



Match My Email

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A Story Of How MME Made One Salesforce Admins' Life Easier



The Problem

Recently, a Salesforce Admin at a large health care company came to Match My Email with a seemingly straightforward problem. In his Salesforce Org, he had created a custom object, Purchase Orders, and needed to capture the complete history of email communication for each specific order automatically in Salesforce. After exploring Einstein Activity Capture (“EAC”) and the other [email syncing apps on the AppExchange](#), this individual kept running into the same issues. EAC couldn’t capture emails in custom objects and other apps could only offered manual

matching. In the strict regulatory healthcare environment, a manual match wouldn't pass the compliance bar. He needed to know with 100% certainty that all emails related to a purchase order were captured in Salesforce.

The Backdrop

When it was time to discuss data inaccuracies that people were experiencing at a recent Salesforce User Group Therapy meeting, this specific admin raised his hand and proceeded to explain his email capture conundrum. On top of the frustrations that he was having with custom object email capture, he said it didn't help that compliance made his team initially fill out purchase orders on a program that was probably built in the 80's. The software didn't even have an API, a testament to the antiquity of the system.

As is customary in Salesforce User Group Therapy meetings, the admin made an appeal to anyone in the audience who thought that they might know a solution. Enter Match My Email! I enthusiastically raised my hand and told him that I had just the tool. We could discuss it during a break.

The Solution

In order to automatically capture emails in a custom object, there needs to be some way to differentiate which emails relate to the custom object. In this admin's case, the Purchase Orders custom record don't have explicitly related email addresses. For example, the same individual might be involved with numerous purchase orders, which excludes the possibility of matching an email by the sender's or recipient's email address without recreating duplicates. Matching only to full email addresses is a major limitation of Einstein Activity Capture's email integration functionality.

To get around this issue, Match My Email installed its custom email composer into the Purchase Orders object. The composer included a template that would automatically stamp outbound emails with the alphanumeric Salesforce record ID assigned to the specific object. This would allow users to send tagged emails out from Salesforce. With Match My Email's precision matching logic, the app would be able to automatically identify tagged emails and replies to tagged emails, then [capture and sync those emails in their appropriate Salesforce records](#) with no duplication or clutter and with 100% accuracy for compliance. And voilà, the admin's life was made a whole lot easier.



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