Microsoft Dynamics 365

Automating your Business with Dynamics 365 and the Power Platform

Kelsey Bloomquist & James Bamford
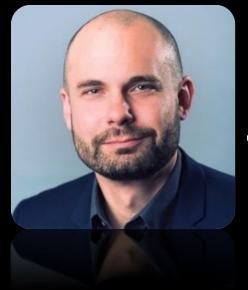June 23, 2020

Meet the team

Kelsey Bloomquist
Product Solution Architect

James Bamford
Product Solution Architect

Power Automate

Native integration is the path to maximum efficiency

Across Microsoft

Microsoft 365

Dynamics 365

Azure

Power Automate is Designed For Everyone

Power Automate is the automation service for everyone in your organization.

Citizen Developers

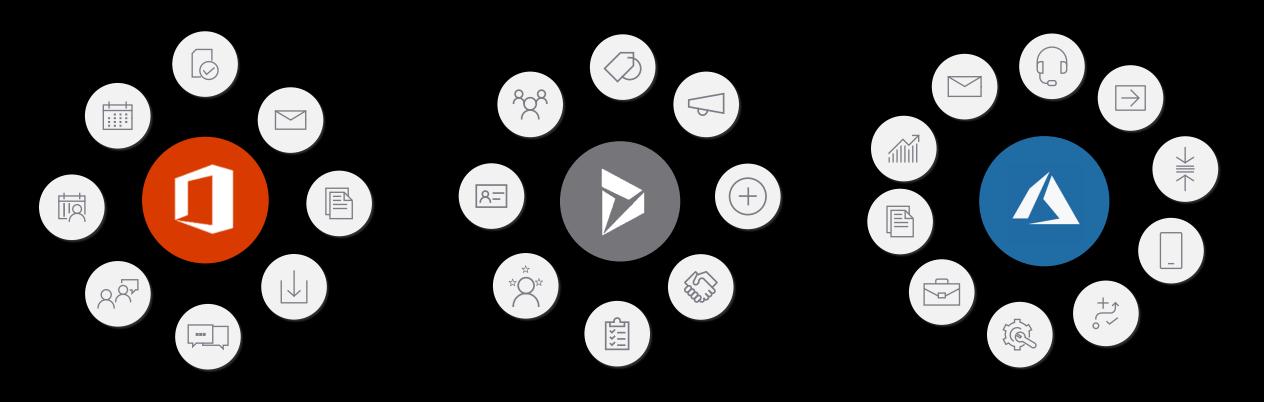**Pro Developers**

IT/Admins

What Power Automate offers

Intelligent automation for all

Automation at scale

Efficiently scale automation across your organization

Allow everybody in your organization to automate workflows using their favorite on-premises and cloud-based apps and services. From end users, professional developers, to IT.

Seamless, secure integration

Securely integrate automation at every level

Confidently enable end users to build automated workflows in a secure, compliant manner, and focus your skilled IT resources on more complex, strategic work.

Accelerated productivity

Accelerate productivity and focus on more strategic work

Minimize repetitive, manual, time-consuming tasks and create more time for your teams to focus on strategic work with easy to use low/no-code tools, templates, and connectors.
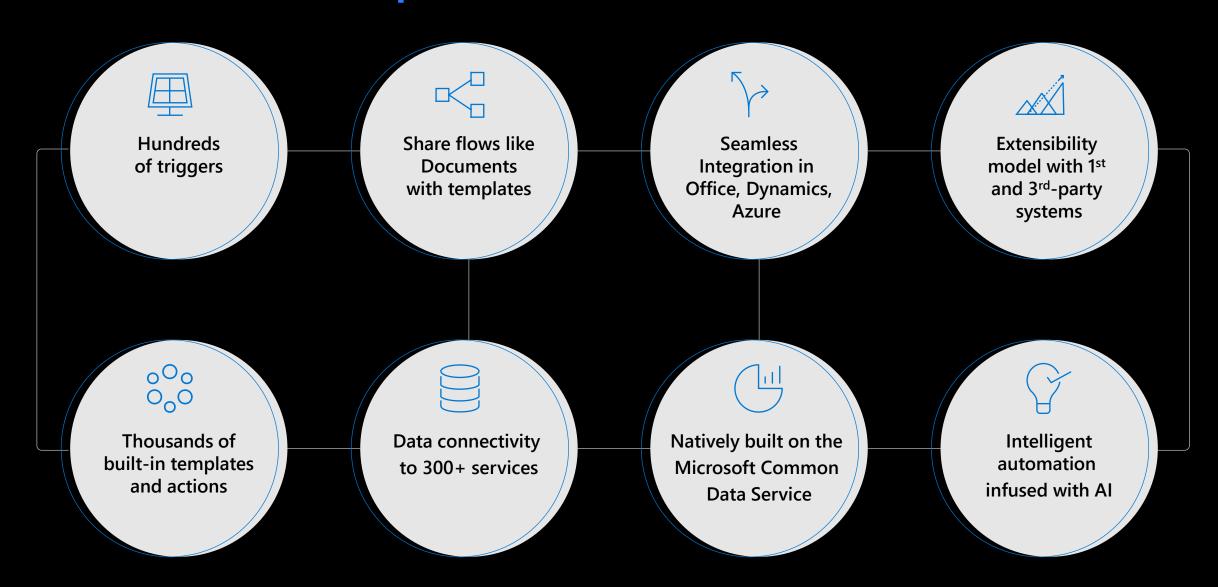
Intelligent automation

Increase efficiency through automated workflows with the power of AI.

Streamline how you work by combining the power of AI with automated workflows and business process.
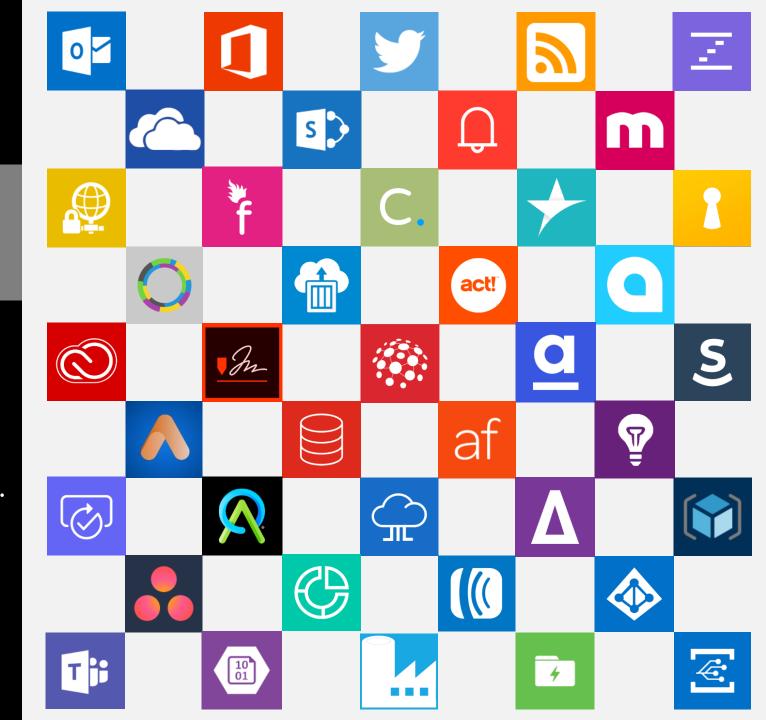
One automation platform

Hundreds of triggers

Share flows like Documents with templates

Seamless Integration in Office, Dynamics, Azure

Extensibility model with 1st and 3rd-party systems

Thousands of built-in templates and actions

Data connectivity to 300+ services

Natively built on the Microsoft Common Data Service

Intelligent automation infused with AI
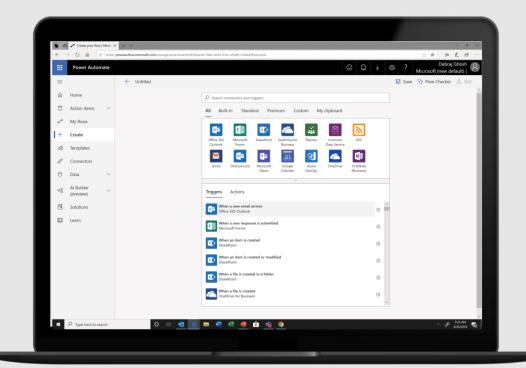
Microsoft

300+ connected experiences

Connect to more than 300+ 1st and 3rd party services with built-in connectors for everything from Adobe to Zendesk to on-premises solutions.

Attributes of a workflow

Hundreds of triggers

Initiate your workflows in whatever way is most convenient: With buttons, through connected cloud apps, or on a schedule.
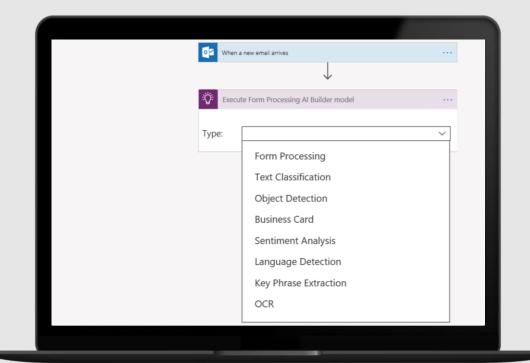
Attributes of a workflow

Thousands of possible actions

Choose from built-in actions or create your own, using cloud services or on-premises solutions. Automate advanced scenarios without limit.
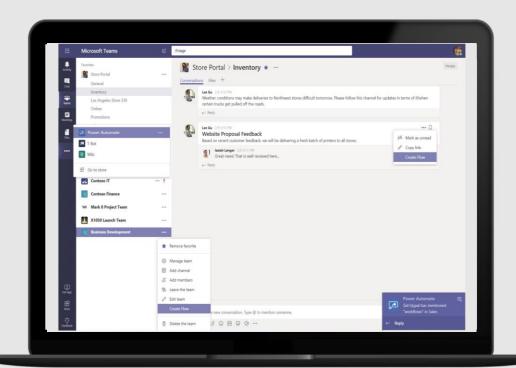
Attributes of a workflow

Intelligent automation

Build workflows that leverage AI Builder to process unstructured data and continually improve processes.

Attributes of a workflow

Easy collaboration and integration

Share workflows as easily as you share documents. Collaborate on building workflows, and distribute Power Automate templates to your organization. Seamless integration with PowerApps, Power BI, Microsoft Teams, Microsoft 365, and Azure enhances collaboration.
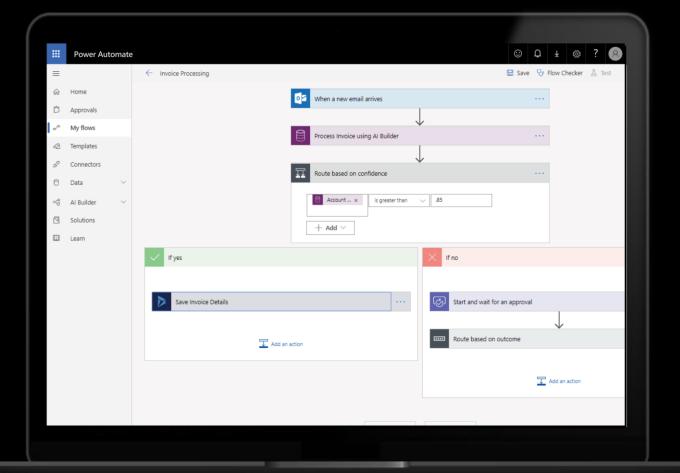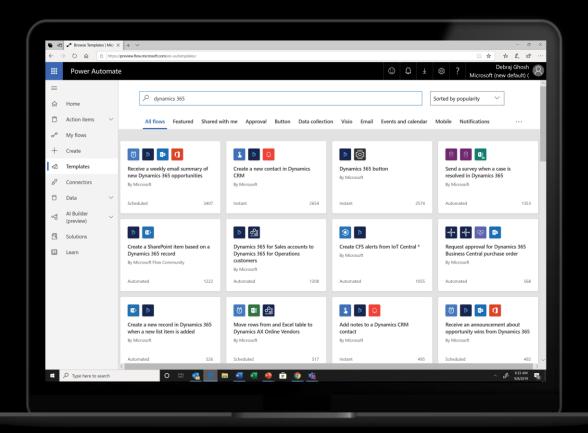
Leverage the Microsoft Power Platform

Invoke an AI model with specific workflows, data, and AI Builder

Embed AI into processes without the help of a data scientist.

Build robust, dynamic automations

Leverage Microsoft Dynamics 365

Streamline business processes

- Automatically request approvals
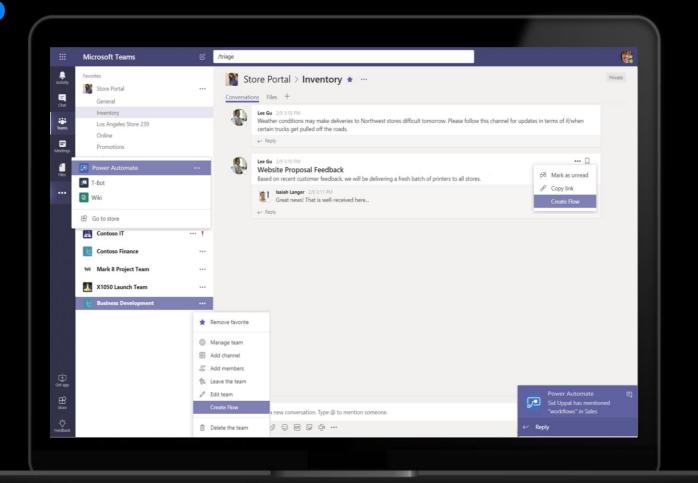- Integrate with your favorite applications.
- Build robust, dynamic automations.

Power Virtual Agents

Chat bots can help, but…

Microsoft

Bots are hard to create and expensive to maintain

There is impedance between the subject matter experts with answers – and the developers and scientists who create bots

Bots aren't useful unless they can integrate with the backend and provide personalized answers

Power Virtual Agents is designed for everyone

The chatbot service that enhances everyone's experience

Your Customers
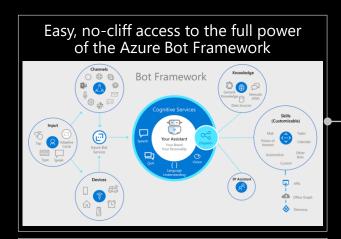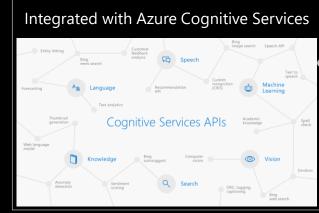
Subject Matter Experts

IT Admin/Dev

Microsoft
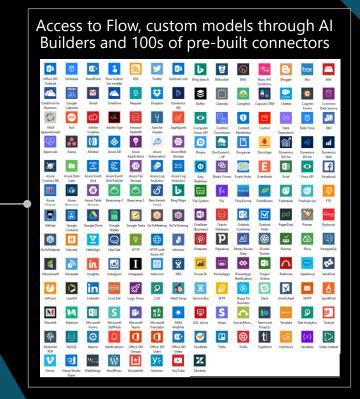
Built on Power Platform & Bot Framework

Easy, no-cliff access to the full power of the Azure Bot Framework

Integrated with Azure Cognitive Services

Access to Flow, custom models through AI Builders and 100s of pre-built connectors

Azure Cognitive Services

Bot Framework

Power Platform

Power Virtual Agents

Create a New Virtual Agent

Open the Power Virtual Agents designer

https://powerva.microsoft.com/

Select 'new bot'

View Topics

A bot comes with 4 User topics & 8 system topics

Using one of the 4 topics to get familiar with the structure

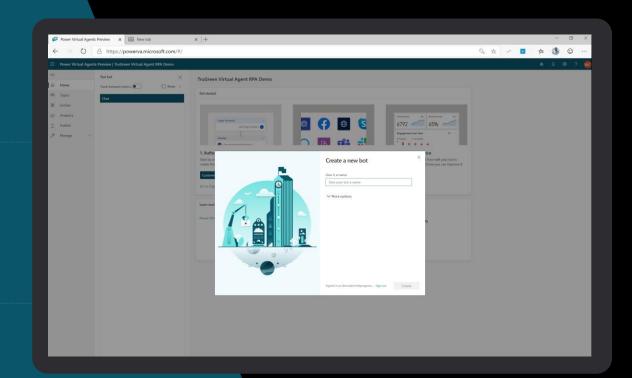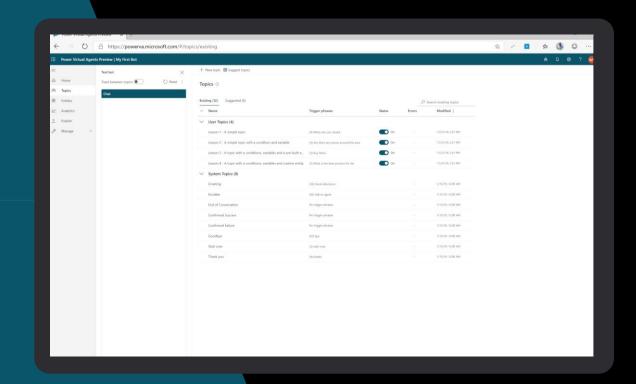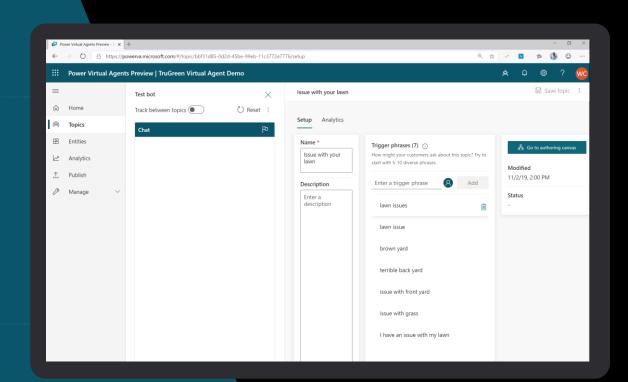# Add Conversational trigger phrases

For a topic you'll define a few trigger phrases

A trigger phrase is a way to describe an intent, it captures the way a customer might ask about a problem/issue. E.g., "problem with weeds in lawn"

You only need to provide a few sample phrases – the AI will parse whatever the user says and trigger the topic closest in meaning to the user utterance
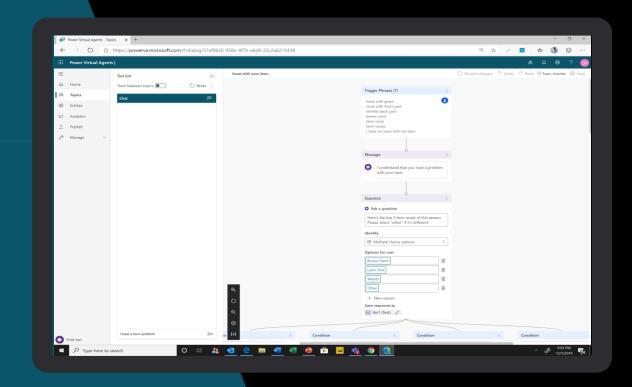
Open the authoring canvas and begin editing a topic

Open authoring canvas to view the conversation tree

You'll see the trigger phrases at the top. You can edit the conversation tree, adding questions the bot should ask, things the bot should say etc.

Easily create an Intelligent Virtual Agent

Simple, graphical bot creation
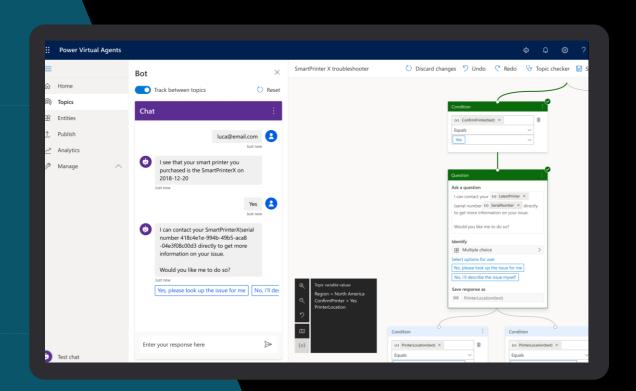Easily test and maintain bots through a simple, easy to use graphical interface

Extract information from user responses
Recognize, extract, and act on dozens of common entities in a user's responses. For example, colors, currencies, ages, dates and times. Or create your own custom entities, e.g. model numbers

Remember user responses
Store user information for use later in variables and use them to branch or create complex conversations
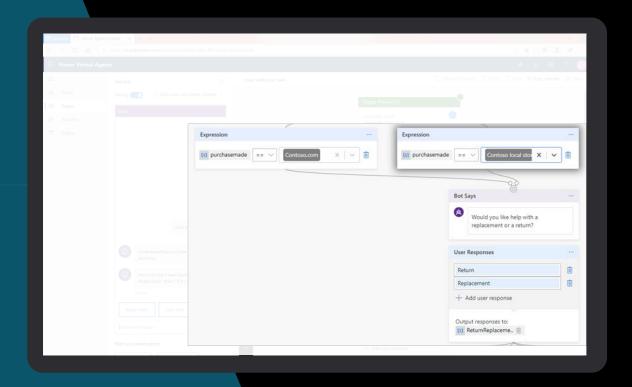
Use variables to navigate customers to tailored content

Direct your customers to content you want them to see

Add variables to keep customer information for later in the conversation
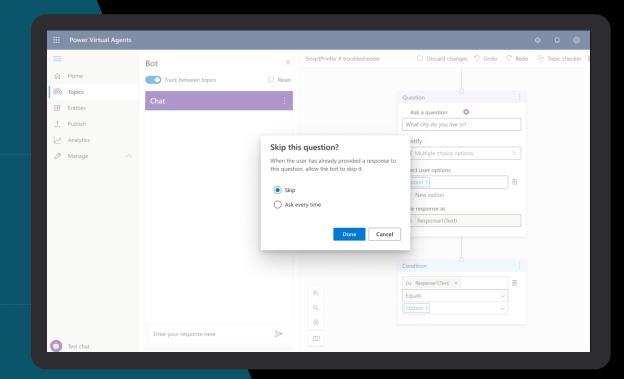
Slot-filling capabilities

Power Virtual Agents can intelligently avoid repetitive conversations
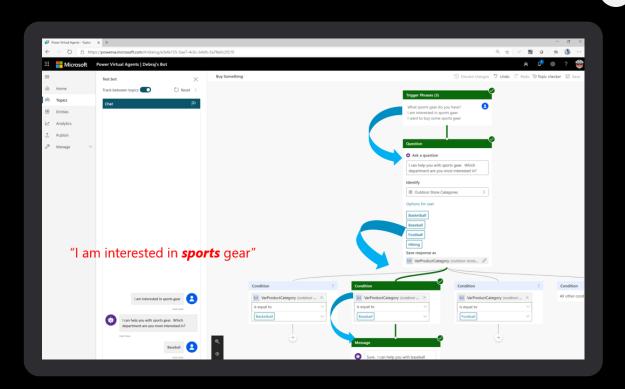
Enhances your efficiency as a maker

Power Virtual Agents can guide you to making the best experience
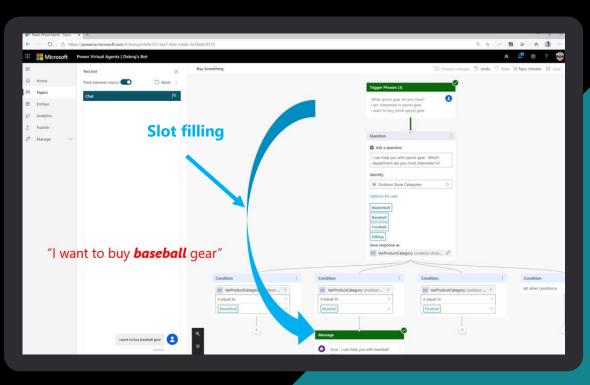
Example of Slot Filling

Slot-filling provides realistic conversations. The chatbot has contextual understanding of what you type and can 'hop' to the appropriate part of the conversation and skip a repetitive question/comment.
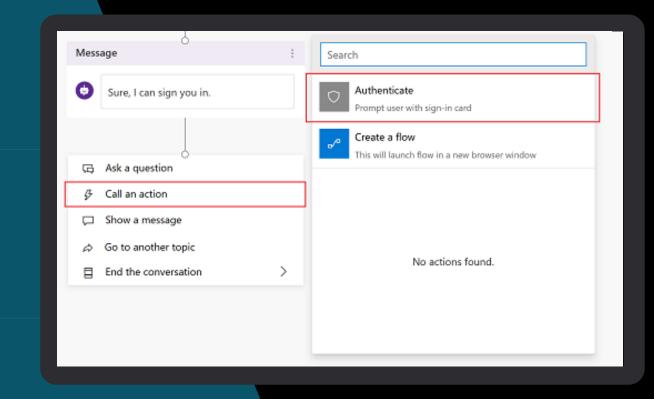
Test your topic as you construct it
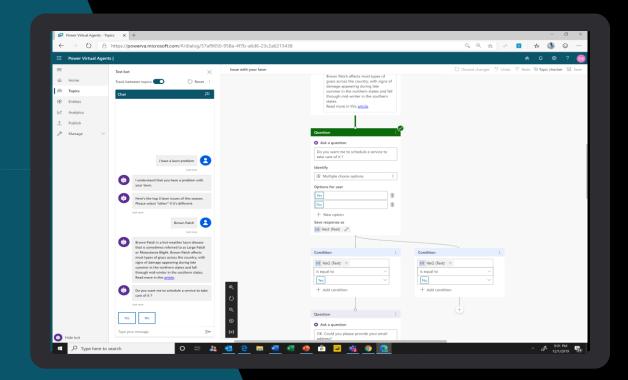
To test what you've created click on test bot (bottom left) to expand test window

Turn on "Track between topics". This lets you trace your way through both this topic and any others you call
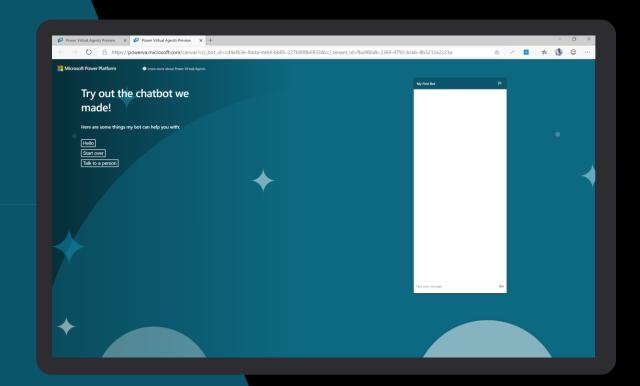
Publish to demo website

Publish to demo website and share the URL with colleagues so they can try the bot

Add screen shot with that publish to demo site show and demo page

Microsoft

Enhance Your Virtual Agent From Analytics

GAIN VISIBILITY OF MANY PARAMETERS

Summary charts

Engagement over time chart

Session outcomes over time chart

Resolution rate drivers chart

Escalation rate drivers chart

Abandon rate drivers chart
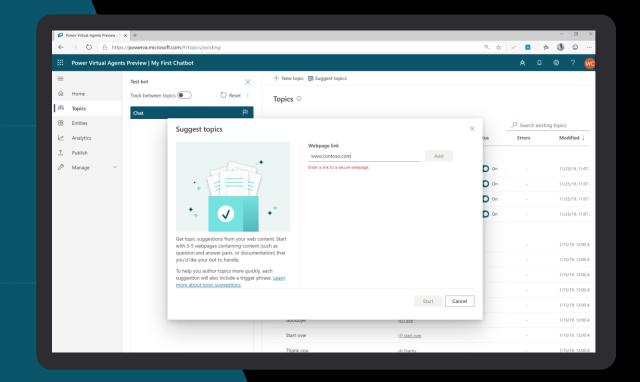
PVA Information Architecture

Microsoft

CDS Environment

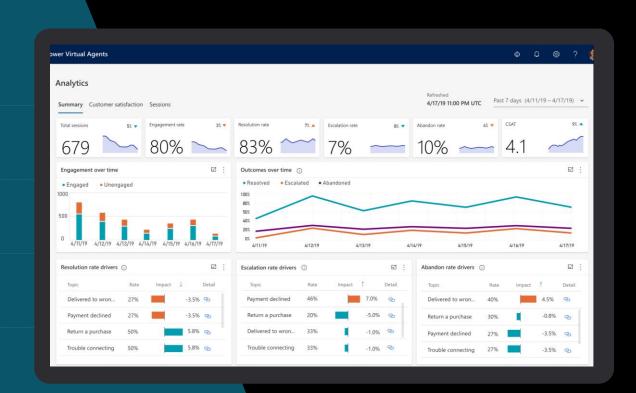### PVA BOT (0, 1 or more bots in a CDS environment)

User Topics (1 or M in a bot)

It's common to have 25+ user topics within a bot. To help you get started the bot comes with 4 pre-defined user topics that you can use or delete. Within each topic you construct a conversation tree.

Conversation Tree (1 per user topic)

Consists of trigger phrases, multiple nodes (message, question, etc.), conditions, the ability to use entities and call actions (flows or skills). You can redirect/call another user topic or system topic from within a conversation tree.

Trigger Phrases
(0,1 or more in a user topic)

Prebuilt Entities (0,1 or more)	Custom Entities (0,1 or more)
Power Automate **Flows*** (0,1 or more)	Bot Framework **Skills** (0,1, or more)

System Topics (8 pre-defined in a bot)

Includes: Greeting, Goodbye, End of conversation survey etc. Recommend minimal editing e.g., greeting message only. Think of these as building blocks for your conversation.

Conversation tree

Consists of trigger phrases, multiple nodes (message, question, etc.), conditions, the ability to use entities and call actions (flows or skills).

Trigger Phrases
(read only in system Topics)
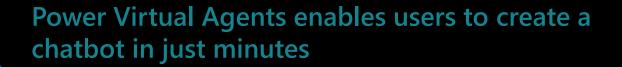(0, 1 or more)

Prebuilt Entities (0,1 or more)	Custom Entities (0,1 or more)
Power Automate Flows* (0,1 or more)	Bot Framework Skills (0,1, or more)

*to use Power Automate flows in a PVA bot they must be in a solution, within the same CDS environment as the bot

THE BASICS

Power Virtual Agents enables users to create a chatbot in just minutes

Offers an easy to use designer to help create unique customer virtual agent experiences

Part of the Microsoft Power Platform

Built on the Microsoft Common Data Service

BEYOND THE BASICS

Power Virtual Agents leverages Microsoft's Industry Leading AI to create intelligent virtual agents

Virtual agents can be deployed on widely used channels to expand the usage of the agent

Virtual agents can work seamlessly with human agents

Power Virtual Agents can extend virtual agents with the Microsoft Bot Framework

Learn more about Microsoft Power Virtual Agents

Visit Power Virtual Agents to learn more and request a demo

Technical details about the application are available in our help documentation

For questions please engage in our Community forum

Demo:

Virtual Automation Bot using Power Automate

Questions?