



Why, how and value proposition ...

Custom Copilots



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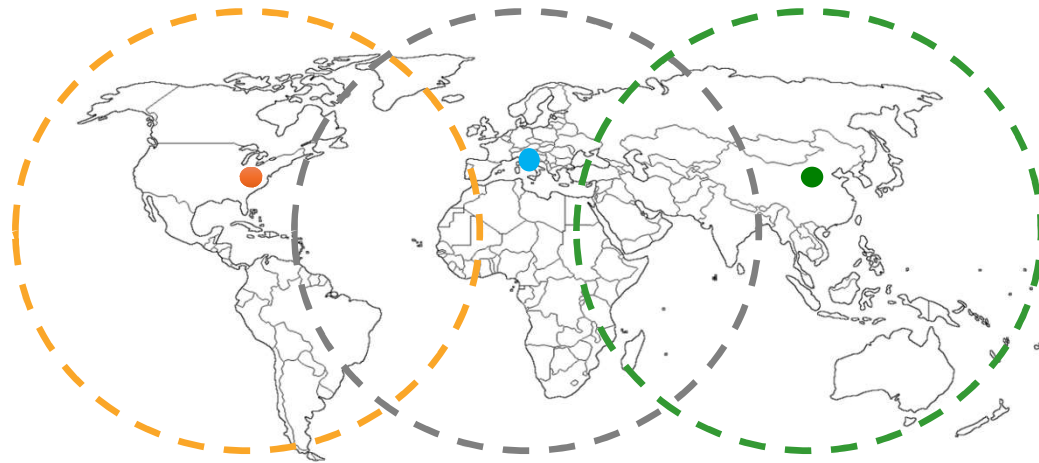
DFW D365 User Group

Get to know

SUNRISE TECHNOLOGIES

Sunrise Technologies is a premier implementation partner for Microsoft Dynamics 365, Azure and Power Platform. We're industry experts in **retail**, apparel, footwear, and consumer product **brands** as well as manufacturing,

We deliver game-changing, Tier 1 supply chain solutions without the cost and complexity. After a "go-live" we offer continuous global support to hundreds of customers worldwide.



LOCATIONS

- HQ: Winston-Salem, NC
- Amsterdam
- Switzerland
- China



110+ ACTIVE CUSTOMERS



- **Microsoft "Inner Circle" member**; top 1% of implementation partners globally
- **Global Support** available after go-live with an on-demand and pay-as-you go model
- **Access hard-to-find talent** with Dynamics 365 technical and functional expertise
- High company **retention rates of over 95%** means consistency in account management and staffing
- Questions? Email info@sunrise.co



Copilot studio - Your friend in AI Journey



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- **Create** and **extend** copilots
- **Framework** for you to create **awesome** experiences
- Quickly enable **Generative AI** capabilities on your knowledge
- **Testing** chatbots made **easy**
- **Built on Power platform**
- You have All **ALM** Capabilities that come with Power platform
- You can **publish** to Multiple channels
 - You will need to setup security related information based on what channel you are targeting
 - Publishing to **Microsoft Teams**, **does not require** extra security configurations
- Use **security groups** to share your custom copilot
- **Speed** of innovation and delivery
- Create **topics** based on the requirements
- **Efficiently** respond to user to create engaging experience
- Take **timeout** into consideration when you writing the interactions
 - **100 Seconds time out limit**
- Design topics to be **standalone**, do not create large ones. **Reuse**. You can return values as well.
 - If you need to get info for a common entity – create a topic and redirect to it.
- Global vs Topic **variables**
 - You store Global variables as persistent. They do not loose value
 - Adhere to some naming **convention**
- Use entity **slotting** where possible, Test it thoroughly
- Security
 - Difference between Dataverse connectors and Web API calls.
 - Impersonate user!!! (*think ...*)
- **Respond** to user with information that is **needed**, do not try to push large information back to user. You will lose user's focus.
 - *Teams response size limit ~28 KB per post.*
- **Know** your **audience**



Custom Copilot @ Sunrise

Sunrise Copilot 9:18 AM



Hello Rizwan Ahmed, thanks for ping me. I am Sunrise Copilot , your assistant. I have *following* features available.

- **Set billing period** to work on
- **Show resource timesheet** to review
- **Approve timesheet** for project hours
- **Send missing timesheet** email to resource
- **Send timesheet review** email to resource
- **Show customer timesheets** to see all timesheets for a customer
- **Show aging** for customer balance from F&O
- **Show open invoices** for customer open transactions
- **Show customer team** for current resources
- **Show customer profile** for current team, pending invoices and aging
- **Show customer rates** for all rates on a customer
- **Show project rates** for project rates
- **Show resources rates** for resource rates by project
- **Email customer timesheets** sends an email to you with all project hours for customer projects

How can I help you today?

Please be aware that some of my replies may be generated through artificial intelligence.

"It was a **game changer** for us"

"Possibilities are **endless**"

"We used to have to manually figure this out in Power BI, cross-checking in CRM, then go into Outlook, write the email, and now, we can do it **all** within **Teams**"

"What used to take up to **eight hours** between two people—checking time, emailing reminders and updates—had been reduced to about **ninety minutes**"

"**Copilot** shows up just like a **coworker**"

"It's **smart** enough to figure out the answers I want even if I say something in a different way"

<https://sunrise.co/fact-sheets/copilot-sunrise-case-study/>

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Prompts

2

Phases

2

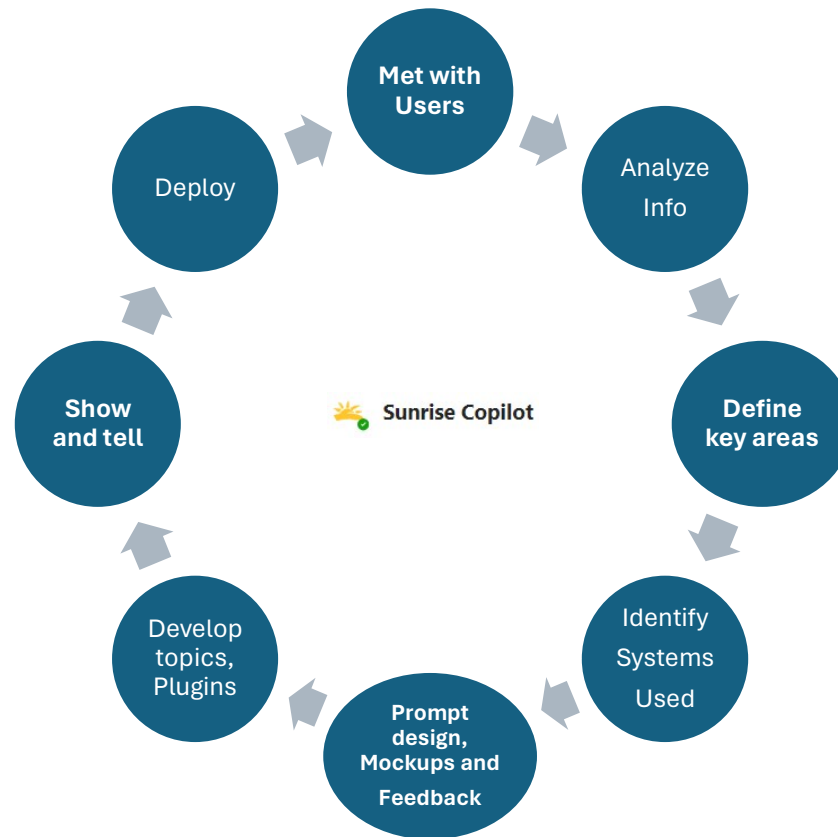
Number of days shadowing users

20

Days to deliver the whole experience

Process, delivery and value generation @ Sunrise

- **Developed** “Sunrise Copilot” for our team and delivered it to Finance team
- Used our **agile** approach and delivered it in phases
- Delivery by **most value**, and then moving along to next set
- **Faster** time to release new features (~ 1 Week on average)
- Enabled in **Microsoft Teams**



50%

Time to process timesheets

334

Processed Timesheets in a Day

222

Timesheet emails sent to consultants in a day

212

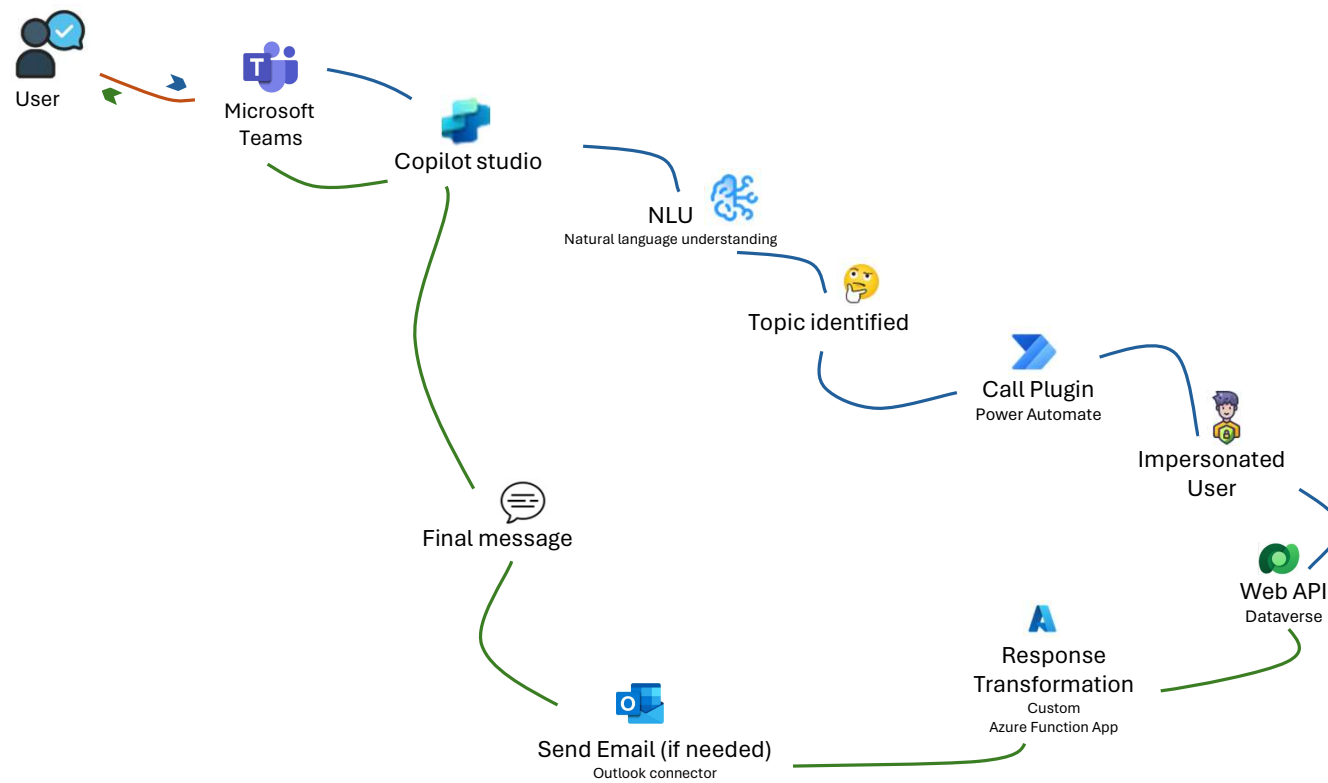
Timesheet approvals in a day

Reduced clicks | Faster access to information | Summarized insights | Email automations

Information Flow

How we did it ...

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Q & A

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Helpful Links:

- [Dewain Robinson - The Copilot Studio Dude – YouTube](#)
- [What was announced in Build 2024 https://youtu.be/kjHYGxT_F2U?si=WaW0pZM7zcFvxChk](https://youtu.be/kjHYGxT_F2U?si=WaW0pZM7zcFvxChk)
- [Key concepts - Authoring copilots - Microsoft Copilot Studio | Microsoft Learn](#)
- [Topics in Copilot Studio - Microsoft Copilot Studio | Microsoft Learn](#)
- [Copilot connectors and actions overview \(preview\) - Microsoft Copilot Studio | Microsoft Learn](#)
- [ALM https://learn.microsoft.com/en-us/power-platform/alm/basics-alm](https://learn.microsoft.com/en-us/power-platform/alm/basics-alm)
- [Sharing copilots - https://learn.microsoft.com/en-us/microsoft-copilot-studio/admin-share-bots?tabs=web](https://learn.microsoft.com/en-us/microsoft-copilot-studio/admin-share-bots?tabs=web)
- <https://learn.microsoft.com/en-us/microsoftteams/limits-specifications-teams#chat>
- <https://sunrise.co/fact-sheets/copilot-sunrise-case-study/>

Thank you !!!

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[LinkedIn](#)

