	33K	Contact: Simone Duncan * Paul Sterne User: Gail McGlamery Account: MatchMyEmail

The ‘Email Messages’ web tab will provide a list of emails uploaded into Salesforce. For ‘View’, a user can choose ‘All Email Messages’ or ‘My Email Messages’ and click ‘Go’ button.



Leads Accounts Contacts Opportunities Contracts Cases Products Reports **Email Messages** Match My Email +

Email Messages Home

View: All Email Messages Go! Edit | Create New View

Recent Email Messages New

No recent records. Click Go or select a view from the dropdown to display records.

In this view, it is possible to perform a bulk delete of Emails in Salesforce. As shown in screenshot below, check boxes next to message desired for deletion. The number of emails selected will be shown at bottom in yellow. Once selected, click ‘Delete’ button, and in pop up confirm deletion.



Match My Email

Leads Accounts Contacts Opportunities Contracts Cases Products Reports **Email Messages** Match My Email

All Email Messages Edit | Delete | Create New View

Delete

Action	From	Subject	Date	Attachment
<input type="checkbox"/>	Cynthia & Michael Morse	Fw: Don't Miss Your Chance to Give B...	3/6/2013 10:48 AM	
<input type="checkbox"/>	Gail McGlamery	another support doc update	2/28/2013 2:05 PM	
<input type="checkbox"/>	Gail McGlamery	Invoice for February 2013	3/1/2013 6:50 AM	
<input type="checkbox"/>	Gail McGlamery	Out of State Transfer inquiry	2/27/2013 8:25 AM	
<input type="checkbox"/>	Gail McGlamery	RE: Out of State Transfer inquiry	2/28/2013 1:19 PM	
<input type="checkbox"/>	Gail McGlamery	RE: Out of State Transfer inquiry	3/4/2013 7:26 AM	
<input type="checkbox"/>	Gail McGlamery	Testing 4 accounts	3/7/2013 6:40 AM	
<input type="checkbox"/>	Gail McGlamery	Testing 4 accounts	3/7/2013 6:40 AM	
<input type="checkbox"/>	Gail McGlamery	Testing 4 accounts	3/7/2013 6:40 AM	
<input type="checkbox"/>	Gail McGlamery	Testing	3/7/2013 6:08 AM	
<input type="checkbox"/>	Gail McGlamery	need ftp info	3/6/2013 10:51 AM	
<input type="checkbox"/>	Gail McGlamery	testing_email	3/7/2013 7:58 AM	
<input type="checkbox"/>	Gail McGlamery	flight change	3/18/2013 1:20 PM	
<input checked="" type="checkbox"/>	The Holewinski Group	Fw: Resident/Domicile	3/4/2013 1:38 PM	
<input checked="" type="checkbox"/>	The Holewinski Group	Fw: Evelvn & Hugh	3/6/2013 10:52 AM	
<input checked="" type="checkbox"/>	The Holewinski Group	Re: need ftp info	3/6/2013 10:54 AM	
<input checked="" type="checkbox"/>	The Holewinski Group	usaa coverage	3/12/2013 8:33 AM	
<input type="checkbox"/>	The Holewinski Group	Re: Inquiry from Trevor Holewinski - ...	3/15/2013 12:23 PM	
<input type="checkbox"/>	Trevor Holewinski	Marketing Meeting RESCHEDULED	3/3/2013 2:15 PM	
<input type="checkbox"/>	Trevor Holewinski	terr_email	3/3/2013 4:22 PM	
<input type="checkbox"/>	Trevor Holewinski	FW: priceline.com Rental Car Confr...	3/10/2013 6:57 PM	
<input type="checkbox"/>	Trevor Holewinski	No Subject	3/15/2013 6:29 PM	
<input type="checkbox"/>	Trevor Holewinski	FW: It's Time To Check-in	3/18/2013 1:37 PM	
<input type="checkbox"/>	davmar58	Re: Testing	3/7/2013 9:31 AM	
<input type="checkbox"/>	davmar58	Doc, truly a gift from God!	3/13/2013 3:43 PM	

1-25 of 33 4 Selected Previous Next

It is possible to also select all by checking the top check box next to the column header 'Action'. Please note by doing so, you are choosing to select and delete all emails from Salesforce. Messages remaining in the cloud can be imported again by using Reprocess.

Leads Accounts Contacts Opportunities Contracts Cases Products Reports **Email Messages** Match My Email

All Email Messages Edit | Delete | Create New View

Delete

<input checked="" type="checkbox"/> Action	From	Subject	Date	Attachment
<input checked="" type="checkbox"/>	Cynthia & Michael Morse	Fw: Don't Miss Your Chance to Give B...	3/6/2013 10:48 AM	
<input checked="" type="checkbox"/>	Gail McGlamery	another support doc update	2/28/2013 2:05 PM	
<input checked="" type="checkbox"/>	Gail McGlamery	Invoice for February 2013	3/1/2013 6:50 AM	
<input checked="" type="checkbox"/>	Gail McGlamery	Out of State Transfer inquiry	2/27/2013 8:25 AM	
<input checked="" type="checkbox"/>	Gail McGlamery	RE: Out of State Transfer inquiry	2/28/2013 1:19 PM	
<input checked="" type="checkbox"/>	Gail McGlamery	RE: Out of State Transfer inquiry	3/4/2013 7:26 AM	
<input checked="" type="checkbox"/>	Gail McGlamery	Testing 4 accounts	3/7/2013 6:40 AM	
<input checked="" type="checkbox"/>	Gail McGlamery	Testing 4 accounts	3/7/2013 6:40 AM	

Performing a search in Salesforce for a particular record, then clicking either Show More or Show Filters, will open a view of the Email Messages web tab with emails pertaining only to the searched object. This allows users to perform a bulk delete on a focused list of Email Messages.

3. Getting Around in MME

The black MME Menu Ribbon is visible when a user logs in to MME, either within the Salesforce environment or in an independent browser window at www.matchmyemail.com. It aids in navigating through several pages—Email, Import, Ignore, Settings—that allow the user to view and make decisions about emails, make use of settings for privacy, and set up and adjust import and authentication settings.



On Email Page one finds:

- Email Viewer showing a table of emails in the MME cloud.
- Indications of whether an email was matched, and if so, how.
- Emails with status “No Match”.
- Ability to Reprocess emails
- Ability to add email addresses to Ignore list
- Ability to search through emails in cloud
- Ability to delete emails from cloud and permanently delete them from Salesforce

On Import Page one finds:

- IMAP import settings
- Ability to select folders
- Ability to start next import manually

On Ignore Page one finds:

- Personal Ignore List of email addresses
- Domain Ignore List of email addresses
- Ability to add email addresses to or remove them from Ignore List

On Settings Page one finds:

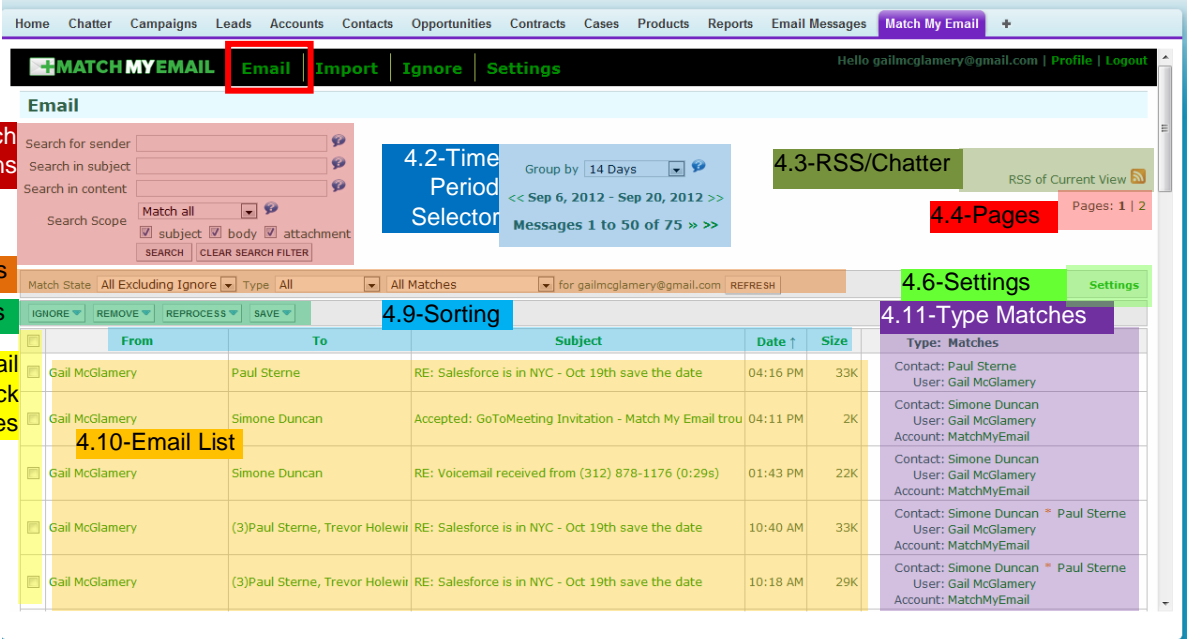
- Salesforce Integration
- Optional set up information for Google Docs and Gmail integration.
- Ability for Account Owner to add Domains and Users to MME account.

4. 'Email' Page

When a user logs in to MME, the screen will default to a view of the MME cloud. At any time a user can click "Email" in the black MME Menu Ribbon to return here. If a user is elsewhere in their Salesforce account, they can also click the 'Match My Email' web tab.

The Email Cloud View is the heart of MME and this screenshot maps areas explained in the subsequent sections below.

The Email Cloud View allows a user to see their email stream in the MME cloud and how emails have been processed by MME. End Users can only see their emails. Domain Admins are able to see and manipulate the email stream of their entire domain, while the Account Owner can see and manipulate the email stream of the entire account.



The screenshot shows the Match My Email interface with the following callouts:

- 4.1-Search Options:** Points to the search input fields for sender, subject, and content.
- 4.2-Time Period Selector:** Points to the date range selector showing "Sep 6, 2012 - Sep 20, 2012".
- 4.3-RSS/Chatter:** Points to the "RSS of Current View" link.
- 4.4-Pages:** Points to the "Pages: 1 | 2" pagination control.
- 4.5-Filter Options:** Points to the "Match State" dropdown menu.
- 4.6-Settings:** Points to the "Settings" button.
- 4.7-Commands:** Points to the "IGNORE", "REMOVE", "REPROCESS", and "SAVE" buttons.
- 4.8-Email Check Boxes:** Points to the checkboxes in the email list.
- 4.9-Sorting:** Points to the "Date" and "Size" column headers.
- 4.10-Email List:** Points to the main table of email matches.
- 4.11-Type Matches:** Points to the detailed view of a match on the right side.

4.1. Search Options

Users can enter keywords, phrases or symbols in the sender, subject, or content of emails boxes. Pattern matching allows you to use '_' to match any single character and '%' to match an arbitrary number of characters (including zero characters). To match exactly '%' or '_' characters escape them as '\%', '_'. The check boxes allow the user to choose what part of the email message is searched, the subject field, email body, or attachments.

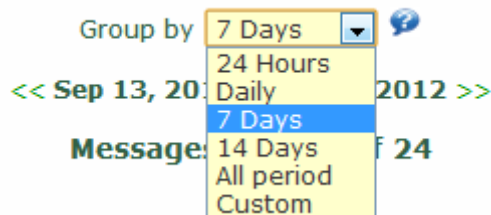
The 'Clear Search Filter' button will clear all fields and make it easy to begin a new search. Mouseover the question marks for guidance in how to fill in these fields.

Match My Email

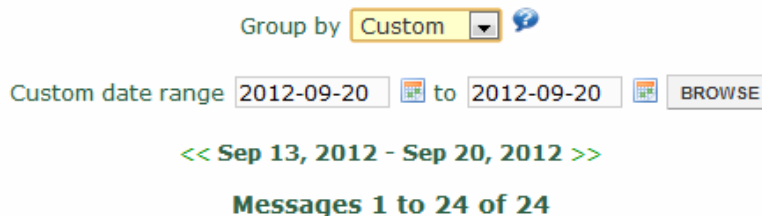
It takes 2-3 hours for new emails to be indexed and for searches to be possible. Thus, after initial set up and importing, one must wait a few hours before being able to use 'Search'.

4.2. Time Period Selector

Time Periods are set through the dropdown menu in the middle of the screen. Users can choose between the last 24 hours, Daily, 7 Days, 14 Days and All period [which equals 45 days in MME].



Choosing the Custom time period option opens two boxes in which the user can type in the date they want or use the calendar icons to select. If typing in, the dates are displayed in reverse Japanese calendar notation, i.e. YYYY-MM-DD. In the example below, 2012-09-20 is September 20th, 2012.



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

4.3. RSS / Chatter

RSS and Chatter Feeds are enabled by clicking on the RSS button after the user has configured the Email Viewer to the desired MME View.

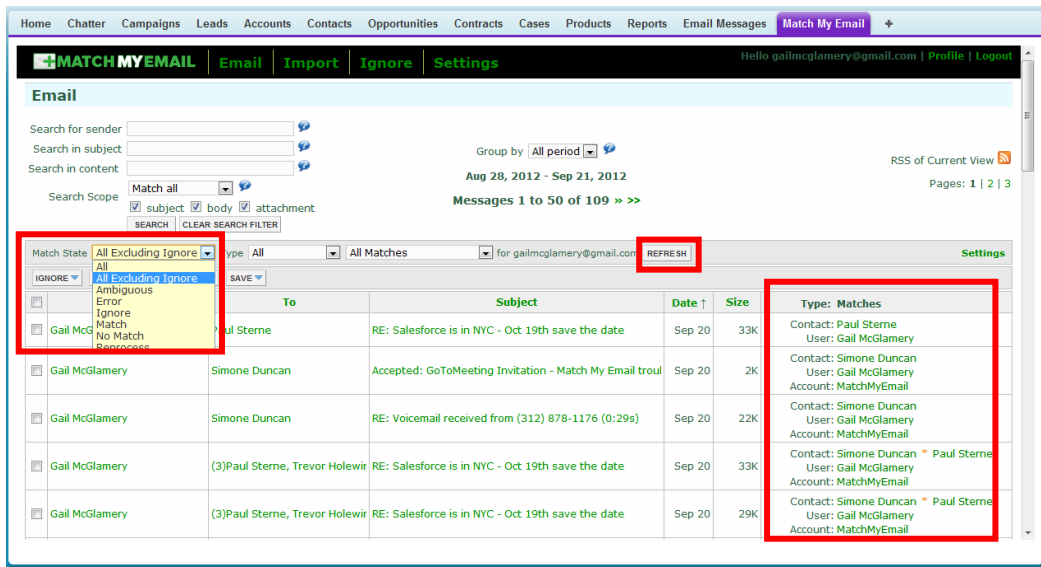
4.4. Pages

The page to be viewed is selected by clicking on the page number. If there are not enough messages in the system to require multiple pages of emails for viewing, this area will be blank on the screen.

4.5. Filter Options

The Email Cloud Views are selected and displayed using the Filter Options, the top grey ribbon above the table of emails. Emails can be sorted and viewed according to a rich variety of options for the Match State, the Type of Salesforce object, and Association by using the drop down menus and clicking the 'Refresh' button. (This overrides any limits on date in the Time Period Selector.)

MME categorizes imported emails by their "Match State", for example "No Match", "Ignore", or match made with type of SFDC object and other information indicated—all in the Type: Matches column at far right. The default viewing state will be shown as 'All excluding Ignore', but a user can choose 'All' emails, or view emails of a particular state including 'Ignore', 'No Match', or 'Reprocess'. After selecting a particular state, click the Refresh button to view the desired emails in descending chronological order.



The screenshot shows the Match My Email interface. At the top, there is a navigation bar with tabs for Home, Chatter, Campaigns, Leads, Accounts, Contacts, Opportunities, Contracts, Cases, Products, Reports, Email Messages, and Match My Email. Below this is a header with 'MATCH MY EMAIL' and sub-tabs for Email, Import, Ignore, and Settings. The main area is titled 'Email' and contains search filters for sender, subject, and content, along with search scope options (subject, body, attachment). A table of email matches is displayed with columns for Match State, To, Subject, Date, Size, and Type: Matches. A dropdown menu for Match State is open, showing options like All, All Excluding Ignore, Ignore, Ambiguous, Error, No Match, and Reprocess. A 'REFRESH' button is highlighted in red.

Match State	To	Subject	Date	Size	Type: Matches
All Excluding Ignore	Paul Sterne	RE: Salesforce is in NYC - Oct 19th save the date	Sep 20	33K	Contact: Paul Sterne User: Gail McGlamery
All Excluding Ignore	Gail McGlamery	Accepted: GoToMeeting Invitation - Match My Email trou	Sep 20	2K	Contact: Simone Duncan User: Gail McGlamery Account: MatchMyEmail
All Excluding Ignore	Gail McGlamery	RE: Voicemail received from (312) 878-1176 (0:29s)	Sep 20	22K	Contact: Simone Duncan User: Gail McGlamery Account: MatchMyEmail
All Excluding Ignore	(3)Paul Sterne, Trevor Holewir	RE: Salesforce is in NYC - Oct 19th save the date	Sep 20	33K	Contact: Simone Duncan = Paul Sterne User: Gail McGlamery Account: MatchMyEmail
All Excluding Ignore	(3)Paul Sterne, Trevor Holewir	RE: Salesforce is in NYC - Oct 19th save the date	Sep 20	29K	Contact: Simone Duncan = Paul Sterne User: Gail McGlamery Account: MatchMyEmail

When emails are matched, MME will identify the type of Salesforce object to which it is matched. In addition to the default Type filtering option of 'All', a user can choose to filter emails to view all those matched with 'Accounts', 'Cases', 'Contacts', 'Leads', 'Opportunities', and 'Users'. Clicking the Refresh button will apply these choices and display appropriate emails.



Match My Email

The screenshot shows the Match My Email interface. At the top, there is a navigation bar with tabs for Home, Chatter, Campaigns, Leads, Accounts, Contacts, Opportunities, Contracts, Cases, Products, Reports, Email Messages, and Match My Email. Below this is a sub-navigation bar with Email, Import, Ignore, and Settings. The main area is titled 'Email' and contains search filters for sender, subject, and content. A search scope dropdown is set to 'Match all'. Below the filters, there is a table of email matches. A dropdown menu is open over the 'Type' column, showing options: All Matches, My Accounts, Cases, Contacts, Leads, Opportunities, and Users. A 'REFRESH' button is highlighted in red in the top right of the table area.

Match State	All Excluding Ignore	Type	All Matches	for.gailmcglamery@gmail.com	REFRESH	Settings
		All				
		My Accounts				
		Cases				
		Contacts				
		Leads				
		Opportunities				
		Users				

The third drop down field in the Filter Options ribbon allows filtering based on the name of the matched object, i.e. the name of the Lead, Contact, Account, etc. The default option is 'All Matches'. As the user clicks on the drop down box arrow, the list of matched objects to choose from for filtering is displayed with the number of matches indicated in parentheses. Again, by clicking the Refresh button after filtering options are made, the Email Viewer will show relevant emails.

This screenshot shows the same Match My Email interface as the previous one, but with the dropdown menu expanded. The dropdown menu lists the following options: All Matches, All Matches, Gail McGlamery (User 59 matched), Match My Email (Account 21 matched), Ovidiu Bivolaru (Lead 21 matched), Paul Sterne (Contact 13 matched), and Simone Duncan (Contact 38 matched). The 'Match My Email (Account 21 matched)' option is highlighted in blue. The 'REFRESH' button is still visible in the top right of the table area.

Match State	All Excluding Ignore	Type	All Matches	for.gailmcglamery@gmail.com	REFRESH	Settings
		All Matches				
		All Matches				
		Gail McGlamery (User 59 matched)				
		Match My Email (Account 21 matched)				
		Ovidiu Bivolaru (Lead 21 matched)				
		Paul Sterne (Contact 13 matched)				
		Simone Duncan (Contact 38 matched)				

4.6. Settings

Mouseover the 'Settings' option to display a pop up window in which Email Viewer settings can be set depending on user preference. The user can Show or Hide the Sender column of the Email List, Show or Hide the Recipient column and select the number of Messages per page from 20 to 100.

4.7. Commands-Ignore, Delete, Reprocess, Save

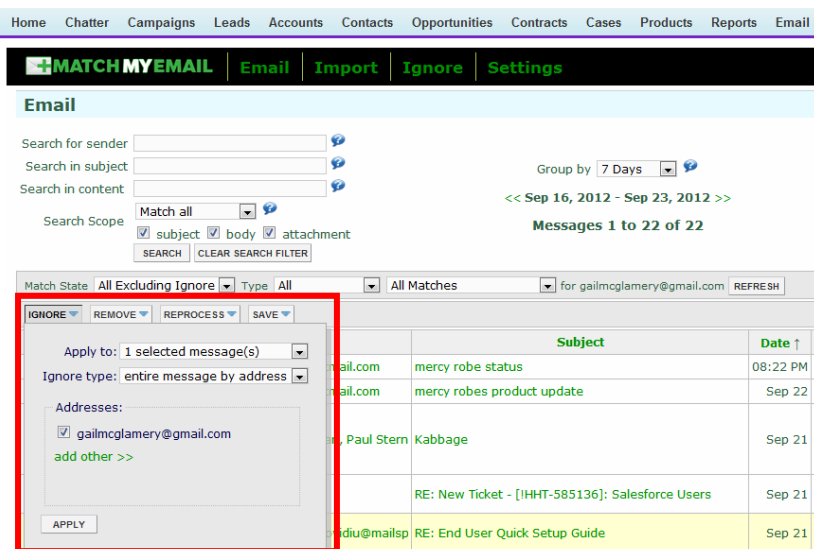
The Manual Command buttons of 'Ignore', 'Delete', 'Reprocess', and 'Save' allow those actions to be taken on messages that are selected using the check box in the far left column. By clicking the box for one message, these commands “mine” information within the message and then use that as a starting point for the user to refine their desired use of that command. Find details about how to employ these commands in their own subsequent section below.

4.7.1. Ignore Command

The ability to 'Ignore' emails is a way for users to employ privacy controls and keep private and/or irrelevant emails from cluttering up the MME cloud. This is especially beneficial for users importing from their general Inbox and Sent folders—the recommended folders.

There are two methods that allow a user to make use of "Ignore" – the manual command discussed here and the Ignore Tab (see Chapter 6). Both methods lead to the creation of a Personal Ignore List. When MME processes emails, the first step executed by the MME algorithm is to check this Personal Ignore List. Users can ignore email addresses by choosing two methods, 'just address' or 'entire message by address'. When an email address is ignored, the email is not processed for that email address.

To add an email address to the Personal Ignore List, check the box next to the email message you wish to ignore and click the Ignore button popping down a box of options.



The screenshot shows the Match My Email interface. At the top, there is a navigation bar with links: Home, Chatter, Campaigns, Leads, Accounts, Contacts, Opportunities, Contracts, Cases, Products, Reports, Email. Below this is a secondary navigation bar with buttons: MATCH MY EMAIL, Email, Import, Ignore, Settings. The main content area is titled 'Email' and contains search filters: Search for sender, Search in subject, Search in content, Search Scope (Match all), and Search Scope (subject, body, attachment). There are also buttons for SEARCH and CLEAR SEARCH FILTER. A date range filter shows '<< Sep 16, 2012 - Sep 23, 2012 >>' and 'Messages 1 to 22 of 22'. Below the search filters is a table of email matches. The table has columns for Match State, All Excluding Ignore, Type, All, All Matches, and a REFRESH button. The table lists several messages with their subjects and dates. A red box highlights the 'IGNORE' button and the resulting dialog box. The dialog box has buttons for IGNORE, REMOVE, REPROCESS, and SAVE. It contains the following text: 'Apply to: 1 selected message(s)', 'Ignore type: entire message by address', 'Addresses: gailmclamery@gmail.com', and 'add other >>'. There is an 'APPLY' button at the bottom of the dialog box.

Match State	All Excluding Ignore	Type	All	All Matches	REFRESH	
				Subject	Date ↑	
				mail.com	mercy robe status	08:22 PM
				mail.com	mercy robes product update	Sep 22
				Paul Stern	Kabbage	Sep 21
					RE: New Ticket - [IHHT-585136]: Salesforce Users	Sep 21
				rdiu@mailsp	RE: End User Quick Setup Guide	Sep 21



Match My Email

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 two options:

- ‘just address’: means that processing of the email message will be ignored for just this address. 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. For this reason, the Match State in the Type:Matches column may be ‘No Match’ or show match information. If all email addresses in header of an email message are on the Ignore List as ‘just address’, then the system will report a status of ‘Ignore’.
- ‘entire message by address’: means that when this email is in the header, this entire message will not be processed. It is important to apply this type of ignore carefully because even if other email addresses desired for processing are in the email header the email will not be processed at all and result in “Ignore” in Type:Matches column for Match State.

Clicking apply will add the chosen addresses to the Personal Ignore List.

It is important to employ a ‘just address’ ignore for a User’s own address if the User has their email address entered in the email field for a Lead, Contact, or another Salesforce object. Without the ignore, every email a User sends or receives with this email address, which could be all emails, will be matched and uploaded to the particular record. This can create unnecessary processing, API call usage, and use of Salesforce storage. (See Section ##### for information on domain-wide ignores.)

It is necessary to reprocess messages once an address has been added to the Ignore list. This can be done using the Match Detail pop up commands described in 4.11 or in batches using the check boxes and Reprocess Command button described in 4.7.3.

Match My Email

The screenshot shows the Match My Email interface with a search results table. A red box highlights the 'REPROCESS' dropdown menu, which is open and shows options: '2 selected message(s)', '2 selected message(s)', and 'all 22 messages'. The table below has columns for From, To, Subject, Date, Size, and Type. The first two rows are highlighted in yellow.

From	To	Subject	Date	Size	Type
Gail McGlamery		mercy robe status	08:22 PM	3K	No Match
Gail McGlamery		mercy robes product update	Sep 22	4K	No Match
Gail McGlamery	(3)Simone Duncan, Paul Sterne	Kabbage	Sep 21	52K	Contact: Simone Duncan * Paul Sterne Lead: Ovidiu Bivolaru User: Gail McGlamery Account: MatchMyEmail
Gail McGlamery	Paul Sterne	RE: New Ticket - [HHHT-585136]: Salesforce Users	Sep 21	3K	Contact: Paul Sterne User: Gail McGlamery
Gail McGlamery	(2)Vivian Deng, ovidiu@mailsp	RE: End User Quick Setup Guide	Sep 21	17K	Lead: Ovidiu Bivolaru User: Gail McGlamery
Gail McGlamery	Paul Sterne	RE: Salesforce is in NYC - Oct 19th save the date	Sep 20	33K	Contact: Paul Sterne User: Gail McGlamery
					Contact: Simone Duncan

After reprocessing is complete, a pop up window will indicate how many messages were processed and direct the user to refresh the page. Click the 'Close' button to exit the pop up window.

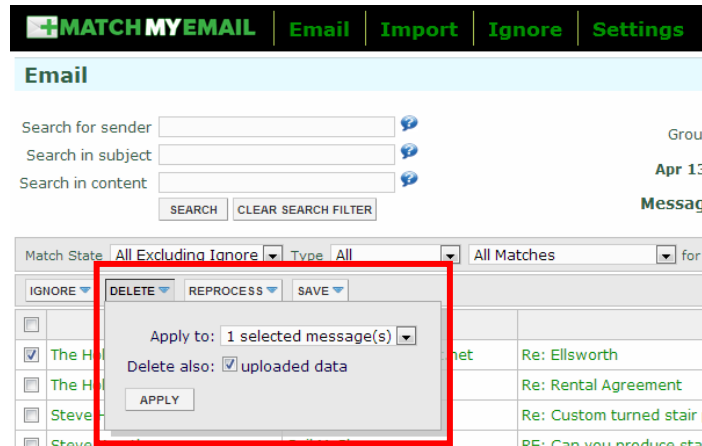
The screenshot shows the Match My Email interface with a 'Please wait' dialog box open. The dialog box contains the text: 'Please wait', 'Done', 'Reprocessing message 2407689 with match status no_match', 'Reprocessing message 2402672 with match status no_match', 'Processed 2 message(s)', and 'Please refresh page'. There are 'CLOSE' buttons on the right side of the dialog box. The table below is partially visible.

From	To	Subject	Date	Size	Type
Gail McGlamery	tholewinski@hotmail.com	mercy robe status	08:22 PM	3K	No Match

4.7.2. Delete Command

The Delete command allows users to delete an email from the MME cloud, and ultimately Salesforce if that is desired, but should be used judiciously. Typically, a user will click the Check Box next to the messages desired for removal. Clicking the 'Delete' command button opens a window in which the user is asked to apply Delete to the selected number of messages or all messages. All messages means all, not just all the emails that might match the one selected, so rarely would 'All' be used.

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 List in the MME cloud, but uploaded data will remain in Salesforce. However, if the box is checked, then the email will be deleted from the Email List AND the email and all related links will be deleted from Salesforce. In doing so it is important to remember that **once deleted, emails cannot be uploaded again into Salesforce.**



4.7.3. Reprocess Command

To reprocess an email is to ask MME to again analyze the email address or addresses in the email header. This may be because changes have been made that could include adding an email address to the Ignore list, adding a new Lead in Salesforce, or updating email information in Salesforce. While automatic reprocessing occurs on emails with a 'No Match' status every 20 minutes, messages with a match state will need to be manually reprocessed.

The user can choose to individually reprocess emails by clicking the Check Box to the left of emails desired and selecting the drop down arrow on the Reprocess button. The choice will be to reprocess the number of emails selected. Click Apply to execute the reprocess. Once 'Done' is indicated in window, click Refresh.

A user can also reprocess all emails in Email Viewer by going straight to the Reprocess button and clicking the drop down arrow. In the command box, for 'Apply To' use the drop down to select the option for all emails. Click Apply. Another window will pop up that reads Please Wait and will indicate emails are being reprocessed. It is important to wait until the 'Done' appears at the top, as shown in the below screenshot before the user clicks the Close button.

It is important to understand that reprocessing uses API calls in addition to those used for normal processing. Thus it may be advisable if significant reprocessing is desired, to check API call usage in Salesforce and/or do smaller groups of emails such as 50 to 100 instead of choosing all emails in cloud, which could be in hundreds or thousands.



Match My Email

The screenshot shows the Match My Email interface. At the top, there is a navigation bar with 'MATCH MY EMAIL', 'Email', 'Import', 'Ignore', and 'Settings'. Below this, there are search filters for sender, subject, and content. A 'Please wait' dialog box is open, indicating a reprocessing action. The main area contains a table with columns for 'Match State', 'From', 'Type', and 'All'. The 'Type' column shows 'Matches' and 'no_match'. A 'Reprocess' button is visible in the top right of the table area.

Match State	All	Excluding	Ignore	Type	All
IGNORE	REMOVE	REPROCESS	SAVE		
	Gail McGlamery	ovidiu@mail		no_match	Reprocessing message 2506389 with match status match
	Gail McGlamery	ovidiu@mail		no_match	Reprocessing message 2506387 with match status match
	Gail McGlamery	Simone Duncan		no_match	Reprocessing message 2505144 with match status match
	Gail McGlamery	ovidiu@mail		no_match	Reprocessing message 2604326 with match status match
	Gail McGlamery	(2)ovidiu@mail		match	Reprocessing message 2583462 with match status match
				match	Reprocessing message 2584213 with match status match
				match	Reprocessing message 2583456 with match status match
				match	Reprocessing message 2583459 with match status match
				match	Reprocessing message 2583453 with match status match
				match	Reprocessing message 2583056 with match status match
				match	Reprocessing message 2582679 with match status match
				no_match	Reprocessing message 2580705 with match status no_match
				no_match	Reprocessing message 2579159 with match status no_match
				no_match	Reprocessing message 2579158 with match status no_match
				no_match	Reprocessing message 2578680 with match status no_match
				no_match	Reprocessing message 2573180 with match status no_match
				match	Reprocessing message 2568253 with match status match
				match	Reprocessing message 2563902 with match status match
				no_match	Reprocessing message 2562890 with match status no_match
				match	Reprocessing message 2560138 with match status match
				match	Reprocessing message 2553246 with match status match
				match	Reprocessing message 2553244 with match status match

The Reprocess command can also be enabled through the pop-up dialogue box that occurs when a user scrolls his or her mouse over the Type:Matches cell related to a specific email in the column of the Email Viewer closest to the right edge of the screen. By clicking on the Reprocess button in the Pop-Up, that specific email will be reprocessed. After the reprocessing is complete, the user will be prompted to Refresh the screen to show the new State of the email. (This is further described in Section 4.11 below).

The screenshot shows an email list with columns for sender, recipient, subject, date, size, and match status. A 'Match details' pop-up is visible over one of the rows, showing 'No Match' and 'Processed on: Oct 05'. A 'Reprocess' button is highlighted in a red box within the pop-up.

From	To	Subject	Date	Size	Match Status
Gail McGlamery	Ms. M	possibly of interest	Oct 05	5K	No Match
Gail McGlamery	Simone Duncan	Status Change to Email Blast			
Gail McGlamery	Simone Duncan	Status Change to Email Blast			
Gail McGlamery	Simone Duncan	duplication maybe?	Oct 05	7K	Contact: Simone Duncan User: Gail McGlamery

The reprocess command can be used in conjunction with filtering options to help clean up the Email List. For example, use the filtering options and Refresh to show in the Email List only emails of a particular type that need reprocessing. Then, use the Reprocess Command and apply to all emails.

4.7.4. Save Command (Troubleshooting)

The Save command currently 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. Choose the Save Command and apply to selected messages. 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.

4.8. Email Check Boxes

Check Boxes next to individual emails are used to specify which email should be affected by a Command. Note that at the top left-hand corner of the Email Viewer there is a Check Box which will check all the emails on a page. By default, pages show 20 emails. This can be changed in either Settings (See 4.6) or in the black Menu Ribbon under Profile.

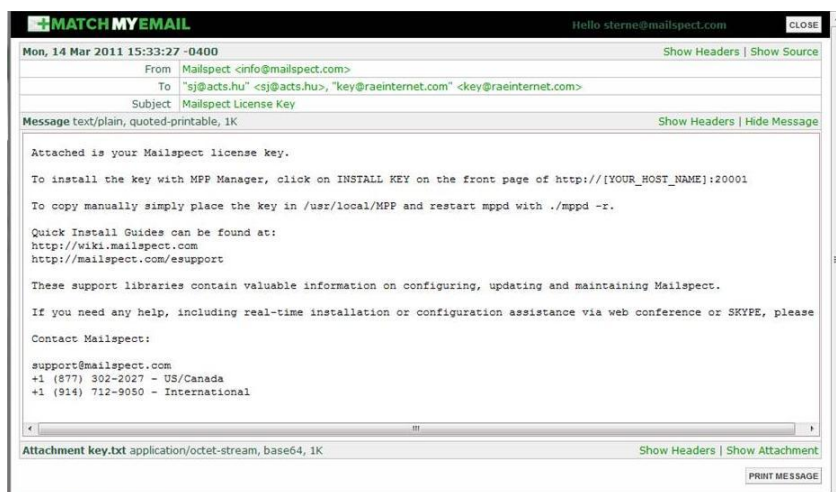
4.9. Sorting

The headings for columns in the Email List exist also as a Sorting Ribbon. Much as one can sort a column in a spreadsheet by clicking the column header, in the Email List a user can change the order of viewed emails by alphabetical, date, or by size. Clicking on the column header 'From', 'To', etc. once will sort the column. Clicking on a column header a second time will sort it in the opposite order. For example, one click will sort size from smallest to largest, and the second click from largest to smallest. An arrow will appear to help indicate the direction of the sort.

4.10. Email List and Drilldown

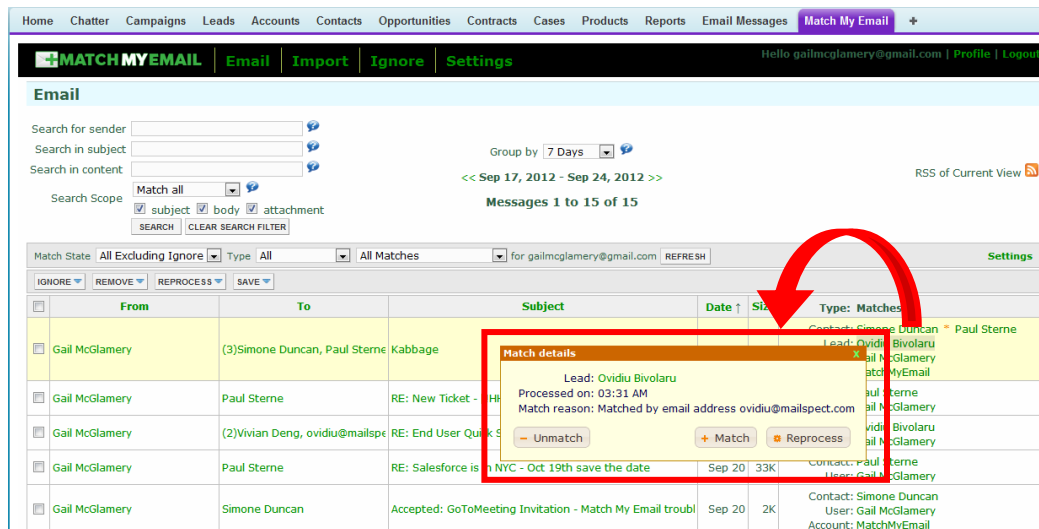
Details regarding the email being processed are shown in the Email List: Sender, Receiver, Subject, Date, and Size. By clicking on 'Sender name', 'Recipient name' or 'Subject' within the Email Viewer, the user can open the underlying email that is stored in the Match My Email database. This opens a pop-up window which contains the email and its attachments. Inside the pop-up window, the user can enact the following:

- Show Headers - enables the user to view the Header details
- Show Source - enables the user to view the Source code details
- Hide Message - hides the body of the email or restores it to view
- Show Attachment - open the attachment for viewing
- Print Message – enables the user to print the email



4.11. Type Matches & Match Detail pop-up commands

The Type: Matches column shows the state of the email. Place the cursor over the match status to open a Match Details pop-up box with details about the match. A user can see details of why a match was made and when, or see why an email was ignored. Inside the Match Details pop up box are command options explained below which allow the user to change the state of an email or the ability to jump seamlessly into Salesforce.



The screenshot shows the Match My Email interface with a table of email matches. A red arrow points from the 'Type: Matches' column to a 'Match details' pop-up window. The pop-up window displays the following information:

- Lead: Ovidiu Bivolaru
- Processed on: 03:31 AM
- Match reason: Matched by email address ovidiu@mailspect.com
- Buttons: Unmatch, Match, Reprocess

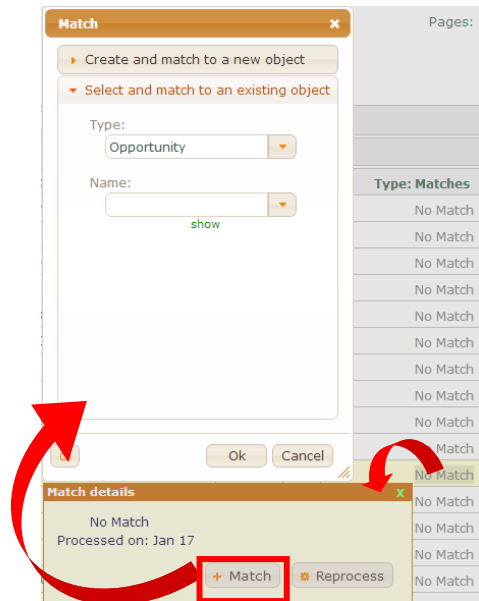
4.11.1. Green Link

In the Match Details pop up box, clicking the name of the matched “Object” e.g., Lead or Contact (in green), enables the user to jump from the MME Email Viewer to the user’s Salesforce.com account to view the object file that has been associated with a particular email. If Salesforce.com is already open, the jump to the Salesforce.com account is direct and immediately to the object file (Lead, Contact, etc.). If Salesforce.com is not open, then the user will be prompted to enter username and password before the jump can be completed.

4.11.2. Manual Matching

The ‘+Match’ command enables the user to force (or manually make) a match, whether the email in question resulted in a state of No Match or already identified a match. Clicking ‘+Match’ brings up a Match pop up window in which a user can select the Type of Salesforce object to which the email is to be manually matched and select among Names available for that object type. Names are located using “two-letter” look up that displays all the possible names contain those two letter. A three- or four-letter look up can be used to narrow the possibilities. Clicking OK will manually make the Match and immediately link the email to the selected Salesforce file object.

Match My Email



4.11.3. Create (and Match) a New Salesforce.com Object

A new Salesforce object can be created from the email viewer, most often in the case of a 'No Match' status, though the functionality works for messages already matched. In the same manner to make a manual match, hover over the phrase 'No Match' which will open the Match Details pop up box. Click the '+Match' button to reveal the Match window and expand the option at the top of the window 'Create and match to a new object'.

Use the Type dropdown menu to choose the type of object to create. To create a Contact, the Account it will associate with should already be created. If the Account does not already exist, it must be created first, followed by creation of the Contact. To create an Opportunity, which is also associated with an Account, the Account must exist or be created first.



Match My Email

The screenshot shows the Match My Email interface. On the left, there's a search bar and a table of email matches. The table has columns for 'From', 'To', and 'Match State'. The main area shows a 'Match' pop-up window with fields for 'Type', 'First Name', 'Last Name', 'Phone', 'Email', 'Company', and 'Title'. A red box highlights the 'Phone' field, and a red arrow points from the email content to it.

From	To	Match State	Type	Match Reason
Michael Norse	demosale@demo.matchmy		Contact	
Tom Salesman	Jane McHenry		Lead	
Tom Salesman	David Smith		Opportunity	
Tom Salesman	Dan Stablemaster			
Jane McHenry	Tom Salesman	Temporary Fence Needed		02:07 AM 3K
David Smith	Tom Salesman	Topped Picket Fence		01:33 AM 3K
Harrison Dodge	demosale@demo.matchmyem	Interest in a New Fence		01:21 AM 3K

Clicking the Envelope button in the lower left corner will open another pop up with the contents of the email, providing a convenient reference for populating the object fields. Select text in the email, then click on it and drag it to the appropriate field to save time. Fields marked with a '*' are required. When complete, click OK button.

The screenshot shows the Match My Email interface with an email content pop-up window on the left and a 'Match' pop-up window on the right. The email content pop-up shows the email body with a red box around the phone number '410 223 2245'. A red arrow points from this box to the 'Phone' field in the 'Match' pop-up window. Another red arrow points from the 'Match' pop-up window to the 'Match' button in the main interface.

The message will immediately be matched and show details in the Type: Matches column as shown below. Hovering over the match information brings up the Match details pop up box noting the match reason. Clicking the green linked Lead Name in the pop up box will jump to the Lead page in Salesforce.



Match My Email

The screenshot shows the Match My Email interface with a list of email matches. A pop-up window titled 'Match details' is open over the first match. The pop-up contains the following information:

- Lead: Michael Norse
- Processed on: 04:37 PM
- Match reason: Created and matched manually by John

The pop-up also has three buttons: '- Unmatch', '+ Match', and 'Reprocess'.

From	To	Subject	Date	Size	Type: Matches
Michael Norse	demosale@demo.matchmyem	Artisanal Fences	04:01 PM	2K	Lead: Michael Norse
Tom Salesman	Jane McHenry	Re: Temporary Fence Needed			McHenry Salesman
Tom Salesman	David Smith	Re: Toppled Picket Fence			Rockefeller Estate id Smith Salesman
Tom Salesman	Dan Stablemaster	Re: Hurricane Sandy Fence Damage	03:38 PM	4K	Opportunity: Hurricane Sandy Repair User: Tom Salesman
Jane McHenry	Tom Salesman	Temporary Fence Needed	02:07 AM	3K	Lead: Jane McHenry User: Tom Salesman
David Smith	Tom Salesman	Toppled Picket Fence	01:33 AM	3K	Account: Rockefeller Estate Contact: David Smith + Maggie Jones User: Tom Salesman
Harrison Dodge	demosale@demo.matchmyem	Interest in a New Fence	01:21 AM	3K	No Match

4.11.4. Undoing a Match

A user is able to undo a Match by clicking the '-Unmatch' button. This will result in the email being unlinked to the Salesforce file object. A pop up window will ask for confirmation of this step before performing the action. If a mistake is made, the user can go through the steps above for making a Manual Match to recreate the link for the email to the Salesforce file object.

The screenshot shows the Match My Email interface with a list of email matches. A pop-up window titled 'Unmatch' is open, asking for confirmation: 'Are you sure you want to unmatch an object from a message?'. The pop-up has two buttons: 'Yes' and 'No'. A red box highlights the '- Unmatch' button in the table below, and a red arrow points from it to the 'Unmatch' pop-up.

From	To	Subject	Date	Size	Type: Matches
Gail McGlamery	(3)Simone Duncan, Paul Sterne				Contact: Simone Duncan + Paul Sterne
Gail McGlamery	Paul Sterne	RE: New Ticket - [idiu Bivolaru il McGlamery tchMyEmail ul Sterne il McGlamery
Gail McGlamery	(2)Vivian Deng, ovidiu@mailspe	RE: End U			idiu Bivolaru il McGlamery
Gail McGlamery	Paul Sterne	RE: Salesforce is in NYC - Oct 19th save the date	Sep 20	33K	Contact: Paul Sterne User: Gail McGlamery

Bulk Unmatch is available as a feature in the Email Messages related list. One can check boxes next to emails for a record and click the UnMatch button to break the link for this record to the Email Message. This does not remove the message as it may be linked to other objects. Also, performing an unmatch in

Match My Email

this manner does not affect the email's match status in the MME cloud (indicated in the Type: Matches column). These messages will still show as matched.

Email Messages					
<input type="checkbox"/> Unmatch					
<input type="checkbox"/> Action	From	Subject	Date	Direction	
<input type="checkbox"/> Edit Del	Ovidiu Bivolaru	test	2/28/2013	Recipient	
<input type="checkbox"/> Edit Del	Ovidiu Bivolaru	test	2/28/2013	Recipient	
<input type="checkbox"/> Edit Del	Ovidiu Bivolaru	testing 123	2/13/2013	Recipient	
<input type="checkbox"/> Edit Del	Ovidiu Bivolaru	test	2/13/2013	Recipient	

Unmatching can be reversed by finding the emails in the cloud and reprocessing them. To do this one would mouseover the match status and click Reprocess button in pop-up window. The emails would again be matched to all relevant Salesforce objects.

4.11.5. Reprocessing

If the Type: Matches column displays "Reprocess" as the Match State for an email message, it may indicate that there is a disruption in the authentication of Salesforce credentials to MME. It may also indicate a max out on the number of API calls needed to process emails between MME and Salesforce. If the system does not address these messages within 24 hours, contact MME support staff for assistance.

Though MME reprocesses 'No Match' emails every 20 minutes, it is also possible to manually force the system to reprocess a specific message by clicking the 'Reprocess' button in the Match Details pop up box. In the case where a user makes a change to a Lead or Contact, or adds an email address to the Personal Ignore List, by clicking 'Reprocess' the change will be performed immediately.

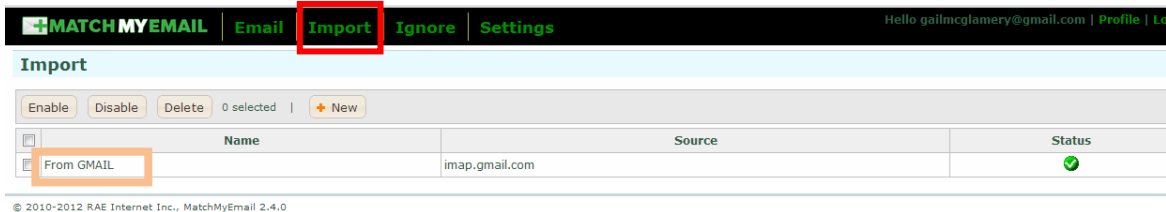
4.11.6. Reassigning Ignored Messages

It is possible that an email may be relevant to Salesforce even though the system is directed to ignore it via the Personal Ignore List. If the Filter Options (mapped as 4.5) is changed to either 'Ignore' or 'All Messages', any messages with a Type: Match of Ignore will be visible ('Ignore' showing in the far right column). If a user would like to manually match this email to a Salesforce object after all, mouseover the match state of 'Ignore' and use the '+Match' button in the pop up window as described in section 4.11.2 above to make a match. The change will take effect immediately and the Type: Matches column will display the new state.

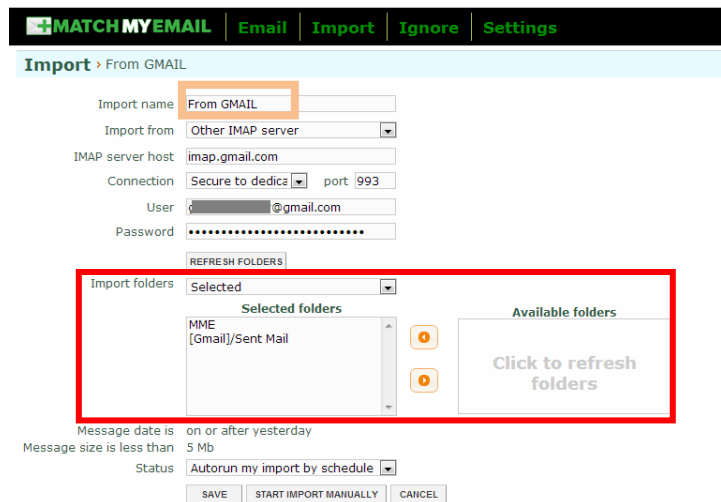
5. 'Import' Page

5.1. Email Folder Structure & Selecting for Import

Clicking 'Import' will allow the user to view the email addresses and folders from which information is being imported.



By clicking on each import listed in the “Name” column, for example “from GMAIL” in the screenshot above, details of the import settings including IMAP server and folder selection can be viewed and/or modified.



To change folders for import, remove the folders in the Selected Folders window. Click the button “Refresh Folders”. The system will connect with user’s email account and populate the Available Folders window with the folder structure. The user then selects the folders and clicks the < button to add them to Selected folders.

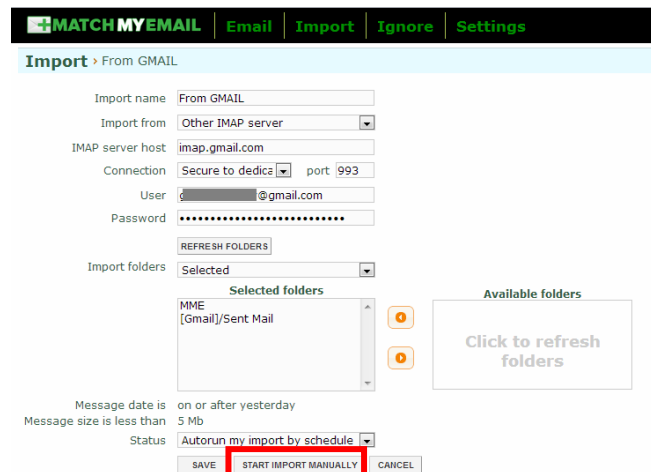
In order to capture relevant ingoing and outgoing emails, the Import Folders field should be set to “Selected” and Inbox and Sent folders should be selected. If a filter or rule puts emails in specific subfolders when received, then that folder should be selected with, or instead of, the Inbox. Again, the desire is to select folders where relevant emails pertaining to SF operations will be received as well as sent.

Using the 'Import Folders' dropdown field, the user can change the logic used for importing from "Selected", the default option, to "All, Except Selected". If this reverse logic is used, then all folders should be moved to Selected Folders window EXCEPT the folders from which emails need to be uploaded. There may be situations where this reverse logic is helpful. **Whichever logic is used, it is vital that folders such as Draft, Trash, Junk etc. are NOT selected for importing.** Contact support[a]matchmyemail.com for assistance.

Please note that with IMAP protocol, it is important to set up the email account to leave emails on the server and not remove them for at least 24 hours. If promptly removed, MME is unable to download and process them for matches.

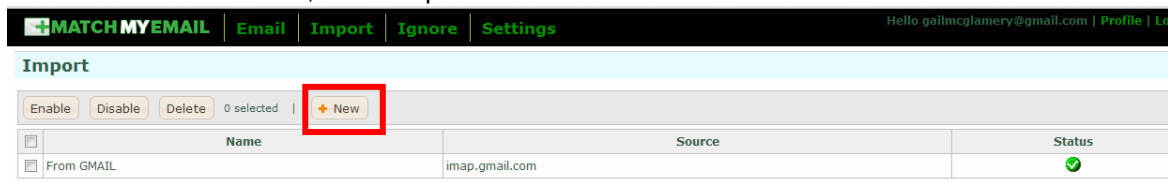
5.2. Start Import Manually

If a user would like to force an import to check operations or to immediately have email processed, use the button "Start Import Manually" found with Import settings. This button directs the system to perform the steps that normally happen every 20 minutes automatically in the background. After clicking the button, the user can observe progress in the window in lower portion of screen. Wait until 'Done' is noted at end of code (scrolling down may be required) before proceeding.



5.3. Adding New Email Imports

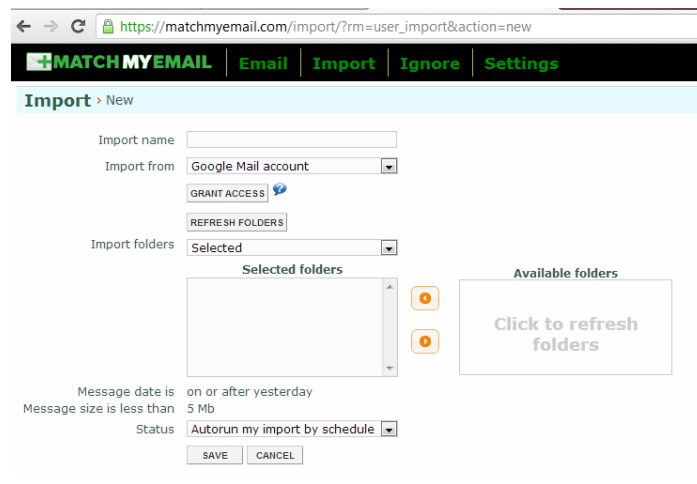
*To add new users, See Chapter 7-Domains & Users



Name	Source	Status
From GMAIL	imap.gmail.com	Success

Match My Email

By clicking on “+New”, users can add email addresses from which to import. On the next screen, shown in screenshot below, the user will be prompted for an “Import Name”. This name is at user discretion. It becomes more important to give it a descriptive name if several email addresses are used for importing so that they can be differentiated in the Name column. Importing is often set up during an online session when MME is initially installed and configured. Assistance for this step can be found in Set-up Guides at <http://www.matchmyemail.com/support/> or by contacting MME staff at support@matchmyemail.com.



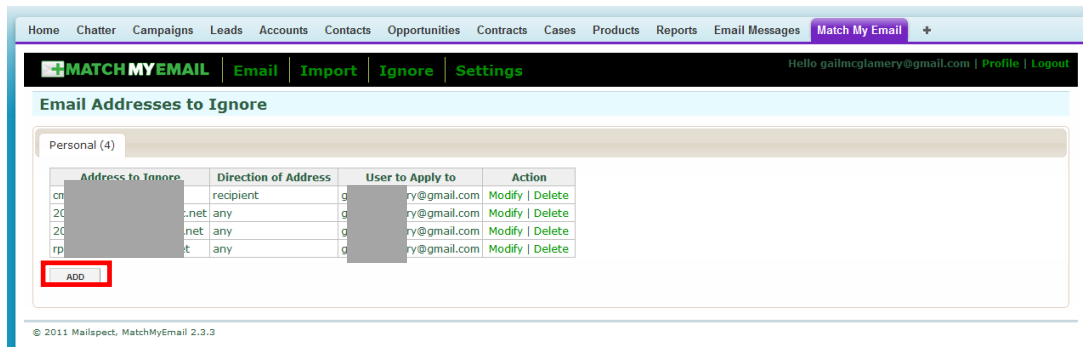
The screenshot shows a web browser window with the URL https://matchmyemail.com/import/?rm=user_import&action=new. The page has a navigation bar with 'MATCH MY EMAIL' and links for 'Email', 'Import', 'Ignore', and 'Settings'. The main heading is 'Import > New'. The form includes the following fields and controls:

- Import name:** A text input field.
- Import from:** A dropdown menu currently showing 'Google Mail account'. Below it are buttons for 'GRANT ACCESS' and 'REFRESH FOLDERS'.
- Import folders:** A dropdown menu currently showing 'Selected'. To its right is a box labeled 'Available folders' with a 'Click to refresh folders' button.
- Message date is:** A dropdown menu currently showing 'on or after yesterday'.
- Message size is less than:** A dropdown menu currently showing '5 Mb'.
- Status:** A dropdown menu currently showing 'Autorun my import by schedule'.
- Buttons:** 'SAVE' and 'CANCEL' buttons at the bottom.

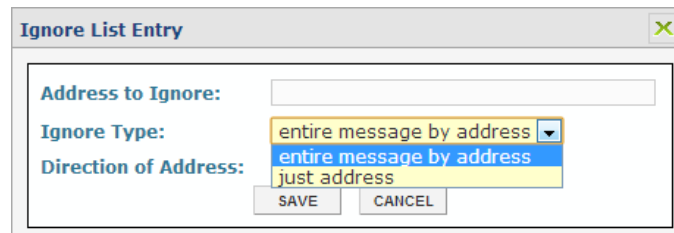
6. 'Ignore' Page & Personal Ignore List

A user can access the 'Ignore' Page by clicking 'Ignore' in the black MME Menu Ribbon. The page will show a user's Personal Ignore List. Initially it is empty, but as emails are added to the list, it can grow and be quite long, which is fine.

Email addresses can be added to the list as described in Section 4.7 while on the Email Viewer screen. Another way to add to the list is clicking the 'Add' button.



This will open a pop up box in which the user can manually type or cut & paste in an email address, select ignore type, select which direction to ignore (as sender, receiver, or any) by clicking a button, and click Save. (See Section 4.7.1 page 15 for explanation of 'just address' versus 'entire message by address' ignore types)



Once an address is in the list, users can click 'Delete' to remove an address, thus directing MME NOT to ignore it when processing. However, previously Ignored emails will not be automatically Reprocessed and must be reprocessed manually.

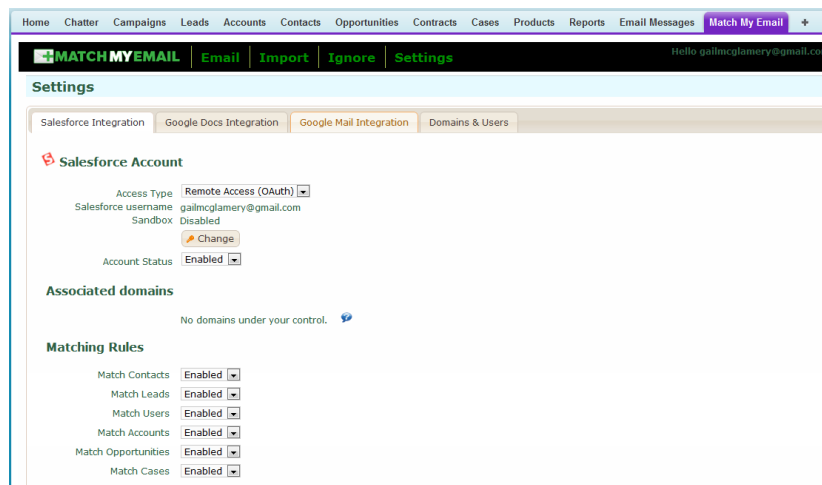
Clicking 'Modify' will open a the Ignore List Entry pop up box (shown below) in which a user can designate the direction of the address, meaning to ignore the address if they are the sender of a message, the recipient of a message, or to ignore in any instance.

7. 'Settings' Page

7.1. Salesforce Integration web tab

Here one finds details of the integration set up with Salesforce. The default Access Type is Remote Access (OAuth) which once set up enables continual authentication, even when the Salesforce password changes. Salesforce integration can be disabled here. Matching Rules can also be disabled. This is usually handled during set up, though can be changed. One may want to disable matching for an object if it is not used by an organization. The Other Services section contains the ability to enable services such as Google Docs uploads and Email to Case.

Information pertaining to these options can be found in Set-Up Guides at <http://www.matchmyemail.com/support/>. Once acted upon during MME set up, these settings are rarely changed. For assistance with Settings contact support@matchmyemail.com.



7.2. Google Docs Integration, Google Mail Integration, Domains & Users web tabs

The remaining webtabs in Settings are for users with specific needs and are configured during set up. Support staff can assist. In general, Google Docs Integration combined with enabling Google Docs uploads will send copies of email attachments to a user's Google Docs account. When access to a Gmail account is granted via Google Mail Integration, a user need not enter their email password and can login to MME using email address and check box for Login with Google Account. These Google-related sub-tabs are optional.

The Domains and Users webtab will not appear for End Users. Only Account Owners and Domain Admins have this tab for domain(s) management. For detailed information about Domains & Users, refer to MME Set-up Guides.



8. MME Special Features

8.1. Multiple or Secondary Email Address Matching to a Single Contact

In product design, it was understood that some Contacts may utilize more than one email address for communication with a Salesforce user. To that end, as part of the MME package installation a User can choose to add the related list 'Secondary Email Address' to the page layout(s) for Contacts. MME will then also utilize email addresses here to match email to a particular Contact. This functionality is only available for Contacts, and not Leads.

If you do not see the related list available, please contact support@matchmyemail.com.

8.2. Importing Legacy Email

When a User sets up MME, emails begin importing with "Message Date: on or after yesterday" which means from the last 24 hours. Emails pre-dating the start of MME importing are termed Legacy Emails. This can include emails from two months prior or two years prior or more. It is possible to import these older messages into the MME cloud for matching and uploading into Salesforce. This Legacy Importing is a free service available to MME subscribers only. Users should contact support@matchmyemail.com to ask for assistance.

9. Troubleshooting

9.1. Error Message: API_DISABLED_FOR_ORG:

This error message occurs when a Salesforce Professional Edition user attempts to connect to Salesforce.com without first properly upgrading or configuring his or her Salesforce account. Contact MME support for assistance.

9.2. Using Microsoft Internet Explorer, Web Tab log-in is unresponsive

Internet Explorer users should update Security settings before starting MatchMyEmail set-up:

- Go to Internet Options -> Security tab -> Trusted sites -> Sites.
- Type in "https://*.matchmyemail.com" in "Add this website to the zone" field.
- Hit "Add" -> Corresponding entry should appear in a list "Websites".
- Hit "Close".
- Go to Privacy tab -> Sites.
- Type in "matchmyemail.com" in "Address of website" field.
- Hit "Allow" -> Corresponding entry should appear in a list "Managed websites".
- Hit "Ok" -> "Ok"

9.3. My Outgoing Email is not being logged?

MME is using IMAP protocol to retrieve a copy of incoming / outgoing messages. It's very likely that Sent folder is not part of selected folders in Import settings or email client is not saving a copy of sent message into Sent folder from server (please check your email account options). Contact MME support for assistance.

Please visit http://wiki.matchmyemail.com/index.php/Main_Page for more frequently asked questions and answers.

10. Limitations

10.1. In MME

- **MME Folder Limits:** Basic MME subscription per user allows importing from up to 18 folders/subfolders per email address, up to 36 folders/subfolders when importing from two email accounts. There are no folder import limitations for MME Unlimited subscription. Contact Sales for rate differences..
- **MME Automatic IMAP Imports File Size Limit:** There is a limit of 100 MB of emails imported per day per User account (seat) into the Match My Email cloud.
- **Message Size Limit:** The message size limit is 30 MB. Messages < 30MB are imported into MME cloud. If attachment is < 5MB (Salesforce limitation), it is uploaded into Salesforce with email. If attachment exceeds 5MB, it is replaced with link to MME cloud where attachment is available for 45 days, after which it is deleted.
- **MME IMAP Imports Count Limit:** 2 IMAP imports are available per MME account. Additional imports are offered for extra fees.
- **MME Legacy Imports Limits:** 200 legacy emails can be processed at a time, and processing can occur three times each day for a total of 600 messages a day or 18,000 messages in a month. Legacy importing must be set up in coordination with MME support staff.

10.2. Salesforce Limits & MME Operations

- **Salesforce API Usage Limits:** Salesforce limits an organization on total API calls within a 24 hour period. Minimum limits are established at 5,000 API calls for most editions, which is the number used in strategizing import operation for MME. https://na4.salesforce.com/help/doc/en/integrate_api_rate_limiting.htm
- **Salesforce Limits on Custom Apps:** Salesforce limits the number of custom apps available from the AppExchange as follows: Group edition: 1 app, Professional edition: 5 apps, Enterprise edition: 10apps. (Unlimited edition has no limitation on custom apps.) <http://na4.salesforce.com/help/doc/en/limits.htm>
- **Salesforce File Size Limit:** The maximum document size that can be uploaded is 5 MB. Therefore, MME does not import into the cloud any email that is larger than 5 MB.
- **Salesforce Data & File Storage Limit:** Salesforce provides a standard amount of 1GB of Data Storage and 11GB of File Storage shared by all users of organization. MME MultiMatch uploads emails as Data Storage but is able to upload email attachments as File Storage, of which there is more available for all users.
- **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. <http://na4.salesforce.com/help/doc/en/limits.htm>



11. Master Services Agreement

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