



Power Virtual Agents in a Day

Lab 01: Overview and Prerequisites

Hands-on lab Step-by-Step

March 2020

Contents

<i>Lab Overview and Pre-requisites</i>	3
<i>Goal for Lab 1:</i>	3
<i>Task 1: Set up a tenant</i>	3
<i>Task 2: Create a trial environment</i>	12
<i>Task 3: Import Power Virtual Agents in a Day solution package</i>	17
<i>Task 4: Make Flow Connections</i>	23
<i>Task 5: Import the application</i>	29
<i>Task 6: Generate test data</i>	30
<i>Lab survey</i>	33
<i>Terms of Use</i>	34

Lab Overview and Pre-requisites

This beginner-level lab gives you hands-on experience designing and developing a virtual agent. We'll show you the steps to build your bot in less than a day. This lab is subject to the Terms of Use on page 34 of this document.

Here's what you'll learn:

- **Power Virtual Agents:** Create a Virtual Agent and test it in the demo website. Then, monitor the performance of the Virtual Agent.
- **Power Automate:** Make the Virtual Agent (VA) more powerful by integrating Power Automate for actions and connecting to Common Data Services to access customer data.
- **Conversational Design:** Craft great customer experiences and create successful virtual agent conversations by going through those conversational design principles and exercises.

Goal for Lab 1:



This lab will lay the groundwork for your bot. You will:


- Create a trial account and set up a tenant
- Create a new environment
- Import Power Virtual Agents in a Day solution package and Device Ordering app to generate test data to complete the remaining labs



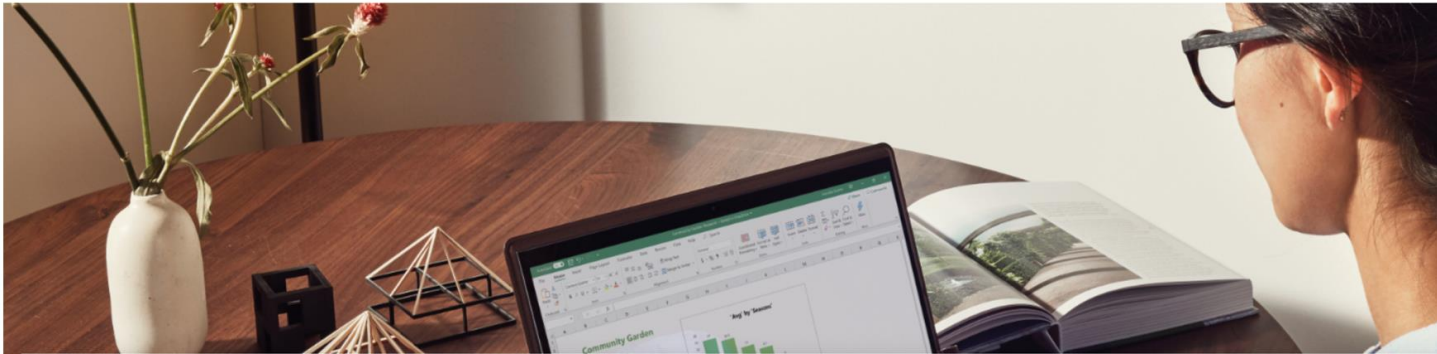
The time to complete this lab is **[45]** minutes.

Task 1: Set up a tenant

- You need to have a valid tenant (Azure Active Directory) set up for the PVA in a day training. Skip this task if you do.
 - If you don't have an existing tenant, you can set one up through Office E3 trial portal.
1. Open a private browser and navigate to <https://products.office.com/en-us/business/office-365-enterprise-e3-business-software>
 2. Select Free Trial to navigate to trial sign up page.

 Microsoft 365 Products Capabilities Resources Support

All Microsoft Search Sign in



Office 365 E3


- Includes full desktop versions of Office apps
- Each user can install Office mobile apps on 5 PCs or Macs, 5 tablets, and 5 phones
- Five layers of security and monitoring help keep customer data safe
- Reduce IT costs, and move to the cloud on your terms
- Guaranteed 99.9% uptime, and 24/7 support from Microsoft

\$20.00 user/month
(annual commitment)

[Buy now](#)

[Free trial >](#)

3. Enter your email address and click **Next**.

 Microsoft

Thank you for choosing Office 365 E3

1

Let's set up your account

Enter your work or school email address, we'll check if you need to create a new account for Office 365 E3.

Next

2

Tell us about yourself


3

Create your business identity

4

Get Office


4. Click **Set up account**.



Thank you for choosing Office 365 E3


- 1 Let's set up your account

Looks like you need to create a new account. Let's get you started!

Continue as @gmail.com [Not you?](#)


Set up account
- 2 Tell us about yourself
- 3 Create your business identity
- 4 Get Office

5. Fill in your information and click **Next**.



Thank you for choosing Office 365 E3

- 1 Signup started
- 2 Tell us about yourself



First name Virtual	Last name Agent
Business phone number 2066666666	
Company name Demo company	Company size 10-24 people
Country or region United States	

Next
- 3 Create your business identity
- 4 Get Office

6. You'll be asked to verify you identify using either phone call or text message. Follow directions and confirm your identity by specifying phone number.

Microsoft

Thank you for choosing Office 365 E3

- 1 Signup started
- 2 Tell us about yourself
- 3 Create your business identity
- 4 Get Office

✓ ●

Prove. You're. Not. A. Robot.

Enter a number that isn't VoIP or toll free.

☒ Text me ☐ Call me

Code (+1)

We don't save this phone number or use it for any other purpose.

[Send Verification Code](#)

[< Go back](#)

7. On the create your user ID page, fill in information for an administrator user and select your tenant domain.

Note: the tenant domain must be unique.

8. Click **Check availability**.

Microsoft

Thank you for choosing Office 365 E3

- 1 Signup started
- 2 Nice to meet you, Virtual
- 3 Create your business identity
- 4 Get Office

● ●

To set up your account, you'll need a domain name. [What is a domain?](#)

You'll probably want a custom domain name for your business at some point. For now, choose a name for your domain using onmicrosoft.com

.onmicrosoft.com

[Check availability](#) [Next](#)

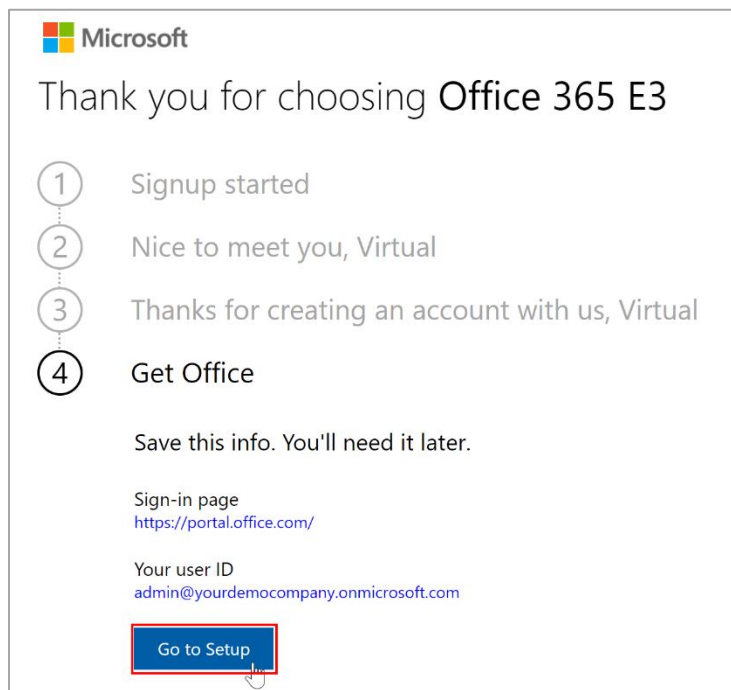
9. Click **Next** if the custom domain name is available.

The screenshot shows the Microsoft Office 365 E3 signup page. At the top, it says "Thank you for choosing Office 365 E3". Below this is a progress indicator with four steps: 1. Signup started, 2. Nice to meet you, Virtual, 3. Create your business identity (current step), and 4. Get Office. Step 3 has two blue dots, indicating it is the active step. The main content area for step 3 explains that a domain name is needed and provides a text input field with the placeholder "yourcompany" and "yourdemocompany" and ".onmicrosoft.com". Below the input field, it states "yourdemocompany.onmicrosoft.com is available." and has a "Next" button highlighted with a red box. There is also a "Check availability" button.

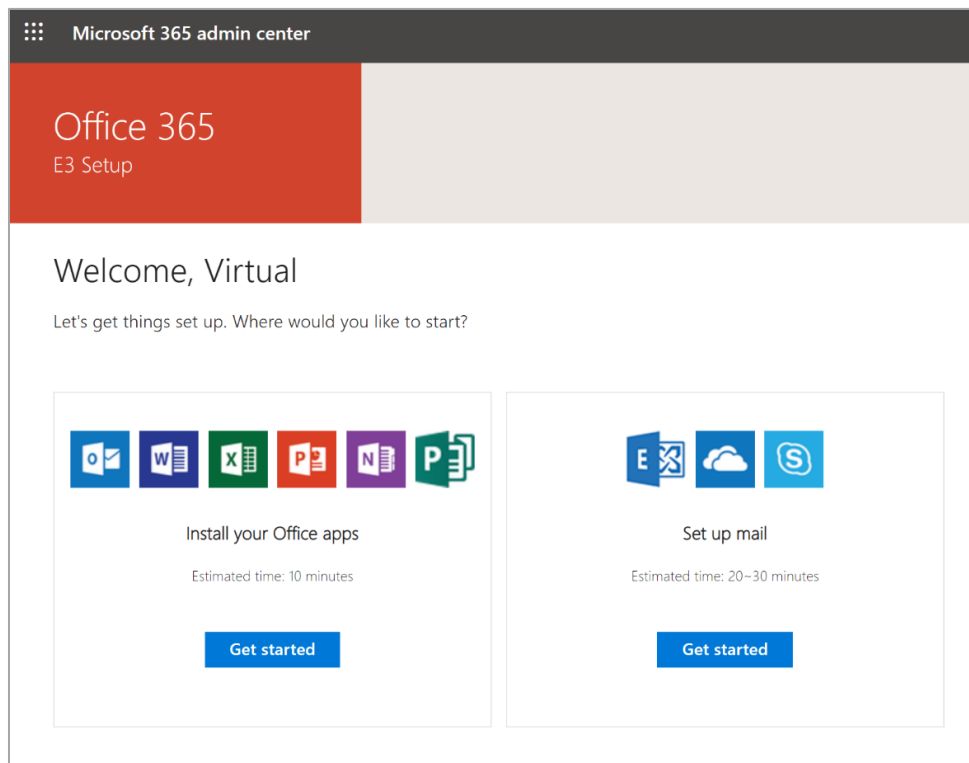
10. Now, let's create your user ID and password to sign in to your account. Once you fill out your user name and password, click **Sign Up**.

This screenshot shows the same Microsoft Office 365 E3 signup page, but at a later stage in step 3. The progress indicator now shows three blue dots, indicating that steps 1, 2, and 3 are completed. The main content area now says "Now create your user ID and password to sign in to your account." and contains three input fields: "Name" (with "admin" entered), "Password" (with "*****" entered), and "Confirm password" (with "*****" entered). These three input fields are grouped together and highlighted with a red box. To the right of the "Name" field, the text "@yourdemocompany.onmicrosof..." is visible. Below the input fields, there is a "Sign up" button highlighted with a red box, and a "Go back" link. At the bottom, it says "Get Office".

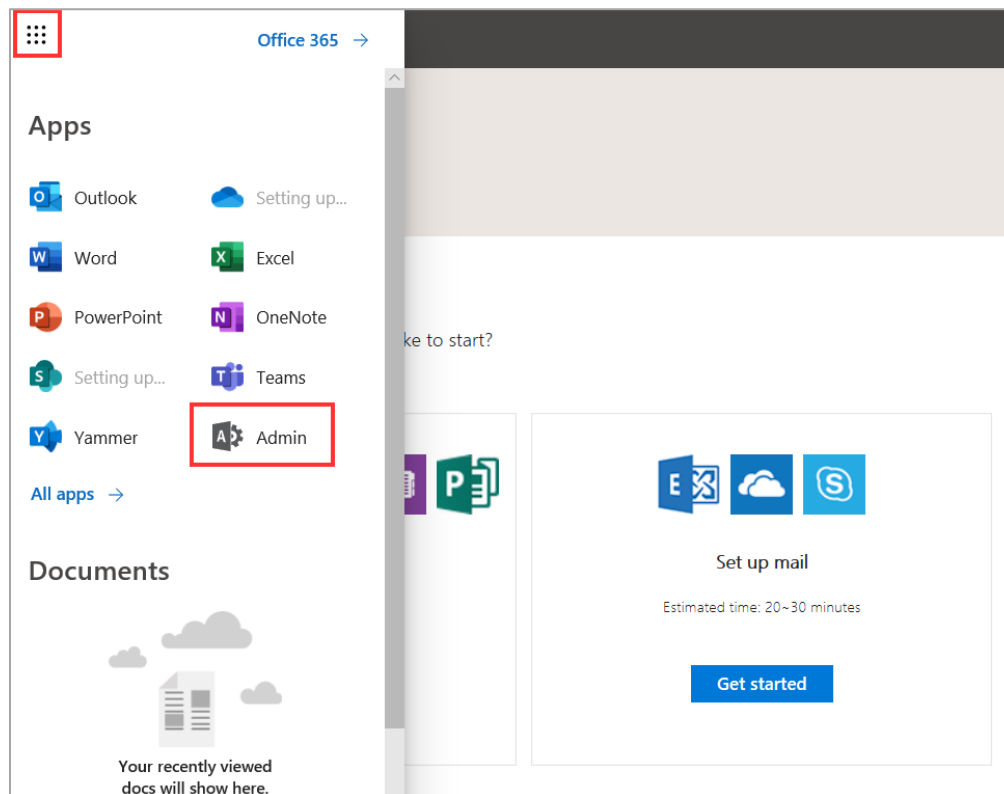
11. Wait while the tenant is created. It usually takes less than 1 min. Then click **Go to Setup**. This will navigate you to **Office admin portal**.



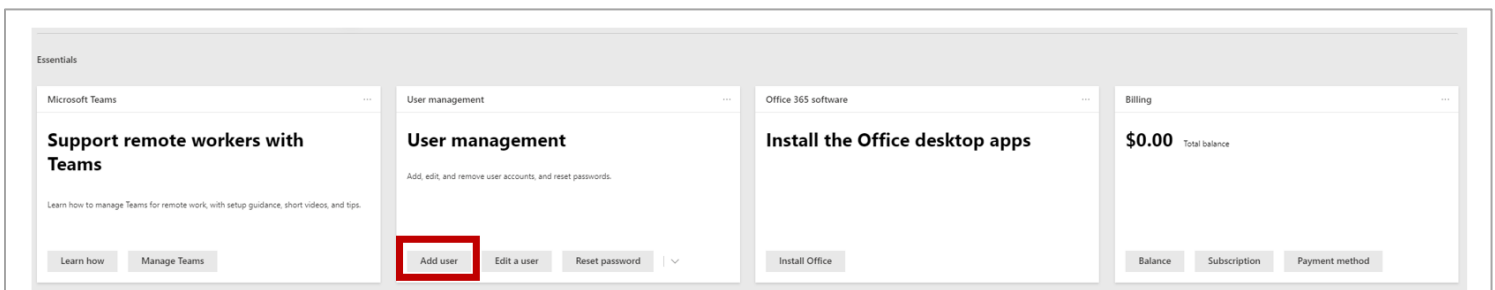
12. Now, navigate back to the Office Admin Portal (<https://admin.microsoft.com>) to add users and assign licenses in Product licenses.



13. Click on menu top left corner and select "**Admin**".



14. Select **Add User** in Microsoft Admin center.



15. Fill in user details and select **Next**.

Add user

- Basics
- Product licenses
- Optional settings
- Finish

Set up the basics

To get started, fill out some basic information about who you're adding as a user.

First name

user

Last name

1

Display name *

user 1

Username *

user1

@

yourdemocompany.onmicrosoft.com

Password settings

☒ Auto-generate password
 ☐ Let me create the password

☒ Require this user to change their password when they first sign in
 ☐ Send password in email upon completion

Next

16. Now, you can assign licenses in **Product licenses** and click **Next**.

Add a user

- Basics
- Product licenses
- Optional settings
- Finish

Assign product licenses

Assign the licenses you'd like this user to have.

Select location *

United States

Licenses (2) *

☒ Assign user a product license

☒ **Dynamics 365 AI for Customer Service Virtual Agents Viral SKU**
 9998 of 10000 licenses available
 ☒ **Office 365 E3**
 23 of 25 licenses available

☐ Create user without product license (not recommended)
 They may have limited or no access to Office 365 until you assign a product license.

Apps (24)

17. You can skip the **optional settings**.

Add user

✓ Basics

✓ Product licenses

Optional settings

Finish

Optional settings

You can choose what role you'd like to assign for this user, and fill in additional profile information.

Roles (User: no administration access) ▾

Profile info ▾

Back

Next

18. Click **Finish adding**.

Add user

✓ Basics

✓ Product licenses

✓ Optional settings

Finish

You're almost done - review and finish adding

Assigned Settings

Review all the info and settings for this user before you finish adding them.

Display and username

user 2

user2@DemoCompanytenantsetup.onmicrosoft.com

Edit

Password

Type: Auto-generated


Edit

Product licenses

Back

Finish adding

19. Congratulations! You had successfully added a new user.


 **user 1 has been added**

You've successfully added a new user. They'll now appear in your list of active users.

User details

Display name: user 1

Username: user1@yourdemocompany.onmicrosoft.com

Password: 

Task 2: Create a trial environment


You'll create a Power Apps trial environment to explore Power Virtual Agents and Power Automate.

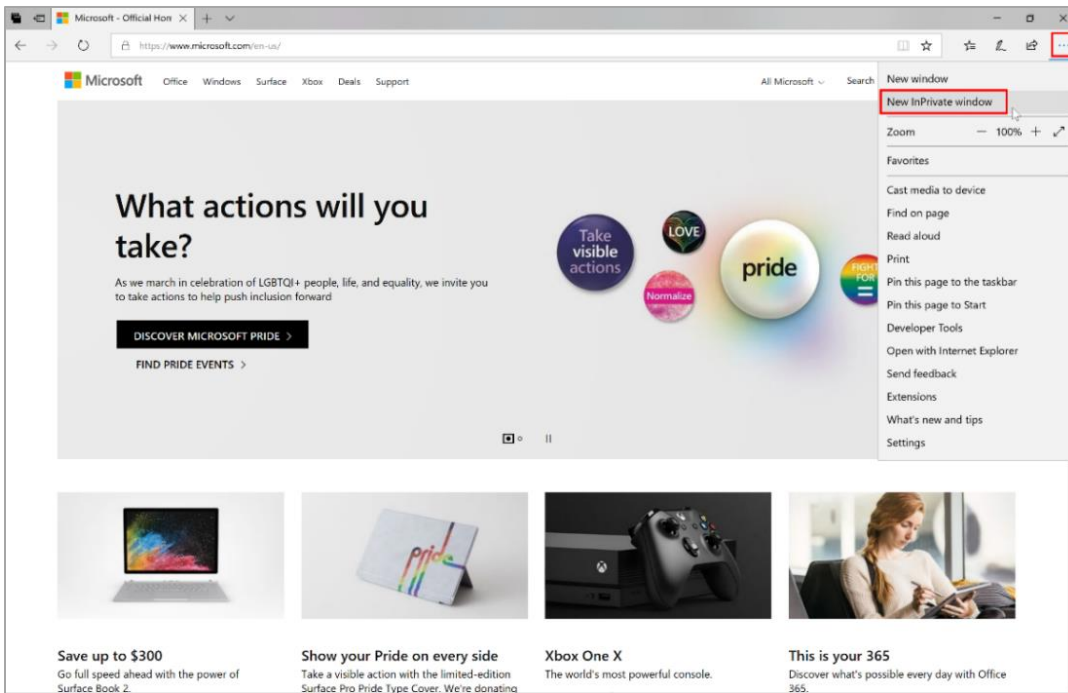
Warning: When your trial expires in 29 days, your data and any customizations will be deleted.

You may want to save your work to use in another environment. To do that, export your work as a solution after you complete all the exercises in the Virtual Agent in a Day training.

1. Open a test window

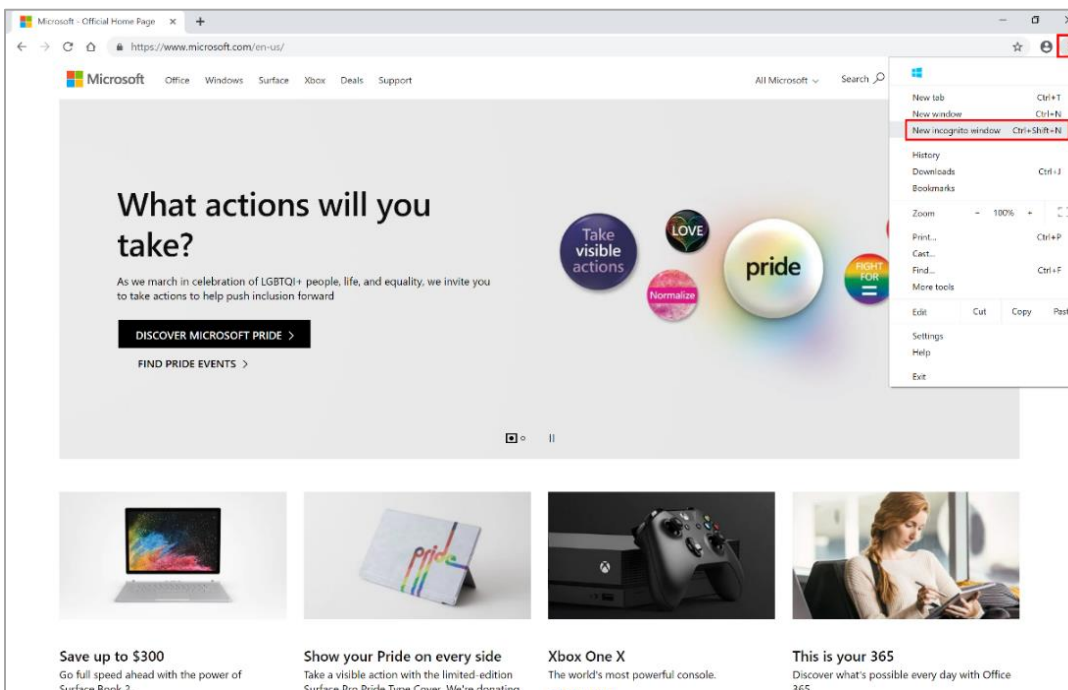
➔ If you're in Edge, open a New InPrivate Window.

- I. To open a New InPrivate Window in Edge: click 
- II. Then, select New InPrivate Window.

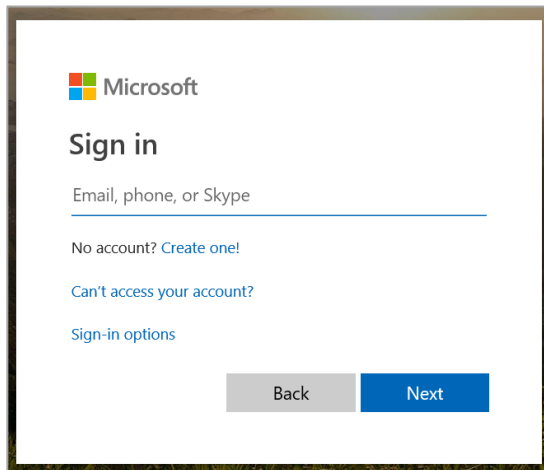


➔ If you're in Chrome, open a New Incognito Window.

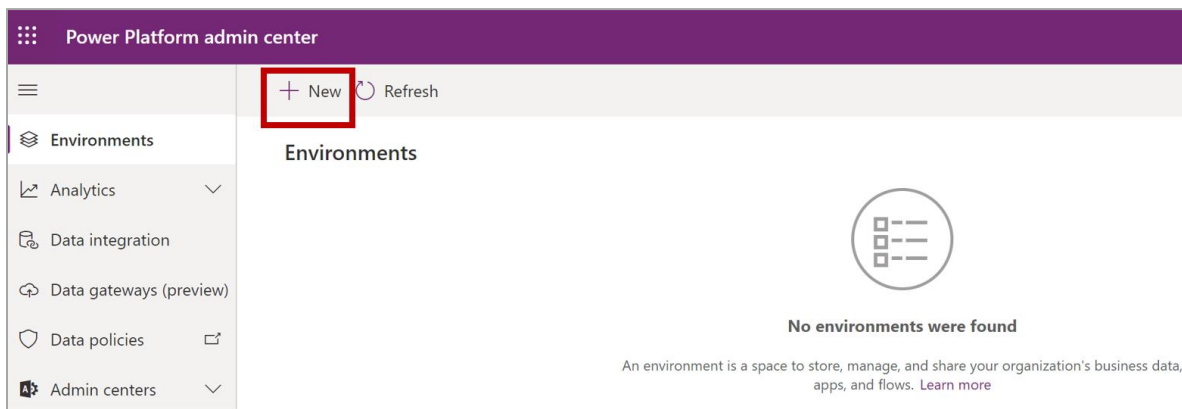
- I. To open New Incognito Window in Chrome: click ⋮
- II. Then, select New Incognito Window.



2. Sign in: copy and paste this link: <https://admin.powerplatform.microsoft.com/environments>, and sign in with the test account you just created.



3. Select New Environment.



4. Fill in the fields in the New environment dialog box with these values and select **Next** to continue.

- Environment Name: PVAtest
- Type: Trial
- Region: United States (default)
- Create a database for this environment? Yes

Note: Creating an environment may take up to one minute.

New environment ✕

Name *

PVAtest

Type ⓘ *

Trial

Region *

Local environments can provide quicker data access.

United States - Default

Purpose

Describe the environment purpose

Create a database for this environment? ⓘ

☒ Yes

Next

Cancel

- Specify values in the dialog box, choose Yes to deploy sample apps and data and click Save to create a new environment.
 - Language: English
 - Currency: USD
 - Select the "Include Sample Apps and Data" option
 - Click "Save"

← Add database

×

Language *

Default language for user interfaces in this environment

English

Currency *

Reports will use this currency

USD (\$)

Enable Dynamics 365 apps

In addition to Power Apps. [Learn more](#)

☐ No

⚠

Currently, Dynamics 365 apps can only be enabled for production environment. You can create trial [here](#)

Deploy sample apps and data

☒ Yes

Security group

Restrict environment access to people in this security group. Otherwise, everyone can access. [Learn more](#)

+ Select

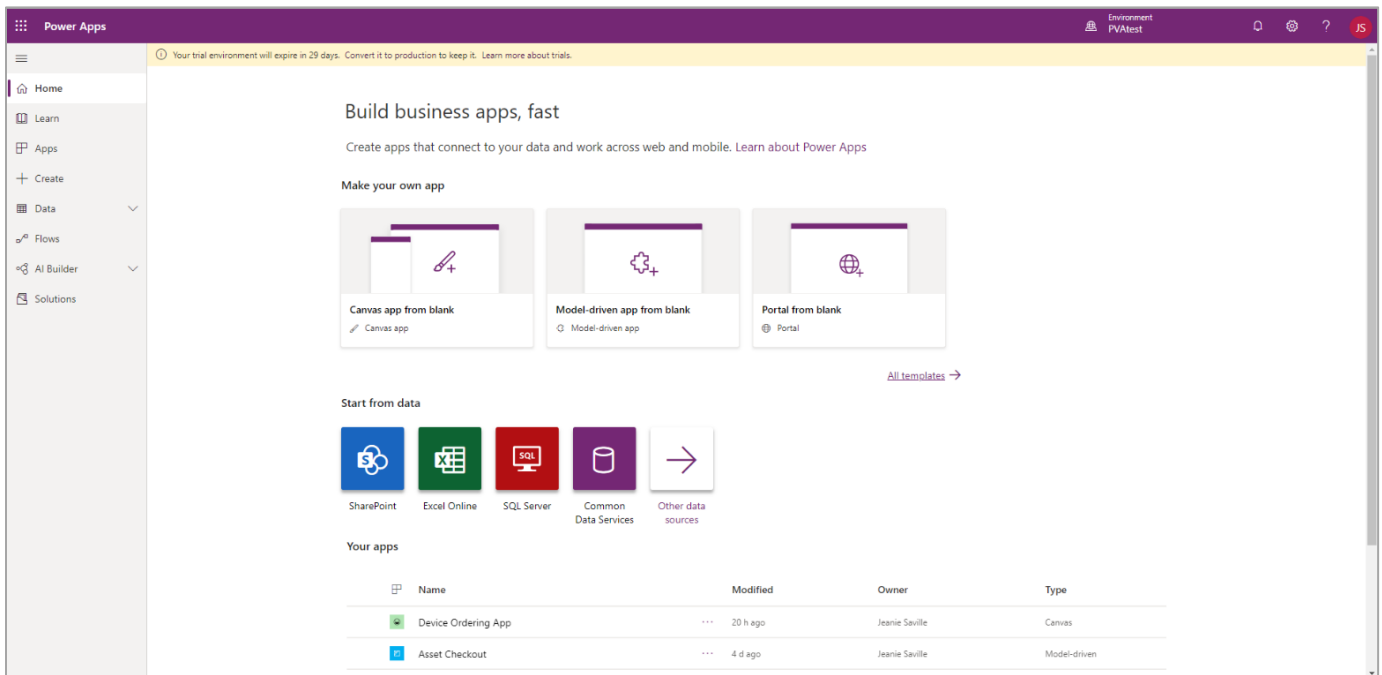
Save

Cancel

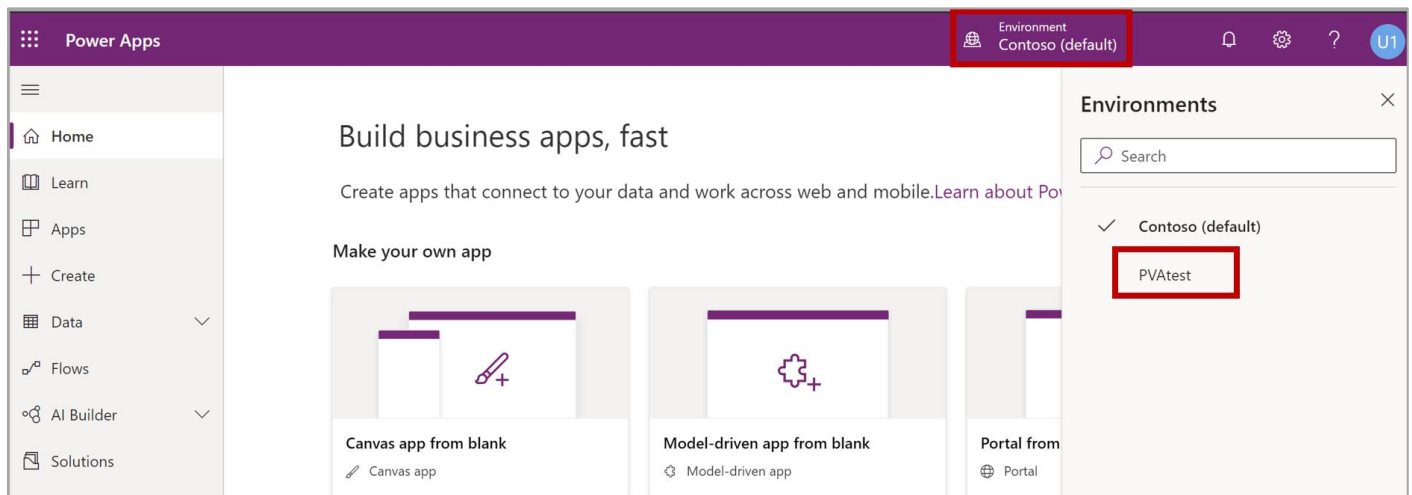
- Wait until the environment has been created successfully. Once that's done, you are ready to create your first virtual agent.

Task 3: Import Power Virtual Agents in a Day solution package

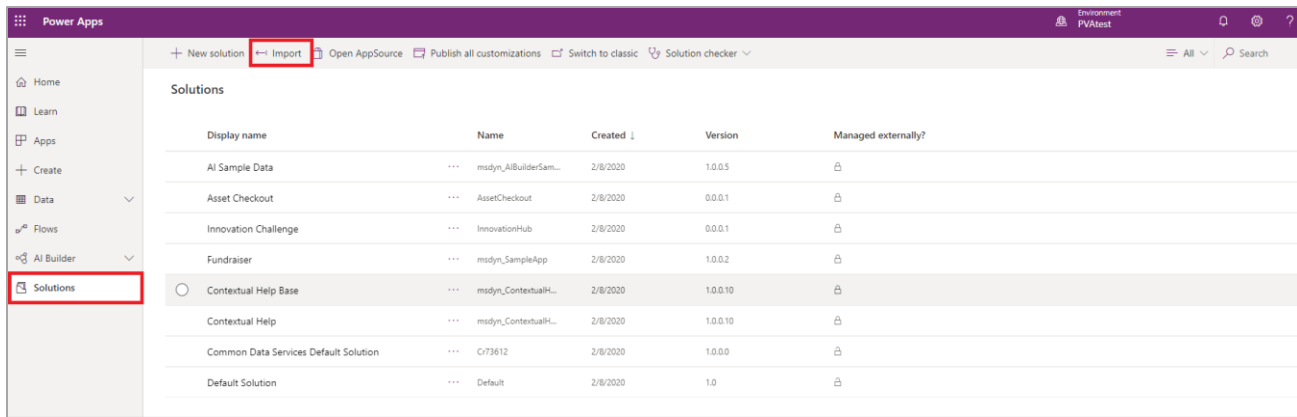
1. Download the latest solution SolutionPowerVirtualAgentInADay.zip
2. Copy and paste <https://web.powerapps.com/> into your Edge or Chrome incognito window.



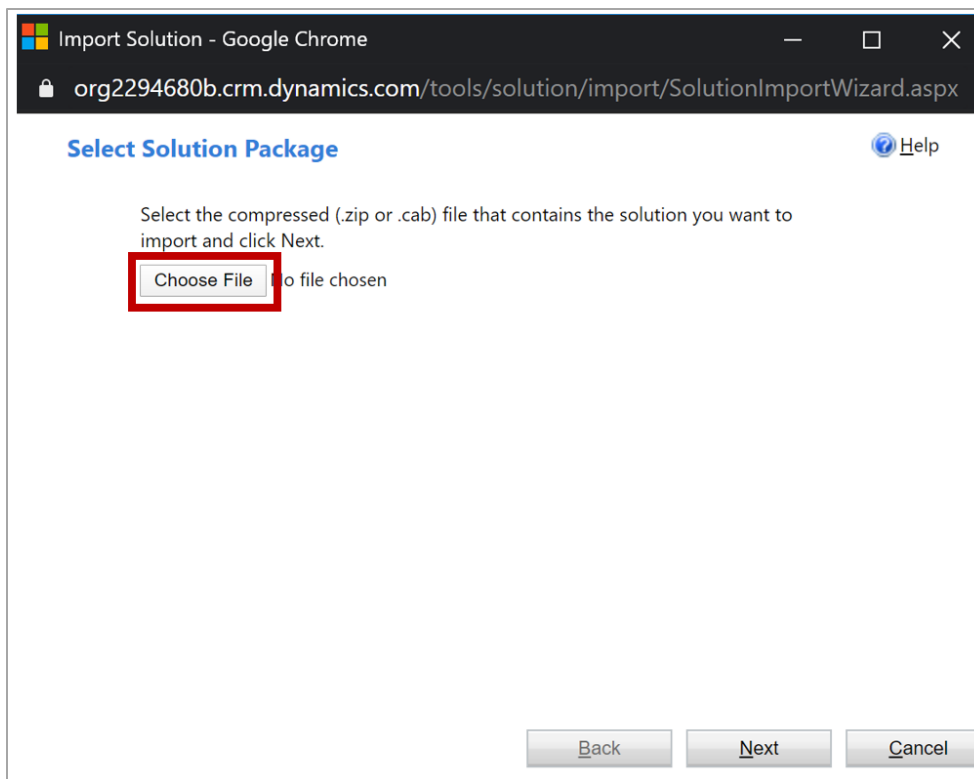
3. Click the environment icon and select the environment you just created in Task 2: Create a trial environment.



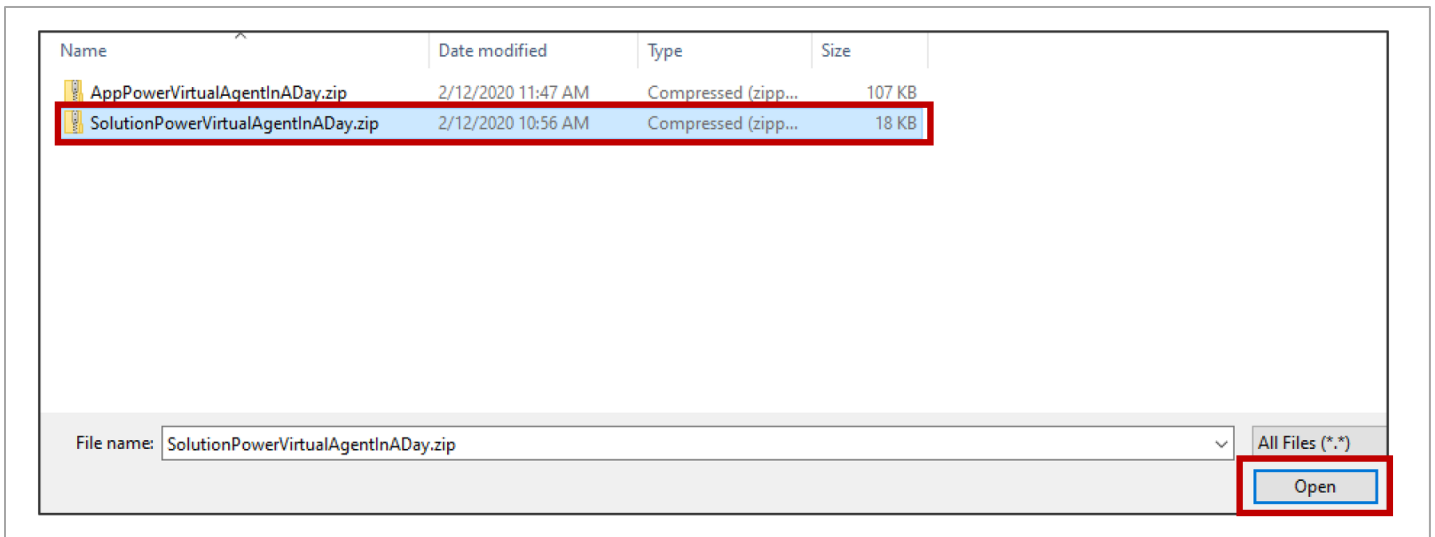
4. Select Solutions and click Import.



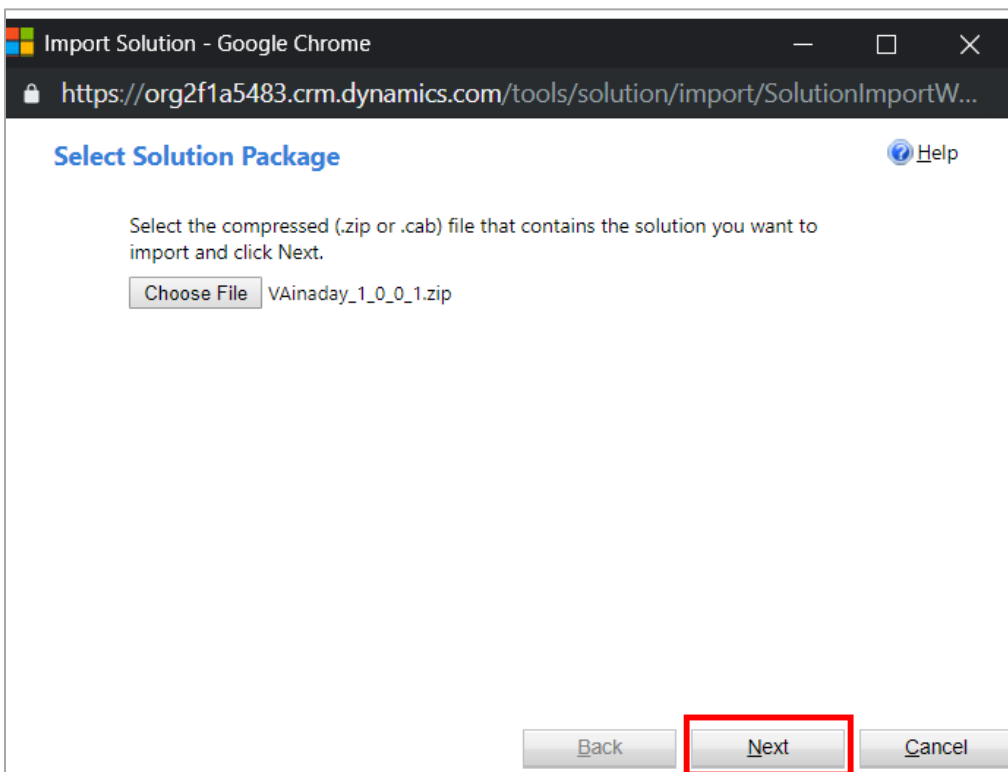
5. Click **Choose File** after the **Import Solution** page pops up.



6. Select **SolutionPowerVirtualAgentInADay.zip** and then select **Open**.



7. Select **Next**.



8. Select **Next** to continue.

Import Solution - Google Chrome

https://org2f1a5483.crm.dynamics.com/tools/solution/import/SolutionImportW...

Solution Information

Help

! Changes applied by importing an unmanaged solution cannot be uninstalled. Do not install this solution if you want to roll back these changes.

Solution Information

Name: VA in a day

Publisher: CDS Default Publisher(Crcd26b)

Package Type: Unmanaged

[View solution package details](#)

i By enabling this command, you consent to share your data with an external system. Data imported from external systems into Microsoft Dynamics 365 are subject to our privacy statement that can be accessed [here](#). Please consult the feature technical documentation for [more information](#).

[Back](#) [Next](#) [Cancel](#)

9. Now, select **Import** (ignore the warning message.)

Note: Importing can take up to two minutes.

Import Solution - Google Chrome

https://org2f1a5483.crm.dynamics.com/tools/solution/import/SolutionImportW...

Import Options

Help

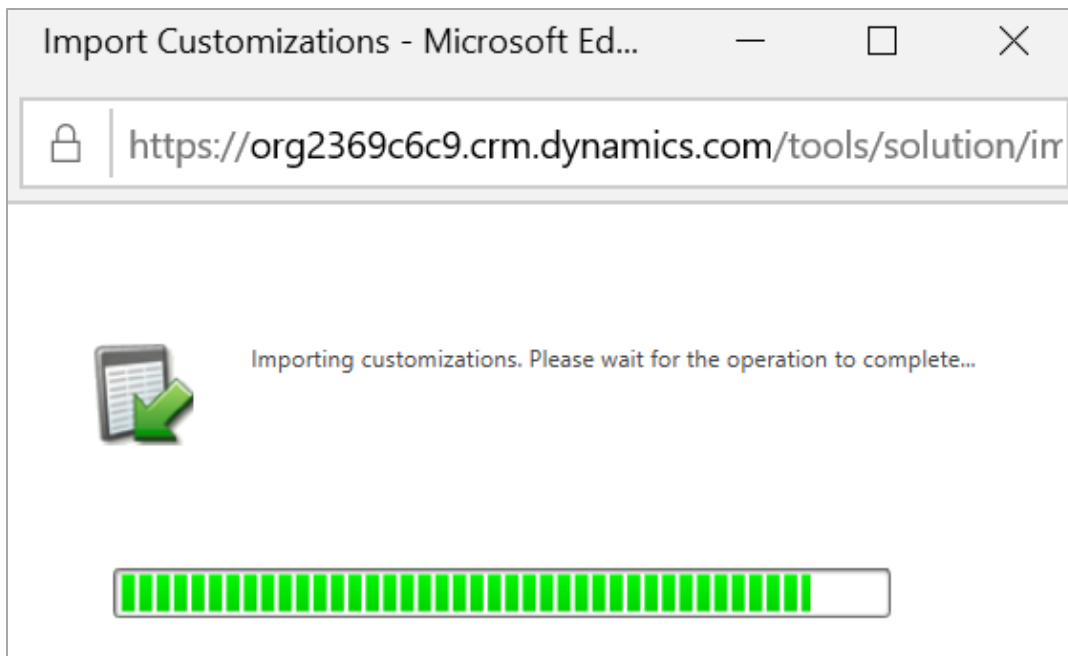
! Changes applied by importing an unmanaged solution cannot be uninstalled. Do not install this solution if you want to roll back these changes.

Post Import Actions

☒ Enable any SDK message processing steps included in the solution

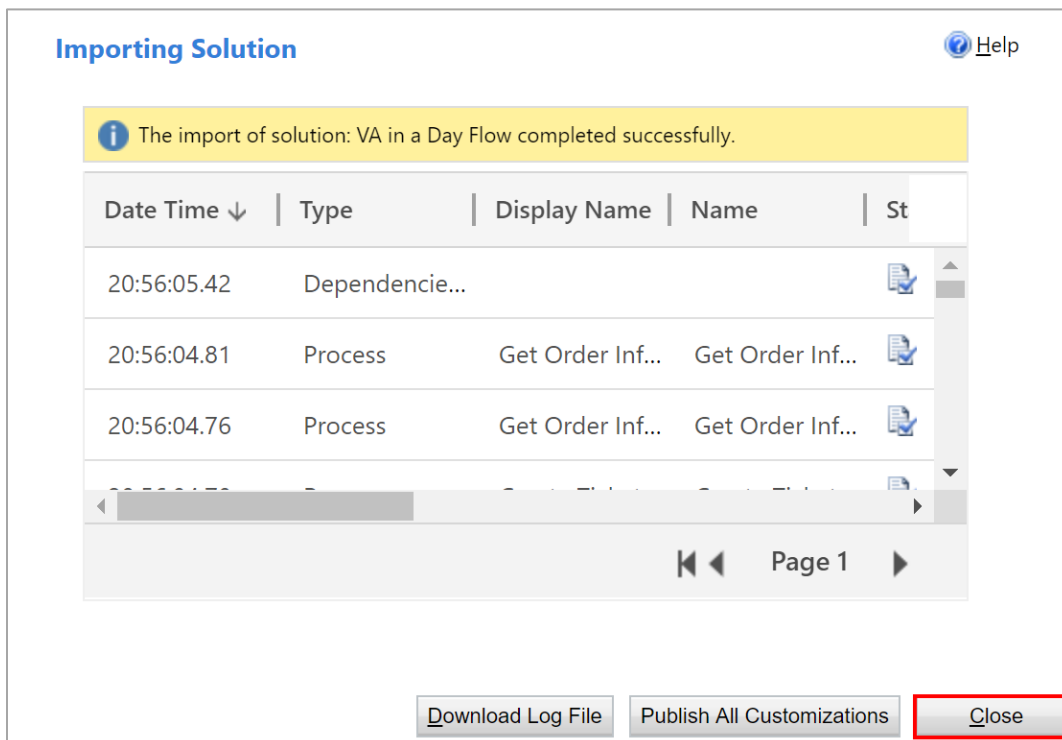
NOTE: New business processes will be in the state that is defined by the solution provider. The state of processes that are already on the system won't be changed.

[Back](#) [Import](#) [Cancel](#)



10. Wait for the import to complete and then select **Close**.

Note: You don't need to click Publish All Customizations.



11. Now, you can see the VA in a Day Flow solution.

Solutions					
Display name		Name	Created ↓	Version	Managed externa...
VA in a day	...	VAinaday	3/26/2020	1.0.0.1	🔒
AI Sample Data	...	msdyn_AIBuilderS...	3/26/2020	1.0.0.5	🔒
Asset Checkout	...	AssetCheckout	3/26/2020	0.0.0.1	🔒
Innovation Challenge	...	InnovationHub	3/26/2020	0.0.0.1	🔒
Fundraiser	...	msdyn_SampleApp	3/26/2020	1.0.0.4	🔒

12. Click **VA in a day solution** — you'll see the pre-built Power Automate flows you have, as shown below:

Solutions > VA in a day							
Display name ▾		Name	Type ▾	Managed...	Modified	Owner	Status
Approval Status	...	cr6bd_approvalstatus	Option set	🔒	-	-	-
Device Order	...	cr6bd_deviceorder	Entity	🔒	-	-	-
Order Status	...	crd4a_orderstatus	Option set	🔒	-	-	-
Get Order Info by Email ☑	...	Get Order Info by Em	Flow	🔒	4 min ago	User 1 #	Off
Return Item ☑	...	Return Item	Flow	🔒	4 min ago	User 1 #	Off

IMPORTANT: Power Automate Flows are in **Off Status**. That's because they're connected to external systems, and those connections need to be created before you can use them. In the next task, you'll fix those connections and change the Status to On.

Task 4: Make Flow Connections

1. In VA in a Day solution you just imported, find and click **Get Order Info by Email** to open the flow.

The screenshot shows the Power Apps interface. On the left, the 'Solutions' tab is selected. The main area displays a table of solutions under the 'VA in a day' solution. The 'Get Order Info by Email' flow is highlighted with a red box. The table has columns: Display name, Name, Type, Managed..., Modified, Owner, and Status.

Display name	Name	Type	Managed...	Modified	Owner	Status
Approval Status	cr6bd_approvalstatus	Option set		-	-	-
Device Order	cr6bd_deviceorder	Entity		-	-	-
Order Status	crd4a_orderstatus	Option set		-	-	-
Get Order Info by Email	Get Order Info by Em	Flow		8 min ago	User 1 #	Off
Return Item	Return Item	Flow		8 min ago	User 1 #	Off

2. In the **Get Order Info by Email** Flow, you will see this flow is turned off.



The screenshot shows the 'Get Order Info by Email' flow details page. The 'Status' is 'Off', highlighted with a red box. The page includes sections for 'Details' and 'Runs'.

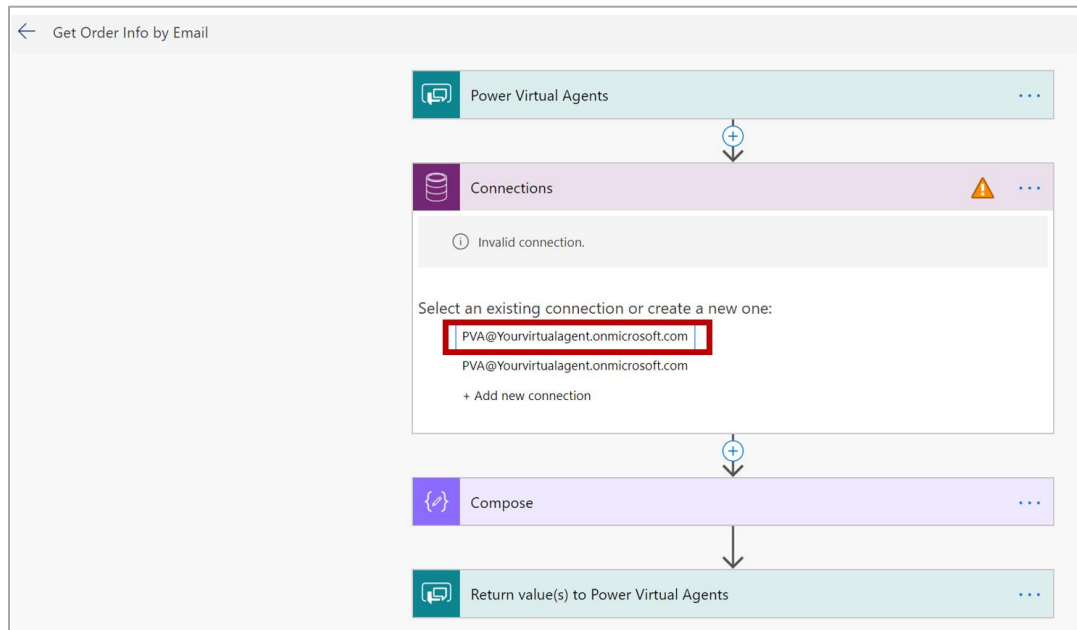
Flow	Status
Get Order Info by Email	Off

3. Click **Edit** to edit the Flow.


The screenshot shows the 'Get Order Info by Email' flow details page. The 'Edit' button is highlighted with a red box. The page includes sections for 'Details' and 'Runs'.

Flow	Status
Get Order Info by Email	Off

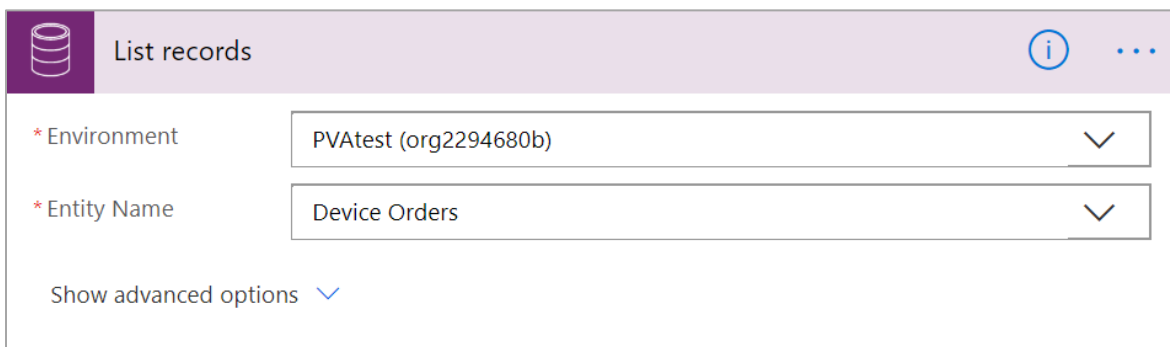
4. Select **Connections**  **Connections** (it will be marked with warning sign )
5. Then, select your test account in the list.



If your account isn't listed:

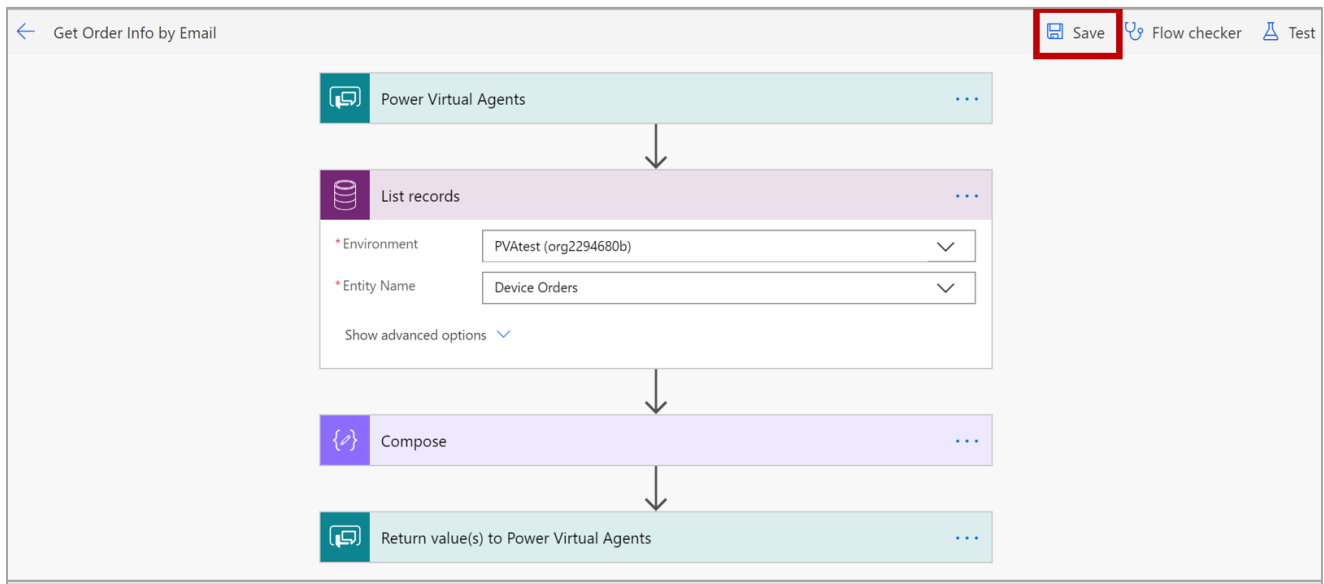
- Click **Add new**.
- Sign in with your account (it may automatically connect to your account after you click Add new.)
- With the right connection in place, the name of the node changes to Create a new record (or List Records) Click on this and you'll see that the  has disappeared.

Note: Make sure you select the environment you created (PVAtest) and Device Orders under Entity Name.



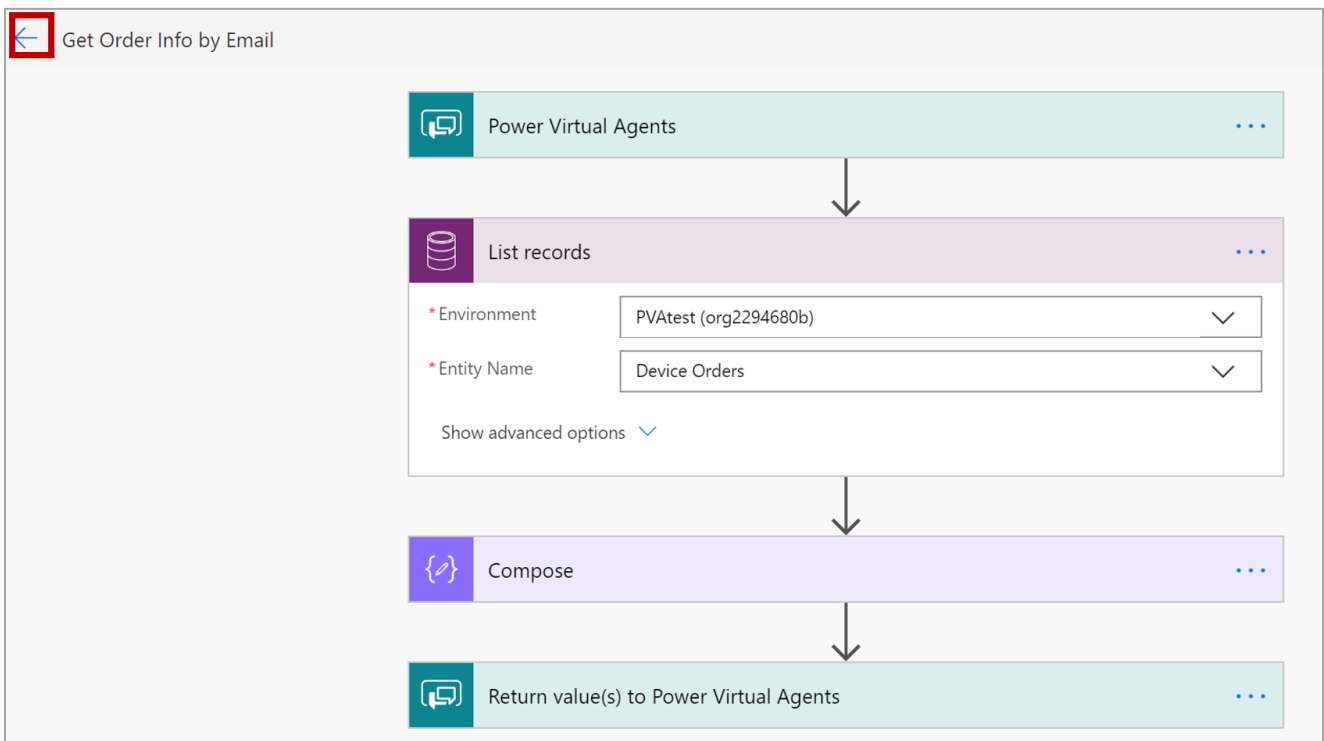
The screenshot shows a dialog box titled 'List records'. It has a purple header bar with a database icon on the left and an information icon and a three-dot menu icon on the right. Below the header, there are two dropdown menus. The first dropdown is labeled '* Environment' and has 'PVAtest (org2294680b)' selected. The second dropdown is labeled '* Entity Name' and has 'Device Orders' selected. Below these dropdowns, there is a link that says 'Show advanced options' followed by a blue checkmark icon.

6. Click **Save**.



Note: You won't be able to save your changes when your Flow is active. You'll need to deactivate the Flow and then save.

7. Go back to the previous page.



8. Click **Turn on** button to activate this flow and make sure the status is **On**.

Flows > Get Order Info by Email

Details

Flow Get Order Info by Email	Status Off
	Created Mar 27, 05:25 PM
	Modified Mar 27, 05:29 PM
	Type Instant
	Plan Per-user plan

Flows > Get Order Info by Email

Details


Flow Get Order Info by Email	Status On
Owner User 1	Created Mar 26, 11:51 PM
	Modified Mar 27, 12:36 AM
	Type Instant
	Plan Per-user plan

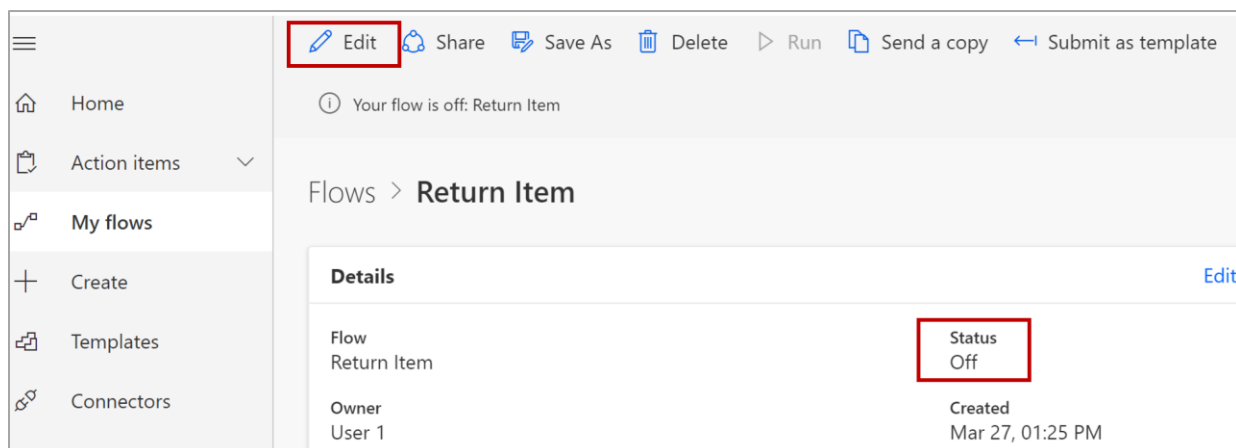
9. Go back to VA in a Day solution, find and click **Return Item** to repeat the process.



Power Apps

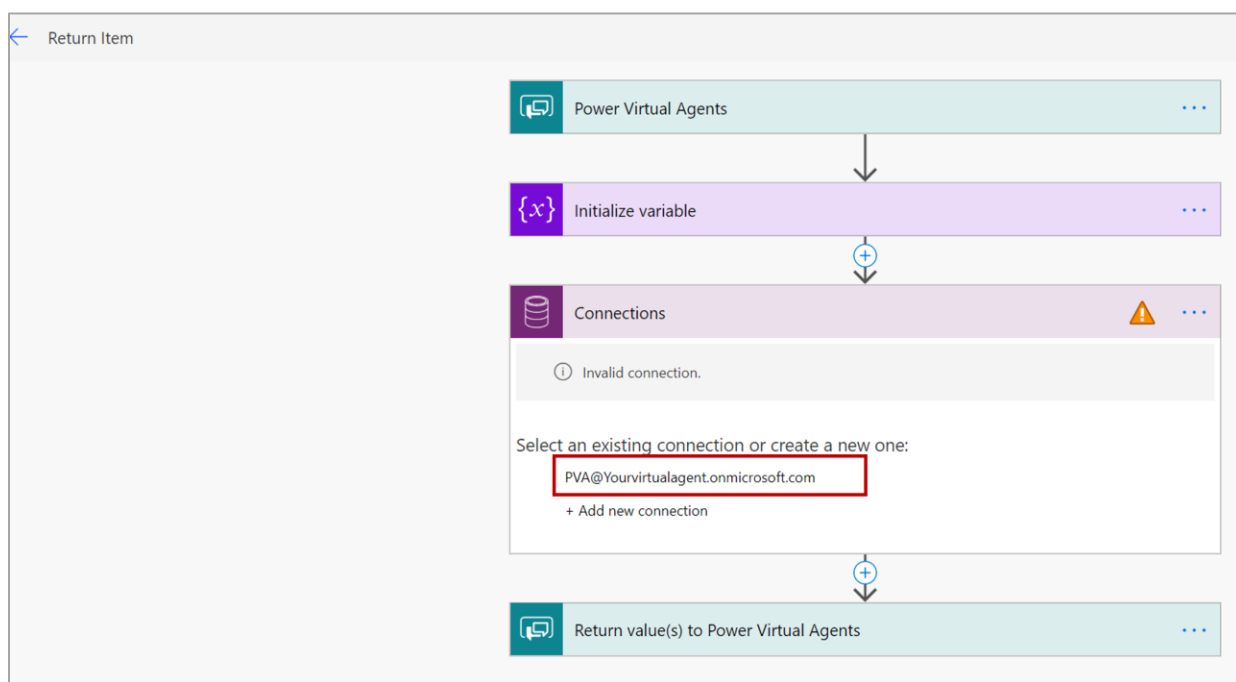
Solutions > VA in a day

Display name	Name	Type	Managed...	Modified	Owner	Status
Approval Status	cr6bd_approvalstatus	Option set	🔒	-	-	-
Device Order	cr6bd_deviceorder	Entity	🔒	-	-	-
Order Status	crd4a_orderstatus	Option set	🔒	-	-	-
Get Order Info by Email	Get Order Info by Email	Flow	🔒	1 h ago	User 1 #	On
Return Item	Return Item	Flow	🔒	1 h ago	User 1 #	On

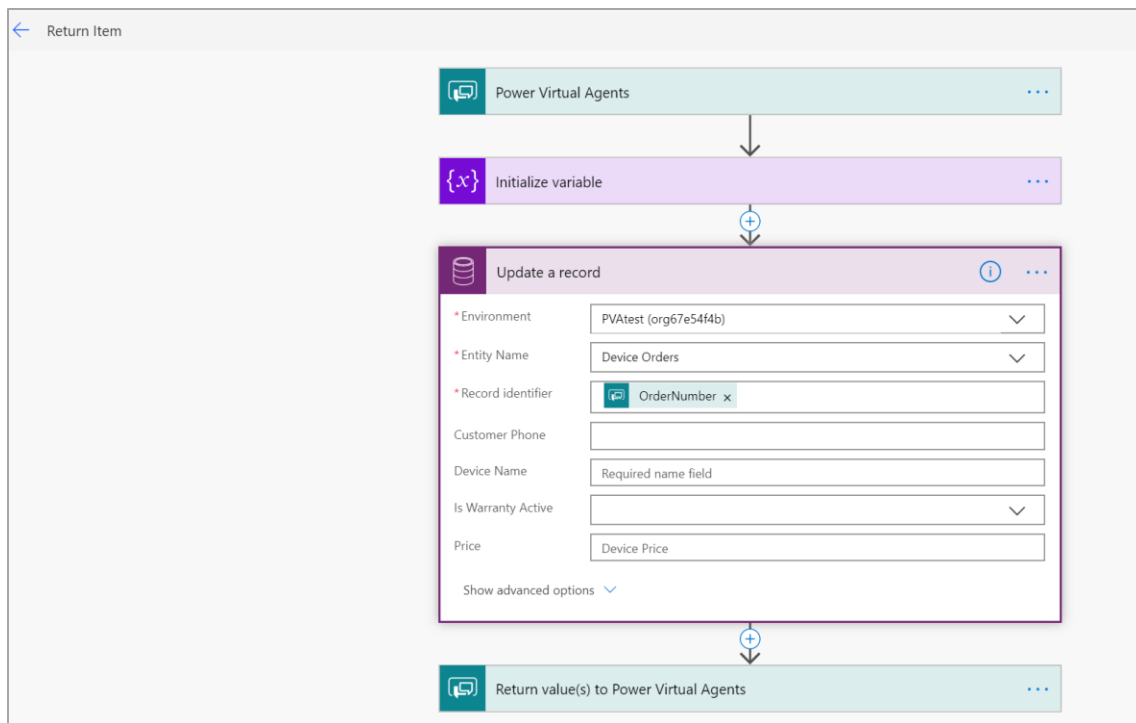
10. Make sure the status is Off and click **Edit**  to edit the Flow.



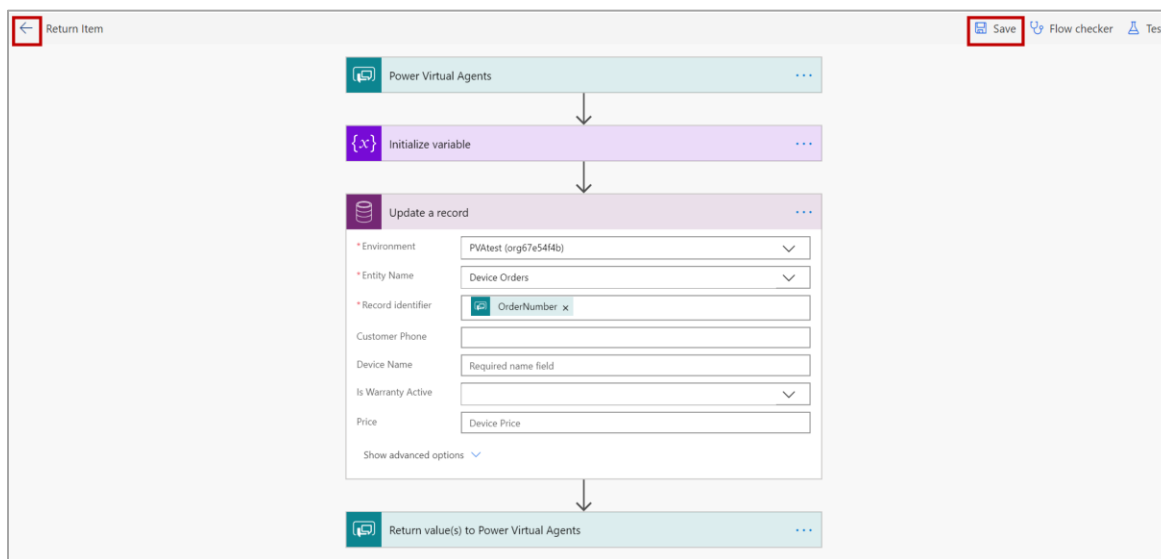
11. Click **Connections**  **Connections** (it will be marked with warning sign ) and select your test account in the list.



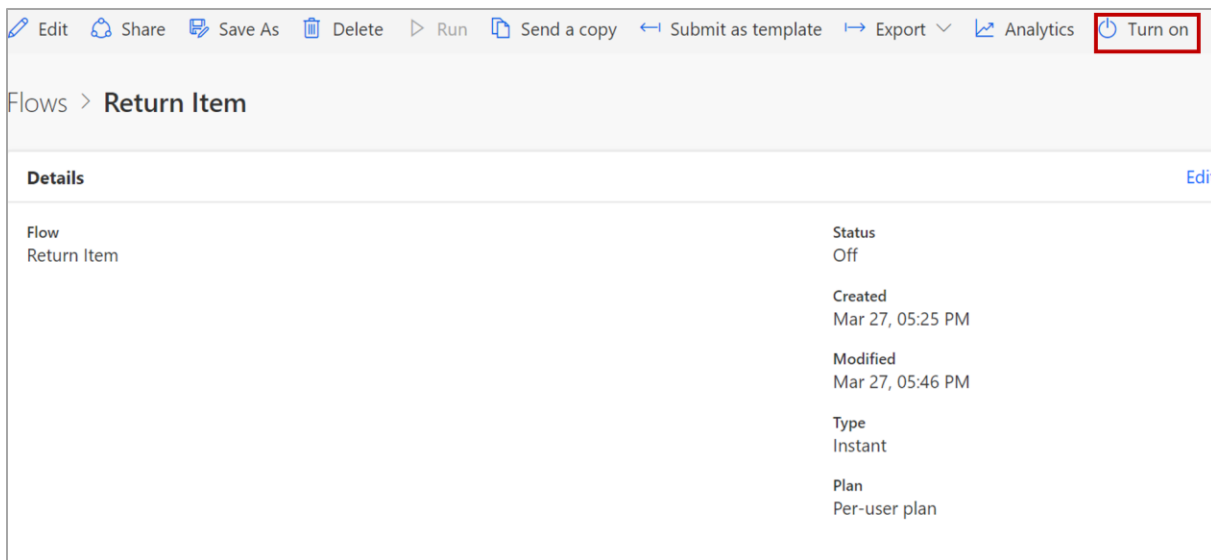
It will look like this:



12. Click **Save** and go back to the previous page.

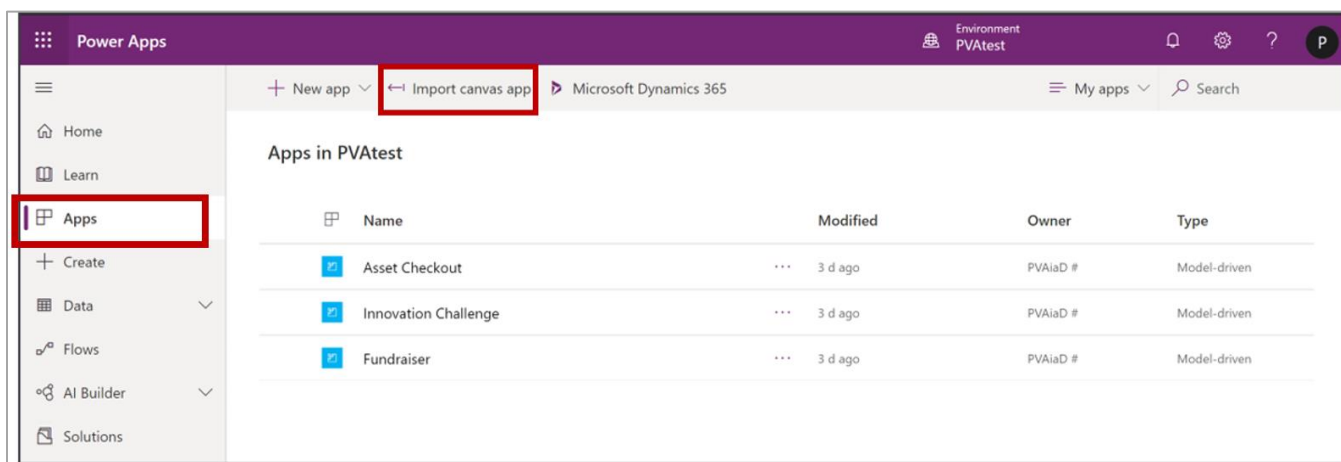


13. Click **Turn on** button to activate this flow and make sure the status is **On**.



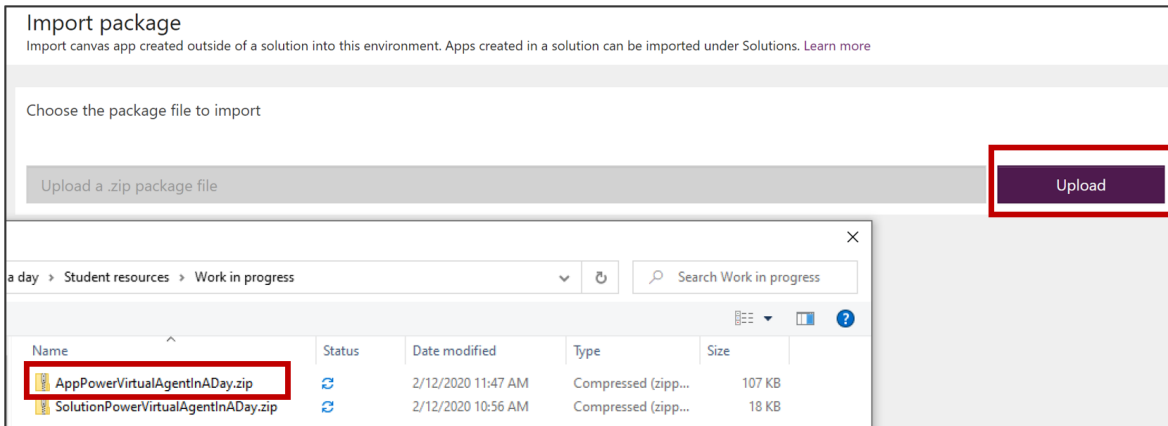
Task 5: Import the application

1. Navigate to <https://web.powerapps.com/>.
2. Select Apps, and then select Import canvas app.

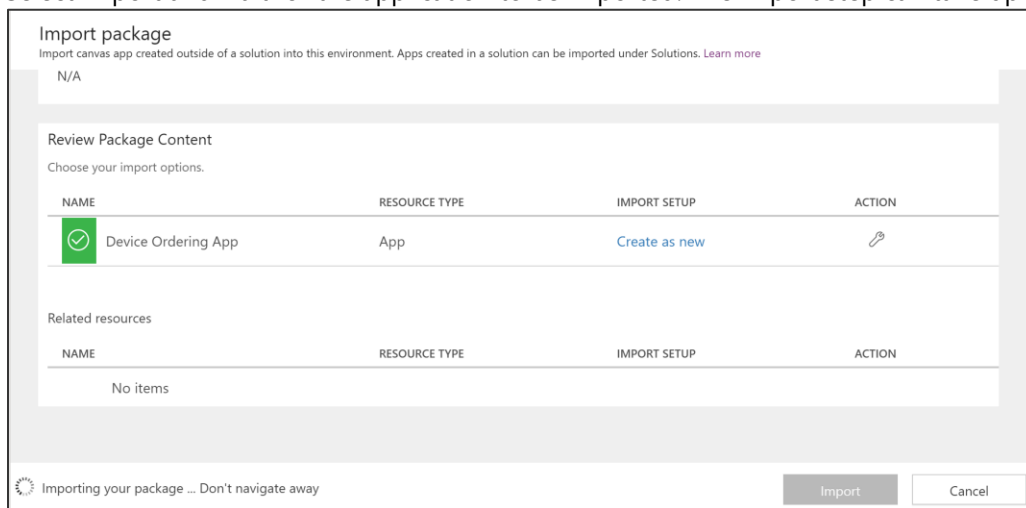


Note: make sure to import this app package in the **Apps** tab.

3. Select Upload and then select the AppPowerVirtualAgentInADay file and click on Open.

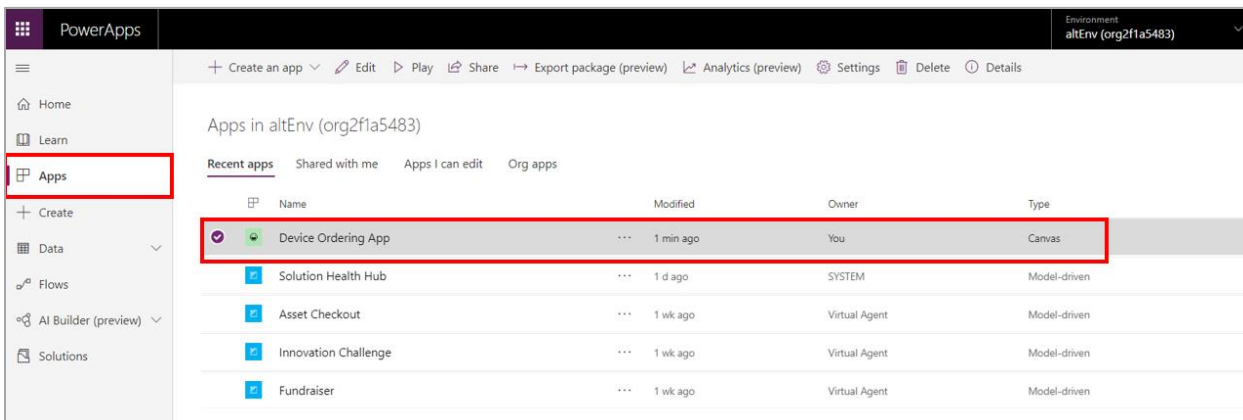


4. Select Import and wait for the application to be imported. The import step can take up to 2 minutes.

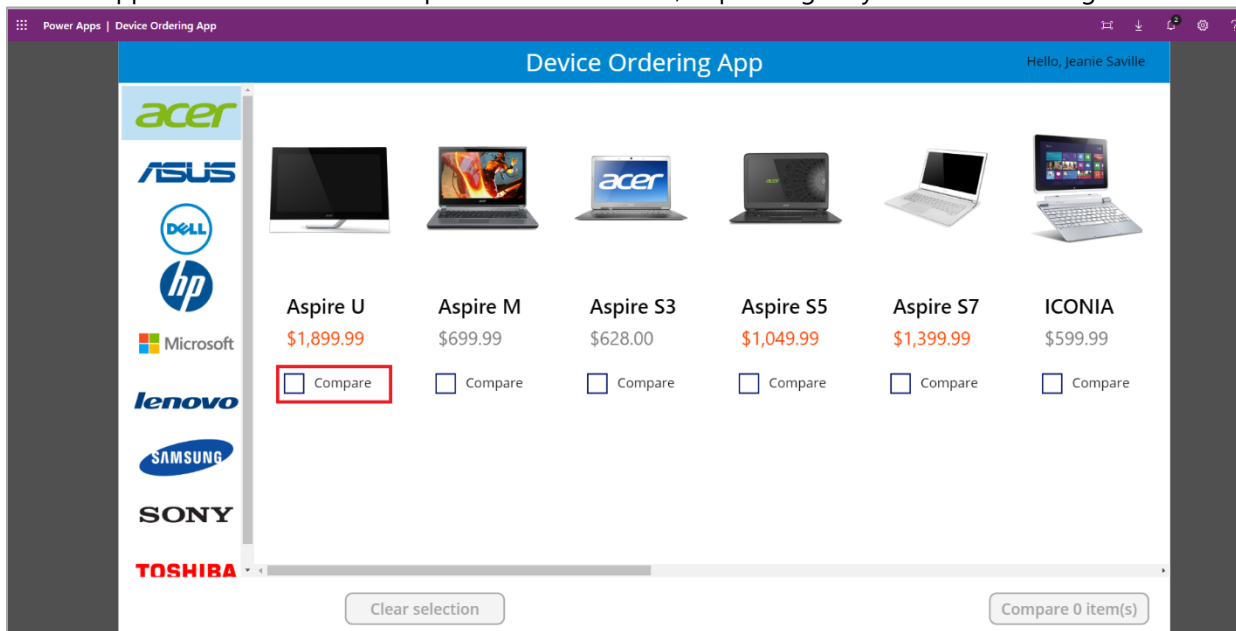


Task 6: Generate test data

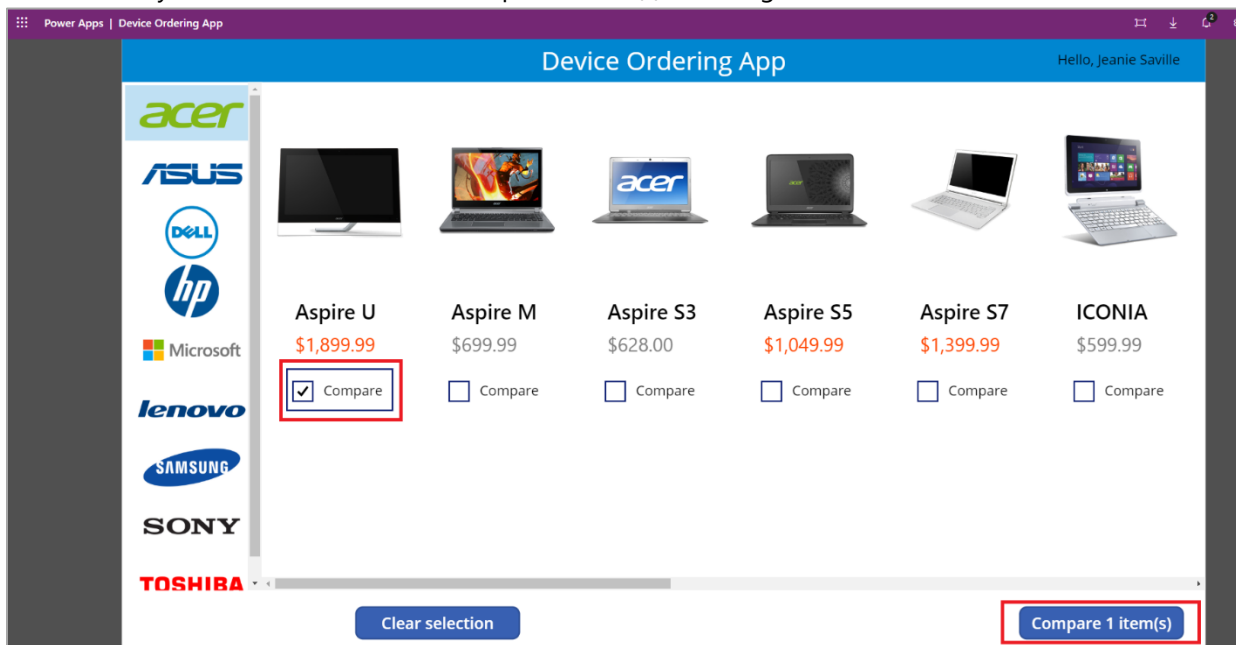
1. Navigate to <https://web.powerapps.com>.
2. Select Apps and then select Device ordering App. Click on it to launch the app in another tab.



3. The application launches in a separate tab or window, depending on your browser configuration.



4. Select any device and then select Compare 1 item(s) in the right bottom corner of the screen.



5. On the compare screen, select Submit device request.

Device Ordering App

Hero, User 1

Device Name

Acer - Aspire U

Price

1899.99

Approver

PVA@Yourvirtualagent.onmicrosoft.com

Comments

Enter justification

Requested By

PVA@Yourvirtualagent.onmicrosoft.com

Submit device request

6. On the request confirmation screen take a note of the email and serial number. We will use this information when testing the virtual agent later. Select **OK** and close the App window/tab.

Device Ordering App

Your device request has been successfully submitted. Thank you.

Device Name

Acer - Aspire U

Price

1899.99

Comments

Approver

PVA@Yourvirtualagent.onmicrosoft.com

Requested By

PVA@Yourvirtualagent.onmicrosoft.com

Request Date

3/27/2020

Serial Number

93a20e97-0270-ea11-a811-000d3a8db39f

Device Order

93a20e97-0270-ea11-a811-000d3a8db39f

OK

Congratulations! You are all set for the training!

Lab survey

We would appreciate your feedback on Power Virtual Agents and on this hands-on-lab, such as the quality of documentation and the usefulness of the learning experience.

Please use the survey at <https://aka.ms/PVAiaDSurvey> to share your feedback.

You may provide feedback for each module as you complete it or at the end once you've completed all the modules.

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