

# **Email Generator**

Connected System Plugin for **Appian**

# **Appian Corporation**

Version 1.0.0

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## Overview

The Email Generator Connected System allows developers to generate mail content with the help of OpenAI services. It allows users to choose the tone of the mail (Formal, Friendly, Casual and Extra casual) with email length.

Developers can leverage their email generation capabilities through Appian with this connected system by entering the credentials retrieved from either OpenAI or Azure OpenAI Studio. This documentation outlines the process of obtaining and leveraging these credentials within the Appian platform.

**Note:** This AI Tool can utilize external LLMs such as OpenAI and Azure OpenAI. As with all plug-ins, data sent to these external organizations is subject to the external organization's security policies, procedures, and pricing. Please check with your administrator and your organization's AI policy before sending any sensitive information to external services.


## Features

- Use OpenAI or Azure OpenAI to generate the body of an email from any user-inputted description or prompt
- Customize your generated email by specifying the length, tone, subject, or recipient

# Connected System Configuration

## Chat Completion Model: OpenAI

### Connected System Properties



**Email Generator**  
Generate emails with ChatGPT  
Version: 1

**Name \***

**Description**

**Email Generator Configuration**

**Authentication**

Use the OpenAI services for Chat Completion

**OpenAI API Key**  
\*\*\*\*\* (Clear)  
Enter your OpenAI APIKey. Visit <https://beta.openai.com/account/api-keys> to get an API key for your account.

**Completion Model \***

Provide the name of the model to use for text completion. Example: gpt-3.5-turbo for GPT 3.5 Turbo model, gpt-4 for GPT 4 model. Visit <https://platform.openai.com/docs/models/model-endpoint-compatibility> and use one of the models listed under /v1/chat/completions endpoint.

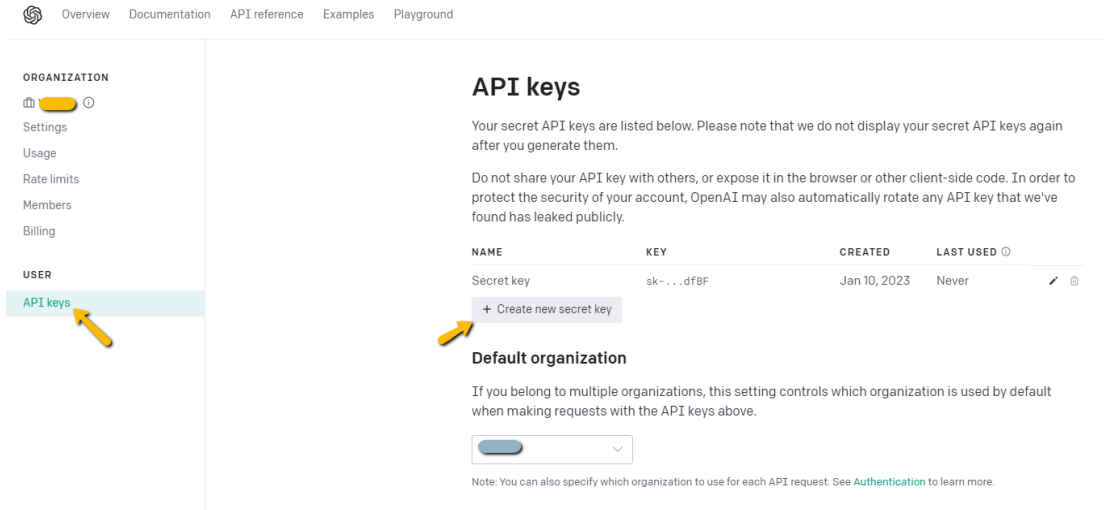
**TEST CONNECTION**

**CANCEL** **USE IN NEW INTEGRATION** **SAVE**

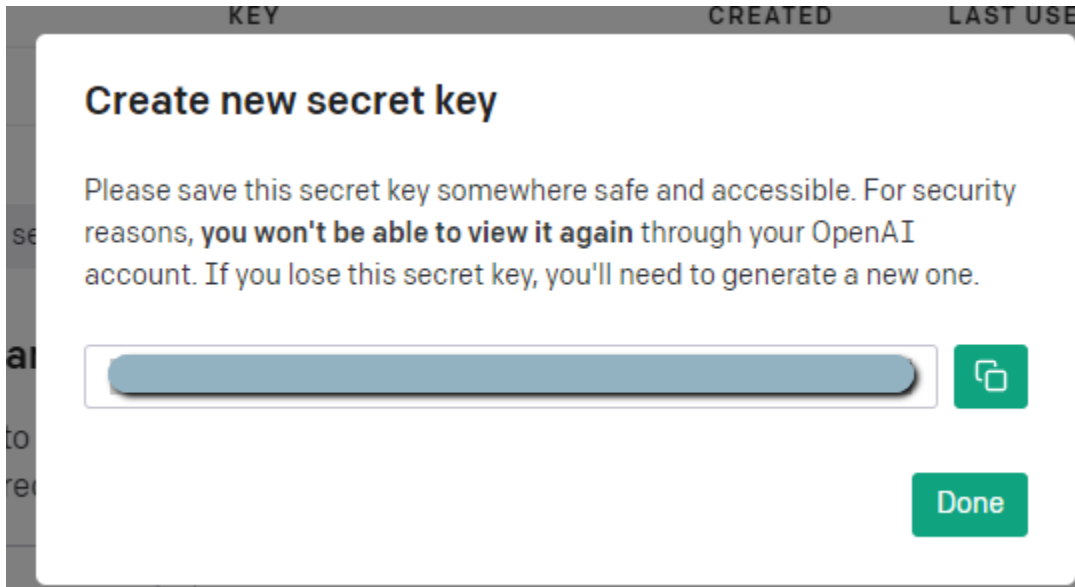
The Email Generator Connected system with OpenAI authentication requires the following credentials: **OpenAI API Key** and **Chat Completion model**.

To retrieve your OpenAI API Key:

1. Go to the [OpenAI console](#). Make sure that the **API keys** menu is selected.



2. Click on **Create new secret key** to generate a new API key.
3. Copy the value and save it separately as we won't be able to access it again. Paste the API key in the connected system dialog box.



To find the appropriate Chat Completions model:


1. Visit <https://platform.openai.com/docs/models/model-endpoint-compatibility> and use one of the models listed under `/v1/chat/completions` endpoint. Example: `gpt-3.5-turbo`

for GPT 3.5 Turbo model, gpt-4 for GPT 4 model.

- a. Each model has unique strengths so try to select the most appropriate for your use. If you would like to prioritize consistency in the size and format of your generated email, we recommend you use a GPT 4 model. If you need to prioritize speed of generation, GPT 3.5 Turbo might be better suited.

## Chat Completion Model: Azure OpenAI

### Connected System Properties

**Email Generator**  
Generate emails with ChatGPT  
Version: 1

**Name \***

**Description**

**Email Generator Configuration**

**Authentication**

Use the Azure Open AI services for Chat Completion

**Azure Region \***

Provide the Azure region.

**Deployment ID \***

Provide the Deployment ID.

**Azure API Key \***

Provide the API Key obtained from Azure OpenAI

Connection successful

**TEST CONNECTION**

**CANCEL** **USE IN NEW INTEGRATION** **SAVE**

This authentication requires the following credentials: Azure Region, Azure Deployment ID and Azure API Key. Follow these steps to get the Azure credentials.

## Set up your Azure OpenAI Account

1. Navigate to [Azure's OpenAI API docs](#) and ensure you have met the listed prerequisites. View the prerequisites by selecting "Quickstarts." If you have not already done so, [create an Azure subscription](#).

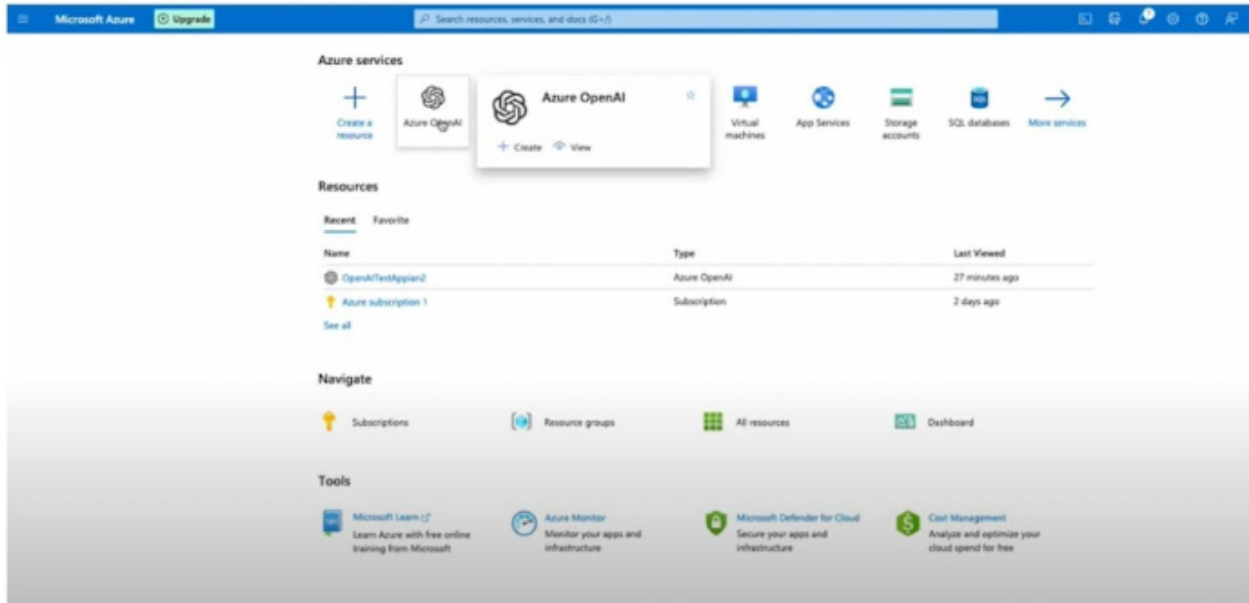
The screenshot shows the Azure OpenAI Service Documentation page. At the top, there is a navigation bar with the Microsoft logo, 'Learn', and various categories like 'Documentation', 'Training', 'Certifications', 'Q&A', 'Code Samples', 'Assessments', 'Shows', and 'Events'. A search bar and 'Sign in' link are also present. Below the navigation bar, the main heading is 'Azure OpenAI Service Documentation'. Underneath, there is a sub-heading: 'Learn how to use Azure OpenAI's powerful language models including the GPT-3, Codex and Embeddings model series for content generation, summarization, semantic search, and natural language to code translation.' The main content area is divided into two rows of cards. The first row contains: 'OVERVIEW: What is Azure OpenAI Service?', 'QUICKSTART: Quickstarts', 'HOW-TO GUIDE: Create a resource', and 'TUTORIAL: Embeddings'. The second row contains: 'HOW-TO GUIDE: Completions', 'TRAINING: Intro to Azure OpenAI training', 'CONCEPT: Azure OpenAI Models', and 'REFERENCE: Support and help options'. Below this, there is a section titled 'Additional resources' with four cards: 'Azure OpenAI' (with links to Studio, support, quotas, and access), 'Video' (with a link to 'Combining OpenAI models with the power of Azure'), 'Reference' (with links to REST API and Terms of use), and 'Tools' (with links to Azure CLI and PowerShell).

2. Apply for access to Azure OpenAI services by completing the form [here](#). You will need your subscription ID from the previous step.

The screenshot shows the 'Request Access to Azure OpenAI Service' form. The title is 'Request Access to Azure OpenAI Service'. Below the title, there is a section marked with an asterisk and the word 'Required'. The text reads: 'Please read all instructions carefully and complete form as instructed'. Below this, there is a paragraph of text: 'Thank you for your interest in Azure OpenAI Service. Please submit this form to register for approval to access and use Azure OpenAI's Limited Access text and code and/or DALL-E 2 text to image models (as indicated in the form). All use cases must be registered. Azure OpenAI Service requires registration and is currently only available to approved enterprise customers and partners. Learn more about limited access to Azure OpenAI Service here.' Below this paragraph, there is a section titled 'Limited access scenarios:' which explains that when evaluating which scenarios to onboard, they consider who will directly interact with the application, who will see the output of the application, whether the application will be used in a high-stakes domain (e.g., medical), and the extent to which the application's capabilities are tightly scoped. It states that in general, applications in high stakes domains will require additional mitigations and are more likely to be approved for applications with internal-only users and internal-only audiences. Applications with broad possible uses, including content generation capabilities, are more likely to be approved if 1) the domain is not high stakes and users are authenticated or 2) in the case of high stakes domains, anyone who views or interacts with the content is internal to your company. At the bottom, there is a note: 'Please be sure to visit the Azure OpenAI Service's transparency note, which provides information and guidelines for responsible use of the service as well as system limitations that may be applicable to your scenario.'

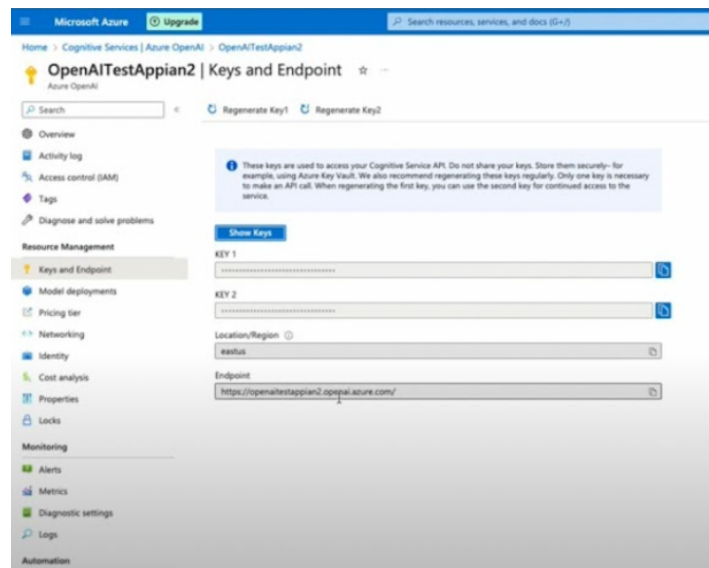
3. Create a service and set your domain name.





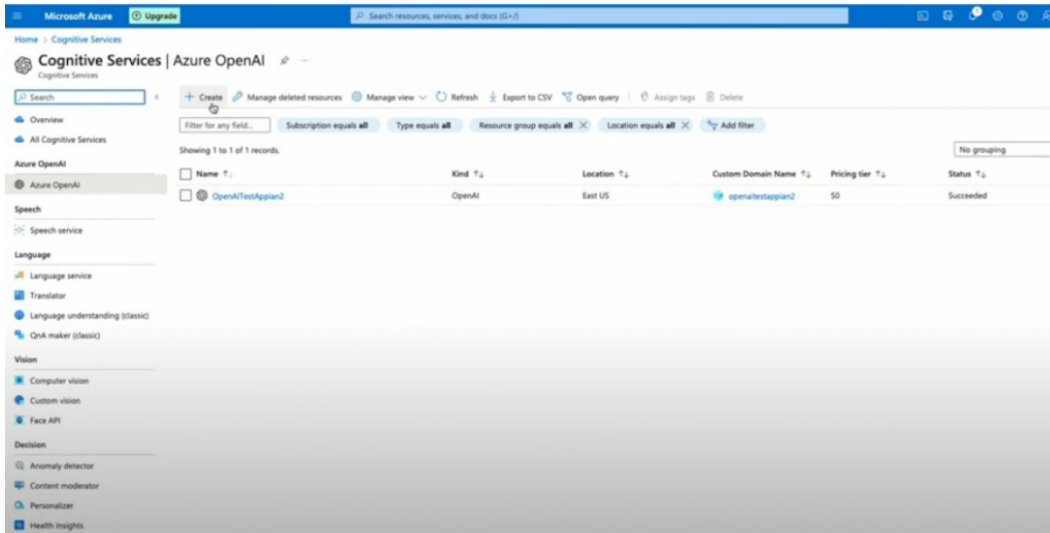
## Create and Access API Keys

4. Within your service, create and access API keys through “Keys and Endpoints” under Resource Management. The “Location/Region” listed in this window will be used as your **Azure Region** in the Connected System configuration.

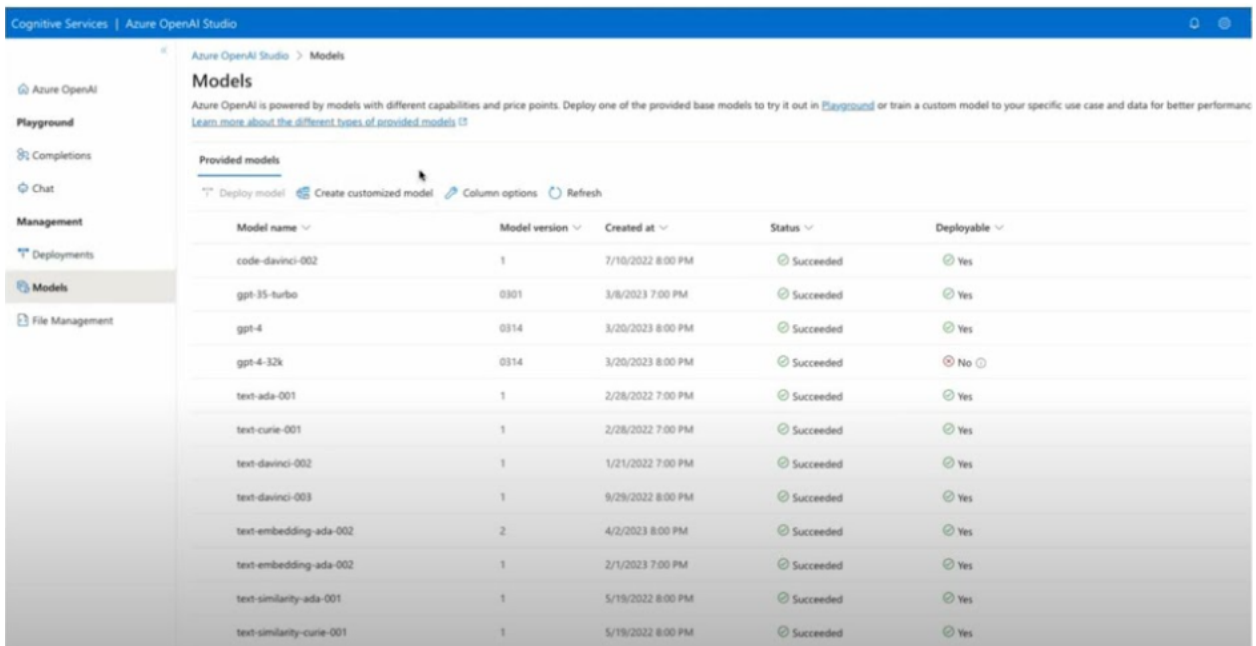


## Deploy OpenAI Models and Set your Deployment ID

5. Visit the Azure OpenAI Studio to deploy OpenAI models under your created resource.



6. Click into your resource to enter the Azure OpenAI Studio. Navigate to “Models” seen as a tab on the left side of the screen. After selecting the best OpenAI Model for your data and use case, deploy your selected chat completions model. The **deployment ID** you create during deployment will be used when configuring your Connected System.



## Integration

Generate mail content based on the inputs provided by the user.

ChatGPT Prompt used:

Write the above content as email in *<FORMAL / CASUAL / FRIENDLY / EXTRA\_CASUAL>* tone in *<5 / 10 / 15>* sentences

### **Inputs:**

**Email Content** (Text) - Required - Provide the Small description of the email to be generated.

**Preferred Tone** (Text) – Optional - Provide the tone for the generated mail. Valid values: FORMAL, CASUAL, FRIENDLY, EXTRA\_CASUAL. Default: FORMAL

**Email Length** (Text) – Optional - Provide the length of the Email with one of the options: Small (5 sentences), Medium (10 sentences) and Large (15 Sentences). Valid values are: SMALL, MEDIUM, LARGE. Default: SMALL.

Example:

### **Input:**

- Integration Configurations:
  - Email Content: "Would like to sync after the meeting on 8/29 about GenAI Tools at Appian. We have exciting new work being done for email generation within Appian!"
  - Preferred Tone: Friendly
  - Email Length: Medium

### **Output:**

{

"success" : true,

"generatedMail" : "Subject: Exciting Updates on GenAI Tools at Appian - Let's Sync Up!

Hello,

I hope this email finds you well. I'm reaching out to share some exciting news about the work we're doing on GenAI Tools at Appian. We've made significant progress and I believe you'll be thrilled to hear about it.

Our team has been working tirelessly on a new feature for email generation within Appian. This is a game-changer and I can't wait to share more details with you.

I'd love to sync up after our meeting on 8/29 to discuss this in more detail. I believe this will be a great opportunity for us to exchange ideas and insights.

Looking forward to our chat. Have a great day!

```
Best,  
  
[Your Name]"  
  
}
```

The screenshot displays the Appian interface for configuring and executing an email generation process. On the left, the configuration panel includes:

- Connected System:** EGS CS EmailGenerator
- Email Content:** Would like to sync after the meeting on 8/29 about GenAI Tools at Appi
- Preferred Tone:** Friendly
- Email length:** Medium

On the right, the **Result** tab shows a successful execution:

- Success!** (highlighted in green)
- Time:** 12,238 ms
- Value: Result:** Dictionary containing `success true (Boolean)` and `generatedMail "Subject: Exciting Updates on GenAI Tools at Appian - Let's Sync Up! Hello, I hope this email finds you well. I'm reaching out..."`

## Sample Application

The Email Generation Sample Application provides Appian Developers with an out of the box way of automatically generating emails within Appian. There are two tabs in the Sample Application: Home and Send Mail.

### To access our preconfigured, out of the box email generation, follow the steps below:

1. Download the Email Generation plug-in from Appian's App Market. This will download a ZIP file with the following files: Email Generation sample app (ZIP file), Email Generation Properties file, Documentation, and a jar file.
  - a. If you are on a cloud site, you can install the Email Generation plug-in from the Admin Console → Plug-Ins
  - b. If you are on-prem, deploy the downloaded jar file in your terminal.
2. Import the Sample App with the properties file in your Appian site from the Appian Designer page.
3. Once the application is available, finish configuring the Connected System with the steps listed in this document in the section called "Connected System Configuration."
4. Open the site and navigate to the "Send Mail" tab. On this page, we have preconfigured everything needed to send an email directly from your Appian interface.

- a. Fill in the fields on the screen and press "Generate"
- b. The generated email will appear on the right. Select the "edit" button in the top right corner to edit the email.
- c. Press "Send Mail" to send the email once everything looks right.

**Recipient User \***  
Alex King X  
Pick the recipient user.

**Subject**  
GenAI Tools - Meeting on 8/29/2023  
Enter the email subject.

**Text \***  
Would like to sync after the meeting on 8/29 about GenAI Tools. We have exciting new work being done for email generation within Appian!  
Small description of the email to be generated.

**Email Length**  
Medium  
Select the length of the Email with one of the options: Small(5 sentences), Medium(10 sentences) and Large(15 Sentences).

**Preferred Tone**  
Casual  
Select the tone for the generated mail.

**Generated Response**

Hey there,

Hope you're doing well. Just wanted to touch base with you after our meeting on 8/29. We've got some really cool stuff happening with GenAI Tools that I think you'll be interested in.

Guess what? We're working on a new project for email generation within Appian! It's pretty exciting and I can't wait to share more details with you.

Let's sync up soon and I can fill you in on all the juicy details. Looking forward to catching up with you.

Best,  
Alex

CLEAR GENERATE SEND MAIL

5. Your generated email will then be sent using a process model that has been set up for your convenience and can be found in the objects of the sample application under the name of "EGS Send Mail".
  - a. The goal of this sample application is to bring inspiration of the many things possible using Generative AI within Appian. Use this Sample Application as is or feel free to use it as a guide for adding email generation into your Appian site.