



Business Applications AI & Copilots

Dynamics 365 & Power Platform

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W²HO – 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!](#)

Embedded in the flow of work in M365

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.

Optimized out of the box for professional roles

Dynamics 365 + Copilot

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

Fully customizable for specific processes

Power + Copilot

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

Application Modernization Spectrum

No Code

Low Code

Mo' Code

Pro Code



Modern Work



Microsoft 365
Copilot App



Microsoft Teams



Microsoft Viva



Copilot for
Microsoft 365



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



Data & AI



Dataverse



Fabric



Microsoft
Graph



Power BI



Azure
OpenAI



Azure Synapse
Analytics



Azure
AI Foundry



Azure Machine
Learning



Digital & App
Innovation



Visual Studio



GitHub



Logic Apps



GitHub
Copilot



Azure



Azure &
Security Copilots

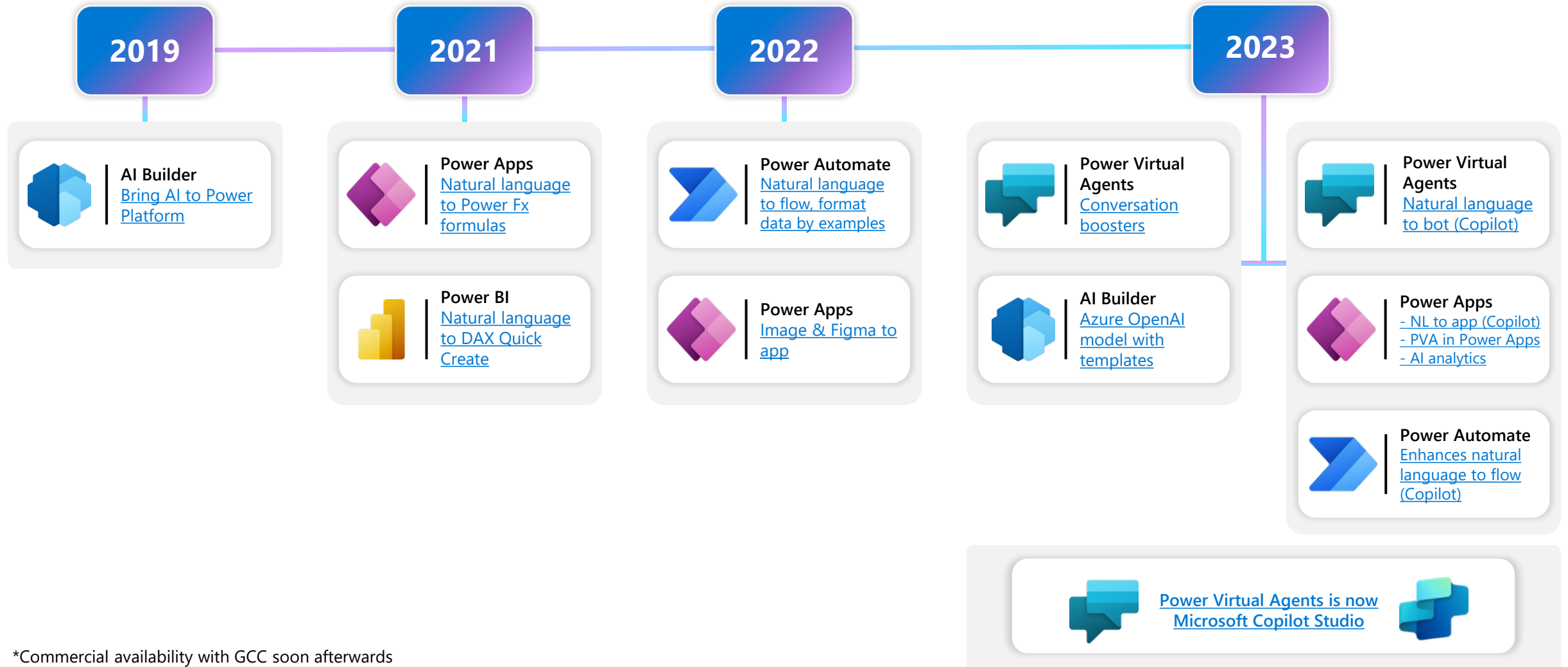


Security & Infrastructure





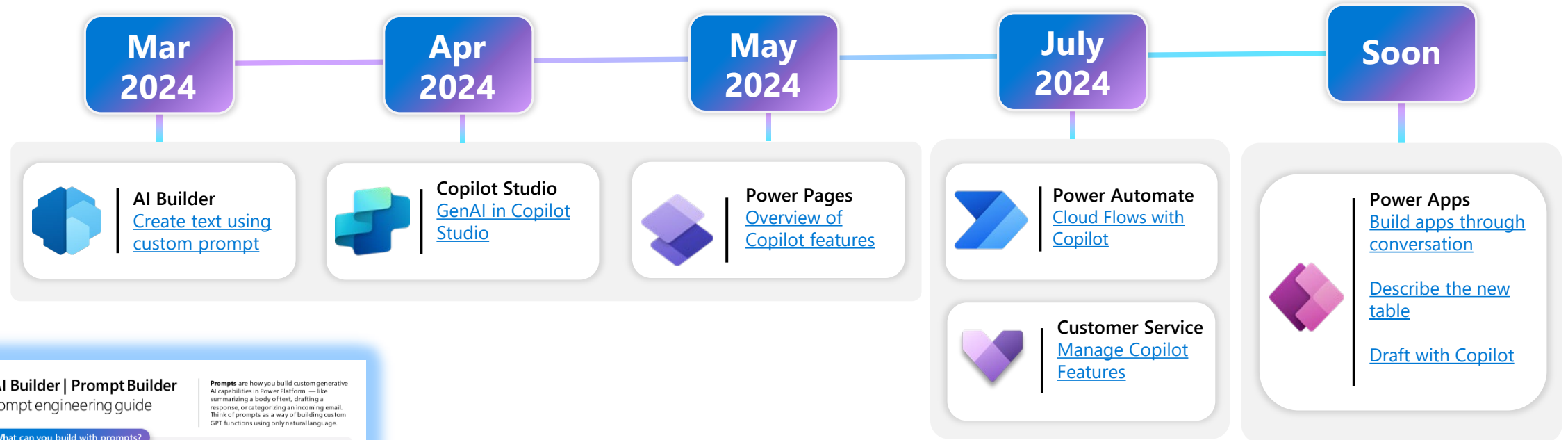
Infusing AI in low code since 2019*



*Commercial availability with GCC soon afterwards



GenAI Timelines in GCC/GCCH



AI Builder | Prompt Builder
A Prompt engineering guide

1. What can you build with prompts?

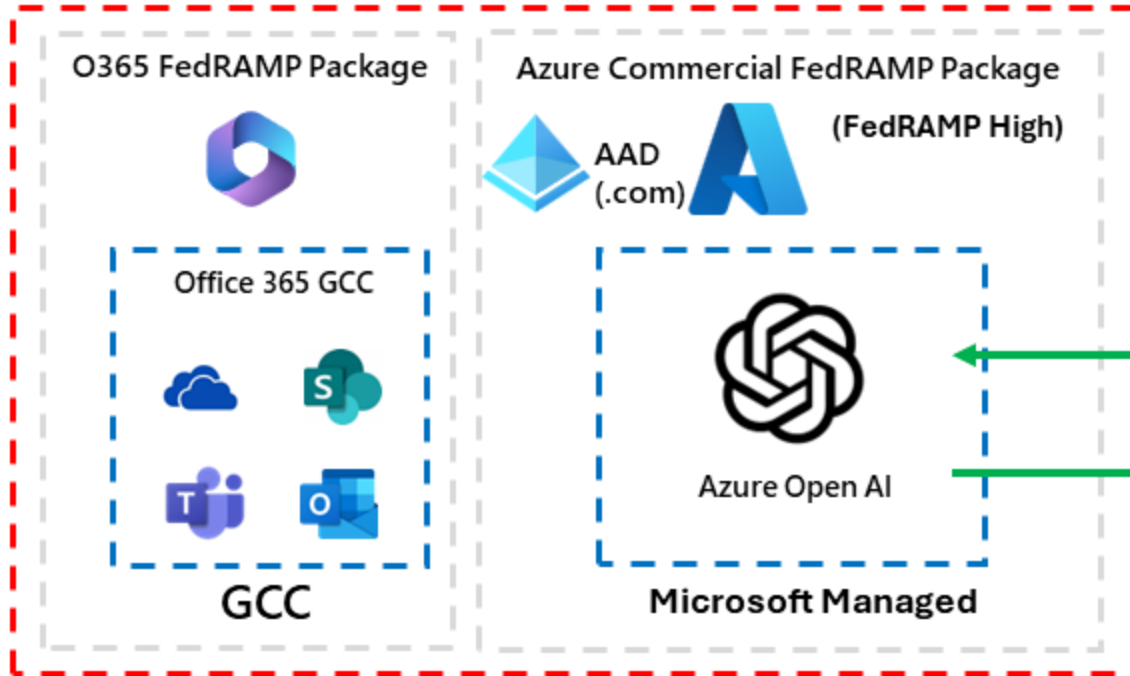
Prompts are the key to many AI solutions, depending on what you need to solve. Here are six common uses:

- 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."

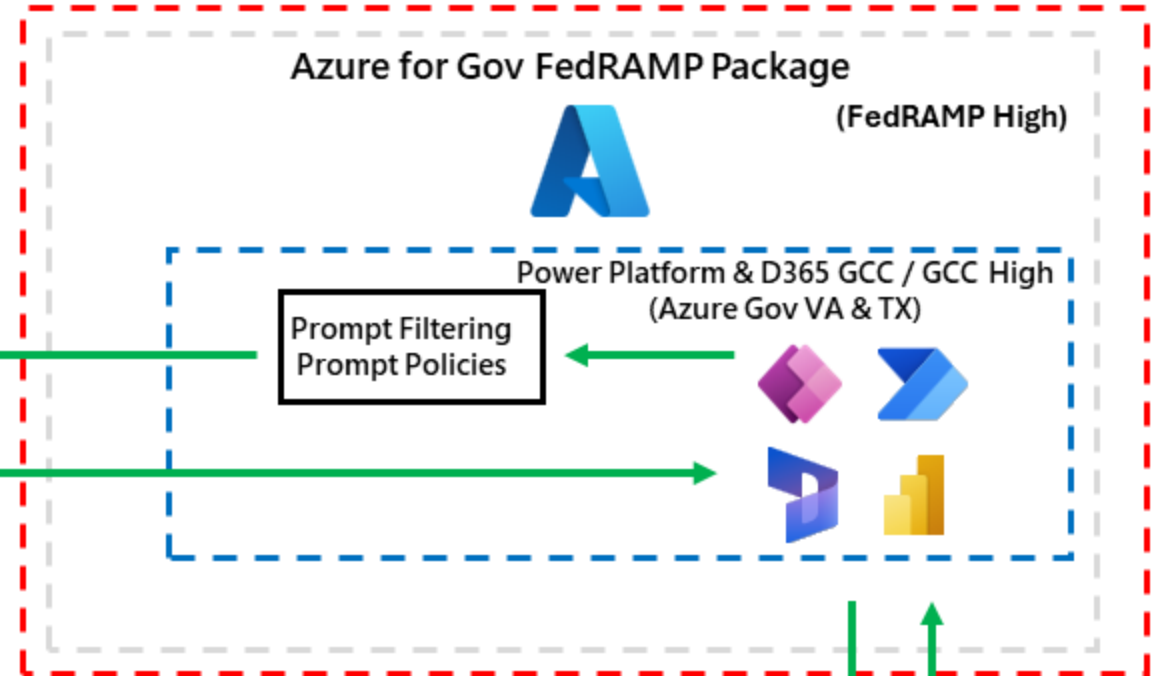
Prompts are how you build custom generative AI capabilities in Power Platform — like summarizing a body of text, drafting a response, or categorizing an incoming email. Think of prompts as a way of building custom GPT functions using only natural language.

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

Azure Commercial



Azure Government



Microsoft Cloud Boundary



FEDRAMP Package



Product Offering



Microsoft Bing



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

Power Platform admin center

1

2

3

4

Open Resources Settings Convert to sandbox Backup & Restore Copy Delete History

Environments > GovBizApps

Details

See all Edit

Environment URL govbizapps.crm9.dynamics.com	State Ready	Region GCC
Refresh cadence Not specified	Type Production	Security group Not assigned
Organization ID fe3c88d6-18cf-490d-826a-e7744d2c1aa9	Environment ID 73e69b35-c610-4880-b130-01f9ed4dd8b3	

Auditing

Manage

Auditing enabled No	Retain audit logs for Forever	Free up capacity Delete audit logs
-------------------------------	---	--

Version

Dataverse version
9.2.24031.00198

Updates

Manage

2024 release wave 1
Off
[See what's new in the release](#)
[Deployment Schedule](#)

Recent operations

Full history

Type Edit	Start time 3/6/2024, 6:37:36 PM	End time 3/6/2024, 6:37:49 PM
Initiated by Nivine Zakhari (Admin)	Status Succeeded	

Access

Security roles
[See all](#)

Teams
[See all](#)

Users
[See all](#)

S2S apps
[See all](#)

Business Units
[See all](#)

Resources

- Dynamics 365 apps
- Power Pages sites
- Power Apps
- Flows

Generative AI features

Edit

Move data across regions
Allowed

Bing Search
Allowed



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 \(github.com\)](#)

Generative AI features



ⓘ Agree to the following terms to enable generative AI features. [See terms](#)

Move data across regions

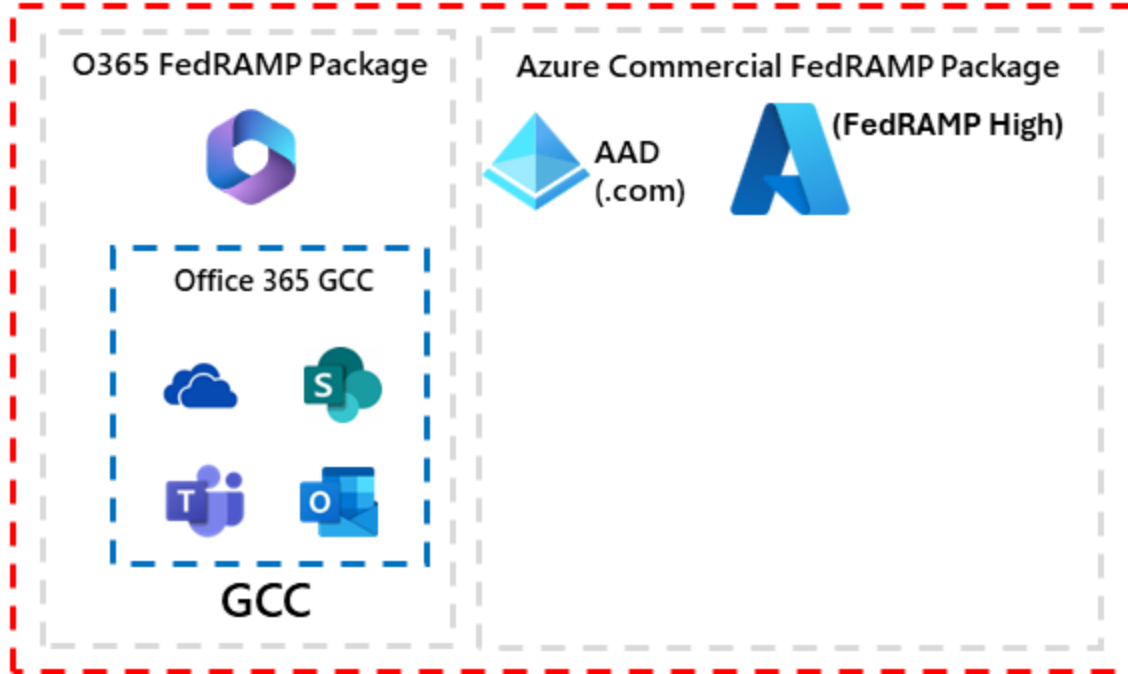
- ☒ Terms of use for data movement across geographical data boundaries
- I understand that generative AI features use the Azure OpenAI Service. By using them, I agree to my data being processed by the Azure OpenAI Service outside of my environment's geographic region or compliance boundary where in-region processing capacity is not available. For government cloud customers, enabling this setting will allow connections to resources in Azure commercial that operate and send data outside your existing Power Platform government compliance boundary. [Learn more](#)

Bing Search

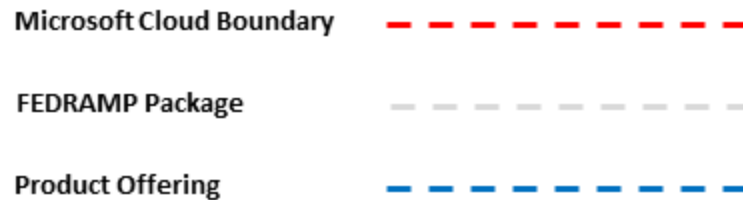
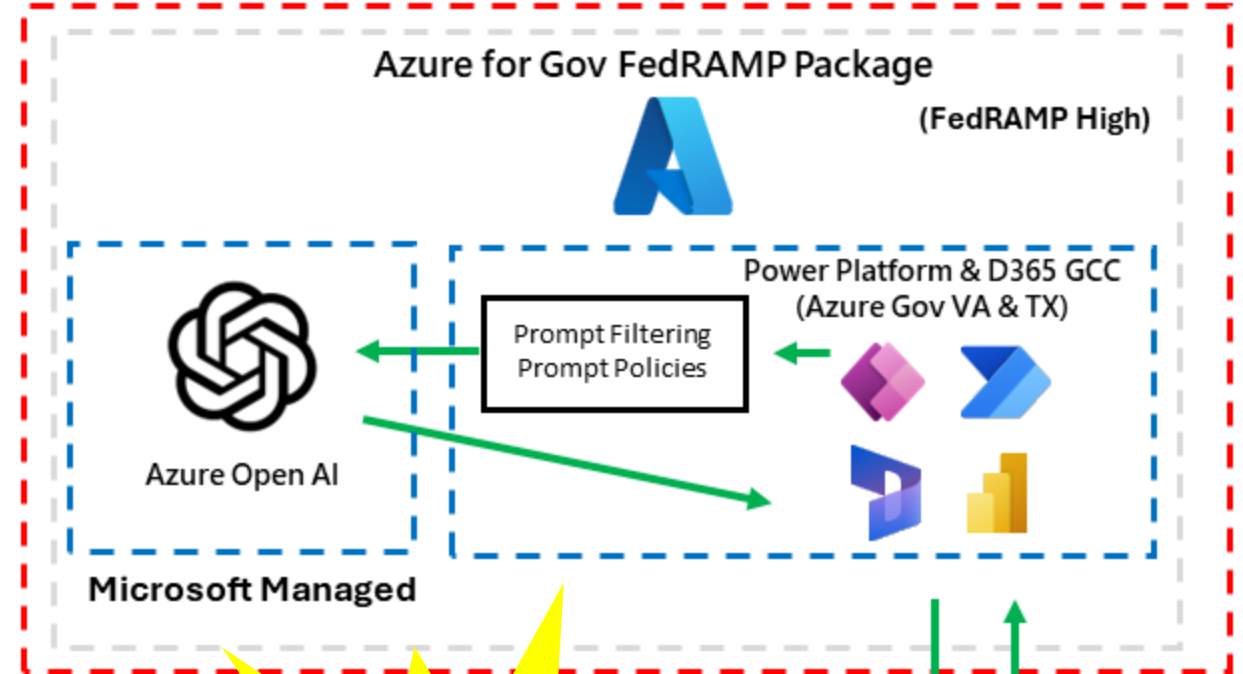
- ☒ Terms of use for Bing Search
- I understand that some generative AI features use Bing Search. Your data will flow outside your organization's compliance and geo boundaries. Customer's use of Bing Search is governed by the [Microsoft Services Agreement](#) and the [Microsoft Privacy Statement](#).

Copilot Phase 2

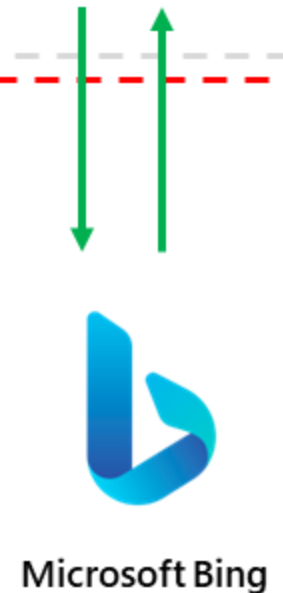
Azure Commercial



Azure Government



We are here as of Nov 2024!



How is AI Builder different from Azure AI Services?

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

POWER
PLATFORM



Power BI



Power Pages



Power
Automate



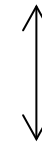
Power Apps



Copilot Studio
(was Power
Virtual Agents)



AI Builder



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
SERVICES



Analysis
Services



API
Management



Azure
Functions



Kubernetes
Service



Logic
Apps



Bot
Services



AI
Services

*Azure AI Services powers
many AI Builder scenarios*

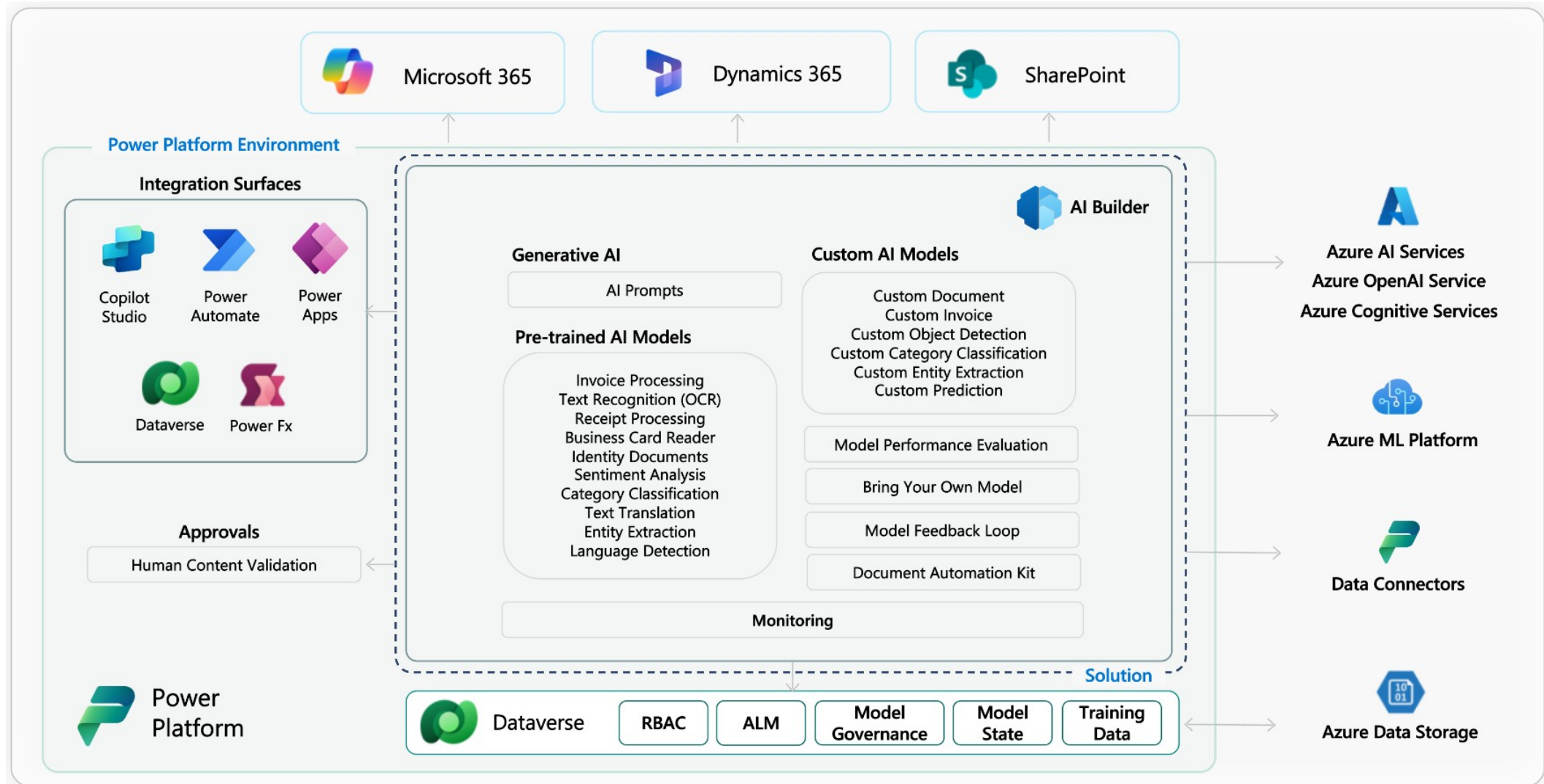
Azure AI Services

For the Pro Developer

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

How is AI Builder different from Azure AI Services?

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



Power Apps*

Per App Plan

Premium / Per User Plan



250 credits



500 credits



5,000 credits



5,000 credits



5,000 credits

Power Automate

Premium/ Per User with Attended RPA

Unattended RPA Add-on

Hosted RPA Add-on



* 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.

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- ✓ **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.



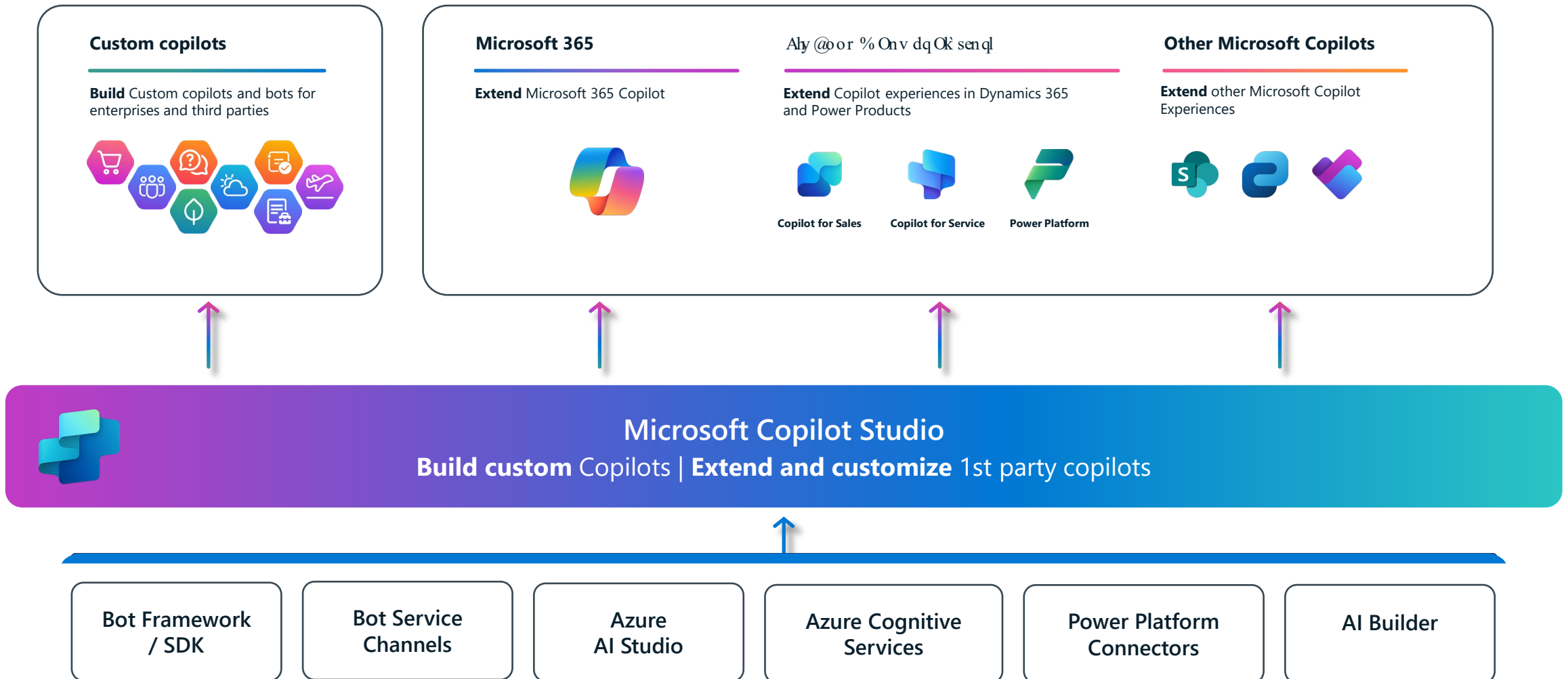
Power Automate

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



Try out the Disaster Assistance Agent we made!

NOTE: This site is for demo purposes only.

Here are some things my bot can help you with:

Declared Disaster Areas

Application Deadlines

Local Resources

Relief Organizations

Disaster Assistance Agent v3.1



Hello, I'm Disaster Assistance Copilot v3, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you want to learn more about available disaster assistance, just ask.

4 minutes ago

Declared Disaster Areas



Just now



You can find a list of declared disaster areas at <https://www.fema.gov/disaster/current>

Just now

Application Deadlines



Just now



Deadlines may vary, but you should start gathering information needed as soon as possible. More information on application requirements is available at <https://www.disasterassistance.gov/>

Just now

Type your message





Home



Create



Agents



Library



Settings



Agent details

Generative AI

Security

Authoring Canvas

Entities

Skills

Voice

Languages

Advanced

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

Disaster Assistance Agent v3.1

Overview Knowledge Topics Actions Analytics Channels


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


 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



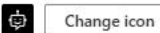
Edit details

Details for Teams

Name

Disaster Assistance Agent v3.1

Icon

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/pvafortteams>.

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

Save

Cancel



Activity 99+ Chat Files

Disaster Assistance Agent v3.1

Disaster Assistance Copilot v3 9:48 AM

Enter your location at <https://www.disasterassistance.gov/> to find local resources

9:48 AM

Relief

Disaster Assistance Copilot v3 9:48 AM

Additional assistance may be available via <https://www.disasterassistance.gov/get-assistance/other-recovery-help>

9:48 AM

Disaster assistance

Disaster Assistance Copilot v3 AI generated 9:48 AM

The Small Business Administration (SBA) offers low-interest disaster loans to help businesses and homeowners recover from declared disasters. You can apply online at sba.gov/disaster. For more information, you can call SBA's Customer Service Center at (800) 659-2955 or email disastercustomerservice@sba.gov. For people who are deaf, hard of hearing, or have a speech disability, please dial 7-1-1 to access telecommunications [1] [2].

9:49 AM

Deadlines

Disaster Assistance Copilot v3 9:49 AM

Deadlines may vary, but you should start gathering information needed as soon as possible. More information on application requirements is available at <https://www.disasterassistance.gov/>

9:49 AM

Declared areas

Disaster Assistance Copilot v3 9:49 AM

You can find a list of declared disaster areas at <https://www.fema.gov/disaster/current>

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



Copilot within Power Pages

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



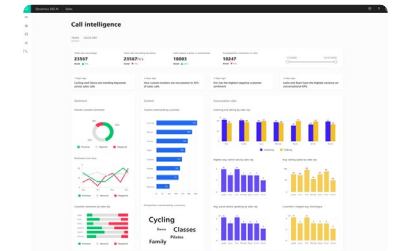
Omnichannel
Intelligent
Unified
Routing



Build and Extend Agents
Leverage Data Connectors
Configure Data Sources

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
- 2 Insights
- 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 >

Get started

Home

Search admin sett...

Guided channel s...

Customer support

Overview

User management

Bots

Channels

Queues

Routing

Workstreams

Case settings

Customer settings

Agent experience

Overview

Workspaces

Productivity

Knowledge

Collaboration

Operations

Productivity

Empower agents to help resolve customer issues quickly with productivity tools.

Copilot for questions and emails

Let agents use AI to find answers and respond to customers.

Learn more

Summaries

Let agents catch up on cases and live conversations using AI-generated summaries.

Learn more

Plugins for generative AI (Preview)

Give agents enhanced Copilot functionalities with plugins.

Learn more

Message formatting

Try out our new capability to send and receive formatted messages using markdowns.

Learn more

Quick replies

Allow agents to create their own quick reply messages with keyboard tagging. Manage and cr

Learn more

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

Learn more

Dynamics 365

Customer Service admin center

Search

Overview

User management

Bots

Channels

Queues

Routing

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Real-time translation

Set up language translation for agents and customers.

Learn more

Reference

Service

AI Builder



Copilot Studio



Dynamics 365 Customer Service



Dynamics 365 & Power Platform



Resources

- [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](#)
- [Understand the US Government plans available](#)
- [Quotas, limits and more in Copilot Studio](#)
- [Add a Copilot \(Agent\) to Microsoft Teams](#)
- [Dynamics 365 service description - Power Platform](#)
- [Omnichannel for Customer Service](#)
- [Manage Copilot features in Customer Service](#)
- [Microsoft Copilot for Service](#)
- [Dynamics 365 Licensing Guide](#)
- [Microsoft Power Platform Licensing Guide](#)
- [Federal-Business-Applications/whitepapers/copilot \(github.com\)](#)
- [Overview of AI-powered and Copilot features in Power Pages | Microsoft Learn](#)
- Gov Biz Apps Functional Parity aka.ms/BAPFunctionalParity



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