

WHITE PAPER

GETTING THE MOST OUT OF SALESFORCE'S EMAIL MODULE

AUTOMATED EMAIL INTEGRATION

This white paper discusses Match My Email, a cloud-based email syncing app that can improve Salesforce productivity, effectiveness and usage.

GET STARTED RIGHT AWAY

Salesforce and email have a love / hate relationship. Salesforce has never offered world-class email syncing—probably because they don't want to store billions of emails in their cloud. Users are forced to click an Add to Salesforce button inside manual plugins for Outlook and Gmail. These plugins are time consuming, buggy and often freeze desktop computers.

Salesforce also doesn't offer a way to REPLY to or FORWARD an email from inside Salesforce. This missing functionality limits the utility of the otherwise excellent SFDC email module.

Automated Email Syncing Can Transform Salesforce

Automated email syncing and handling apps like Match My Email can transform Salesforce into a powerful **email productivity tool**. Email can morph from a frustrating feature to a favorite. By implementing a combination of technologies

(A) Automated email integration

(B) List Views based on Email Meta-Data

(C) Reply & Forward

(D) HTML templates

The logo for Match My Email features the text "Match My Email" in a bold, white, sans-serif font. The word "My" is smaller and positioned between "Match" and "Email". To the right of "My" is a white icon of an envelope with a checkmark inside, set against a dark background.

Available on the AppExchange at
<https://appexchange.salesforce.com/listingDetail?listingId=a0N30000003JutIEAK>

the email experience in Salesforce can actually be **better than in Outlook or Gmail**. That's right, the email experience in Salesforce can be better than in Outlook and Gmail.

Step 1: Automated Email Integration

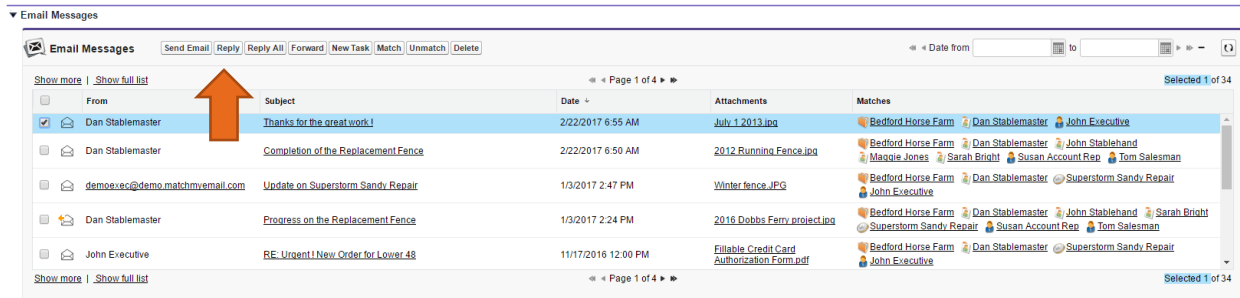
Emails are still the #1 mode of customer communications. It is important for emails to be visible in Salesforce and organized by client record. Syncing emails to Salesforce records can be done automatically using a cloud-based app like Match My Email.

Match My Email looks at the email addresses in each inbound and outbound email – TO:, FROM:, CC: and BCC: -- and matches the email addresses to all relevant Salesforce records. Once a match is found, the email is uploaded to Salesforce permanently and inserted into the record(s).

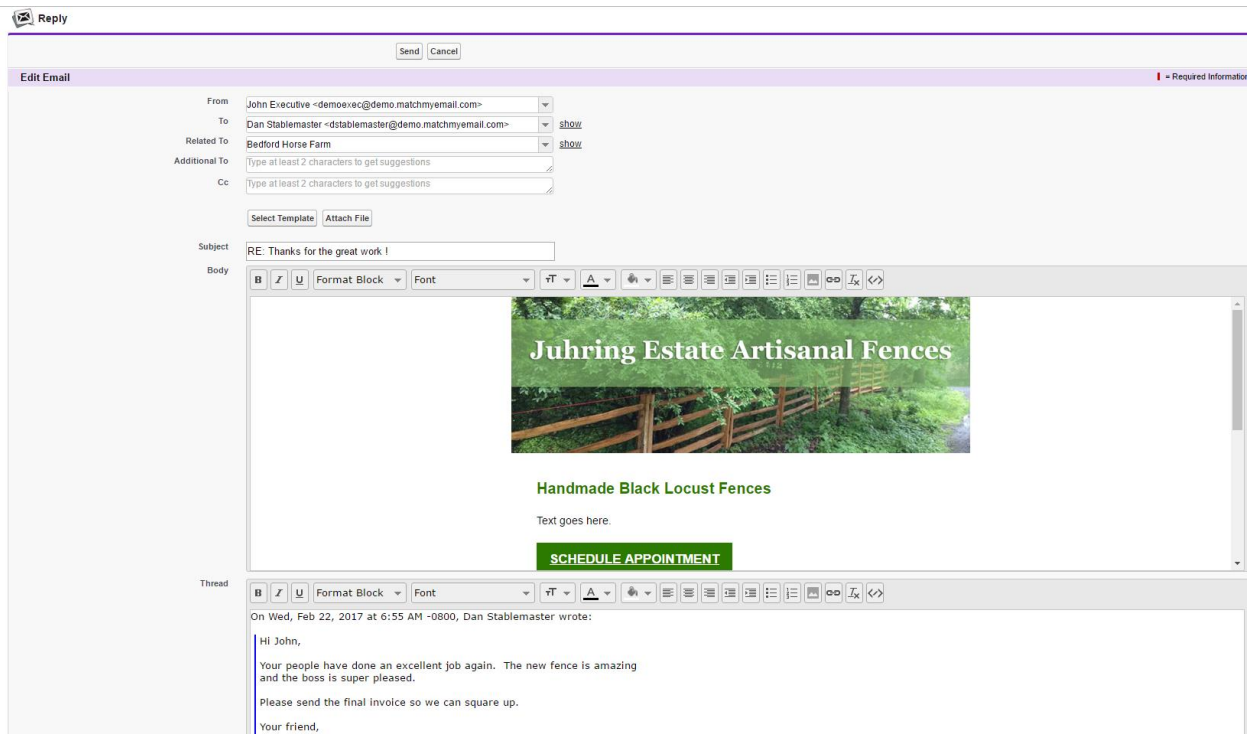
“All my emails are in Salesforce organized by client automatically. The best!”

Step 3: Reply & Forward

Match My Email includes a feature that lets users reply to emails directly from Salesforce. All the user needs to do is pick the email to be replied to and click Reply.



The REPLY command opens up a modified version of the Salesforce email module. Inside the modified email screen, Match My Email adds RE to the Subject Line so the email looks like a ‘real’ Reply and the thread of the previous email is added to the end of the body of the new outbound email.



“With REPLY & FORWARD I can respond to emails from inside Salesforce!”

Step 3: HTML Templates

Salesforce includes tools that can be used to create amazing HTML signatures and templates. HTML signatures and templates can add to the professionalism of new email and replies. The HTML templates can include consistent branding and messaging, mail merge salutations to reduced ‘nameos’, perfectly formatted signature blocks and social media channels linking the email to social media like Facebook and Youtube. If you don’t want to learn how to use the Salesforce HTML template tool, Match My Email offers a design and production service at \$67.50 per hour; most projects take less than three hours.

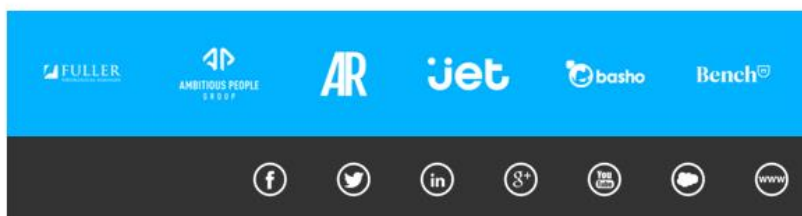


Hi Customer,

Text goes here. And here and here.

Have a great day,

Paul Sterne
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To Unsubscribe, email unsubscribe@matchmyemail.com with the subject line: Unsubscribe

“I am proud of the way my emails look since I started using HTML templates!”



#1 Automated Email Integration App

Contact Us

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THE BEST WAY TO SEE THE FEATURES AND BENEFITS OF MATCH MY EMAIL IS TO SCHEDULE A LIVE DEMO

There is a lot more to tell about the advantages of cloud-based email integration. A Live Demo is the fastest and most efficient way to explain them. Match My Email Live Demos are done using GoToMeeting screen sharing. They are one-to-one, so the prospect can ask questions and steer the conversation to the things they are most interested in. To schedule a Live Demo use the scheduling tool on the Match My Email web site at

[SCHEDULE A LIVE DEMO](#)

