Business Applications AI Agents & Copilots

Dynamics 365 & Power Platform

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W^2HO – Every Conversation

- Which: Which specific AI or Copilot feature are you referring to?
  Some features have been available in GCC/GCCH for years already!
- What: Is it using GenAI capabilities or other embedded AI?
  More native GenAI capabilities have been enabled for use in 2024!
- How much: Is it included "in" existing use rights, or "for" additional cost?
  Premium licensed users have some AI & Copilot features included with their licensing!
- Outcome: Better understand significance of roadmap and timelines across multiple AI & Copilot offerings, esp. what can be used now v. later, and whether it may require an add-on license or capacity

Copilot for M365

Make users more productive where they're already working in Teams, Excel, PowerPoint.

Ask inline questions about data in Dataverse and connected systems.

GCC availability Dec 2024

Business Copilots

Inline workflows optimized for specific personas and tasks and embedded in M365, e.g. Sales Copilot.

Process-specific value on top of basic data Q&A.

Dynamics 365 + Copilot

Full business applications for dedicated professionals, powered by Copilot to remove toil and improve outcomes.

Power + Copilot

The fastest way to automate **every** business process and deliver custom Copilot applications – even atop existing SaaS apps and legacy systems.

Embedded in the flow of work in M365

Optimized out of the box for professional roles

Fully customizable for specific processes

Application Modernization Spectrum

No Code

Modern Work

Microsoft 365 Copilot App

Microsoft Teams

Microsoft Viva

Copilot for Microsoft 365

Low Code

Business Applications

Dynamics 365 Apps

Power Platform

Customer Service

Sales

Power Apps

Copilot for Service

Copilot for Sales

Power Pages

Copilot Studio

Power Automate

AI Builder

Mo' Code

Data & AI

Dataverse

Fabric

Microsoft Graph

Power BI

Azure OpenAI

Azure Synapse Analytics

Azure AI Foundry

Azure Machine Learning

Pro Code

Digital & App Innovation

Visual Studio

GitHub

Logic Apps

GitHub Copilot

Azure

Azure & Security Copilots

Security & Infrastructure

Infusing AI in low code since 2019*

2019

AI Builder
Bring AI to Power Platform

2021

Power Apps
Natural language to Power Fx formulas

Power BI
Natural language to DAX Quick Create

2022

Power Automate
Natural language to flow, format data by examples

Power Apps
Image & Figma to app

2023

Power Virtual Agents
Conversation boosters

AI Builder
Azure OpenAI model with templates

Power Virtual Agents
Natural language to bot (Copilot)

Power Apps
- NL to app (Copilot)
- PVA in Power Apps
- AI analytics

Power Automate
Enhances natural language to flow (Copilot)

Power Virtual Agents is now Microsoft Copilot Studio

*Commercial availability with GCC soon afterwards

GenAI Timelines in GCC/GCCH

Mar 2024

AI Builder
Create text using custom prompt

Apr 2024

Copilot Studio
GenAI in Copilot Studio

May 2024

Power Pages
Overview of Copilot features

July 2024

Power Automate
Cloud Flows with Copilot

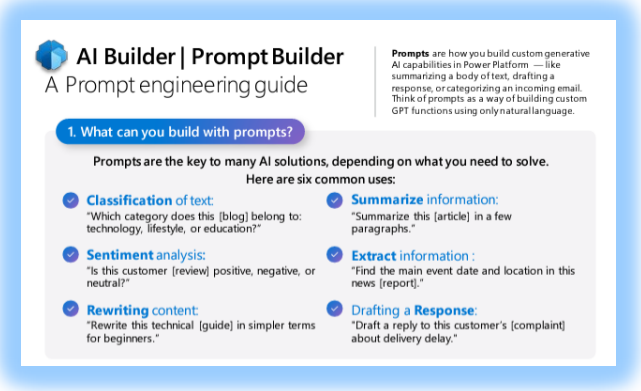
Customer Service
Manage Copilot Features

Soon

Power Apps
Build apps through conversation

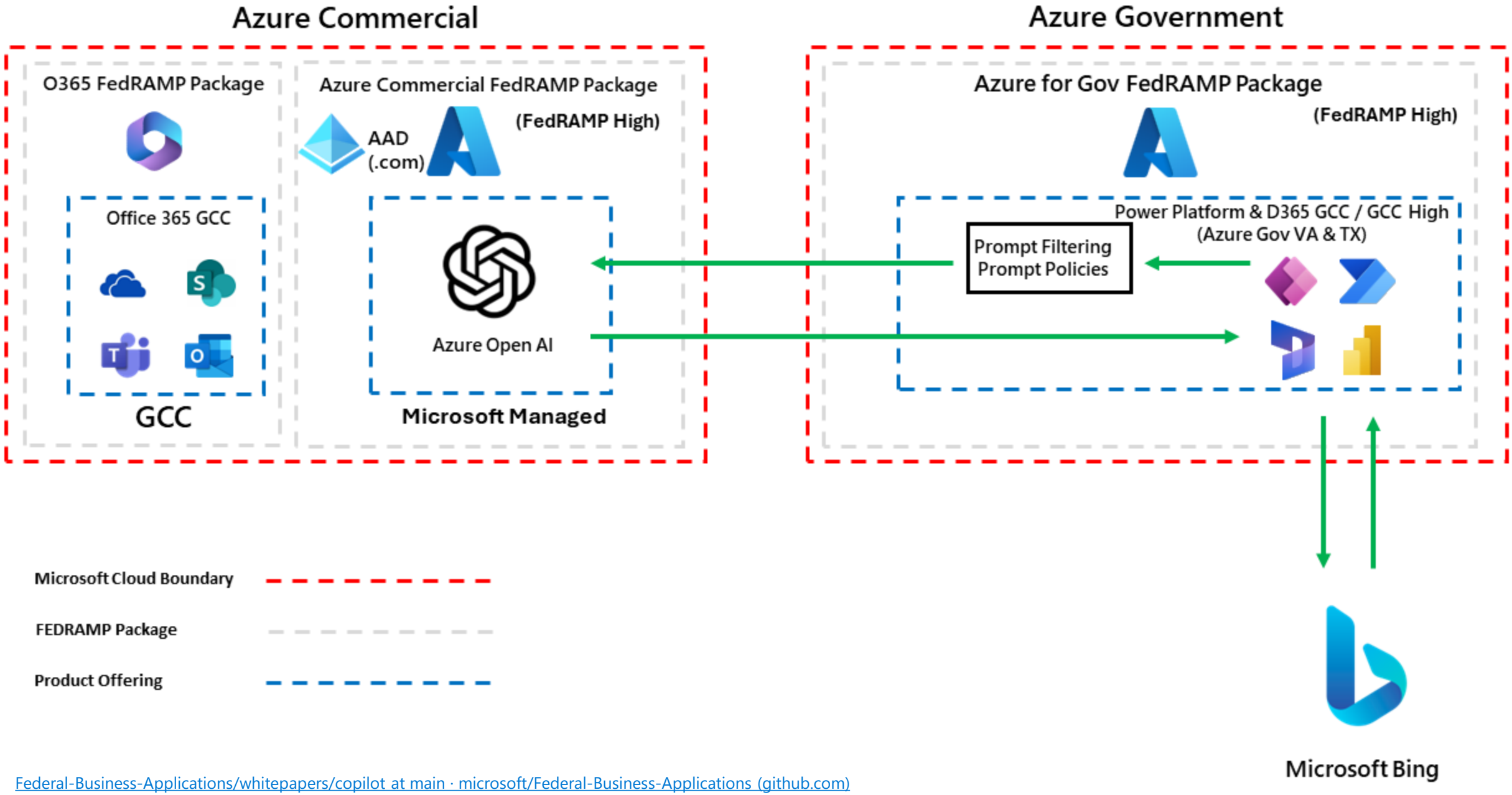
Describe the new table

Draft with Copilot



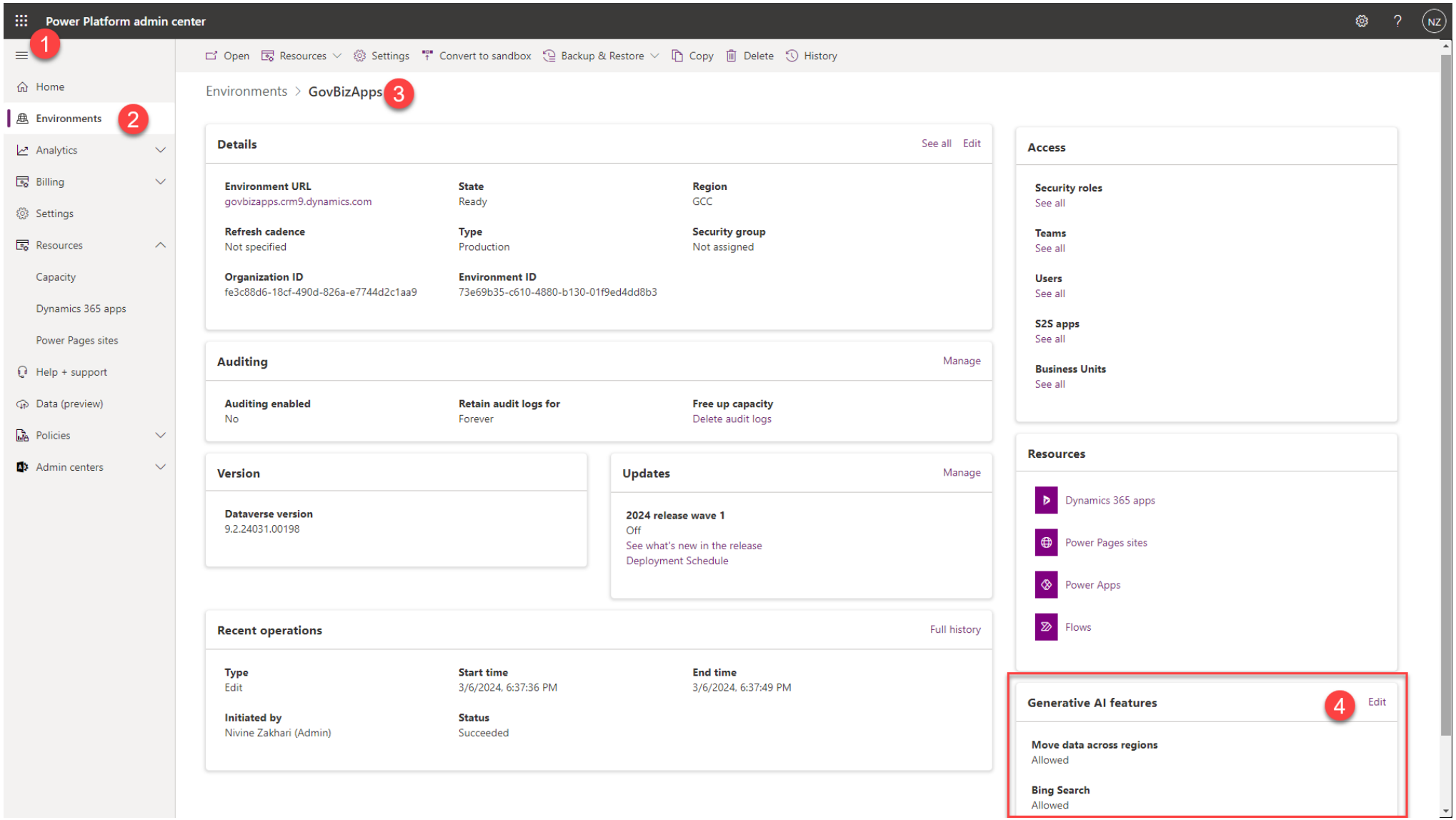
Federal-Business-Applications/whitepapers/copilot at main · microsoft/Federal-Business-Applications (github.com)

Copilot Phase 1 "Opt In" (Pre-Nov 2024 native AOAI availability)



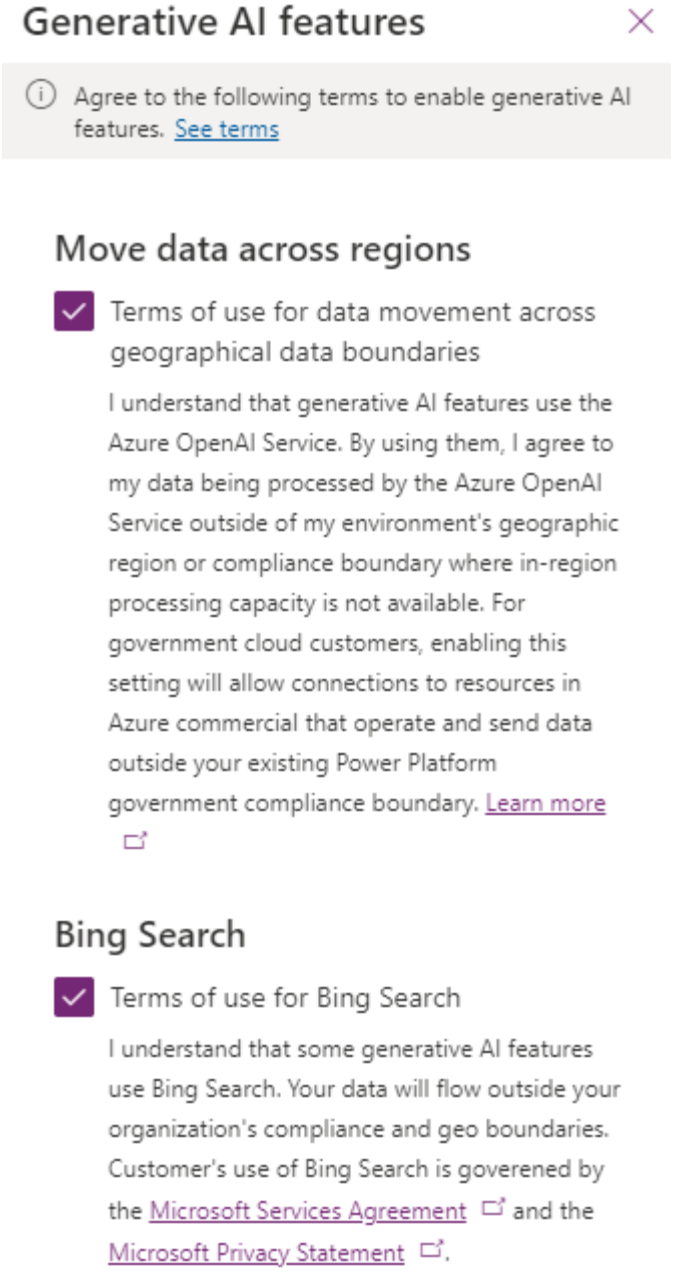
[Federal-Business-Applications/whitepapers/copilot at main · microsoft/Federal-Business-Applications (github.com)](https://github.com/microsoft/Federal-Business-Applications/tree/main/whitepapers/copilot)

Enable GenAI Features – Phase 1 (pre-Nov 2024)

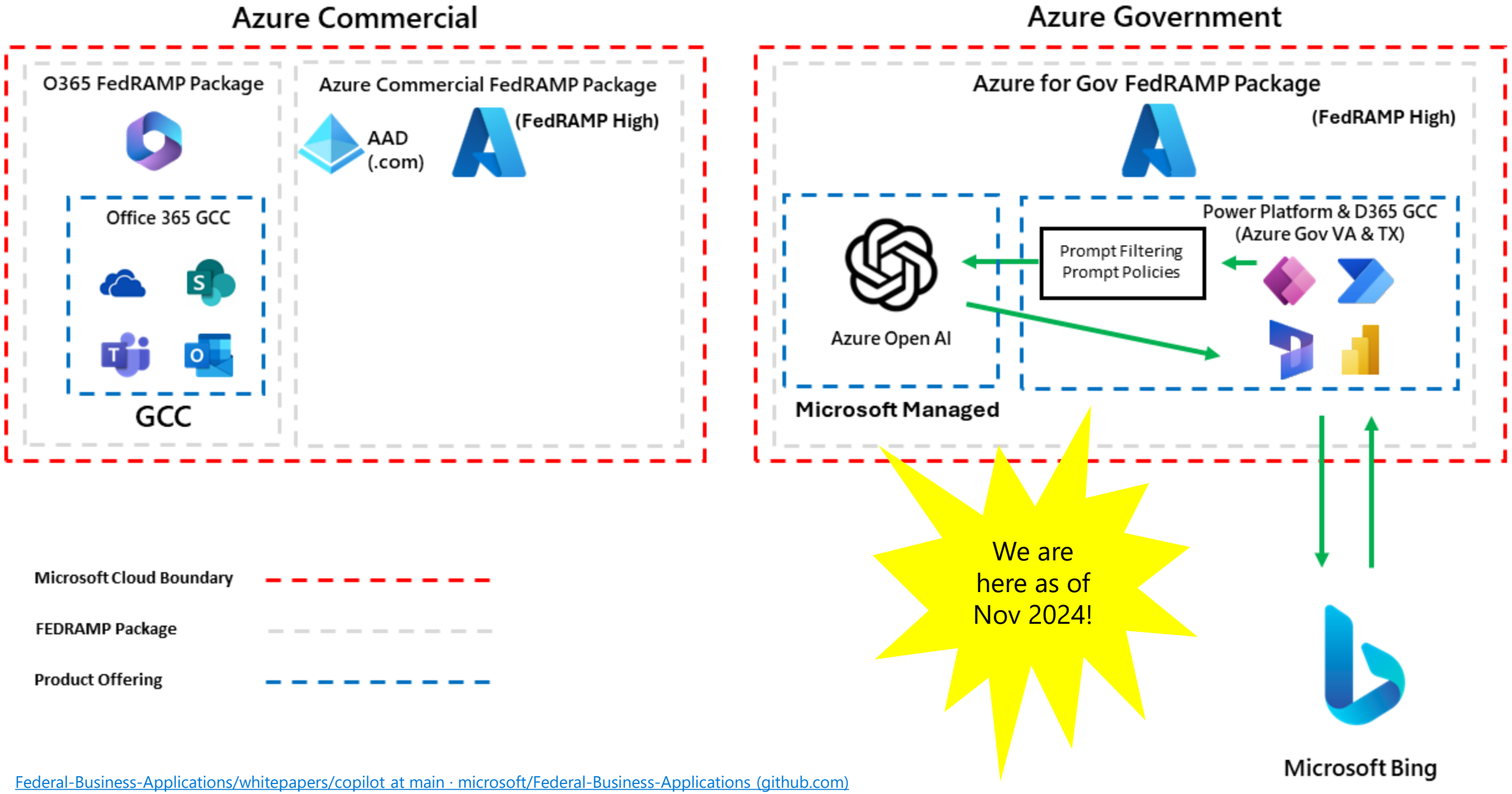


Enable GenAI Features – Phase 1

- Gen AI Features Terms
- Data Movement
- Bing Search Services Agreement
- Bing Search Privacy Statement
- Learn more via Federal-Business-Applications/whitepapers/copilot at main · microsoft/Federal-Business-Applications (github.com)



Copilot Phase 2



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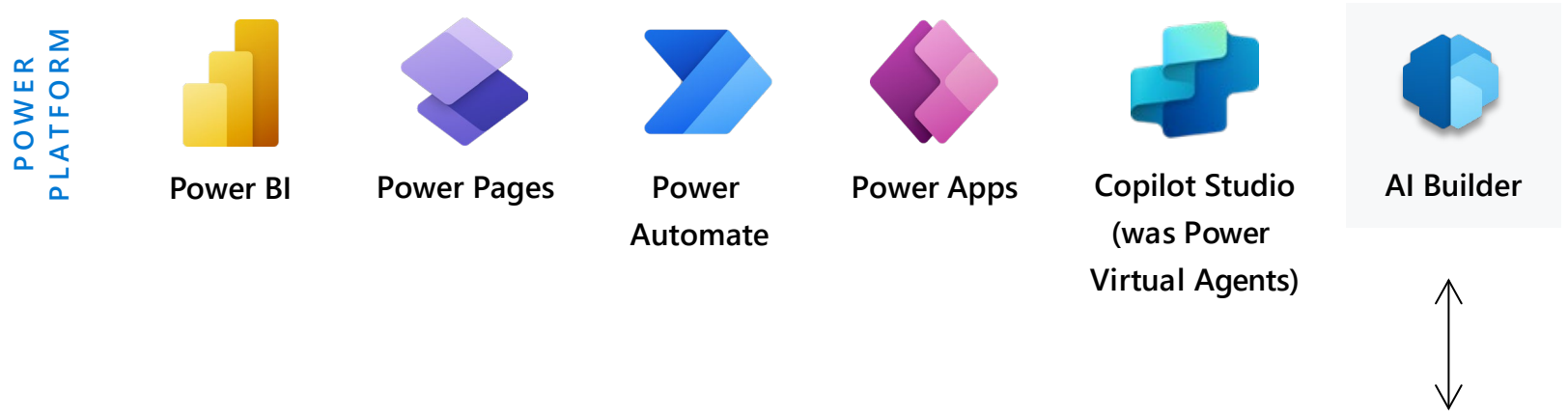
How is AI Builder different from Azure AI Services?

Citizen Developer experience on top of Azure services - natively integrated in the Power Platform.



Azure AI Services powers many AI Builder scenarios

AI Builder
For the Citizen Developer

- **Uses AI Builder credits**, accrued with premium licensing or add-on
- Native Power Platform Integration
- Model customization for makers
- Model Governance, Performance Metrics, Model Usage

Azure AI Services
For the Pro Developer

- **Requires Azure Subscription**
- Interact with APIs
- Custom Code to Integrate

Learn more about AI Builder Architecture, Governance and Security via https://learn.microsoft.com/en-us/ai-builder/ai-builder-architecture

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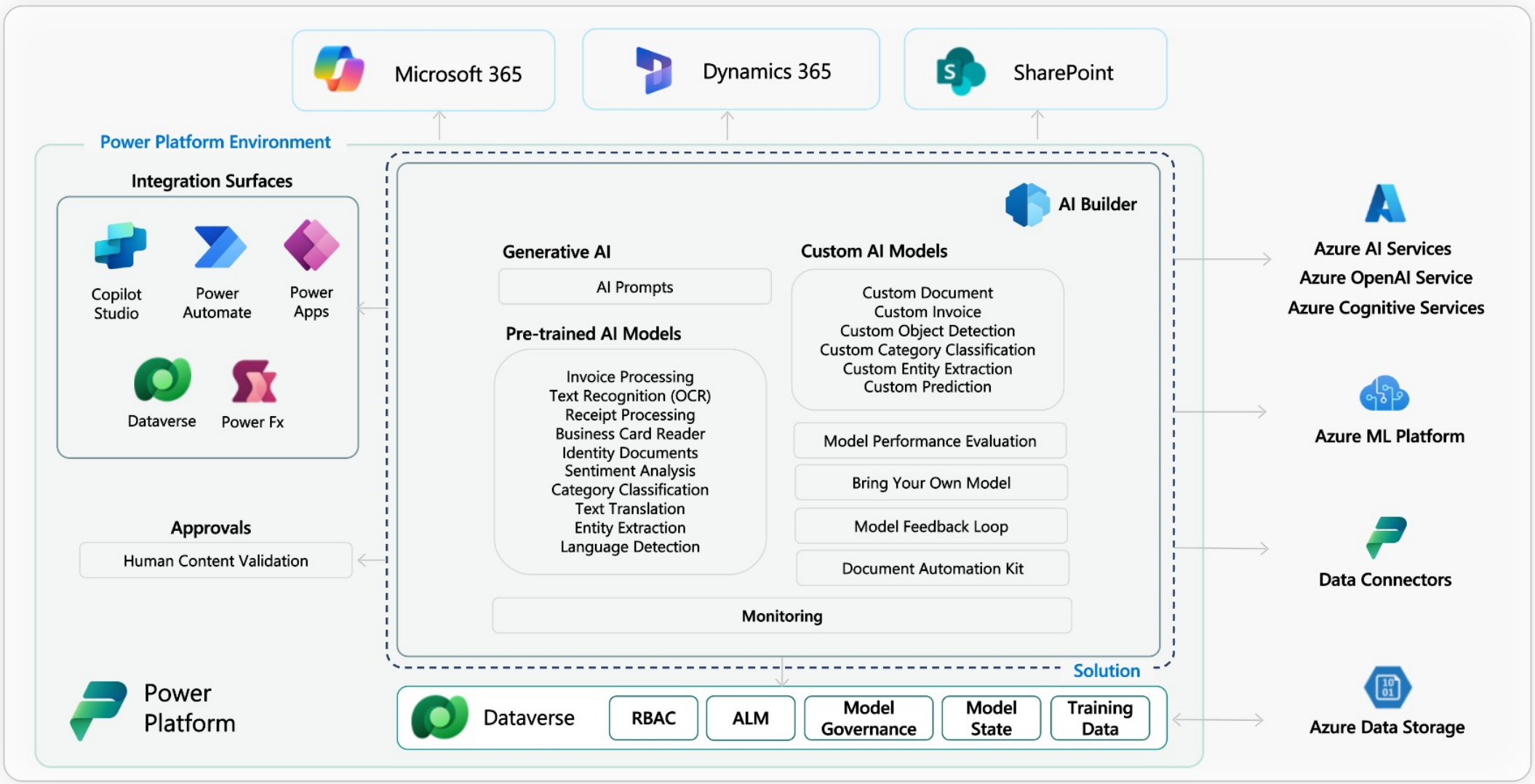


Learn more about AI Builder Architecture, Governance and Security via https://learn.microsoft.com/en-us/ai-builder/ai-builder-architecture

AI Builder Credits Included with Select Power Apps and Power Automate Licenses & Add-ons

Power Apps*		Power Automate		
Per App Plan	Premium / Per User Plan	Premium/ Per User with Attended RPA	Unattended RPA Add-on	Hosted RPA Add-on
250 credits	500 credits	5,000 credits	5,000 credits	5,000 credits

* 1 million credits cap

NOTE: Always check agreement date(s) for applicable terms and accrual rates

Top Prebuilt & Custom AI Models to Start with

Document processing lets you read and save information from standard documents such as invoices or tax documents. When you automate this process, you can save valuable time by reviewing, extracting, organizing, and saving the data automatically by using Power Automate and Power Apps.

The prebuilt **category classification** model is a ready to use AI model that's configured to classify your text into categories that are useful for a specific business scenario. The first prebuilt category classification AI model is built around customer feedback uses. This can be customized further to meet your requirements.

The **text recognition** prebuilt model extracts words from documents and images into machine-readable character streams. It uses state-of-the-art optical character recognition (OCR) to detect printed and handwritten text in images.

The **key phrase extraction** prebuilt model identifies the main points in a text document. For example, given input text "The food was delicious and there was great service!", the model returns the main talking points: "food" and "great service". This model can extract a list of key phrases from unstructured text documents.

The prebuilt **entity extraction** model recognizes specific data from text that's of interest to your business. The model identifies key elements from text, and then classifies them into predefined categories. This can help to transform unstructured data into structured data that's machine-readable. This can be customized further to meet your requirements.

Document Processing

Category Classification

Text Recognition

Key Phrase Extraction

Entity Extraction

NOTE: Always check agreement date(s) for applicable terms and accrual rates

AI Builder | Prompt Builder

A Prompt engineering guide

Prompts are how you build custom generative AI capabilities in Power Platform — like summarizing a body of text, drafting a response, or categorizing an incoming email. Think of prompts as a way of building custom GPT functions using only natural language.

1. What can you build with prompts?

Prompts are the key to many AI solutions, depending on what you need to solve. Here are six common uses:

- **Classification** of text:
  "Which category does this [blog] belong to: technology, lifestyle, or education?"
- **Sentiment** analysis:
  "Is this customer [review] positive, negative, or neutral?"
- **Rewriting** content:
  "Rewrite this technical [guide] in simpler terms for beginners."
- **Summarize** information:
  "Summarize this [article] in a few paragraphs."
- **Extract** information :
  "Find the main event date and location in this news [report]."
- Drafting a **Response**:
  "Draft a reply to this customer's [complaint] about delivery delay."

Download the guide here: AI Builder prompt engineering guide (10 pages, 10X13 in.)

AI Builder | Prompt Builder

A Prompt engineering guide

3. What can I do with prompts?

Prompts are fundamental artifacts in Power Platform. Think of them as custom AI functions and can be invoked via Power Fx across the platform.

Power Apps

In Power Apps, you can easily add prompts as AI models, similar to other AI models. By using **Power Fx**, you can invoke these custom prompts, bringing smart features into your business applications.

Copilot Studio

Prompts can be saved as **Plugins** to enhance your Copilot, much like adding new skills to a toolbox. These plugins, build with prompts, help extend your Copilot with additional functions and expertise.

Power Automate

Prompts in Power Automate are available as AI Builder **actions**, enabling you to automate complex workflows with ease.

Download the guide here: AI Builder prompt engineering guide (10 pages, 10X13 in.)

Copilots and Conversational AI

Build and extend across the Microsoft ecosystem

Custom copilots

Build Custom copilots and bots for enterprises and third parties

Microsoft 365

Extend Microsoft 365 Copilot

Biz Apps & Power Platform

Extend Copilot experiences in Dynamics 365 and Power Products

Copilot for Sales

Copilot for Service

Power Platform

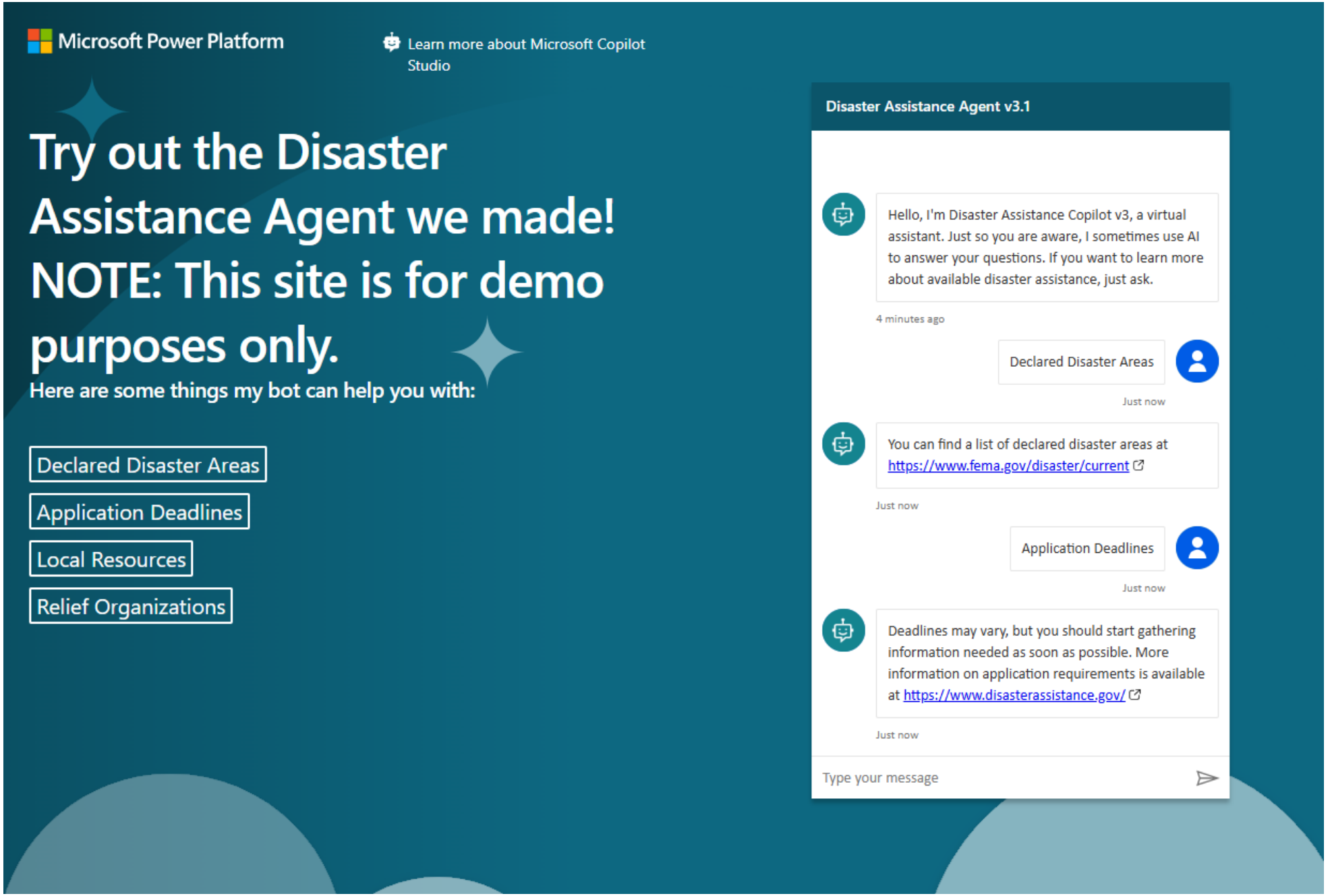
Other Microsoft Copilots

Extend other Microsoft Copilot Experiences

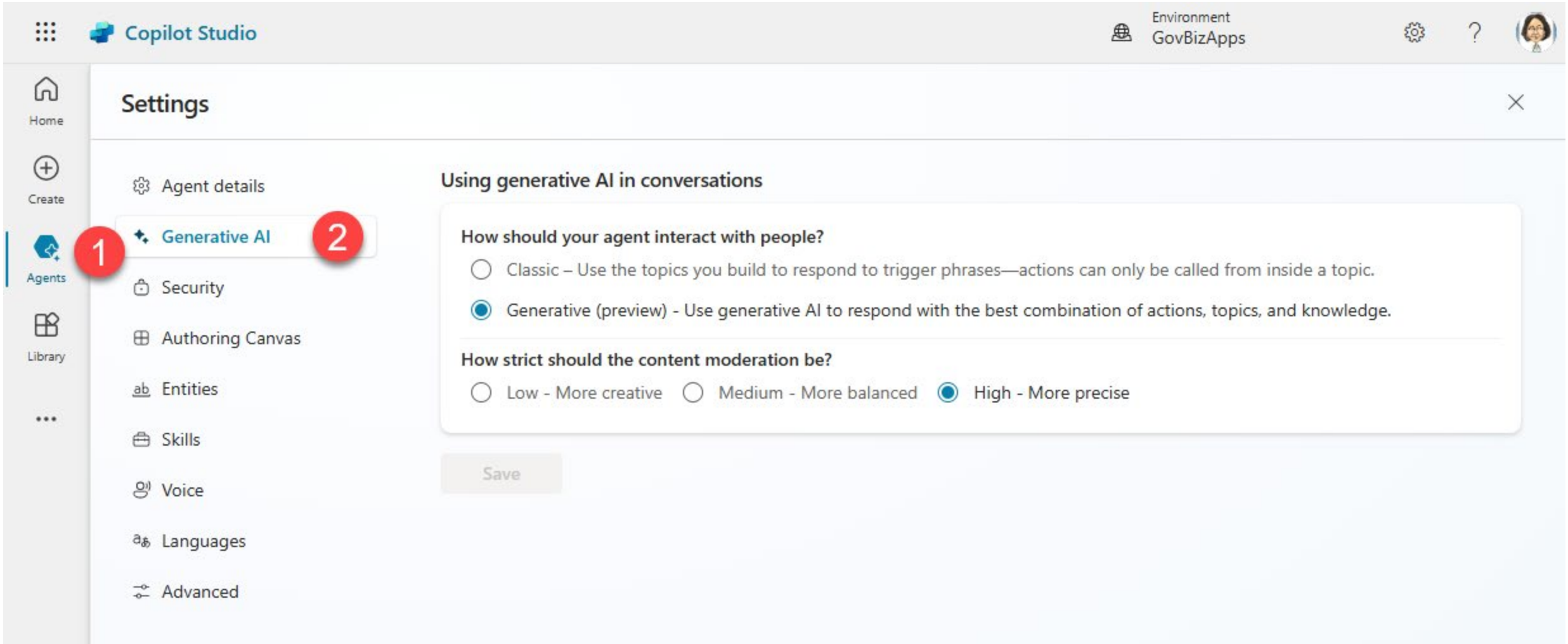
Microsoft Copilot Studio

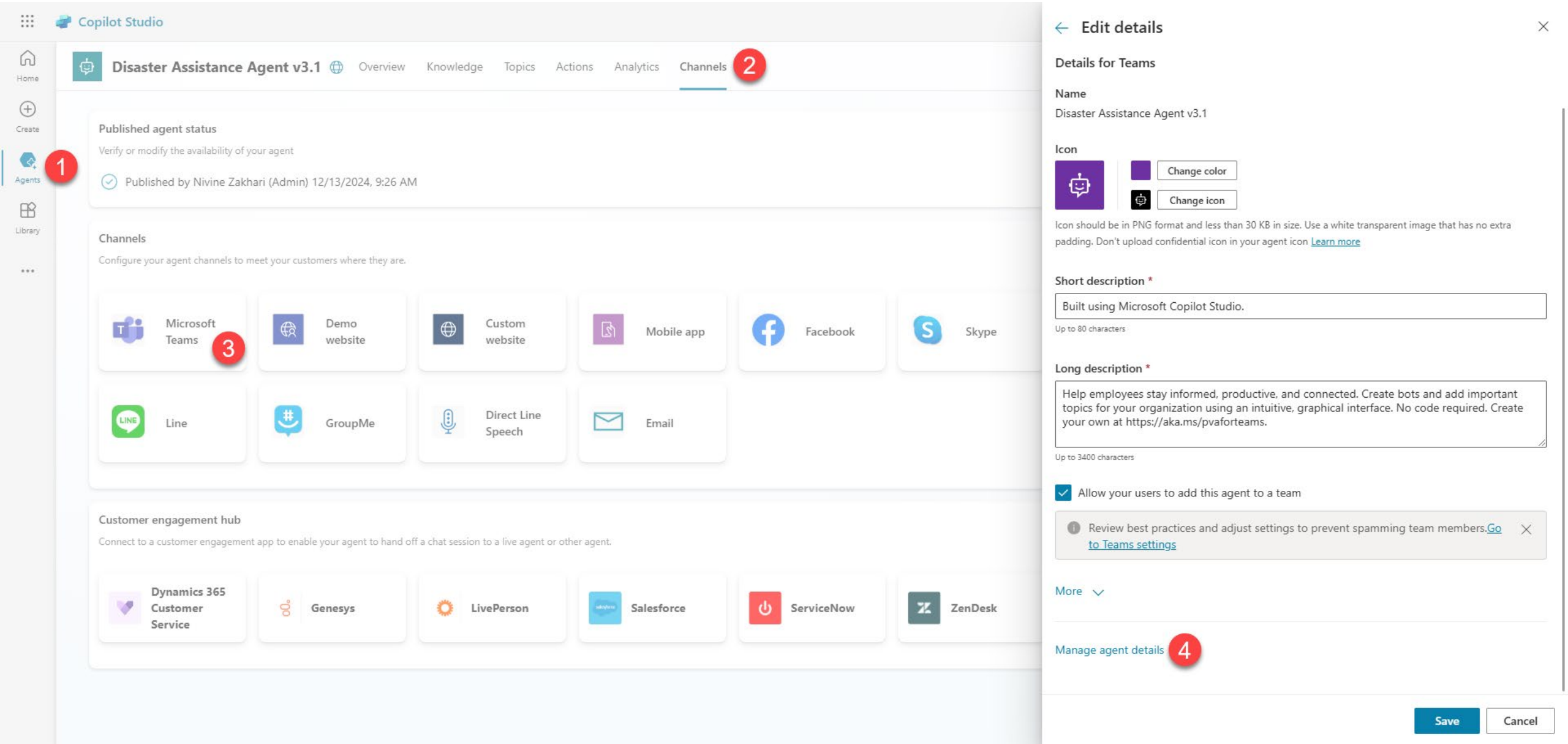
Build custom Copilots | **Extend and customize** 1st party copilots

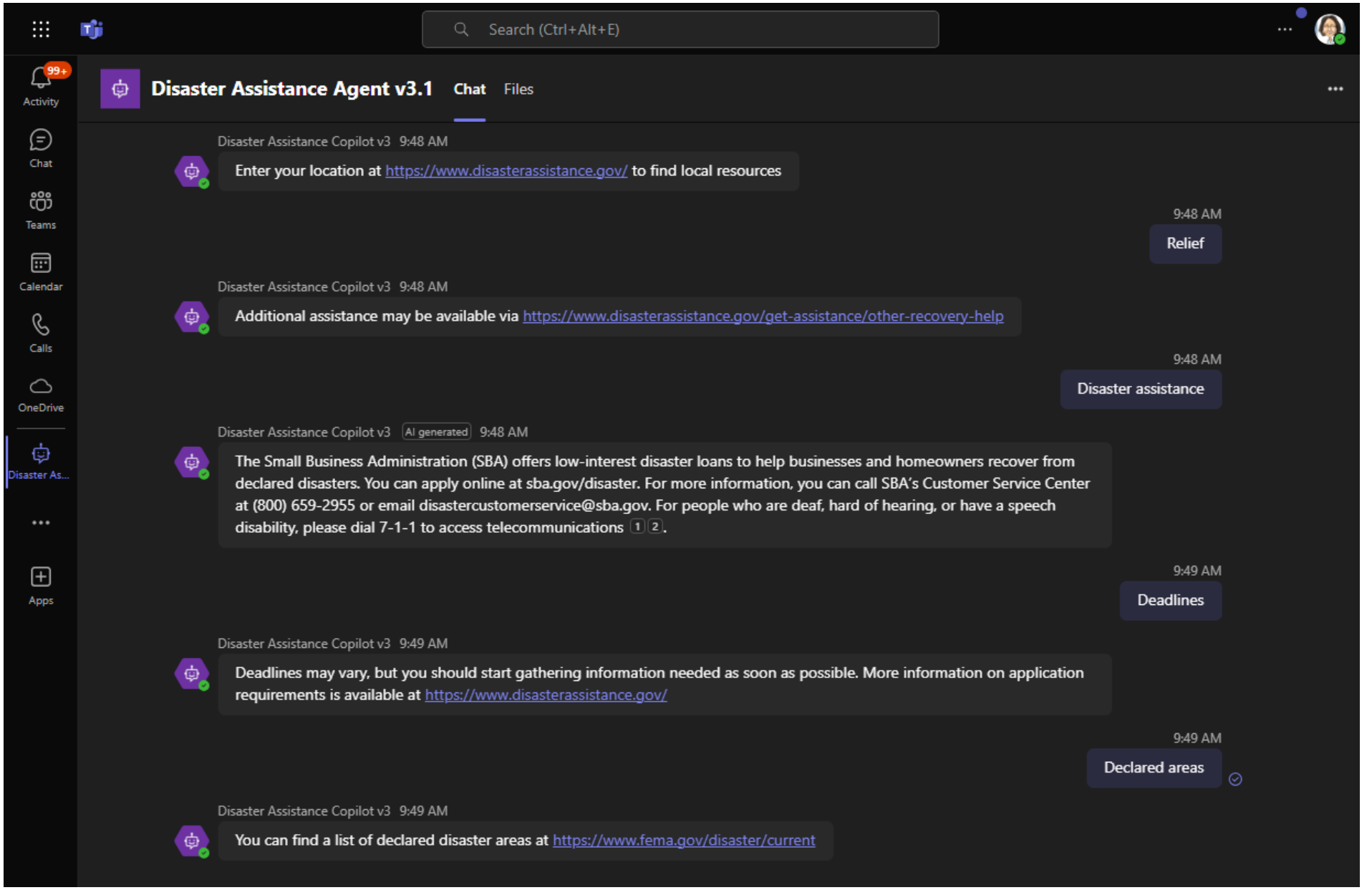
- Bot Framework / SDK
- Bot Service Channels
- Azure AI Foundry
- Azure Cognitive Services
- Power Platform Connectors
- AI Builder



[Demo website - Disaster Assistance Agent (Copilot) v3.1 | Microsoft Copilot Studio]


Copilot Studio
Environment
GovBizApps
Home
Create
Agents
Library
Settings
Agent details
Generative AI
Security
Authoring Canvas
Entities
Skills
Voice
Languages
Advanced
1
2
Using generative AI in conversations
How should your agent interact with people?
Classic – Use the topics you build to respond to trigger phrases—actions can only be called from inside a topic.
Generative (preview) - Use generative AI to respond with the best combination of actions, topics, and knowledge.
How strict should the content moderation be?
Low - More creative
Medium - More balanced
High - More precise
Save


Copilot Studio
Home
Create
Agents
Library
1
Disaster Assistance Agent v3.1
Overview
Knowledge
Topics
Actions
Analytics
Channels
2
Published agent status
Verify or modify the availability of your agent
Published by Nivine Zakhari (Admin) 12/13/2024, 9:26 AM
Channels
Configure your agent channels to meet your customers where they are.
Microsoft Teams
3
Demo website
Custom website
Mobile app
Facebook
Skype
Line
GroupMe
Direct Line Speech
Email
Customer engagement hub
Connect to a customer engagement app to enable your agent to hand off a chat session to a live agent or other agent.
Dynamics 365 Customer Service
Genesys
LivePerson
Salesforce
ServiceNow
ZenDesk
Edit details
Details for Teams
Name
Disaster Assistance Agent v3.1
Icon
Change color
Change icon
Icon should be in PNG format and less than 30 KB in size. Use a white transparent image that has no extra padding. Don't upload confidential icon in your agent icon Learn more
Short description *
Built using Microsoft Copilot Studio.
Up to 80 characters
Long description *
Help employees stay informed, productive, and connected. Create bots and add important topics for your organization using an intuitive, graphical interface. No code required. Create your own at https://aka.ms/pvaforteams.
Up to 3400 characters
Allow your users to add this agent to a team
Review best practices and adjust settings to prevent spamming team members.Go to Teams settings
More
Manage agent details
4
Save
Cancel



[Connect and configure an agent (copilot) for Microsoft Teams]

[Overview of AI-powered and Copilot features in Power Pages | Microsoft Learn]

AI-powered and Copilot features in Power Pages

To learn how to use the new AI features in Power Pages, see:

- Create an AI-generated site using Copilot
- Create an AI-generated webpage using Copilot
- Add an AI-generated form using Copilot
- Add an AI-generated multistep form using Copilot (preview)
- Add AI-generated text using Copilot
- Add an AI-powered chatbot (preview)
- Generate answers from public data using Bing search (preview)
- Add AI-generated code using Copilot (preview)
- Ask Copilot questions

Availability

For AI-powered Copilot features availability in Power Pages, see:

- Geographic and language availability of Copilot features: Copilot international availability
- Turn copilot features on or off: Copilot in Dynamics 365 apps and Power Platform
- Copilot cross-region data movement: Data movement across regions for copilots

Omnichannel for Customer Service

Omnichannel Engagement

- Chat
- Email
- Social
- SMS
- Portals
- Teams
- And more...

Self Service

Virtual agents

Chatbots and voicebots

Build and Extend Agents

Leverage Data Connectors

Configure Data Sources

Omnichannel Intelligent Unified Routing

Skills identification

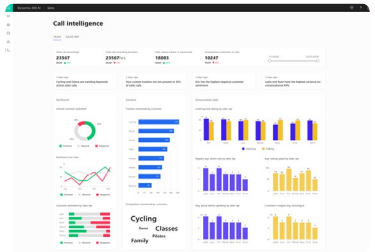
Sentiment analysis

Effort estimation

CRM integration

AI and Automation

Collaboration



Processes & Analytics

KPI and insights

Realtime reports

Workforce management

D365 Omnichannel

Copilot Studio

D365 Omnichannel & Customer Service

D365 Customer Service

Teams

D365 Customer Service

Copilot for all

Copilot in Customer Service

AI built right into the customer service workflow

Copilot for Customer Service

Assist agents everywhere they work

Get started
Home
Search admin settings
Guided channel setups

Customer support
Overview
User management
Bots
Channels
Queues
Routing
Workstreams
Case settings
Customer settings

Agent experience
Overview
Workspaces
Productivity
Knowledge
Collaboration

Operations
Overview
Insights 2
Calendar
Service terms
Service scheduling
Miscellaneous

Insights

View historical operational metrics, real time metrics, and AI capabilities.

Report settings

AI feature settings 3

Copilot for questions and emails AI Copilot On
Let agents use AI to find answers and respond to customers. Learn more — Manage

Summaries AI Copilot On
Let agents catch up on cases and live conversations using AI-generated summaries. Learn more — Manage

Plugins for generative AI (Preview) AI Copilot
Give agents enhanced Copilot functionalities with plugins. Learn more — Manage

Topics clustering for conversations On
Manage AI-discovered topics from your conversations. Learn more — Manage

Auto-summarization for conversations On
Manage AI-generated summarization from your conversations. Learn more — Manage

Suggestions for agents On
Empower your service agents to resolve cases faster through AI-suggested knowledge articles and similar cases in Customer Service workspace. Learn more — Manage

Suggestions for knowledge article authors On
Empower your authors to add high quality and diverse article metadata that improves knowledge article searchability through AI-suggested article keywords and description. Learn more — Manage

Real-time translation Off
Set up language translation for agents and customers. Learn more — Manage

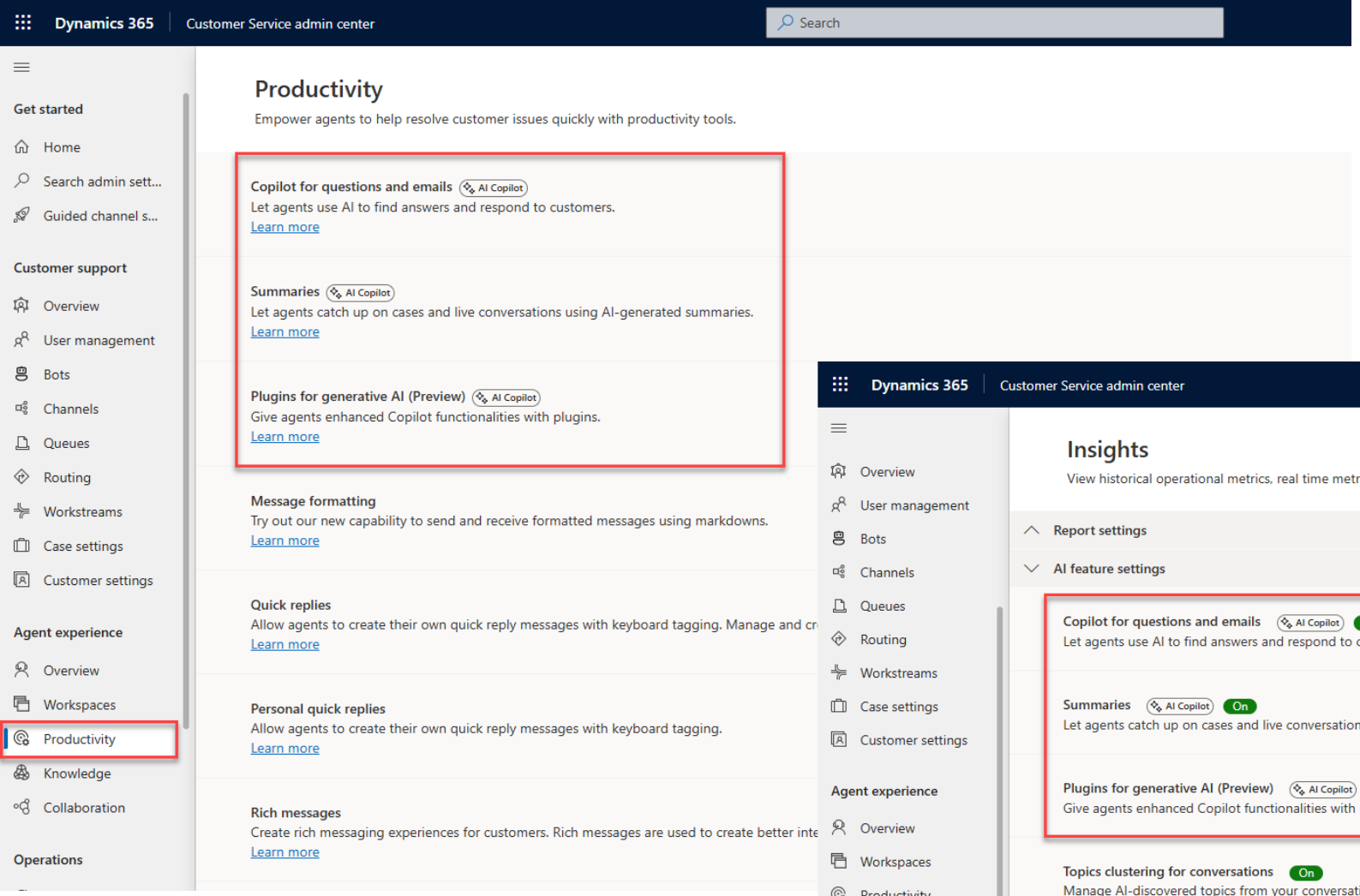
Sentiment analysis
Use AI to track real-time customer sentiment. Real-time and historical views can be used by agents and supervisors to improve customer service. Learn more — Manage

Intelligent skill finder
Manage the machine learning models needed to identify skills needed to complete the service request. Learn more — Manage

Skill-based routing On
Settings related to the skills based routing experience in your organization. Learn more — Manage

Effort-based routing (preview)
Create and train machine learning models that use AI to determine the amount of effort needed for new work items. Learn more — Manage

Sentiment-based routing (preview)
Set up machine learning to predict sentiment for new work items. Learn more — Manage


Dynamics 365
Customer Service admin center
Search
Get started
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Search admin sett...
Guided channel s...
Customer support
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User management
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Message formatting
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Learn more
Quick replies
Allow agents to create their own quick reply messages with keyboard tagging. Manage and cr
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Personal quick replies
Allow agents to create their own quick reply messages with keyboard tagging.
Learn more
Rich messages
Create rich messaging experiences for customers. Rich messages are used to create better inte
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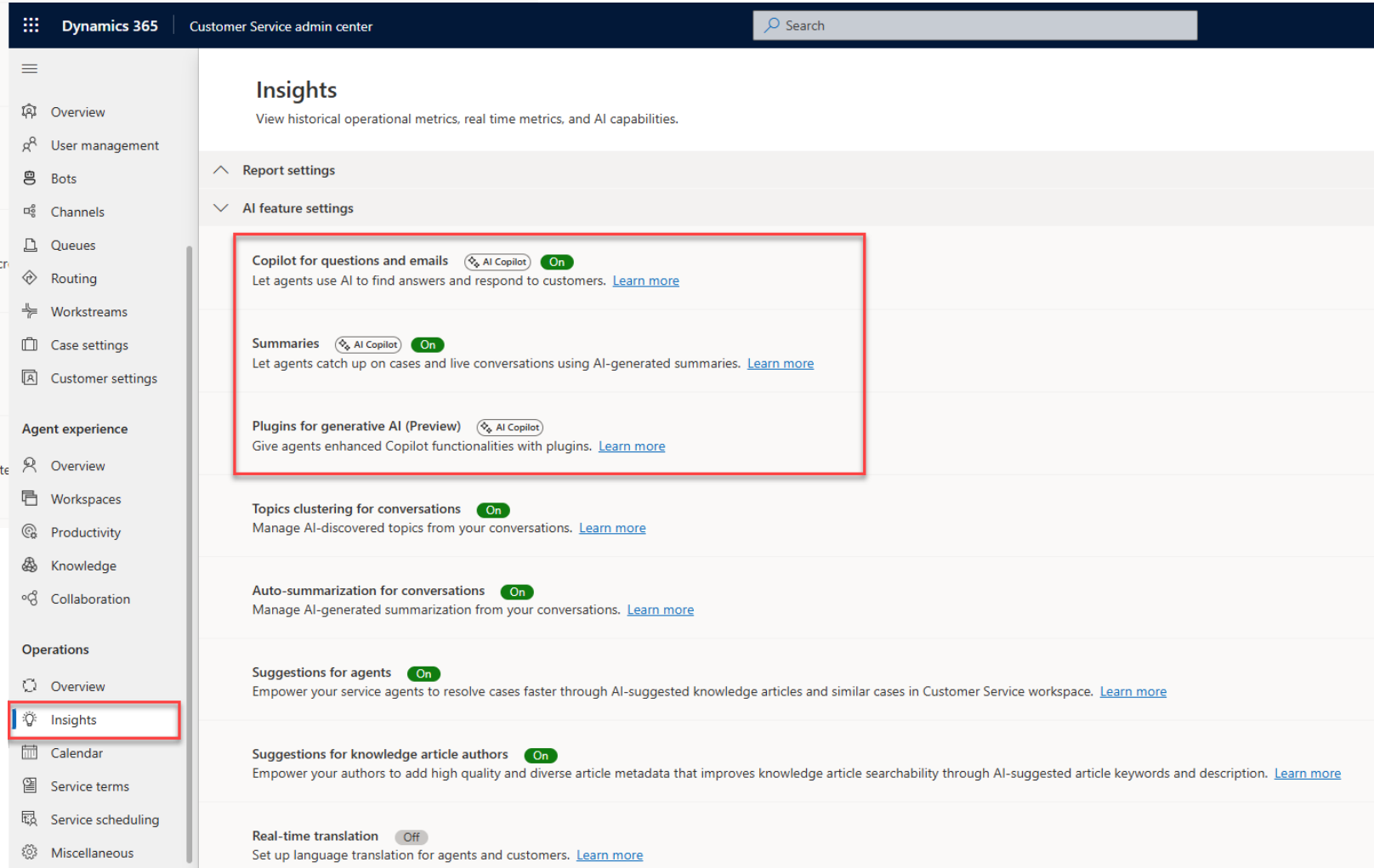
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Suggestions for knowledge article authors
On
Empower your authors to add high quality and diverse article metadata that improves knowledge article searchability through AI-suggested article keywords and description. Learn more
Real-time translation
Off
Set up language translation for agents and customers. Learn more

Reference

Service	Resources
AI Builder	• Check available credits • Estimate Add-on Capacity needed • AI Builder Feature availability by region or US Government environment • Opt-in to use Gen AI features • Download the Prompt Engineering Guide
Copilot Studio	• Understand the US Government plans available • Quotas, limits and more in Copilot Studio • Add a Copilot (Agent) to Microsoft Teams
Dynamics 365 Customer Service	• Dynamics 365 service description - Power Platform • Omnichannel for Customer Service • Manage Copilot features in Customer Service • Microsoft Copilot for Service
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