

Match My Email White Paper

Improvements on Native Salesforce Outlook and Gmail Integration

Salesforce.com provides software plug-ins for Outlook and Gmail. These add-ons lack important features that users want and need to increase productivity. Match My Email has developed enhancements to native Salesforce email integration. The Match My Email app works seamlessly with any IMAP-compatible email service or device.

Improvements to native Salesforce functionality fall in these major categories

1. Automation
2. Ubiquity
3. User interface
4. Privacy
5. De-duplication
6. Customization

Automation: Match My Email automates the process of adding emails to Salesforce. This is in contrast to Salesforce that only provides manual tools. Manual plug-ins force the user to take action each and every time an email is moved from Outlook or Gmail to a SFDC record, which is inefficient.

Automated email syncing and logging saves users time by eliminating a repetitive, non-productive, daily task -- as much as three hours of time per month.

Automated email integration creates a 100% complete and accurate email record in Salesforce, consistently day-after-day over the long term; manual tools like Salesforce for Outlook or Salesforce for Gmail fall out of use due to user fatigue. With manual tools the email record in Salesforce get spottier and spottier until the email information is useless.

Ubiquity: Match My Email is cloud technology. The app works at the network or Internet level. That means it is “always on” regardless of the time of day or what a user is doing. Manual plug-ins like Salesforce for Outlook (“SFO”) only work when a user is actually doing email inside of Outlook. If an SFO user is traveling, sick or on vacation, his or her emails don’t get logged into Salesforce. Being a cloud app, Match My Email captures and syncs emails from all devices at once – desktops, laptops, tablets and smartphones.

Match My Email is technology independent. It is based on the IMAP standard so it works with every business email server or service, for example, GoDaddy, Rackspace, Intermedia, Sherweb, Yahoo! and 1&1, not just Google or Microsoft. Native Salesforce email integration tools are plug-ins; they only work with Windows computers – they don’t work with Mac.

Plug-ins are heavy computer resource consumers. They cause Outlook and Gmail to slow down and crash from time to time. Match My Email is invisible in Outlook and Gmail because it is working at the network level. Match My Email will not slow down Outlook or Gmail nor cause a lock up or crash.

User Interface: Salesforce lacks simple features that make working on emails easier. Match My Email has fixed those problems.

- Match emails to multiple Salesforce contacts at once automatically. Natively Salesforce will only match to one Contact at a time manually.
- Hover over Subject Line and see email body. Natively in Salesforce emails have to be opened one at a time and read. The Hover Over Pop-up makes working on emails Salesforce faster and more convenient.
- Bulk commands like Delete, Match and Unmatch. Instead of handling emails one at a time, users can manage emails more quickly.
- Reply, Reply All and Forward. Respond to an email from directly inside Salesforce. No need to jump back to Outlook or Gmail.
- Date range searching. A way to quickly see when email interactions occurred.
- Show More and Show Full List. See all the emails related to a record in a large popup for quick scanning and taking actions.
- Link Chatter directly to an email. Have discussions in Salesforce about an email.
- Create an Email Task. Associate a task directly with an email.
- Create new records using email data. New records can be created inside Salesforce using drag & drop email data.

The screenshot displays the Match My Email interface within a Salesforce environment. A green arrow points from a yellow callout box to a table of email messages. The callout box contains the text: "Emails embedded in every record". The table, titled "Email Messages", lists several email entries with columns for Name, Subject, Date, Attachments, and Type/Status. The interface includes a sidebar with navigation links and a top navigation bar.

Name	Subject	Date	Attachments	Type/Status
David Smith	Subject Line	2/20/2018 10:10 AM	Attachment 1, Attachment 2	Unread
John Doe	Subject Line	2/20/2018 10:10 AM	Attachment 1, Attachment 2	Unread
John Doe	Subject Line	2/20/2018 10:10 AM	Attachment 1, Attachment 2	Unread
John Doe	Subject Line	2/20/2018 10:10 AM	Attachment 1, Attachment 2	Unread
John Doe	Subject Line	2/20/2018 10:10 AM	Attachment 1, Attachment 2	Unread

Privacy: From time to time a user will want to send an email to a customer and not want that email in Salesforce. Match My Email includes a Confidential Tag feature. If the app sees a SafeWord in the body of an email, that email is blocked from entering the Match My Email cloud and hence, Salesforce.com.

By default, email content in the Match My Email cloud is only visible to the email “owner” to maintain privacy. However, sales managers can see all emails related to their sales group if Match My Email is instructed to remove the default privacy settings.

De-duplication: With the native Salesforce email integration plug-ins, if an email is logged into two Contacts, the same email will roll up twice to the Account file. Match My Email fixes this “clutter” issue. Match My Email de-duplicates emails as they rollup to the Account and Opportunities records.

Team de-dupe is another unique feature of Match My Email. If two members of the sales team are addressed on the same email, the email is de-duped so only one copy is uploaded to Salesforce – to eliminate “clutter”.

Customization: Match My Email includes a scripting language. With this language, users can automatically match emails to custom records, objects, fields and filters. The scripting language can match emails based on email address, parent-child roll up or tagging. This powerful technology enables the seamless integration of the emails into any sales workflow.

The best way to see the power of Match My Email is to schedule a Live Demo. Just click on this link to use Match My Email’s online scheduling tool.

<http://www.matchmyemail.com/install-salesforce-email-integration/>