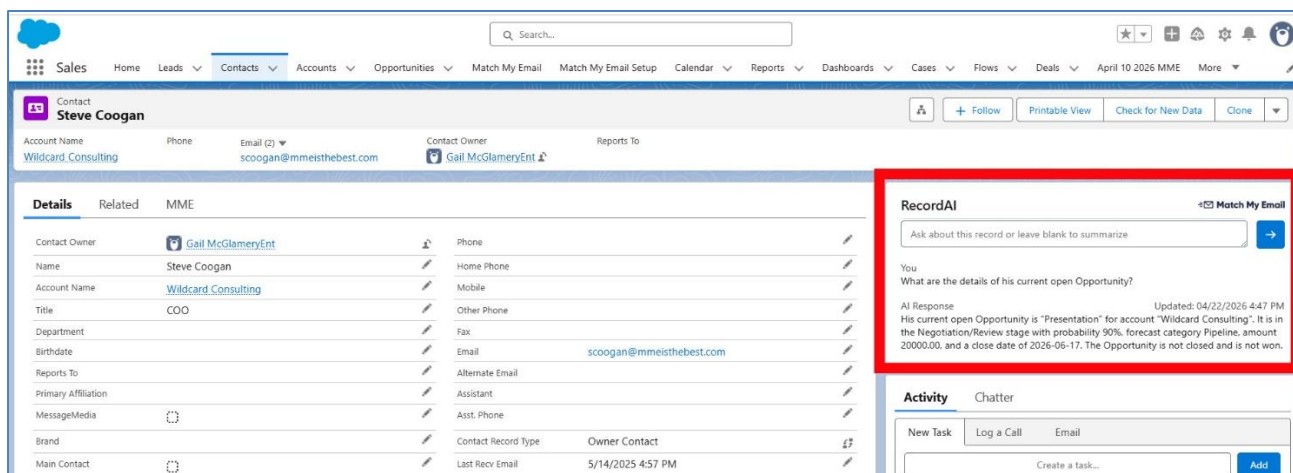


## RecordAI

RecordAI is an opt-in feature available to Match My Email customers working in Salesforce Lightning. It can be deployed on any Salesforce record and lets Users ask natural language questions about Salesforce record data. It can pull in record data, related record data such as Opportunities, and Activity Timeline data to provide answers.



RecordAI differs from Match My Email's initial AI tool, the AI Activity Summarizer in a few ways. RecordAI can access data beyond just the activity timeline and questions and answers are visible to each User and are not stored to be visible to others at a later time, though they may be cached in the browser. If the text input area is empty, RecordAI can create a summary of the record looking beyond just the activity timeline to other important aspects of the Contact or Account. RecordAI is also available for any Salesforce object as opposed to the AI Activity Summarizer which works only for standard objects.

## Installed Package Requirement

RecordAI is available with managed package versions of 7.91 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 RecordAI

Once your package version is upgraded to at least 7.91, steps to set up RecordAI [can be found here](#).

If you have previously set up Match My Email's AI Activity Summarizer, you simply need to upgrade the package and then place the RecordAI component on the desired Lightning Record Pages.

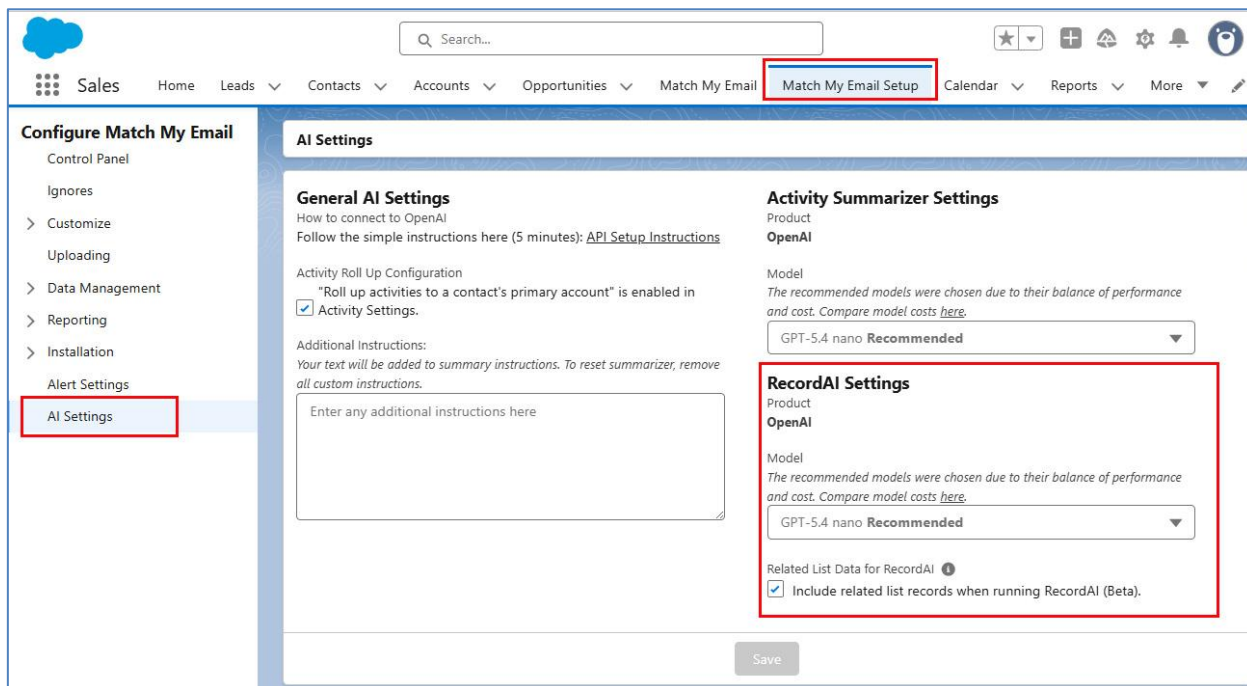
## Cost

Use of OpenAI requires a credit card on file in your OpenAI account to cover credits for calls and analysis. There is no change to your Match My Email subscription cost. Costs depend on the choice of AI model, and those models are changing rapidly. Please note that models behave differently and can result in different speeds for responses, varying quality of results, and subsequent differences in costs.

With the release of RecordAI and our ongoing testing, we now recommend GPT 5.4 nano. It is a more powerful but still cost-effective model appropriate for both Activity Summarizer and RecordAI. We estimate a cost of \$1.00 USD to summarize 16,000 activities. This differs from our original recommendation of an older model, GPT 4.1 nano, in which we estimated \$1.00 USD would summarize 50,000 records.

If you want to use a different model, you have the ability to connect to many of OpenAI's latest models which you can compare costs here: [OpenAI model comparison](#).

Users can choose which model they want to use for RecordAI. Settings are found in Salesforce App Launcher > Match My Email Setup > AI Settings > RecordAI Settings.



In addition to a choice of model, Admins may also choose if related list records should be included in the analysis. If that box is unchecked, AI analysis will be for fields values on just the record and that record's Activity Timeline data.

We recommend beginning with an OpenAI 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?

RecordAI builds on the existing functionality of the AI Activity Summarizer. The logic gives priority to activities and events occurring within the last 30 days and analyzes:

1. The 25 most recent activities in the native Activity Timeline which is comprised of
  - Salesforce Email Messages (Uploading = Enhanced Email) where Task Type = Email is being used,
  - Tasks created by Log a Call function, and
  - Calls.
2. The last 25 Events (which will include events scheduled and recurring meetings up to three months into the future)

3. The last 25 Emails if those are being logged in the Match My Email custom object. (Uploading = MME Email Messages)

In addition to activity data, RecordAI is also looking at a maximum number of characters in the record and its related record fields. Caps are built in proportionally so a field such as Description or other long text fields will be limited to 4,000 characters. Other limits exist for the actioned record and related records to stay under any timeouts or known Salesforce limits.

## Opt-In and Administrative Control

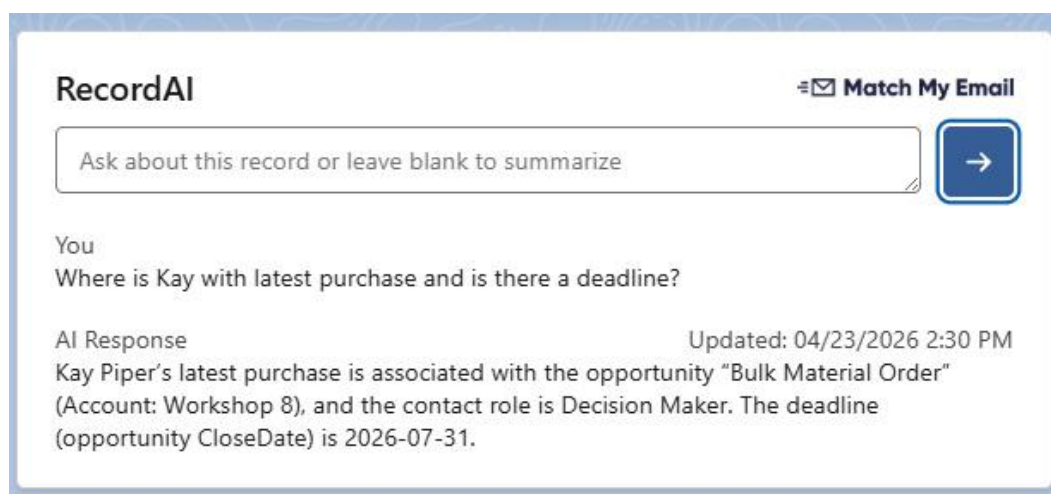
No data passes to the Match My Email cloud. RecordAI is based in Salesforce and summarizes Salesforce data by making use of a connection to OpenAI. This requires an Administrative User to create an OpenAI account and set up payment there for credits. As part of the set-up steps, we recommend disabling 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 RecordAI. 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

A User can ask a question and see both the question and response. This information may be cached by the browser, which may allow the User to return to the record and still see the previous summary or question and answer. However, the AI-generated response is specific to the User and is not visible to others.



The screenshot shows the RecordAI interface. At the top left is the 'RecordAI' logo, and at the top right is a 'Match My Email' icon. Below the logo is a text input field with the placeholder text 'Ask about this record or leave blank to summarize'. To the right of the input field is a blue button with a white right-pointing arrow. Below the input field, the text 'You' is followed by the question: 'Where is Kay with latest purchase and is there a deadline?'. Below the question, the text 'AI Response' is followed by the answer: 'Kay Piper's latest purchase is associated with the opportunity "Bulk Material Order" (Account: Workshop 8), and the contact role is Decision Maker. The deadline (opportunity CloseDate) is 2026-07-31.' To the right of the answer is the text 'Updated: 04/23/2026 2:30 PM'.

Alternatively, a User can simply leave the field blank and click the blue arrow button to generate a summary as shown below.