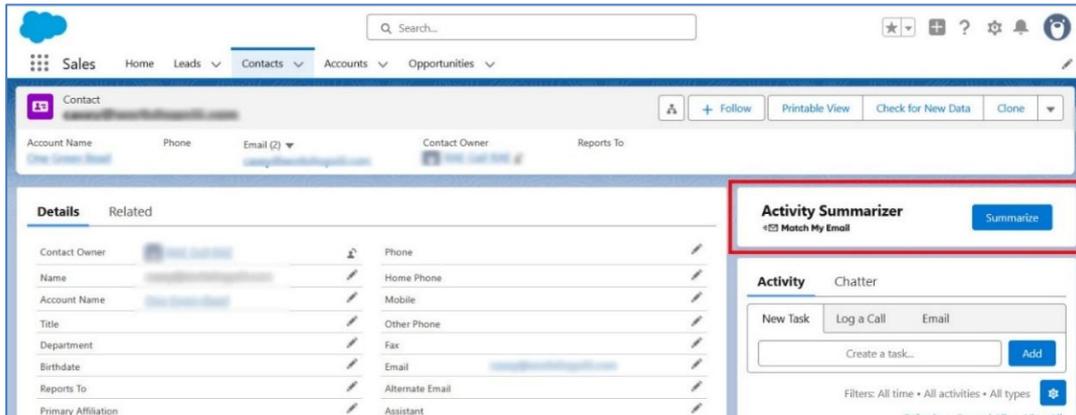


Match My Email

AI Activity Summarizer

The AI Activity Summarizer is available to all Match My Email customers working in Salesforce Lightning. It is an opt-in feature that will summarize activities in the native Salesforce Activity timeline as well as from the Match My Email custom object when synced emails are directed there. It requires an installed package version of 7.86 or higher and is a custom component that can be placed on the Lightning page layout for Account, Contact, Lead or Opportunity.



Installed Package Requirement

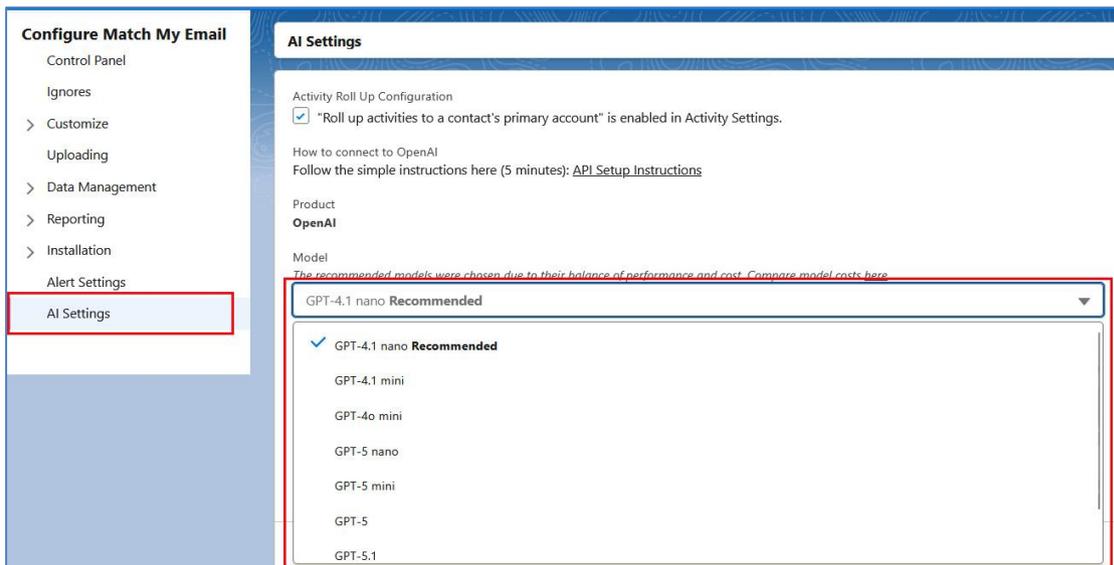
The AI Activity Summarizer is available with managed package versions of 7.86 and higher. To confirm your current package version, go to Salesforce > Setup > Installed Packages. Find Match My Email in the list and note the version number to the right. Click here for the [Match My Email Upgrade Guide](#).

Set Up of the AI Activity Summarizer

Once your package version is upgraded to at least 7.86, steps to set up the Activity Summarizer [can be found here](#).

Cost

Use of OpenAI requires a credit card on file in your OpenAI account to cover credits for calls and analysis. However, based on our estimates, customers should be able to summarize approximately 1,000 "regular length" emails and events for \$0.02. Match My Email researched and tested options and models for speed, efficiency, and quality of response, as well as costs.



We selected OpenAI and the model GPT 4.1 nano as the recommended default. We estimate over time 50,000 activities can be summarized through multiple generations for a total of \$1.00. As part of setup instructions, it is possible to change the model. Please note that models behave differently and can result in different speeds, quality of results, and costs.

We recommend beginning with a credit of \$20 and assignment of Generative permissions to a few Users is a starting place. With ongoing use and evaluation, you should become comfortable with costs for the tool use and can expand the number of Users that can generate summaries.

What is summarized?

It is an opt-in feature that has been created to leverage AI in analyzing:

- The 25 most recent activities in the native Activity Timeline which is comprised of
 1. Salesforce Email Messages (Uploading = Enhanced Email) where the Task of Type Email is being used,
 2. Tasks created by Log a Call function, and
 3. Calls.
- The last 25 Events (which will include events scheduled and recurring meetings up to three months into the future)
- The last 25 Emails if those are being logged in the Match My Email custom object. (Uploading = MME Email Messages)
- Of the above that is considered, priority is given to activities and events that occurred within the last 30 days.

Opt-In and Administrative Control

No data passes to the Match My Email cloud. The component is based in Salesforce and summarizes Salesforce data by making use of a connection to OpenAI. This requires an Administrative User to create an OpenAI account and set up payment there for credits. As part of the set-up steps, we recommend disabling API call logging to ensure none of the data sent through the API is stored with OpenAI.

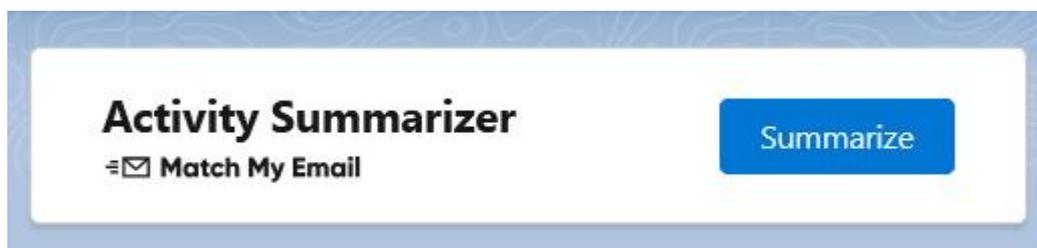
Administrative Users have further control of the feature and use of OpenAI by granting permissions for Salesforce Users for the Summarizer. As part of the setup steps, Permissions Sets provided in the managed package can be assigned to Users to either 1) generate, and also view, data (MME AI Generation Access) or 2) only be able to view summaries that have been generated by other Users (MME AI View Access).

If the component is placed on a Lightning Page Layout but the API key is not setup, clicking the Summarize button will result in an alert message indicating additional steps are needed.

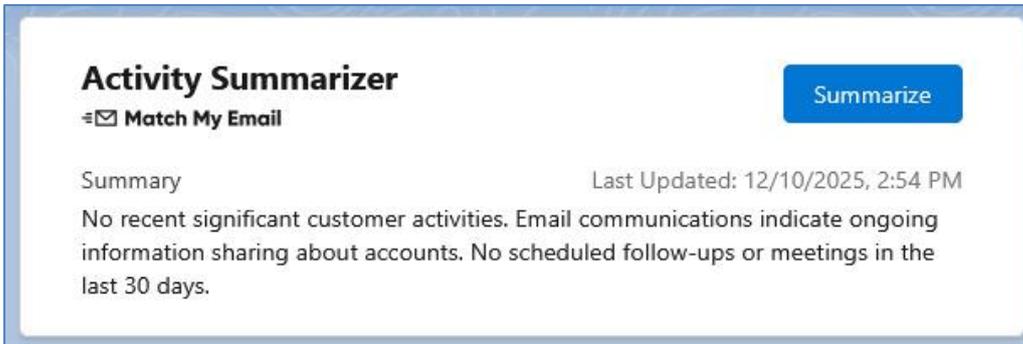
Use

Match My Email has developed a proprietary prompt that is coded into the components use. The summary will work to pull critical pieces of information included but not limited to dates, costs, deadlines, goals and project terms, and names. It will result in three sentences of no more than 25 words each. The purpose of the summary is to give a snapshot of important activities as a reference prior to a phone call, follow-up or meeting. In addition to our proprietary prompt, there is a place in AI Settings within package configuration to add additional instructions.

Users that have MME AI Generation Access will be able to click the Summarize button and have the component create a new and updated summary of activities. This is making use of OpenAI action and charges to the OpenAI-connected credit card. However, as mentioned below, this can be nominal.



When User clicks Summarize and generates a summary, it will remain in the component and visible to those with viewing permission until the Summarize button is clicked again. The last time the summary was generated will be indicated as in the following example(s).

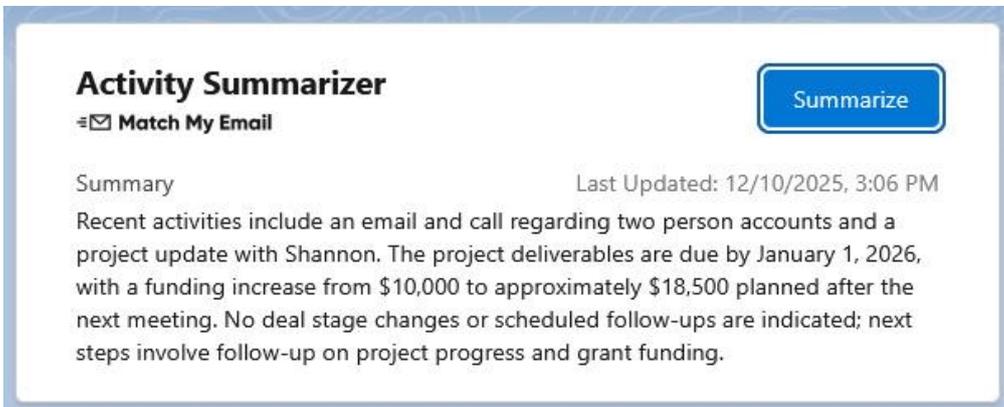


Activity Summarizer Summarize
✉ Match My Email

Summary Last Updated: 12/10/2025, 2:54 PM

No recent significant customer activities. Email communications indicate ongoing information sharing about accounts. No scheduled follow-ups or meetings in the last 30 days.

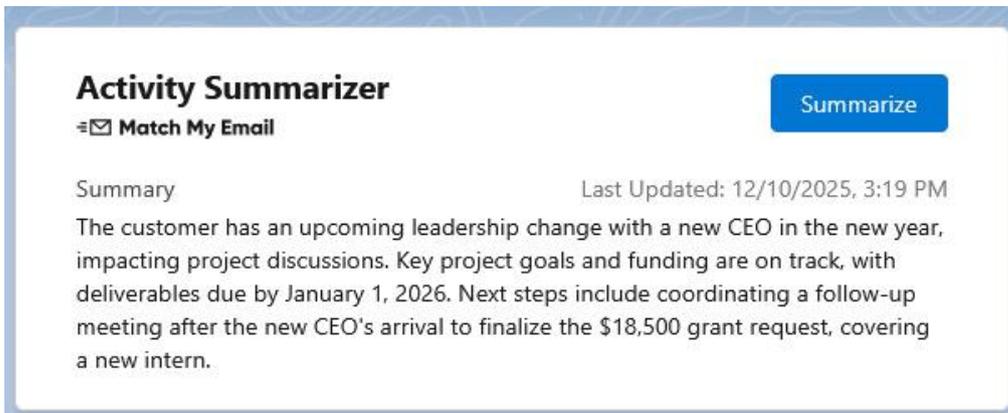
As additional data becomes available in call notes, tasks, email messages and events, the content of the summary will change. This is represented in the following screenshots of the summarizer after additional activities and events were added to the same record's timeline.



Activity Summarizer Summarize
✉ Match My Email

Summary Last Updated: 12/10/2025, 3:06 PM

Recent activities include an email and call regarding two person accounts and a project update with Shannon. The project deliverables are due by January 1, 2026, with a funding increase from \$10,000 to approximately \$18,500 planned after the next meeting. No deal stage changes or scheduled follow-ups are indicated; next steps involve follow-up on project progress and grant funding.



Activity Summarizer Summarize
✉ Match My Email

Summary Last Updated: 12/10/2025, 3:19 PM

The customer has an upcoming leadership change with a new CEO in the new year, impacting project discussions. Key project goals and funding are on track, with deliverables due by January 1, 2026. Next steps include coordinating a follow-up meeting after the new CEO's arrival to finalize the \$18,500 grant request, covering a new intern.