



Level-up CSP Technical Training – Power Platform Facilitator Guide

Build a copilot for your retail customer webpage Lab Guide for Retail Scenario

Description	Develop a Virtual Assistant copilot for Contoso Electronics' website to enhance customer support by simplifying the laptop discovery process, providing tailored recommendations, and offering side-by-side device comparisons. The copilot will also inform customers about current deals, accessories, and protection plans. Additionally, it will assist with appointment scheduling for further consultation with sales associates. To streamline the post-purchase process, the copilot will provide information on Contoso's return policies, check return eligibility, and enable customers to submit refund requests directly within the chat interface for a seamless user experience.
Prerequisites	To get the most out of this lab guide we recommend you have Work-School, Admin Tenant ID and Password. Trial access with Power Apps, Power Automate Flow, Copilot Studio, Lab Files (Refund Policy, Protection Plan, Sales and Promotions)
Duration	90 mins
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Objective & Scenario

Objective

Develop a standalone Virtual Assistant copilot for Contoso Electronics' webpage to assist customers in discovering the best products based on their specific needs and preferences, as well as handling post-purchase activities like verifying return eligibility and submitting refund requests seamlessly.

Solution Focus Area

Contoso Electronics, a leader in consumer electronics, offers a wide variety of devices and accessories, making it challenging for customers to find the right product that meets their unique requirements and book appointment for sales assistance. In addition, customers may need assistance with returns and refunds for products that do not meet their expectations.

Currently, customers face two main challenges:

1. **Product Discovery:** Customers struggle with exploring the vast array of options, comparing specifications, protection plan and understanding promotions and deals, which delays purchasing decisions and book appointment for further sales assistance.
2. **Return Process:** Customers experience difficulties in navigating Contoso's return policies and efficiently submitting refund requests.

To enhance customer satisfaction and streamline both the discovery and post-purchase processes, Contoso Electronics will deploy a Virtual Assistant copilot on its website. This AI-powered assistant, enhanced with knowledge sources, will assist customers from the initial product discovery phase through to post-purchase services like returns and refunds.

Persona and Scenario

- **Remy Morris** - Digital Solutions Architect
- **Mark Brown** – Project lead
- **David Flores** – App developer
- **Jane Miller** – App tester
- **Grady Archie** – Customer (Product Discovery)
- **Miriam Graham** – Customer (Refund Request)

These personas will participate in the following sequential scenarios:

- Remy Morris, Digital Solutions Architect at Contoso Electronics, creates and plans digital architecture that aligns with the business need and articulates this framework to Mark Brown, the Project Lead at Contoso Electronics, and assists him in selecting the most suitable Power Platform tools for the implementation of the digital solutions.

- Mark Brown provides David Flores with an overview of the tools and processes involved in developing a virtual agent with copilot studio and power apps and creating a booking appointment and refund request flow using Power Automate.
- David successfully creates a virtual assistant, fulfilling all the requirements of Contoso electronics to provide virtual assistance for product information, booking assistance appointment and submit refund requests, which he then submits to Jane Miller for testing.
- After thorough testing and validation, Mark Brown officially deployed a virtual agent on Contoso electronics website for virtual assistance to the customer and streamline the refund or return process.
- Grady Archie, a returning student, visits the Contoso Electronics website to find a laptop for his studies, gaming, and video editing. He engages with the Virtual Assistant copilot and outlines his specific needs, including battery life, durability, and performance. The copilot provides him with recommendations, compares specs, highlights current deals on Microsoft Surface laptops, and suggests compatible accessories. Grady decides to purchase the Surface Laptop Studio 2 but opts to schedule an appointment with a sales associate through the copilot to finalize his decision.
- Miriam Graham, a frequent shopper, wants to return a laptop due to unsatisfactory battery life. She interacts with the Virtual Assistant copilot to check if she is eligible for a return. The copilot quickly accesses Contoso's return policies and confirms her eligibility. Miriam then asks the copilot to assist with submitting a refund request. The copilot guides her through the form submission process, enabling her to complete the refund request within the chat window.

Pre-requisites

For this use case, all participants will need the following:

- Work – School or Admin Tenant Email Id and Password.
- Microsoft Power Apps Free Trial License
- Microsoft Power Automate Free Trial License
- Microsoft Copilot Studio Free Trial License
- Refund Policy File
- Protection Plan File
- Sales and Promotion File

Note: Please be aware that the user interface (UI) of Power Apps, Copilot, Power Automate, and other related tools may change over time as Microsoft continues to update its products. However, the core concepts and logic behind their functionality will remain consistent. The principles you learn in this lab can still be applied, even if the UI looks different in the future.

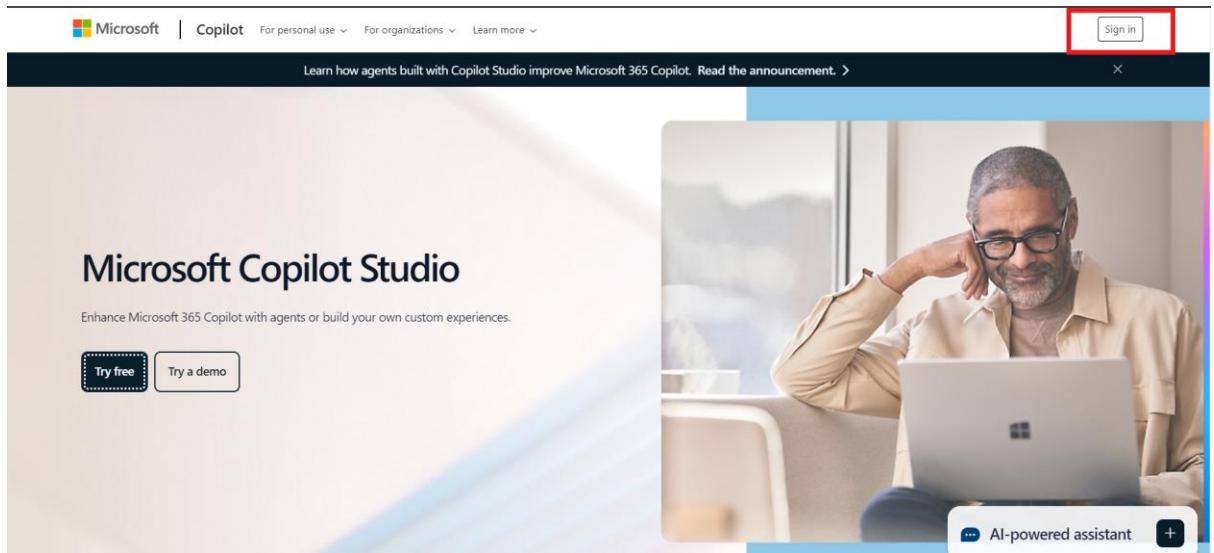
Lab Instructions

Exercise 1: Signup and Build a Copilot in Microsoft Copilot Studio with New AI Capabilities

In this exercise, you will learn how to build and configure a copilot in Microsoft Copilot Studio using its AI capabilities. You will begin by signing into the platform, followed by creating and setting up a custom copilot for Contoso Electronics Services. The tasks will cover configuring security settings, enabling generative AI, and building a knowledge base to empower the copilot to handle tasks like providing information and booking appointments.

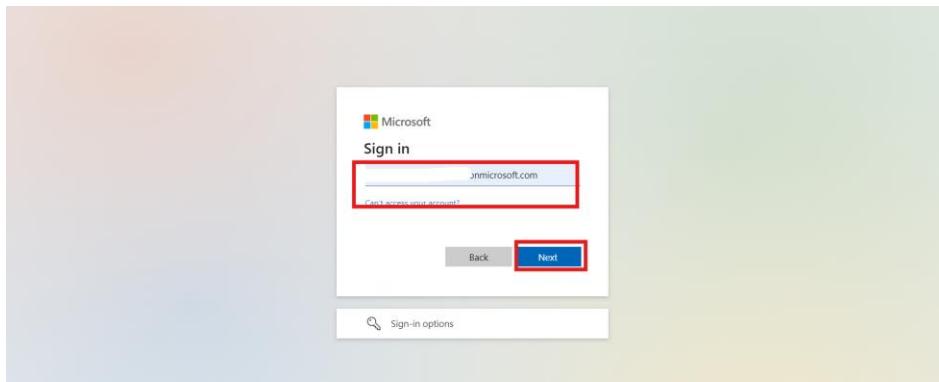
Task 1: Sign In Copilot Studio

1. Navigate to <https://copilotstudio.microsoft.com> and click on **sign in**.

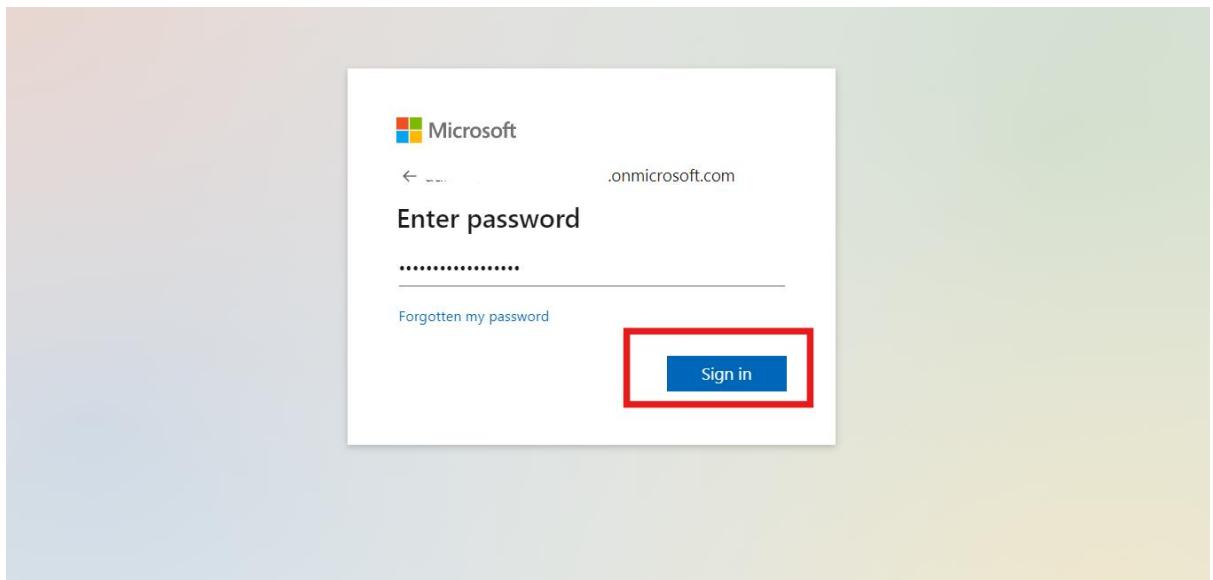


2. Enter **Email ID** (School, Work or Admin Tenant) which have access of Copilot Studio trial license and Power Apps trial license. For this lab we use Admin Tenant ID. Then click on **Next** button to proceed.

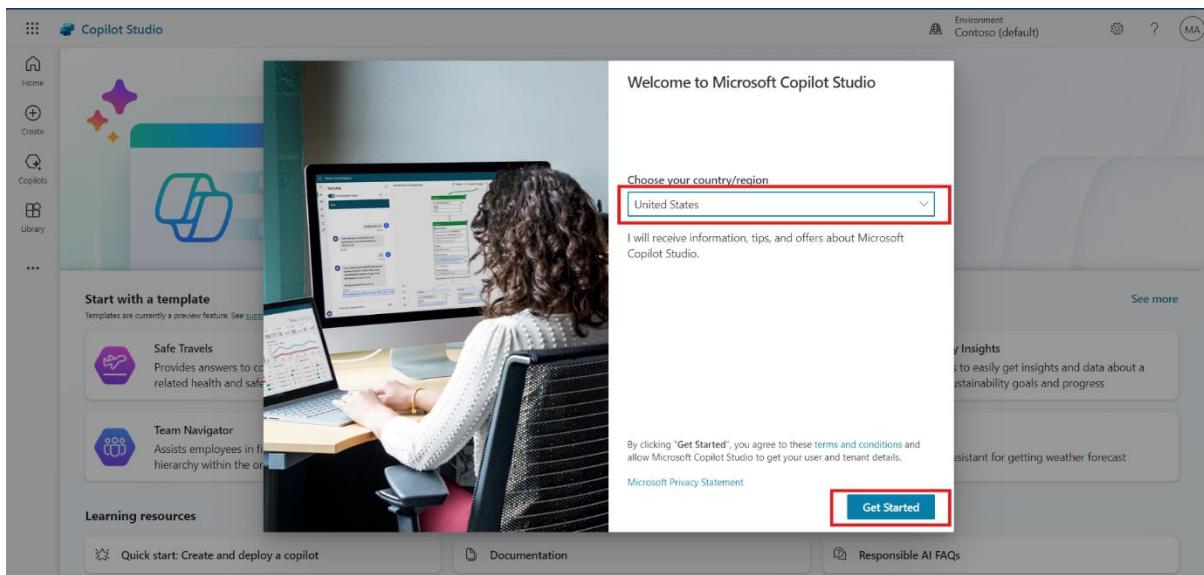
Note: To create Admin Tenant ID use the following link to set up a new ID: [Create New ID](#). This will allow you to complete the registration and resolve any sign-in issues.



3. Enter the **Password** in the field and click on the **Sign in**.



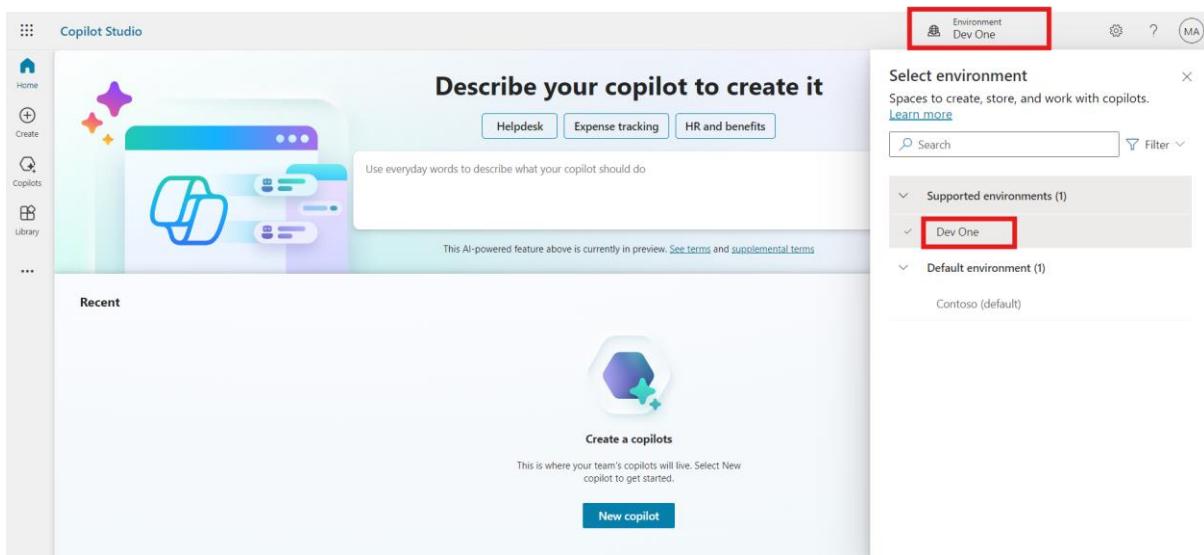
4. In the **Welcome to Copilot Studio** popup, leave the country/region as the default value and select get started.



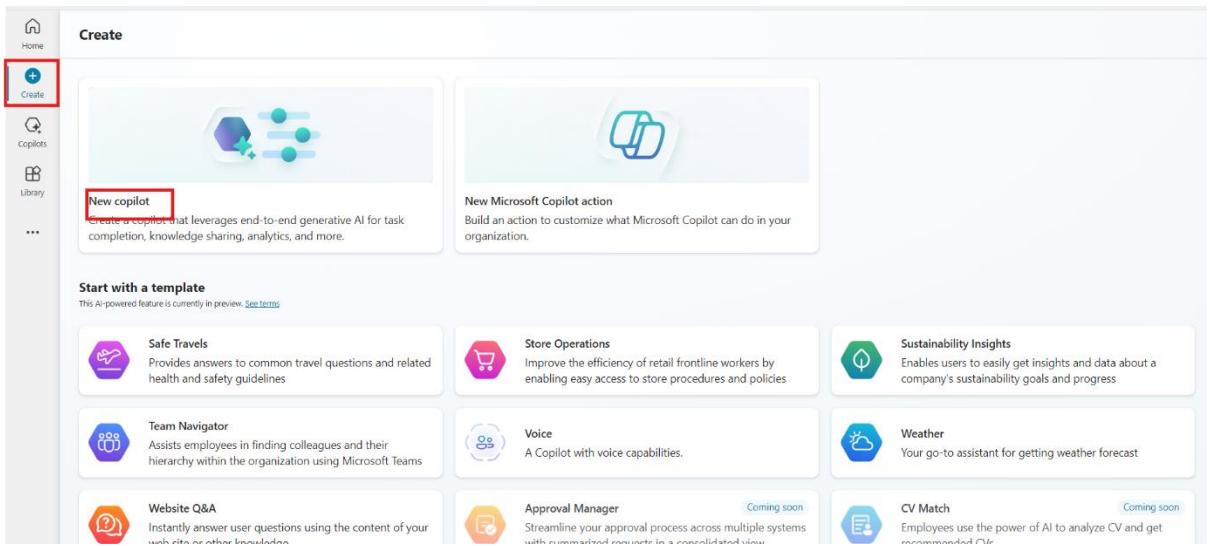
5. At the Welcome to Copilot Studio! popup, select **Skip**.

Task 3: Create Contoso Electronics Services Copilot

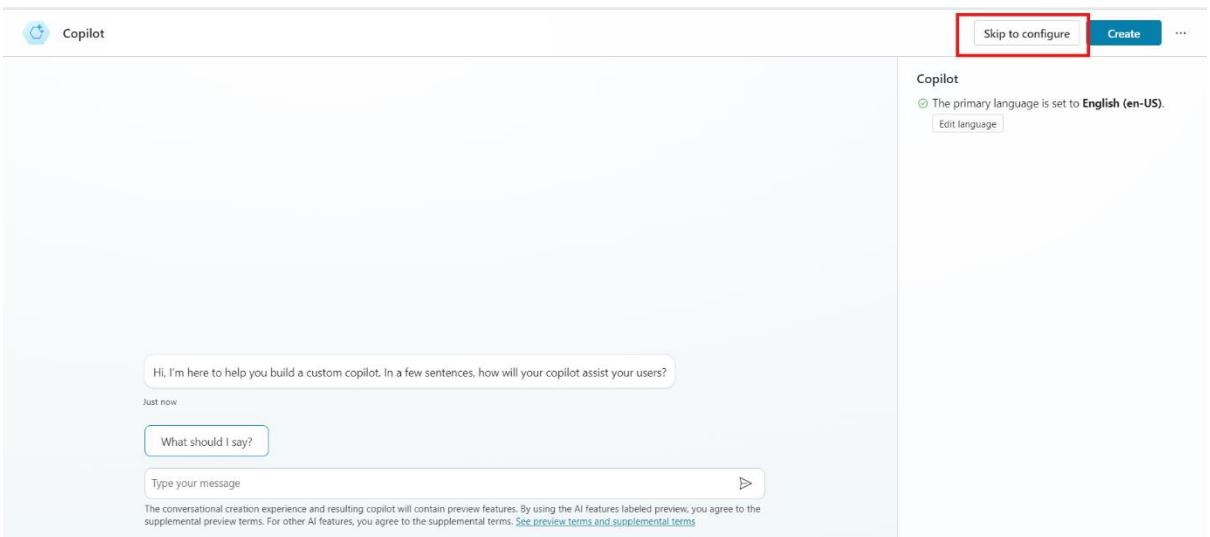
1. Once logged in, make sure you are in the right environment. if not, please select the right environment (**Dev One**).



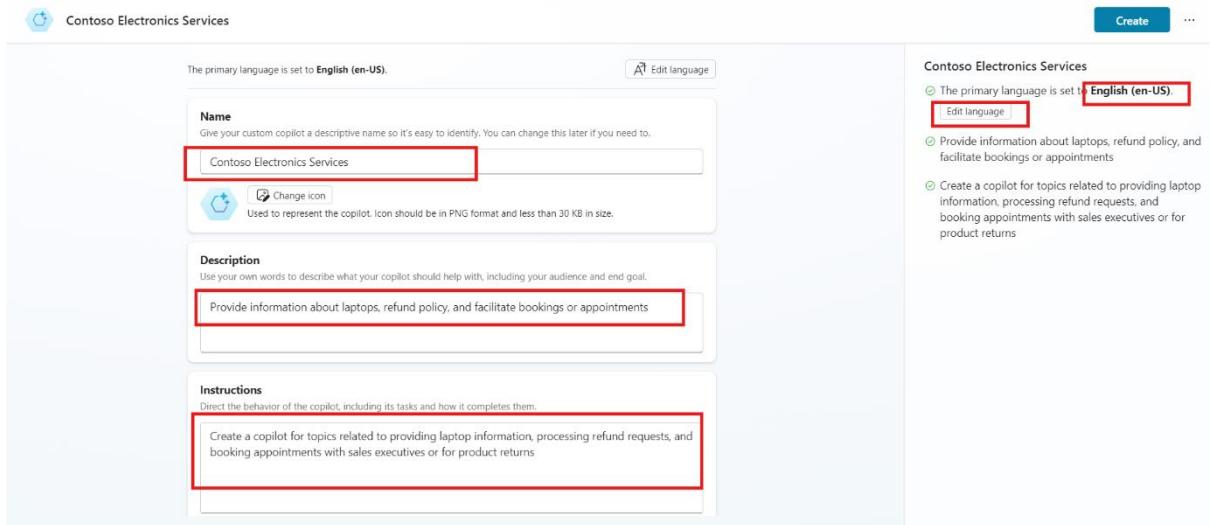
2. On the left navigation pane, find and click on **Create**. Then, select the **New Copilot** tile to begin the setup process.



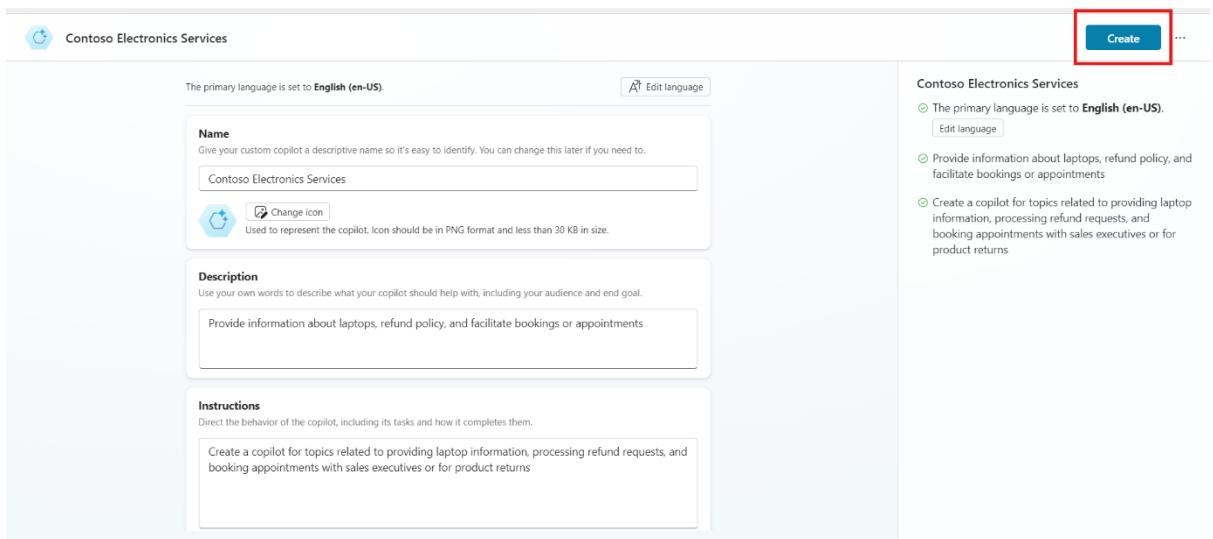
- When prompted, select **Skip to configure** to proceed without additional configuration options at this stage.



- In the **Name** text box, type **Contoso Electronics Services**. This will be the name of your new copilot.
- In the **Description** text box, enter **“Provide information about laptops, refund or return policy, and facilitate booking or appointment.”** This description helps define the copilot's role and functionality.
- In the **Instructions** text box, type **“Create a copilot for topics related to providing laptop information, processing refund request, and booking appointment with sales executives or for product returns.”** This guides the copilot in handling specific tasks and user interactions.
- Choose **English** from the language options. This will set the primary language for interactions with the copilot.

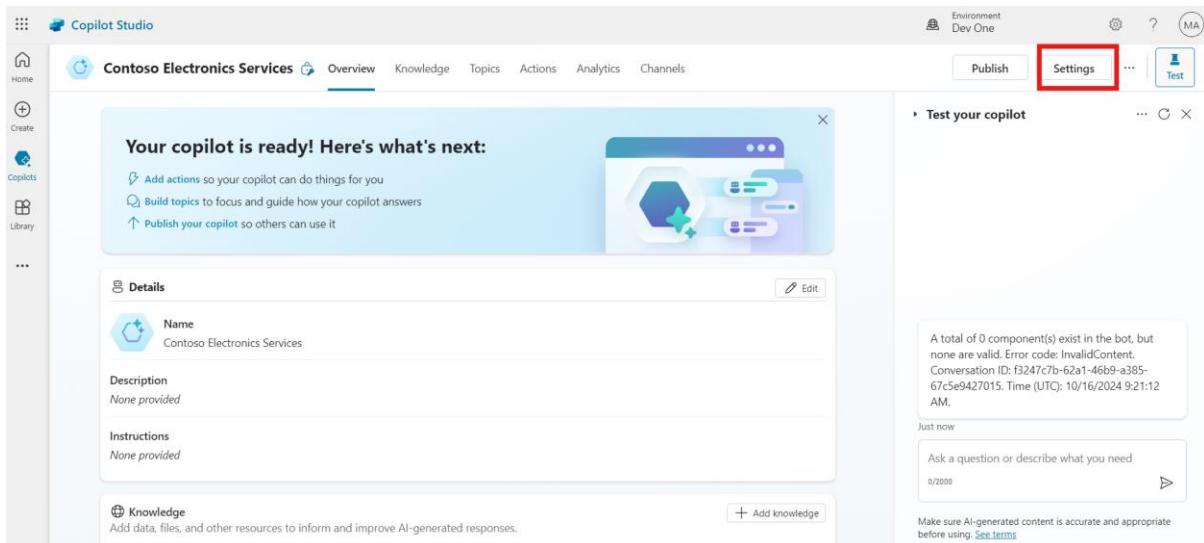


- Finally, in the top-right corner of the screen, click on **Create** to finalize and deploy your new copilot.

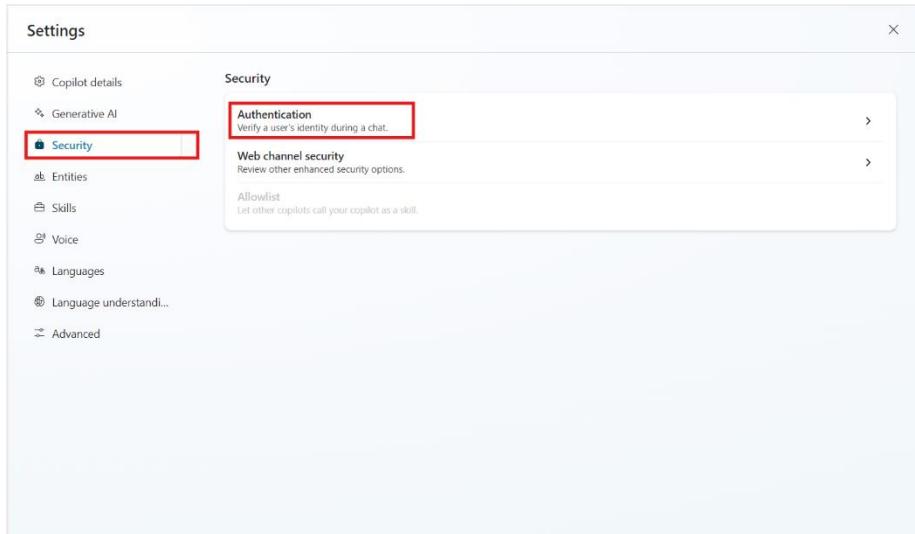


Task 4: Configure Security and Generative AI

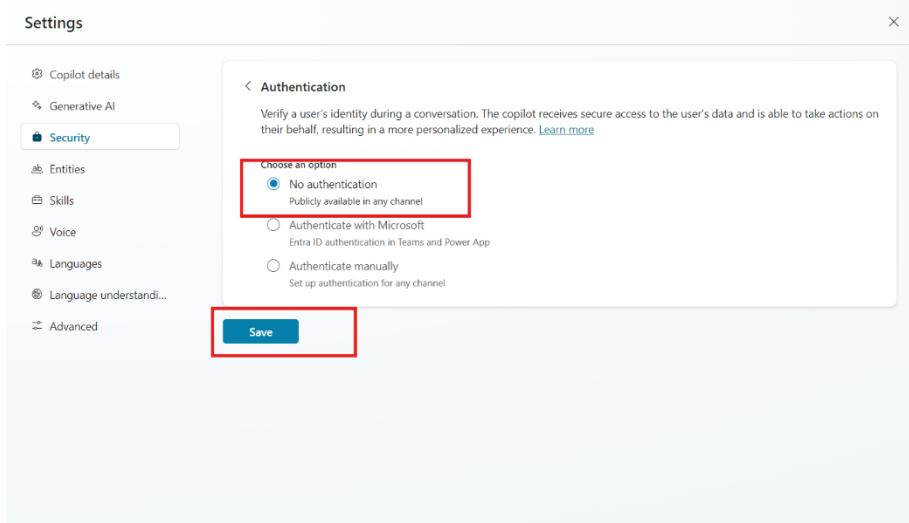
- In Microsoft Copilot Studio, locate and click on the **Settings** option in the top-right corner of the screen. This action will open the settings menu.



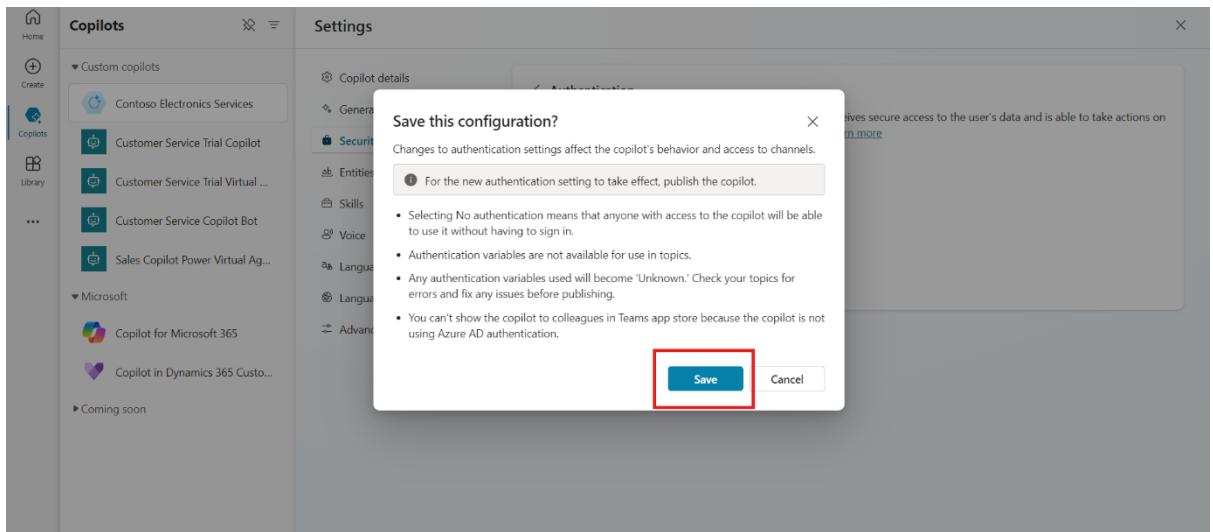
2. Within the settings menu, select the **Security** tab. This tab is specifically for configuring security options for your copilot.
3. In the Security settings, find and select the **Authentication** tile. This section allows you to determine how users will authenticate to interact with your copilot.



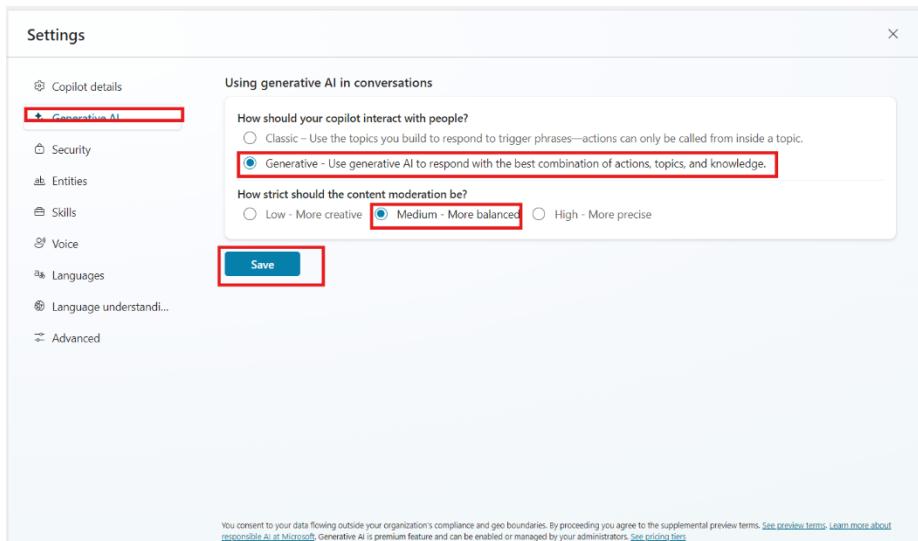
4. Choose **No authentication** from the available options. This setting will allow unrestricted access to your copilot without requiring users to log in.
5. Click **Save** to apply the authentication settings.



6. To ensure your changes have been saved, click **Save** again if prompted by the system.



7. On the left-hand side, above the Security tab, select **Generative AI**.
8. For “**How should your copilot interact with people?**”, select **Generative AI** to enable this feature.
9. For “**How strict should the content moderation be?**”, choose **Medium**. This setting balances content moderation with flexibility.
10. Click **Save** to apply these settings.



11. After saving your settings, click **Close** to exit the settings window.

12. In the Copilot pane on the left-hand side of the screen, select your copilot to return to the **Overview** tab. This will take you back to the main dashboard where you can manage your copilot.

Task 5: Create Knowledge Base for Copilot

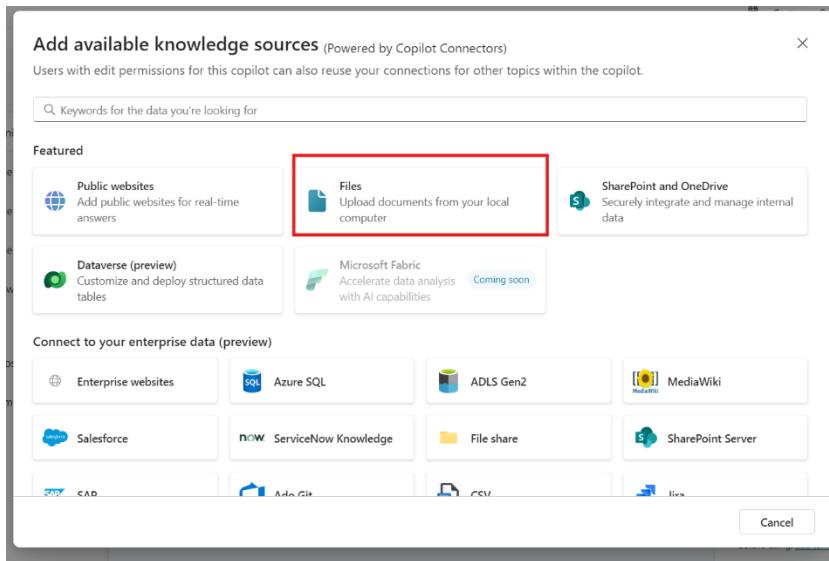
1. Open Microsoft Copilot Studio and go to the **Overview** tab.
2. Scroll down and **Disable** Allow the AI to use its own general knowledge (preview).

The screenshot shows the Microsoft Copilot interface. On the left, there's a sidebar with options like Home, Create, Copilots, Library, and more. The main area is titled 'Contoso Electronics Services' with a 'Overview' tab selected (highlighted by a red box). Below it, there's a 'Details' section with fields for Name (Contoso Electronics Services), Description (Provide information about laptops, refund policy, and facilitate bookings or appointments), and Instructions (Create a copilot for topics related to providing laptop information, processing refund requests, and booking appointments with sales executives or for product returns). There's also a 'Knowledge' section with a '+ Add knowledge' button, which is highlighted with a red box. A toggle switch labeled 'Disabled' is also highlighted with a red box. To the right, there's a sidebar with a message from the AI, a 'Test your copilot' button, and other settings.

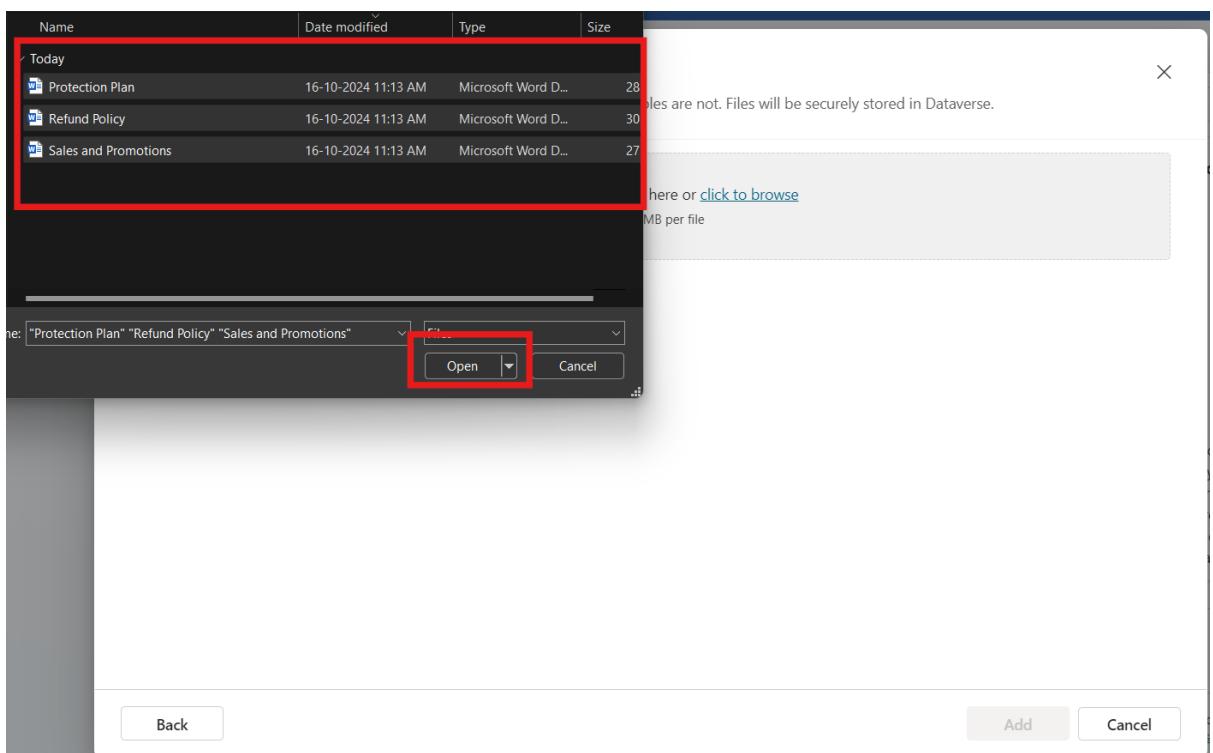
3. Navigate to the **Knowledge** section next to overview option and click on it.
4. Click on the **+ Add Knowledge** button to begin adding new knowledge sources.

The screenshot shows the 'Knowledge' page for the same copilot. The 'Knowledge' tab is selected (highlighted by a red box). In the center, there's a large 'Add a knowledge source' button, which is highlighted with a red box. Below it, there's a placeholder text: 'Add data, files, and other resources to inform and improve AI-generated responses.' To the right, there's a sidebar with a message from the AI, a 'Test your copilot' button, and other settings.

5. After selecting Add Knowledge, Select **Files** for the knowledge source.



6. Click on the **Browse** button to locate and select the **Refund Policy, Sales and Promotions and Protection Plan** lab file and click on **Open**.



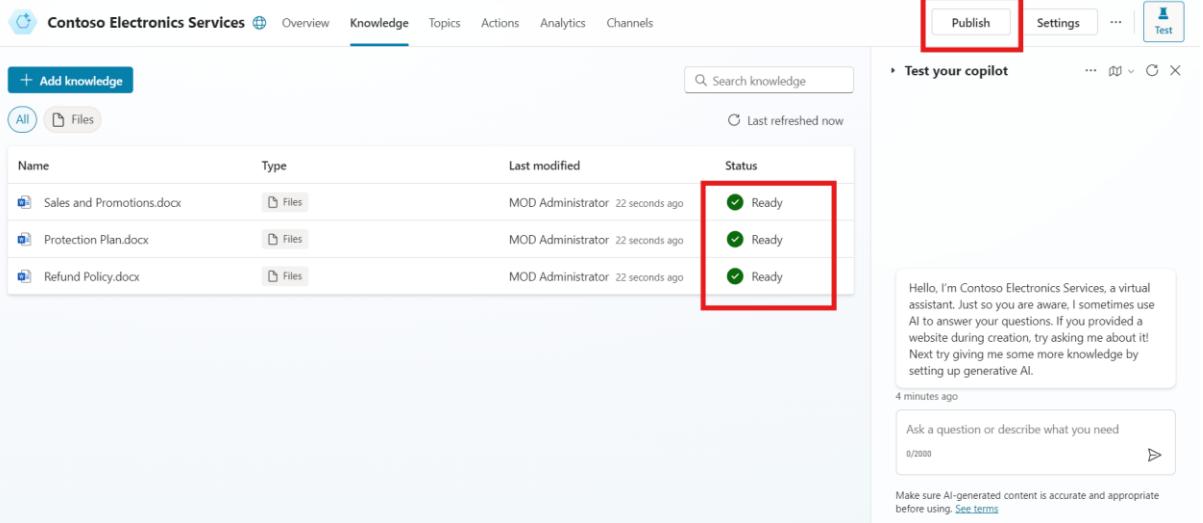
7. Click **Add** to include this file as part of the copilot's knowledge base.

File name	Name	Description
Protection Plan.docx	Protection Plan.docx	This knowledge source searches information
Refund Policy.docx	Refund Policy.docx	This knowledge source searches information
Sales and Promotions.docx	Sales and Promotions.docx	This knowledge source searches information

Back	Add	Cancel
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Task 6: Publish Your Copilot

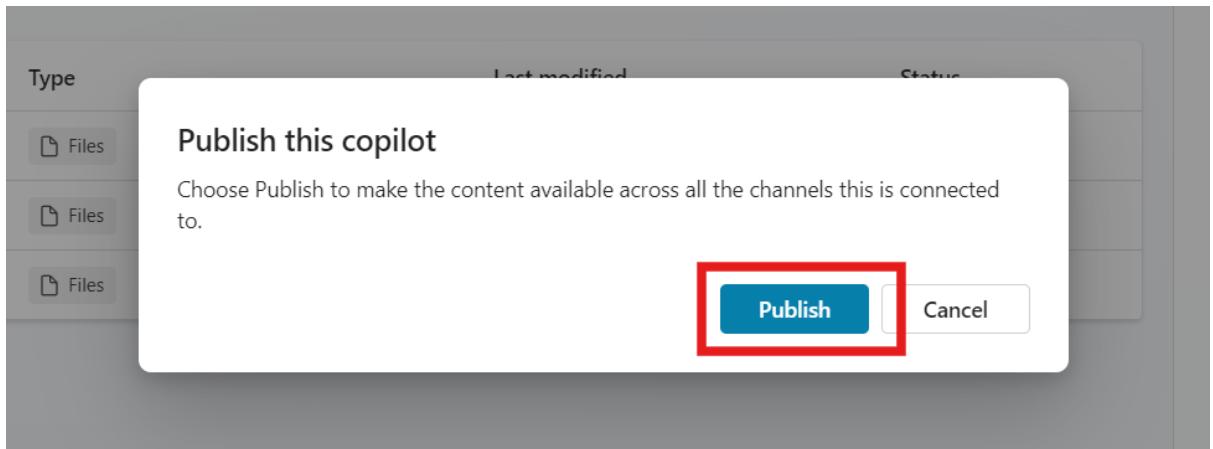
- After File are **Ready**, Go to **Publish** button on the right side of the screen. Click on the **Publish** button to start the publishing process.



The screenshot shows the 'Knowledge' tab of the Contoso Electronics Services interface. On the right, there's a 'Publish' button highlighted with a red box. Below it, a sidebar titled 'Test your copilot' contains a message from a virtual assistant and a text input field. On the left, a list of three files is shown:

Name	Type	Last modified	Status
Sales and Promotions.docx	Files	MOD Administrator 22 seconds ago	Ready
Protection Plan.docx	Files	MOD Administrator 22 seconds ago	Ready
Refund Policy.docx	Files	MOD Administrator 22 seconds ago	Ready

- A confirmation dialog may appear. Select **Publish** again to finalize and publish your copilot.



Conclusion

After completing this exercise, you have gained the following knowledge:

1. Successfully created and deployed a custom copilot in Microsoft Copilot Studio.
2. Configured security settings and enabled generative AI for intelligent interactions.
3. Built a knowledge base to enhance the copilot's response capabilities.
4. Published the copilot for real-time use in customer service tasks like product information, refunds, and appointment bookings.

Exercise 2: Create and Manage Topics

This lab exercise focuses on the creation and management of various topics using Copilot Studio. Participants will explore how to configure a virtual assistant that responds to customer inquiries regarding product information, laptop deals, comparisons, appointments, and protection plans. Through practical tasks, learners will create topics from scratch, set up trigger phrases, and utilize advanced options like generative answers. By the end of this exercise, participants will understand how to enhance customer interactions using dynamic responses and structured conversations powered by AI, driving improved customer engagement and automation.

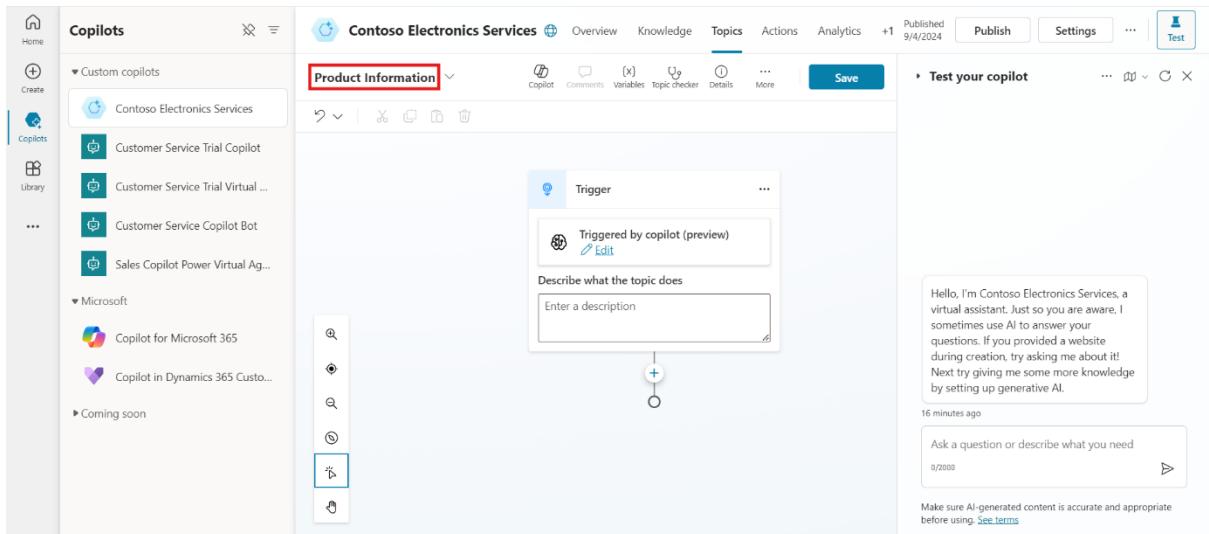
Task 1: Create a Topic "Product Information"

1. Open Copilot Studio and select the copilot you've created for this project.
2. In the top bar, select **Topics** which is located next to **Knowledge**.

- Click on **+ Add a topic** to create a new topic. Choose **From blank** to start with a blank template.

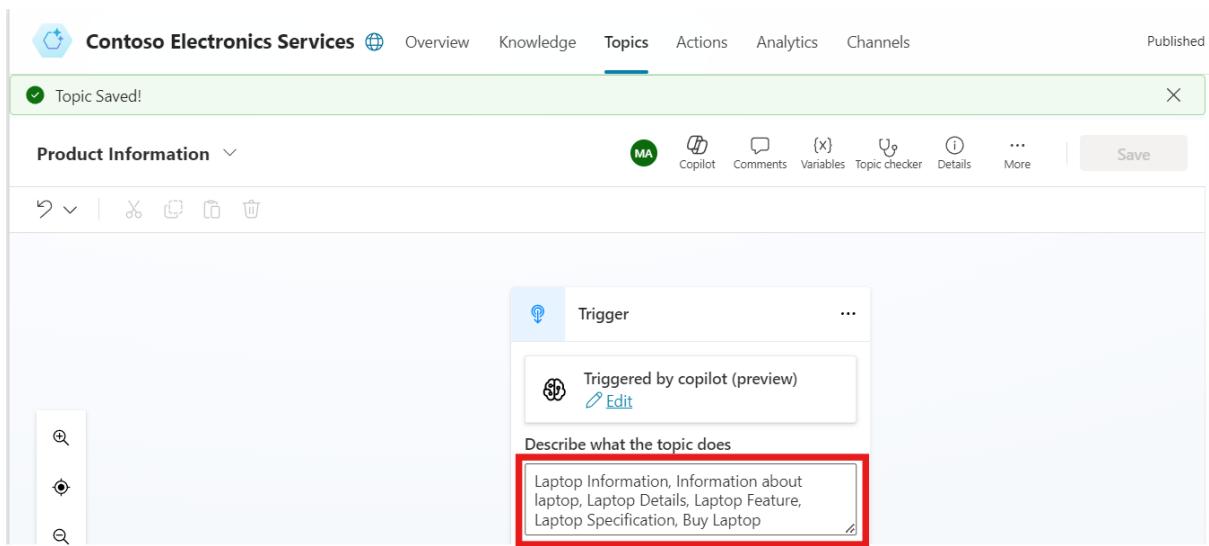
Name	Trigger	Last modified	Enabled
Conversation Start	On Conversation	MOD Administrat...	<input checked="" type="checkbox"/> On
Conversational boosting	On Unknown...	MOD Administrat...	<input checked="" type="checkbox"/> On
End of Conversation	On Redirect	MOD Administrat...	<input checked="" type="checkbox"/> On
Escalate	On Talk to...	MOD Administrat...	<input checked="" type="checkbox"/> On
Fallback	On Unknown...	MOD Administrat...	<input checked="" type="checkbox"/> On
Goodbye	Triggered...	MOD Administrat...	<input checked="" type="checkbox"/> On
Greeting	Triggered...	MOD Administrat...	<input checked="" type="checkbox"/> On
Multiple Topics Matched	On Select...	MOD Administrat...	<input checked="" type="checkbox"/> On
On Error	On Error	MOD Administrat...	<input checked="" type="checkbox"/> On
Reset Conversation	On Redirect	MOD Administrat...	<input checked="" type="checkbox"/> On

- In the new topic canvas, at the top of the screen, enter the name of the topic "**Product Information**".

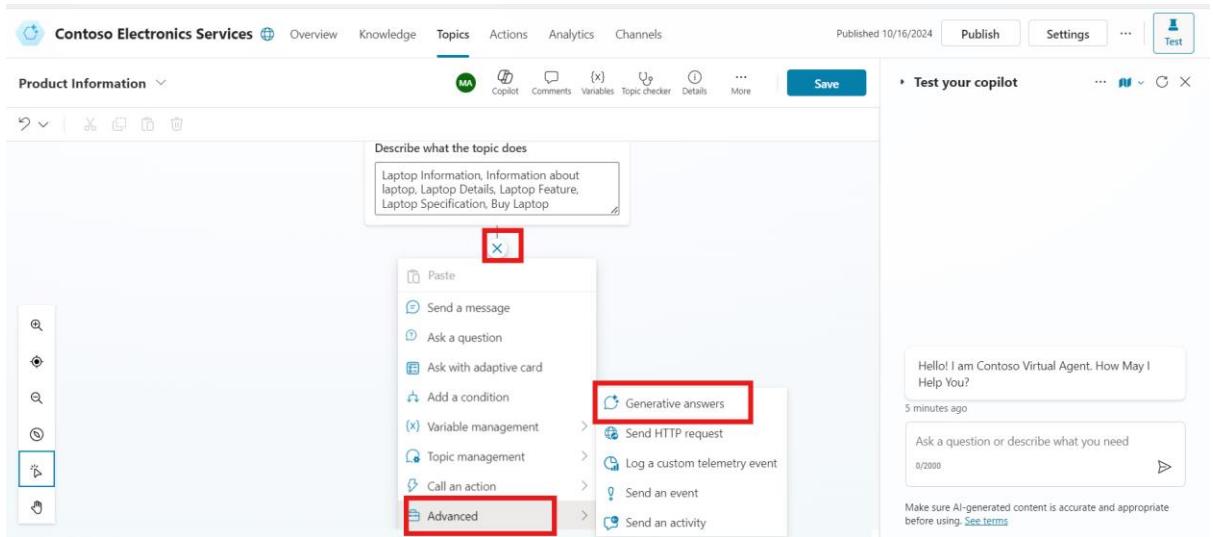


- In the canvas, you'll see a **Trigger node**. In the **Describe** section, enter the following phrases to trigger this topic:

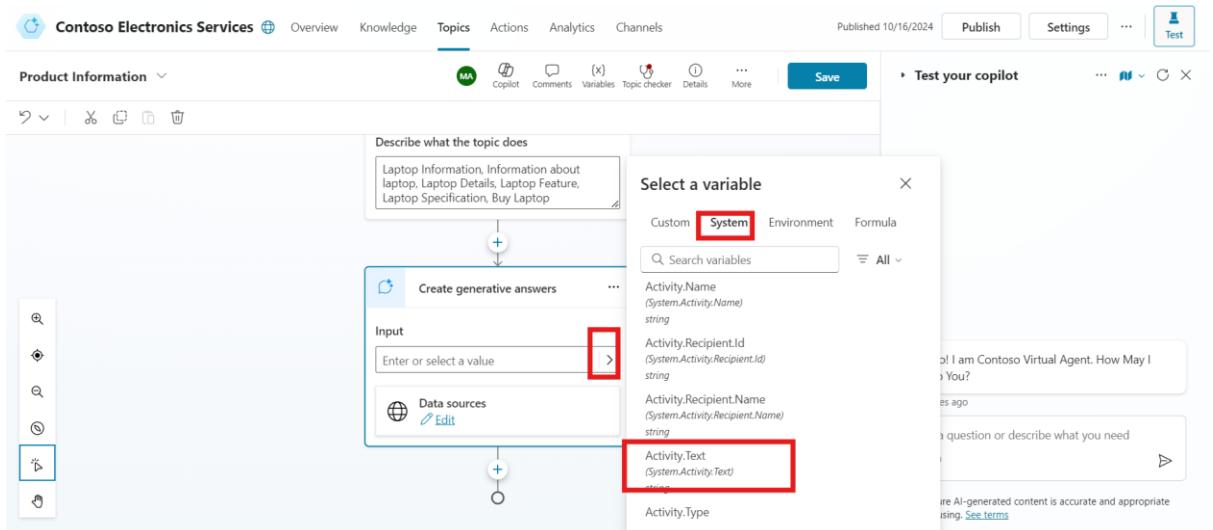
Laptop Information, Information about laptop, Laptop Details, Laptop Feature, Laptop Specification, Buy Laptop



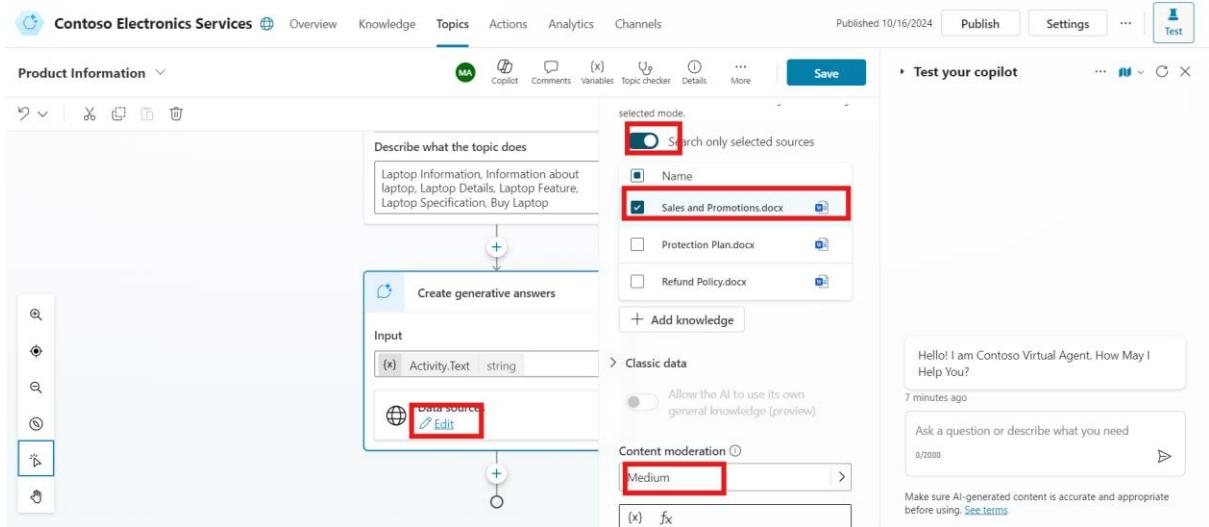
- Below the Trigger node, click on the + sign to create a new node. Select **Advanced options**, then choose **Generative Answer**. A Generative Answer node will be created.



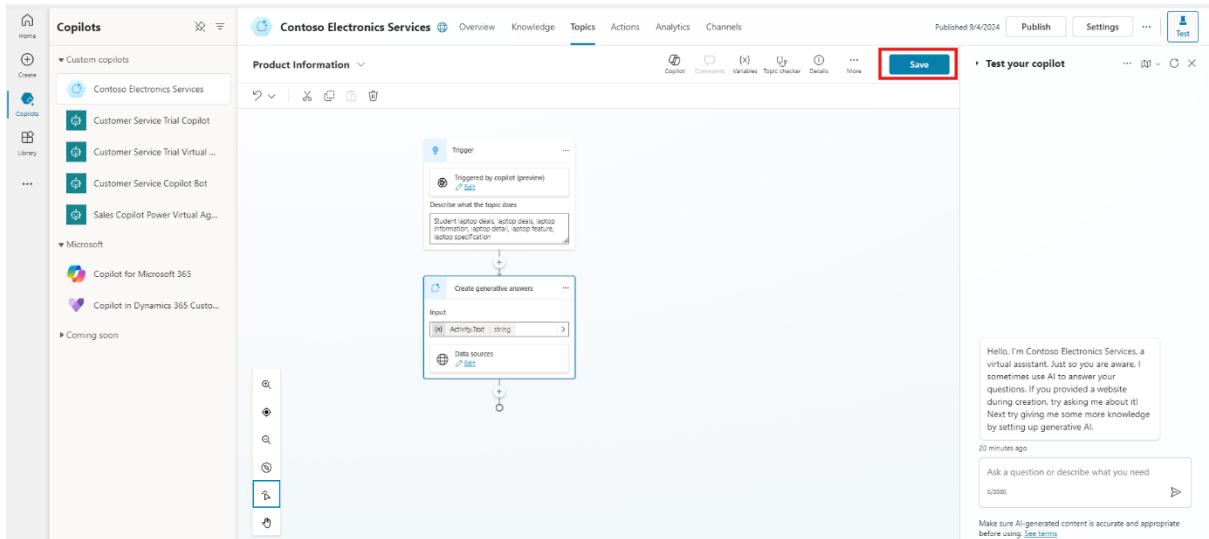
7. In the Generative Answer node, click on the **Input** option variable window will open.
8. In the **Select a variable** window, select **System** and scroll down to choose **Activity.Text**.



9. In the Generative Answer node, click on the **Edit** option in the **Data Source** section.
10. Enable the option **Search only selected sources**.
11. Choose the **Sales and Promotions** doc from the options displayed and scroll down.
12. In the **Content Moderation** section, select **Medium**.
13. Scroll up and click on the **(X)** to close Create generative answer properties window.



- Click on the **Save** button to save your configurations for the "**Product Information**" topic.



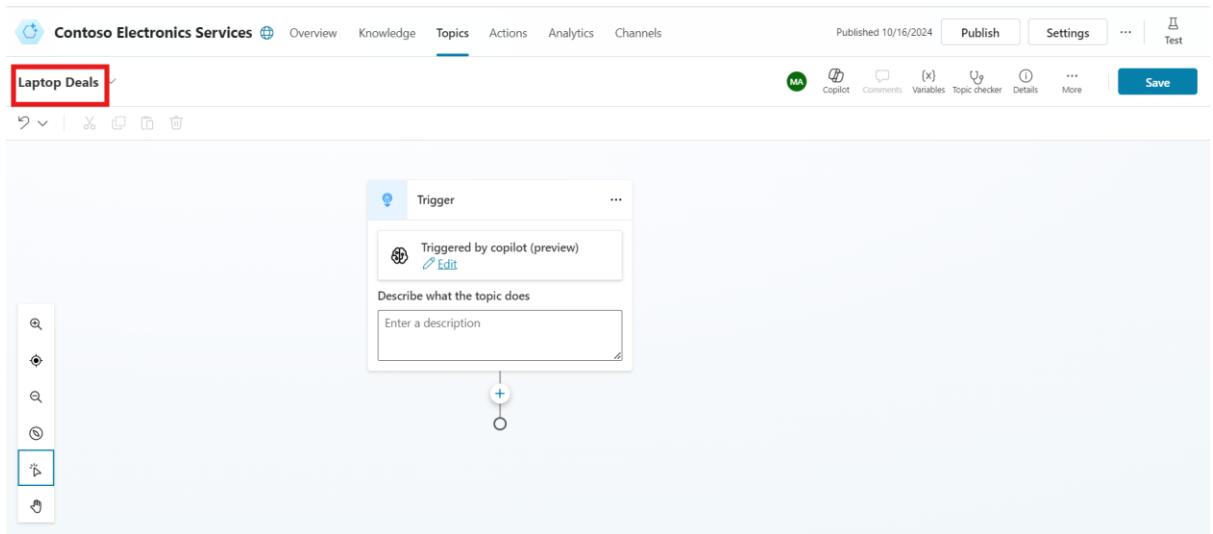
Task 2: Create "Student laptop deals" topic

- Open Copilot Studio and select the copilot you've created for this project.
- In the top bar, select **Topics** which is located next to **Knowledge**.

- Click on **+ Add a topic** to create a new topic. Choose **From blank** to start with a blank template.

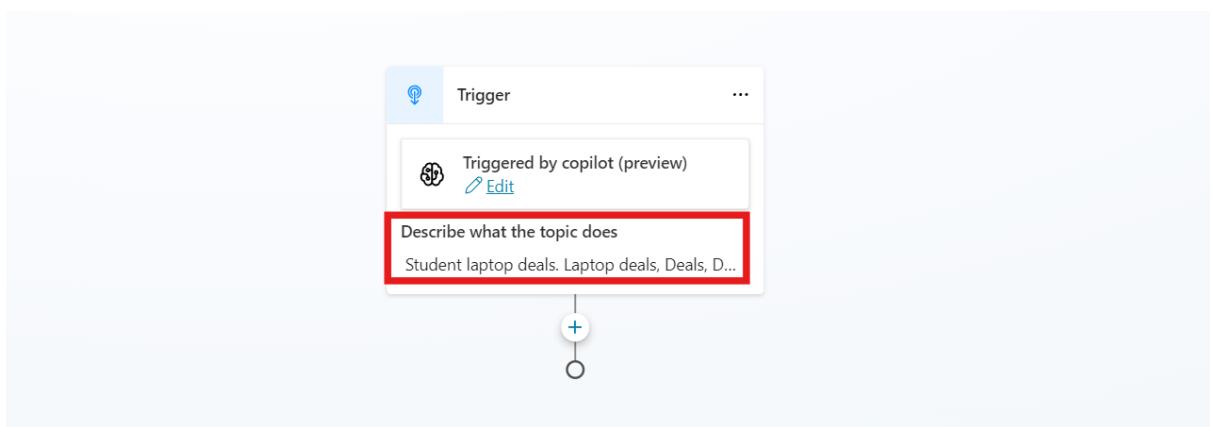
Name	Trigger	Last modified	Enabled
Conversation Start	On Conversation	MOD Administrat...	<input checked="" type="checkbox"/> On
Conversational boosting	On Unknown...	MOD Administrat...	<input checked="" type="checkbox"/> On
End of Conversation	On Redirect	MOD Administrat...	<input checked="" type="checkbox"/> On
Escalate	On Talk to...	MOD Administrat...	<input checked="" type="checkbox"/> On
Fallback	On Unknown...	MOD Administrat...	<input checked="" type="checkbox"/> On
Goodbye	Triggered...	MOD Administrat...	<input checked="" type="checkbox"/> On
Greeting	Triggered...	MOD Administrat...	<input checked="" type="checkbox"/> On
Multiple Topics Matched	On Select...	MOD Administrat...	<input checked="" type="checkbox"/> On
On Error	On Error	MOD Administrat...	<input checked="" type="checkbox"/> On
Reset Conversation	On Redirect	MOD Administrat...	<input checked="" type="checkbox"/> On

- In the new topic canvas, at the top of the screen, enter the name of the topic "**Laptop Deals**".

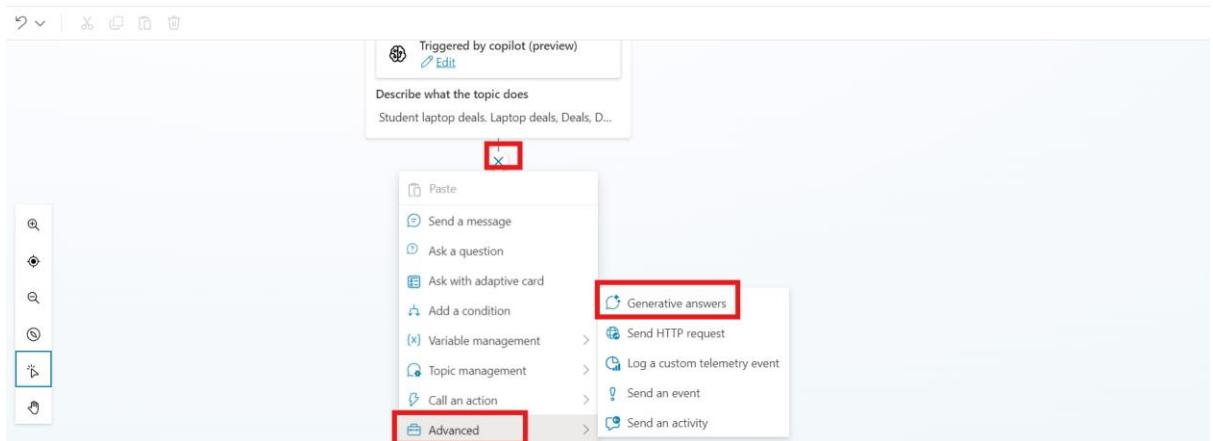


5. In the canvas, you'll see a **Trigger node**. In the **Describe** section, enter the following phrases to trigger this topic:

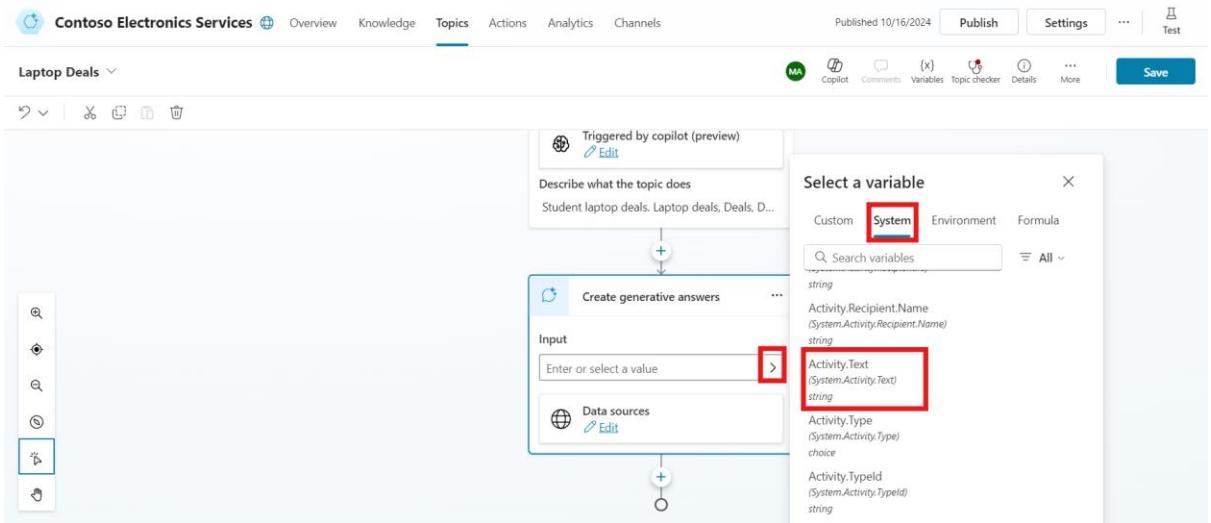
Student laptop deals. Laptop deals, Deals, Deals about laptop, Product deals, Latest deals, Current deals, Trending deals.



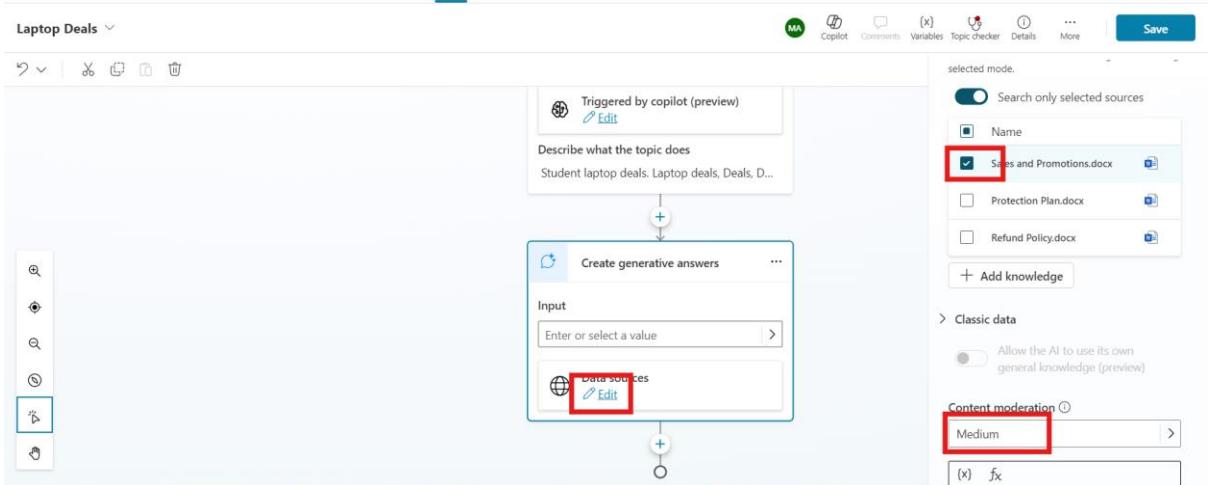
6. Below the Trigger node, click on the + sign to create a new node. Select **Advanced options**, then choose **Generative Answer**. A Generative Answer node will be created.



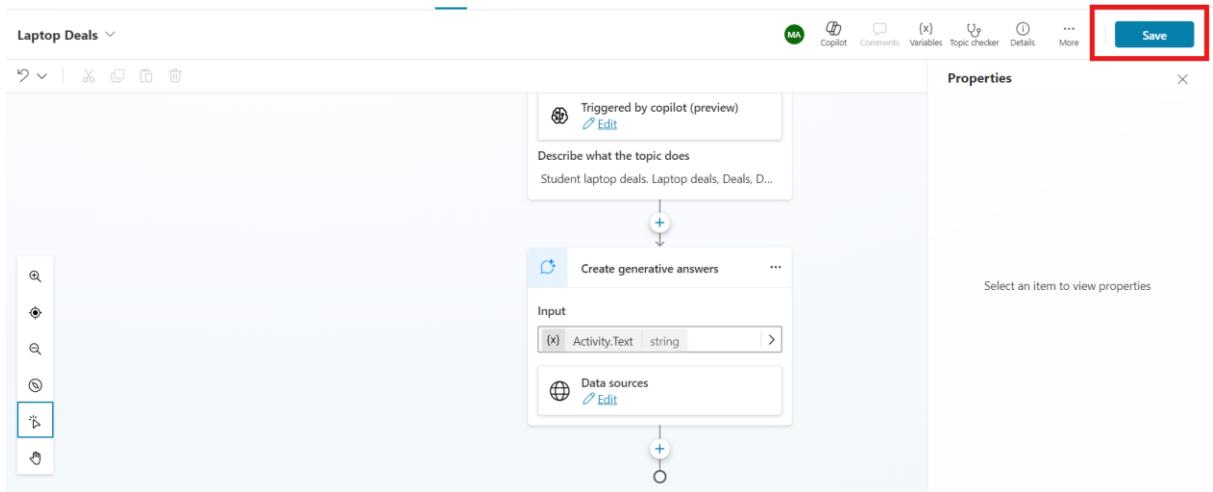
- In the Generative Answer node, click on the **Input** option variable window will open.
- In the **Select a variable** window, select **System** and scroll down to choose **Activity.Text**.



- In the Generative Answer node, click on the **Edit** option in the **Data Source** section.
- Enable the option **Search only selected sources**.
- Choose the **Sales and Promotions** doc from the options displayed and scroll down.
- Scroll down, In the **Content Moderation** section, select **Medium**.
- Scroll up and click on the **(X)** to close Create generative answer properties window.



- Click on the **Save** button to save your configurations for the "**Laptop Deals**" topic.



Task 3: Create a Topic "Compare laptop"

1. Open Copilot Studio and select the copilot you've created for this project.
2. In the top bar, select **Topics** which is located next to **Knowledge**.

3. Click on **+ Add a topic** to create a new topic. Choose **From blank** to start with a blank template.

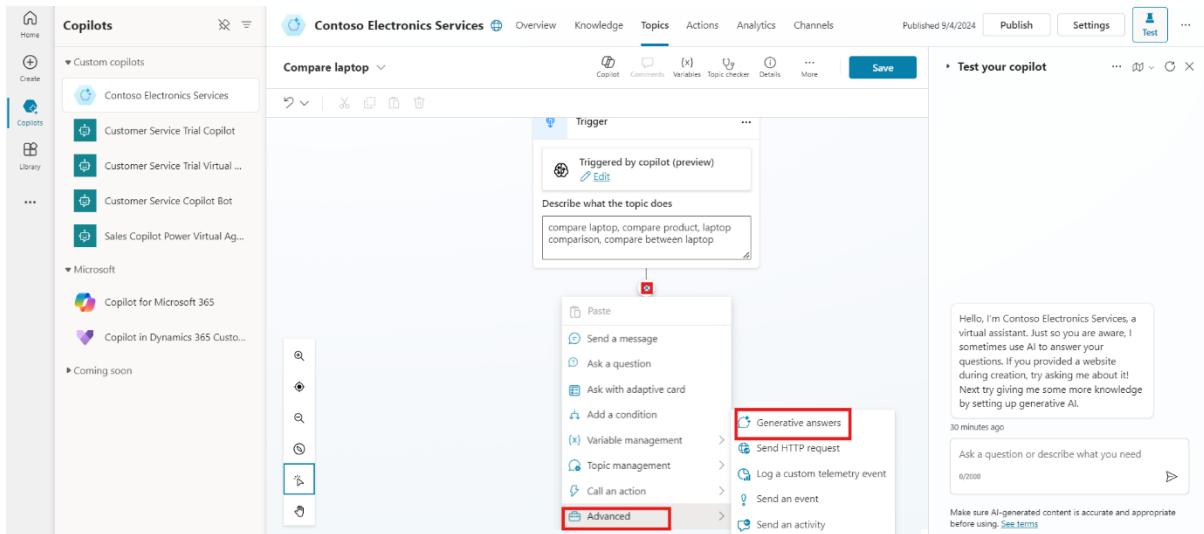
The screenshot shows the Microsoft Copilot Topics canvas. On the left, there's a sidebar with 'Copilots' selected. In the center, a table lists various topics like 'Conversation Start', 'Escalate', etc. At the top right, there's a 'Topics' tab and a 'Test' button. A red box highlights the '+ Add a topic' button. Below it, another red box highlights the 'From blank' option. The main area shows a table with columns: Name, Trigger, Last modified, and Enabled. The 'Name' column contains topics such as 'Conversation Start', 'Conversational boosting', 'End of Conversation', etc. The 'Trigger' column shows conditions like 'On Conversation', 'On Unknown', 'On Redirect', etc. The 'Last modified' and 'Enabled' columns show the date and status of each topic.

- In the new topic canvas, at the top of the screen, enter the name of the topic "**Compare laptop**".
- In the canvas, you'll see a **Trigger node**. In the **Describe** section, enter the following phrases to trigger this topic:

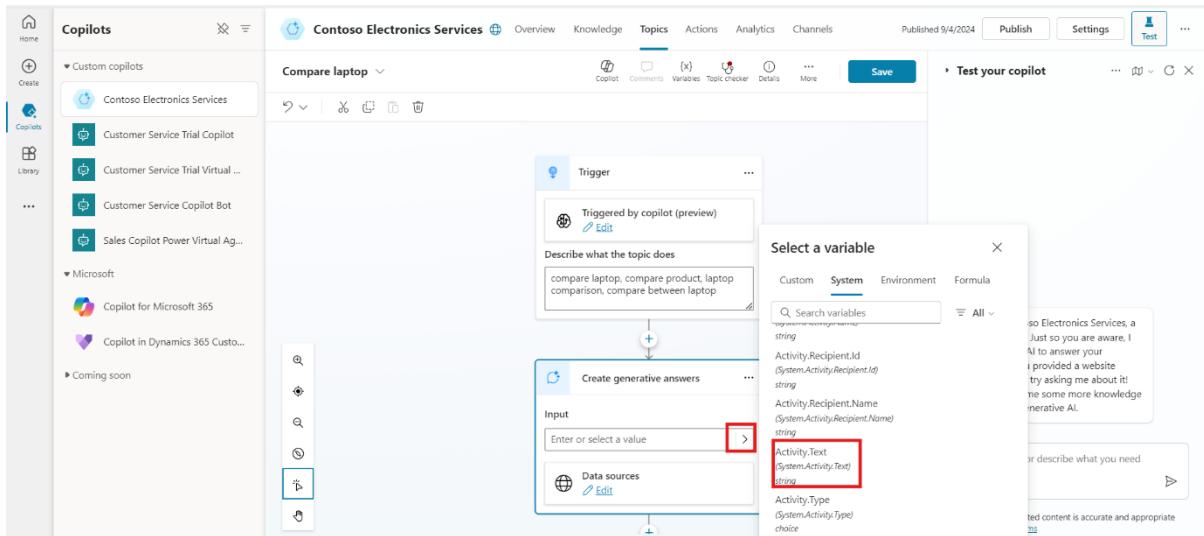
compare laptop, compare product, laptop comparison, compare between laptops

The screenshot shows the Microsoft Copilot Topics canvas with the 'Compare laptop' topic selected. A red box highlights the topic name 'Compare laptop'. Below it, a 'Trigger' node is visible with a red box highlighting the 'Triggered by copilot (preview)' section. The 'Describe what the topic does' field contains the phrases: 'compare laptop, compare product, laptop comparison, compare between laptop'. The right side of the screen shows a preview window with a message from the virtual assistant and a test input field.

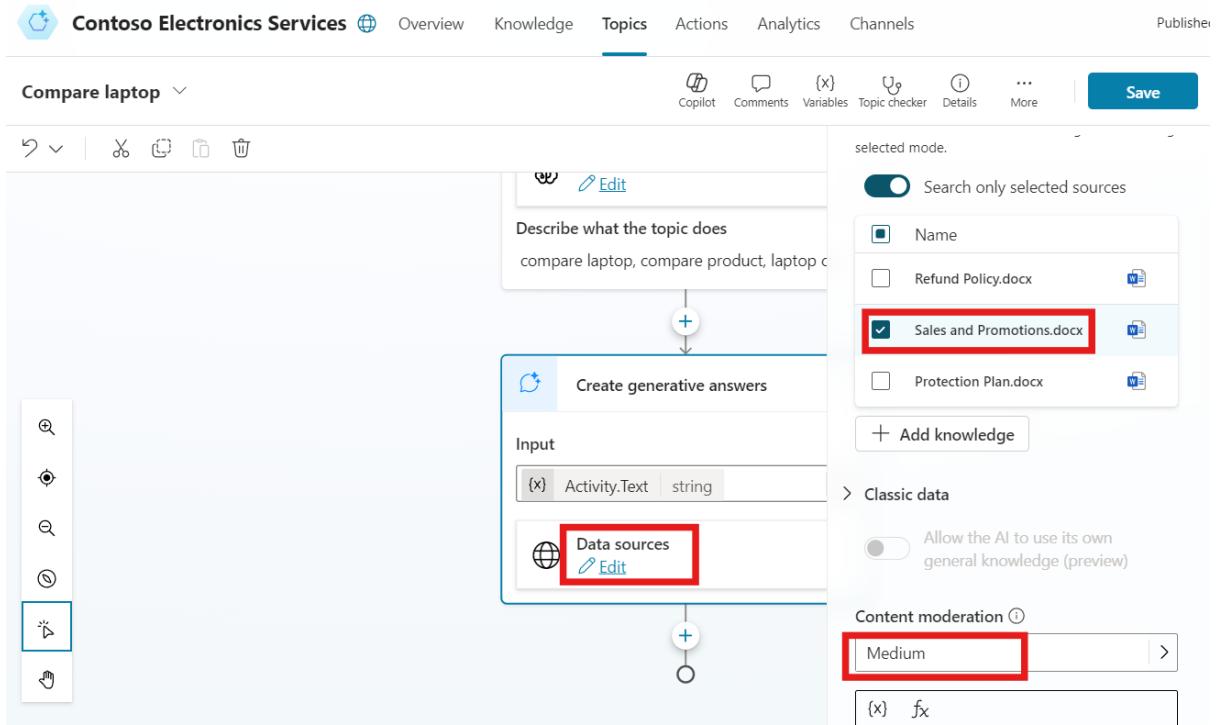
- Below the Trigger node, click on the + sign to create a new node. Select **Advanced options**, then choose **Generative Answer**. A Generative Answer node will be created.



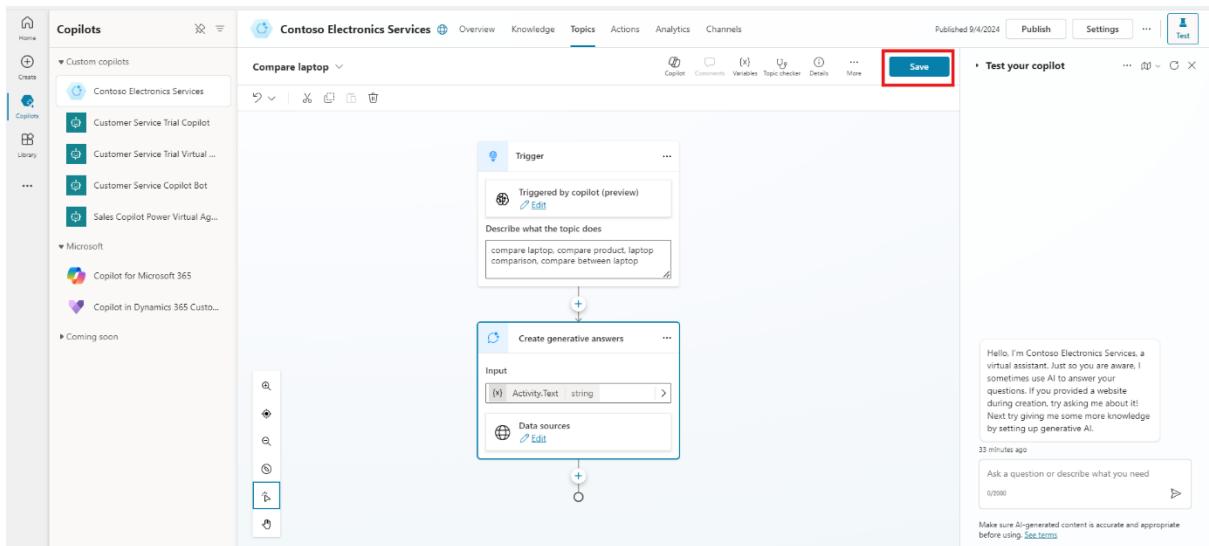
7. In the Generative Answer node, click on the **Input** option variable window will open.
8. In the variable window, select **System** and scroll down to choose **Activity.Text**.



9. In the Generative Answer node, click on the **Edit** option in the **Data Source** section.
10. Enable the option **Search only selected sources**.
11. Choose the **Sales and Promotions** doc from the options displayed and scroll down.
12. Scroll Down, In the **Content Moderation** section, select **Medium**.
13. Scroll up and click on the **(X)** to close Create generative answer properties window.



14. Click on the **Save** button to save your configurations for the "**Compare Laptop**" topic.



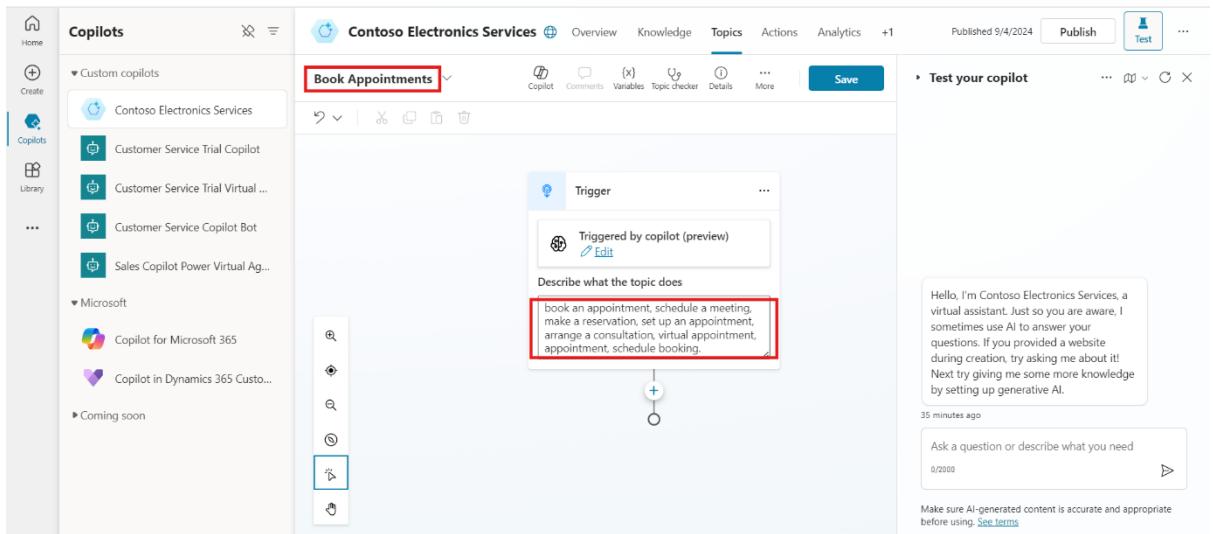
Task 4: Create a Topic "Book Appointments"

1. Open **Copilot Studio** and select the copilot you've created for this project.
2. In the top bar, select **Topics** which is located next to **Knowledge**.

- Click on **+ Add a topic** to create a new topic. Choose **From blank** to start with a blank template.

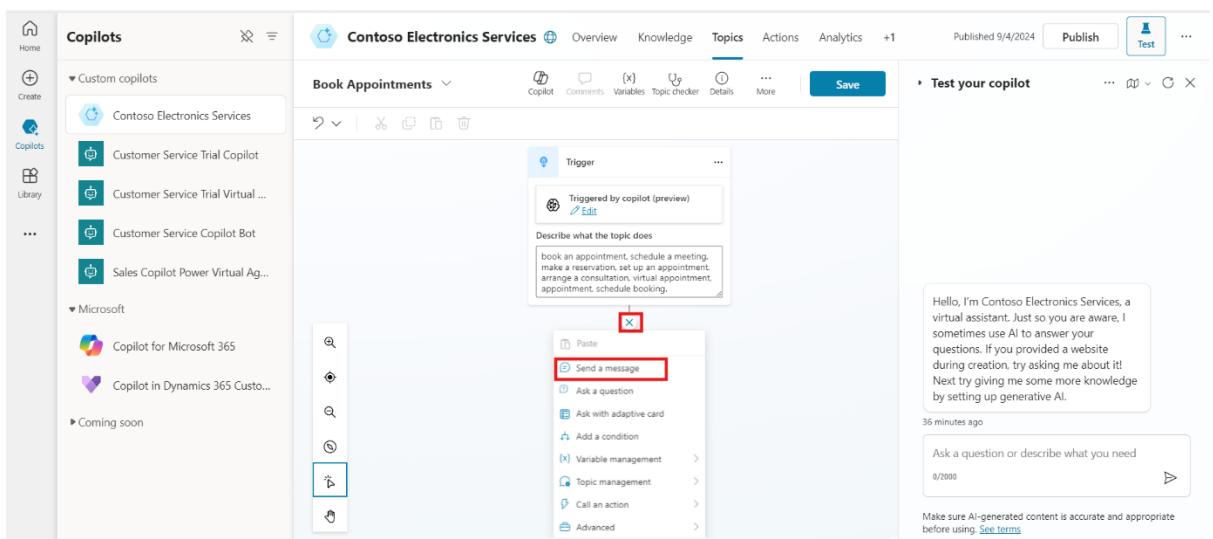
- In the new topic canvas, at the top of the screen, enter the name "**Book Appointments**".
- In the canvas, you'll see a **Trigger node**. In the **Describe** section, enter the following phrases to trigger this topic:

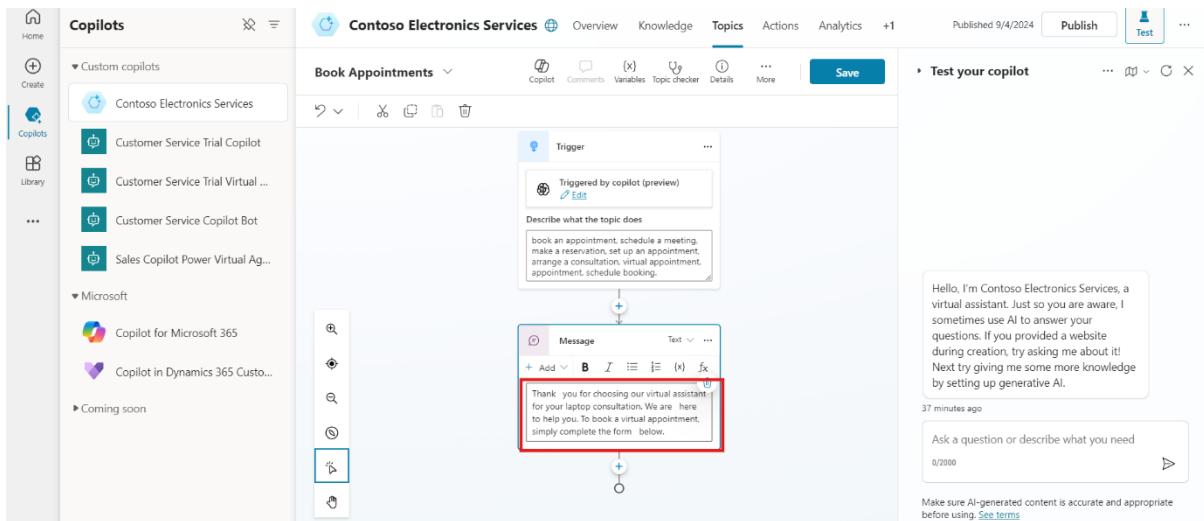
Book an appointment, Schedule a meeting, Make a reservation, Set up an appointment, Arrange a consultation, Virtual appointment, Appointment, Schedule booking.



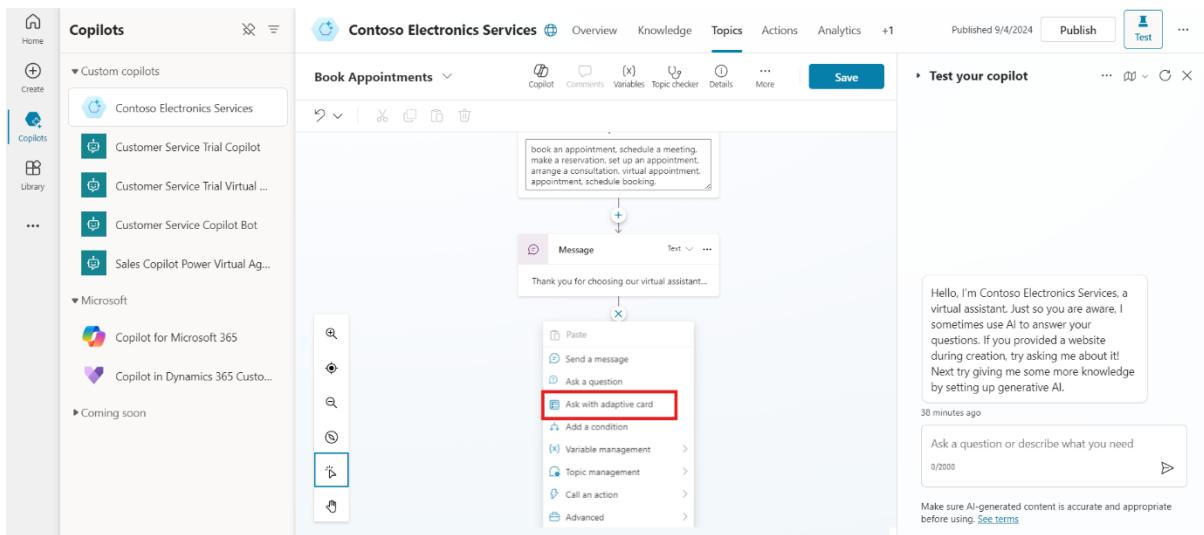
- Below the Trigger node, click on the + sign to create a new node. Select **Send a Message Node**, a **Message Node** will be created. In the Message node, enter the following text:

Thank you for choosing our virtual assistant for your laptop consultation. We are here to help you. To book a virtual appointment, simply complete the form below.

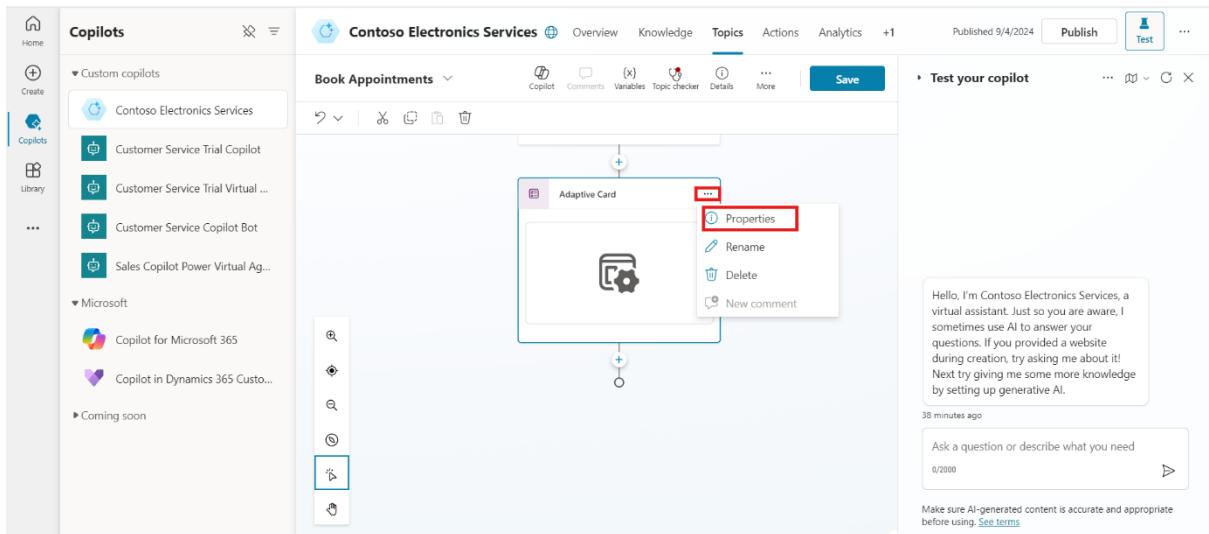




- Below the Message node, click on the + sign to create a new node. Select **Ask with Adaptive Card**. An Adaptive Card Node will be created.



- In the Adaptive Card node, select the **three dots** (More Options) and then select **Properties**.



- In the Adaptive Card properties, below the **Edit JSON**. Paste the provided **JSON** code to create the adaptive card.

```
{
  "$schema": "http://adaptivecards.io/schemas/adaptive-card.json",
  "type": "AdaptiveCard",
  "version": "1.5",
  "body": [
    {
      "type": "TextBlock",
      "text": "Virtual Assistant Booking",
      "weight": "Bolder",
      "size": "Large",
      "horizontalAlignment": "Center"
    },
    {
      "type": "Input.ChoiceSet",
      "choices": [
        {
          "title": "Virtual Showroom",
          "value": "Virtual Showroom"
        },
        {
          "title": "Customer Service",
          "value": "Customer Service"
        },
        {
          "title": "IT Support & Repair",
          "value": "IT Support & Repair"
        }
      ],
      "placeholder": "Placeholder text",
      "style": "Text"
    }
  ],
  "actions": [
    {
      "type": "Action.Submit",
      "title": "Book Appointment"
    }
  ]
}
```

```
"id": "Appointmenttype",
"label": "Appointment Type",
"style": "expanded"
},
{
  "type": "Input.Text",
  "id": "fullName",
  "placeholder": "Enter your full name",
  "label": "Full Name",
  "isRequired": true,
  "errorMessage": "Full Name is required."
},
{
  "type": "Input.Text",
  "id": "contactPhone",
  "placeholder": "Enter your phone number",
  "label": "Phone Number",
  "isRequired": true,
  "errorMessage": "Phone Number is required."
},
{
  "type": "Input.Text",
  "id": "contactEmail",
  "placeholder": "Enter your email address",
  "label": "Email Address",
  "isRequired": true,
  "errorMessage": "Email Address is required.",
  "style": "Email"
},
{
  "type": "TextBlock",
  "text": "Would you like to book a virtual appointment?",
  "wrap": true,
  "spacing": "Medium"
},
{
  "type": "Input.Text",
  "id": "appointmentDate",
  "label": "Date",
  "isRequired": true,
  "errorMessage": "Date is required.",
  "placeholder": "DD-MM-YYYY"
},
{
  "type": "Input.ChoiceSet",
  "choices": [

```

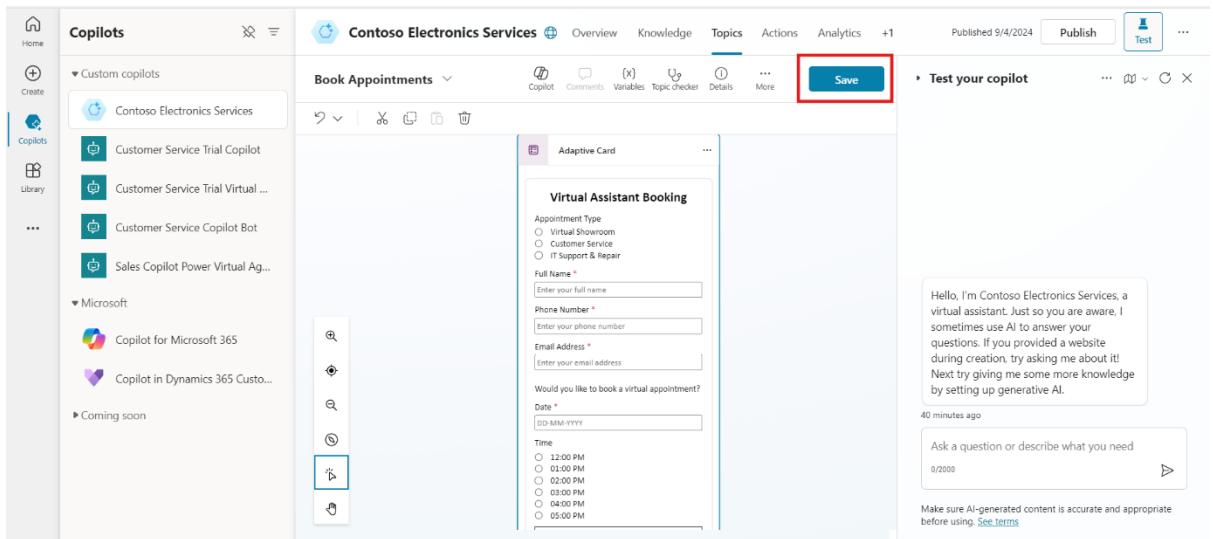
```
{
    "title": "12:00 PM",
    "value": "12:00 PM"
},
{
    "title": "01:00 PM",
    "value": "01:00 PM"
},
{
    "title": "02:00 PM",
    "value": "02:00 PM"
},
{
    "title": "03:00 PM",
    "value": "03:00 PM"
},
{
    "title": "04:00 PM",
    "value": "04:00 PM"
},
{
    "title": "05:00 PM",
    "value": "05:00 PM"
}
],
"placeholder": "Placeholder text",
"id": "appointmenttime",
"label": "Time",
"style": "expanded"
}
],
"actions": [
{
    "type": "Action.Submit",
    "title": "Book Appointments",
    "data": {
        "action": "bookAppointment"
    }
}
]
}
```

The screenshot shows the Microsoft Copilot interface for 'Contoso Electronics Services'. On the left, there's a sidebar with 'Copilots' (Home, Create, Library), 'Custom copilots' (Contoso Electronics Services, Customer Service Trial Copilot, etc.), and 'Coming soon'. The main area shows a 'Book Appointments' form. On the right, the 'Topics' tab is selected in the ribbon. A modal window titled 'Adaptive Card Node properties' has a red box around its close button. Below it, a button labeled 'Open Adaptive Card designer' is also highlighted with a red box. A code editor shows the JSON schema for the adaptive card, with a red box highlighting the 'body' and 'actions' sections.

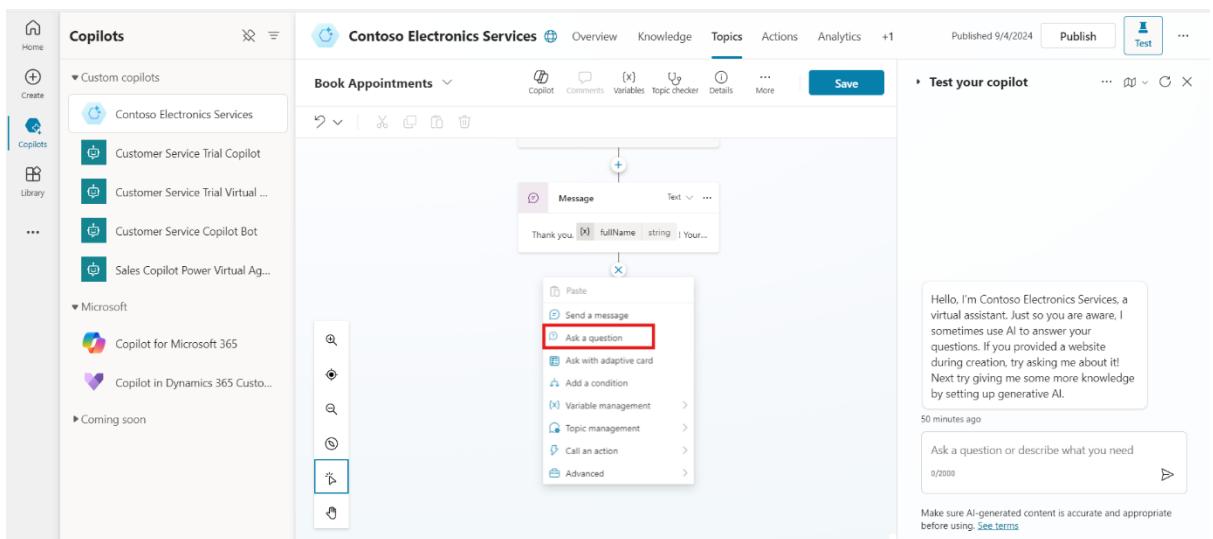
10. Select **Variables** to open the Variables pane.
11. Select all the boxes on the right-hand side for the topic variables.

The screenshot shows the Microsoft Copilot interface for 'Contoso Electronics Services'. The 'Topics' tab is selected in the ribbon. A modal window titled 'Variables' is open, showing a list of variables under 'Topic (8)'. To the right of the variable names, there are checkboxes; all of them are checked, indicating they are selected. The 'Global (0)' and 'Environment (37)' sections are also visible.

12. Click on **Save** to save your configuration.

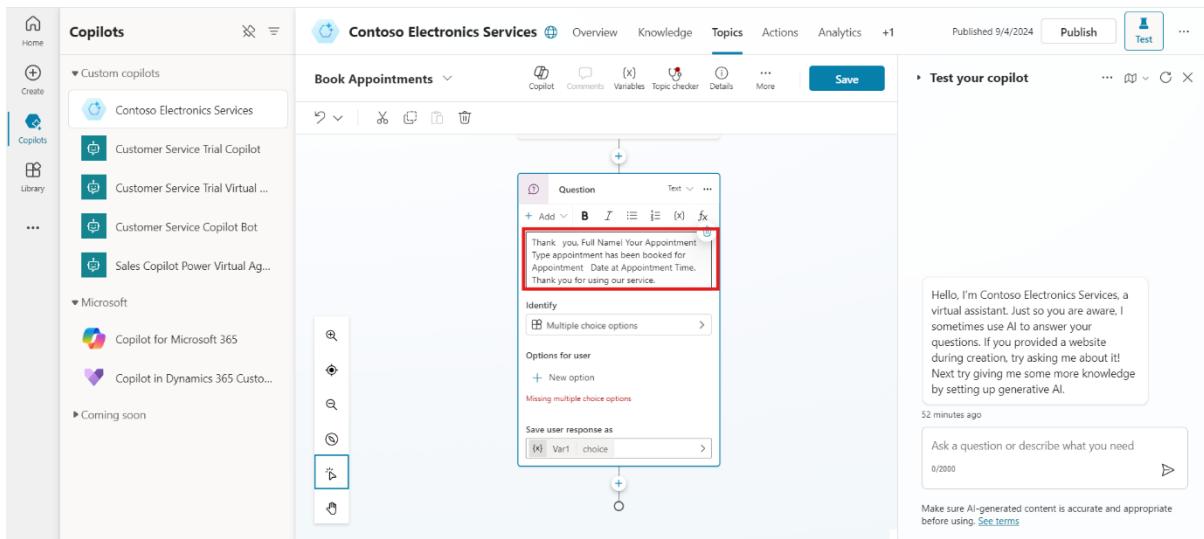


13. Below the Adaptive card node, click on the + sign to create a new node. Select **Ask a Question**. A **Question Node** will be created.

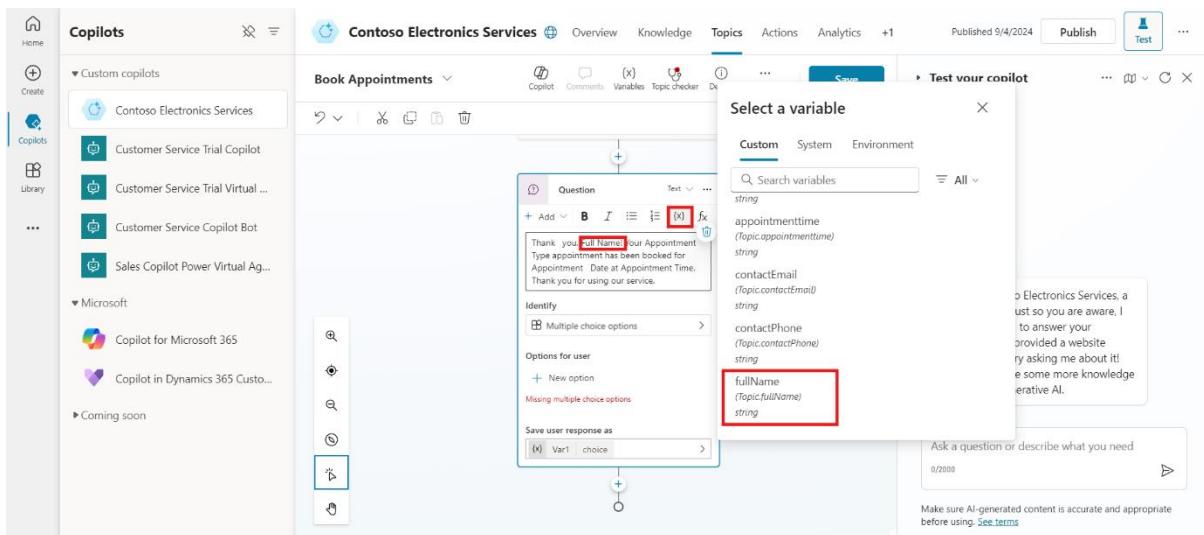


14. In question node select **Enter a Message** and enter the following text:

Thank you, Full Name! Your Appointment Type appointment has been booked for Appointment Date at Appointment Time. Thank you for using our service.



15. Replace the placeholders Full Name, Appointment Type, Appointment Date, and Appointment Time with the appropriate variables by clicking on the **(x)** icon and selecting the corresponding custom variables.



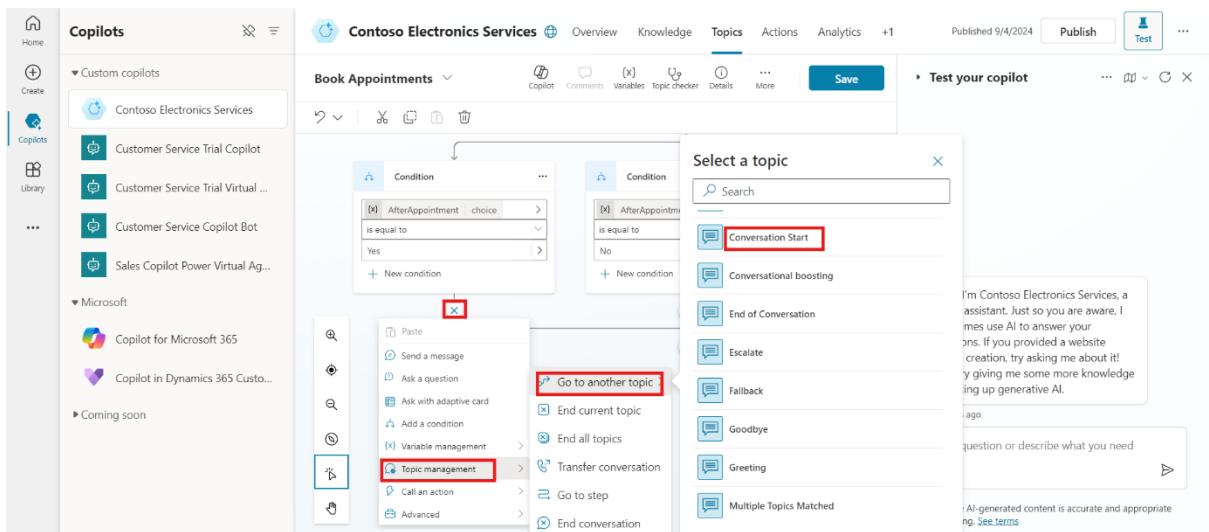
16. In the Question node, select **Multiple Choice** as the identify.

17. In the **Options for user** section, enter the following choices:

- Yes**
- No**

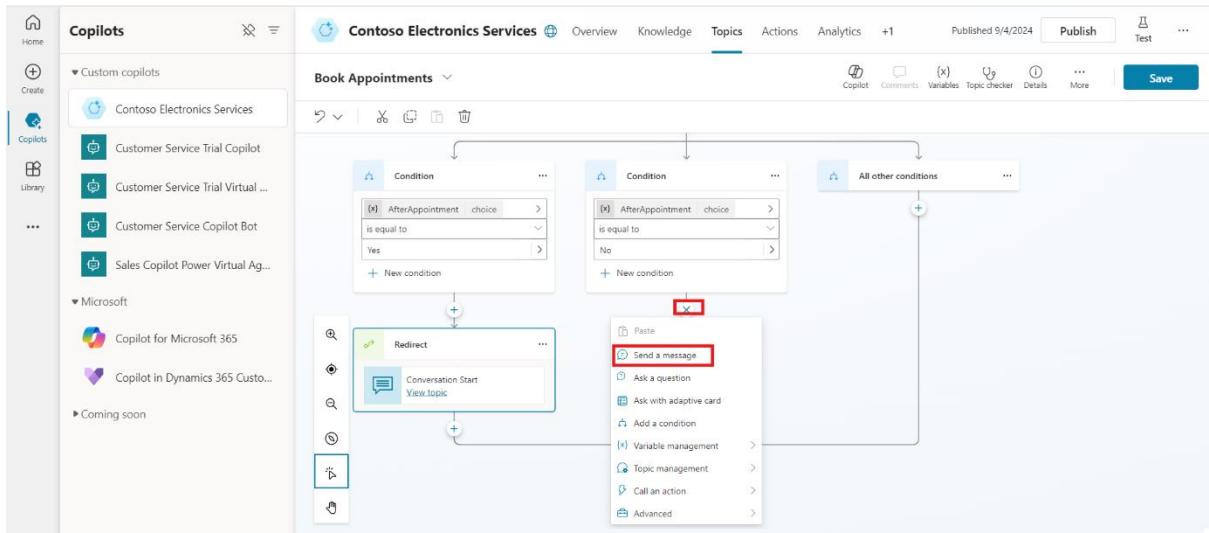
18. Below **Save the user's response** a new variable creates, click on the variable name (Var1), variable properties window will open, where you can rename the variable name with **AfterAppointment**. Click the (X) to close the variable properties window.

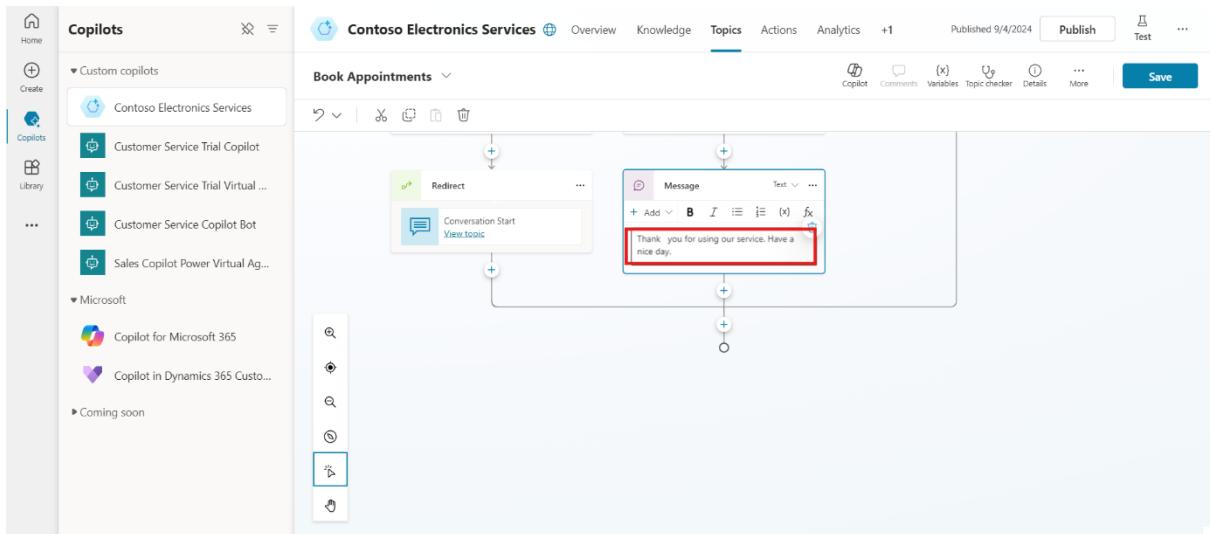
19. Under the **Yes** condition, click on the **+** sign and select **Topic Management**, then choose **Go to Another Topic**. A topic selection window will open—search for **Conversation Start** and select the **Conversation Start** topic.



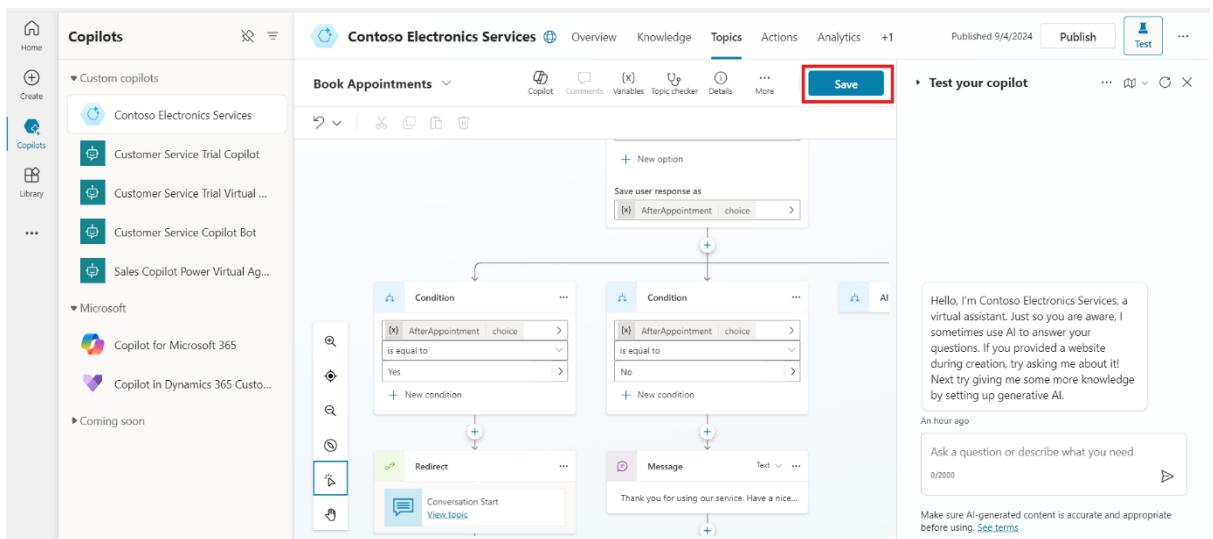
20. Under the **No** condition, click on the **+** sign and select **Send a Message**. A Message Node will be created. In the Message node, enter the following text:

Thank you for using our service. Have a nice day.





21. Once all nodes are configured, click on **Save** to finalize and save your "**Book Appointments**" topic.



Task 5: Create Protection Plan Topic

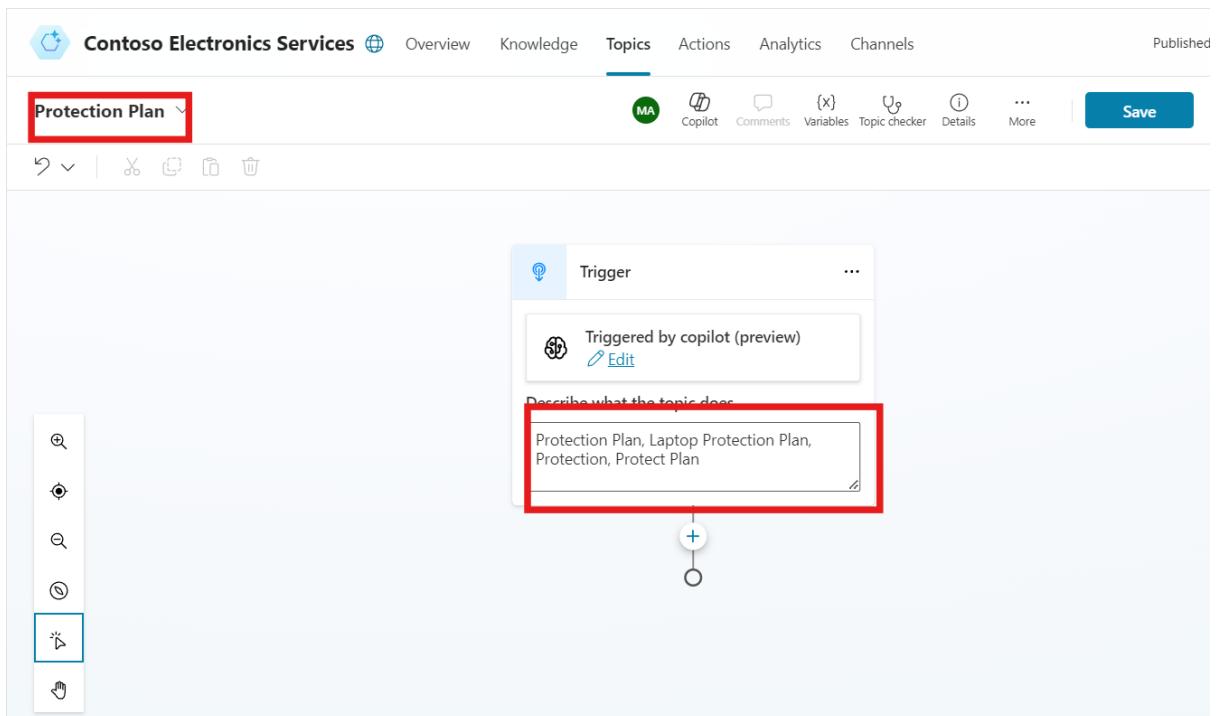
1. Open Copilot Studio and select the copilot you've created for this project.
2. In the top bar, select **Topics** which is located next to **Knowledge**.

- Click on **+ Add a topic** to create a new topic. Choose **From blank** to start with a blank template.

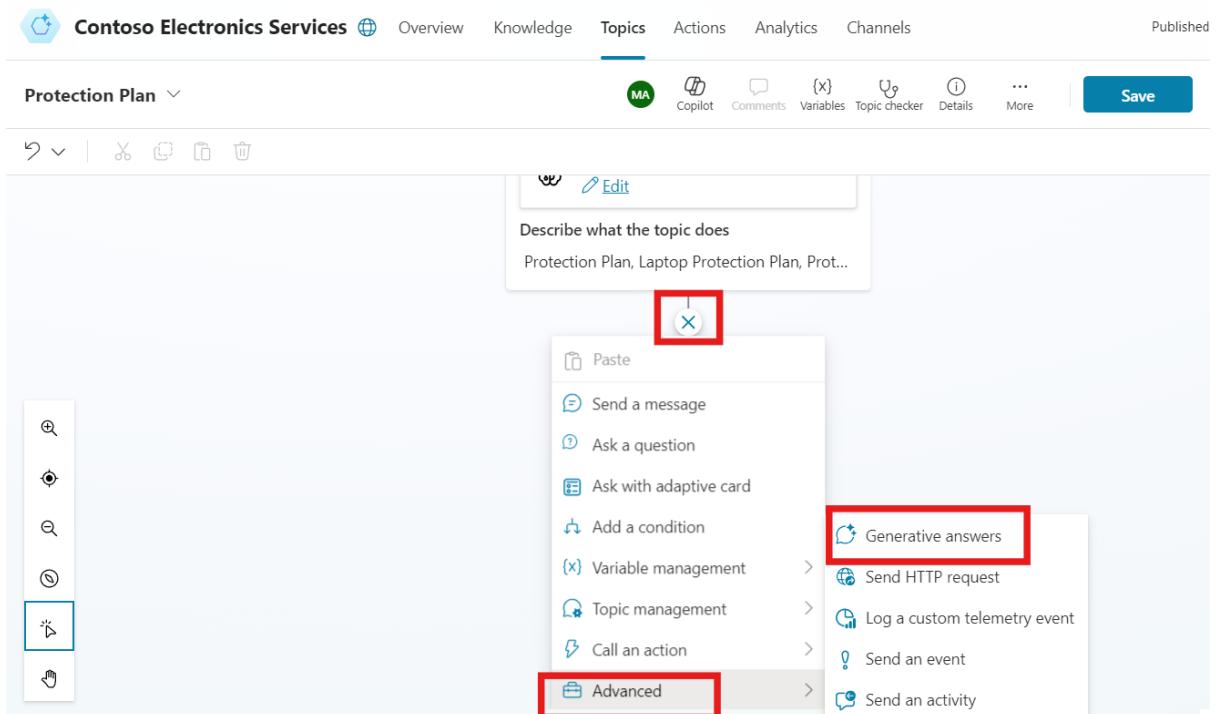
Name	Trigger	Last modified	Enabled
Conversation Start	On Conversation	MOD Administrat...	On
Conversational boosting	On Unknown	MOD Administrat...	On
End of Conversation	On Redirect	MOD Administrat...	On
Escalate	On Talk to...	MOD Administrat...	On
Fallback	On Unknown	MOD Administrat...	On
Goodbye	Triggered	MOD Administrat...	On
Greeting	Triggered	MOD Administrat...	On
Multiple Topics Matched	On Selected	MOD Administrat...	On
On Error	On Error	MOD Administrat...	On
Product Information	Triggered	MOD Administrat...	On

- In the new topic canvas, at the top of the screen, enter the name of the topic "**Protection Plan**".
- In the canvas, you'll see a **Trigger node**. In the **Describe** section, enter the following phrases to trigger this topic:

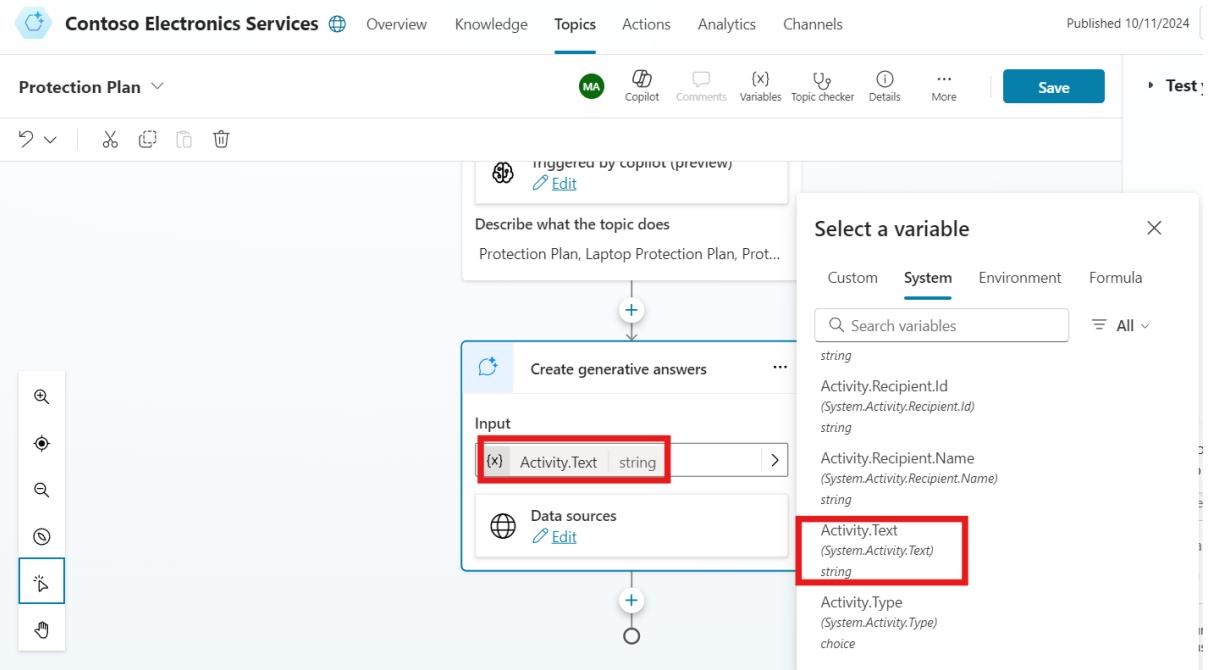
Protection Plan, Laptop Protection Plan, Protection, Protect Plan



6. Below the Trigger node, click on the + sign to create a new node. Select **Advanced options**, then choose **Generative Answer**. A Generative Answer node will be created.



7. In the Generative Answer node, click on the **Input** option variable window will open.
8. In the variable window, select **System** and scroll down to choose **Activity.Text**.



9. In the Generative Answer node, click on the **Edit** option in the **Data Source** section.
10. Enable the option **Search only selected sources**.
11. Choose the **Protection Plan** doc from the options displayed and scroll down.
12. In the **Content Moderation** section, select **Medium**.
13. Scroll up and click on the **(X)** to close Create generative answer properties window.

selected mode.

Search only selected sources

<input type="checkbox"/> Name
<input type="checkbox"/> Refund Policy.docx
<input type="checkbox"/> Sales and Promotions.docx
<input checked="" type="checkbox"/> Protection Plan.docx

+ Add knowledge

> Classic data

Allow the AI to use its own general knowledge (preview)

Content moderation ⓘ

Medium

fx

Hello! I am Contoso Virtual Agent. How May I Help You?

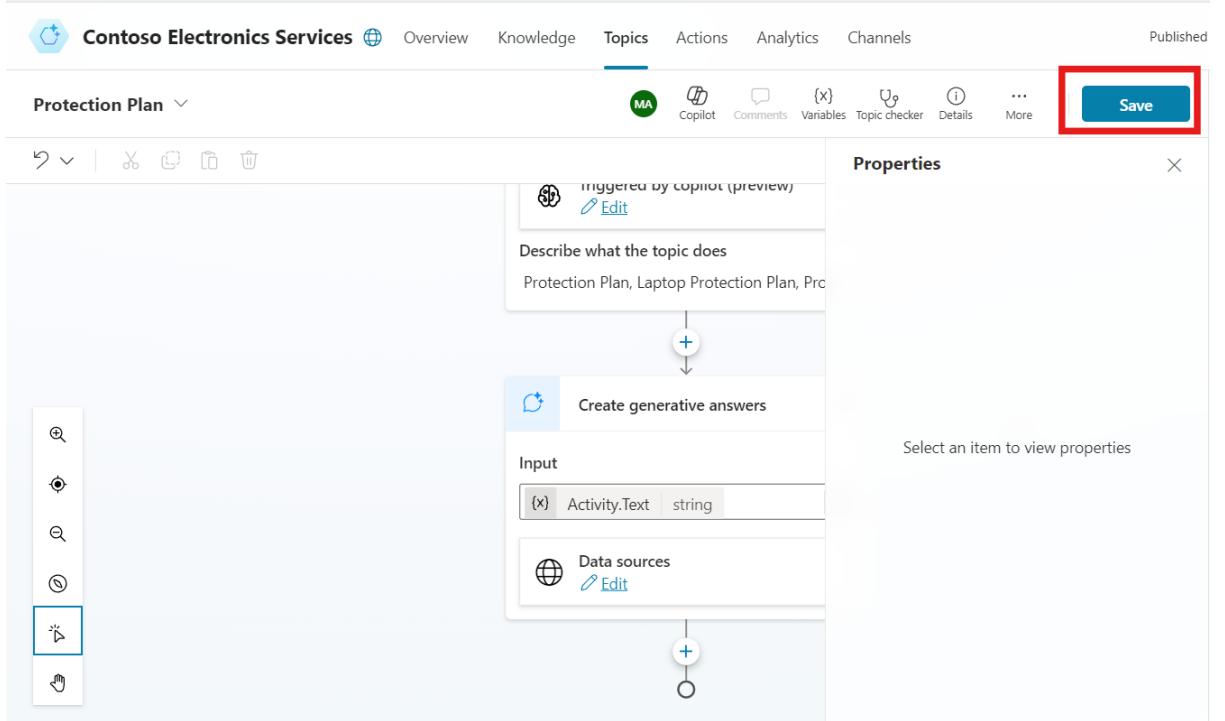
13 minutes ago

Ask a question or describe what you need

0/2000

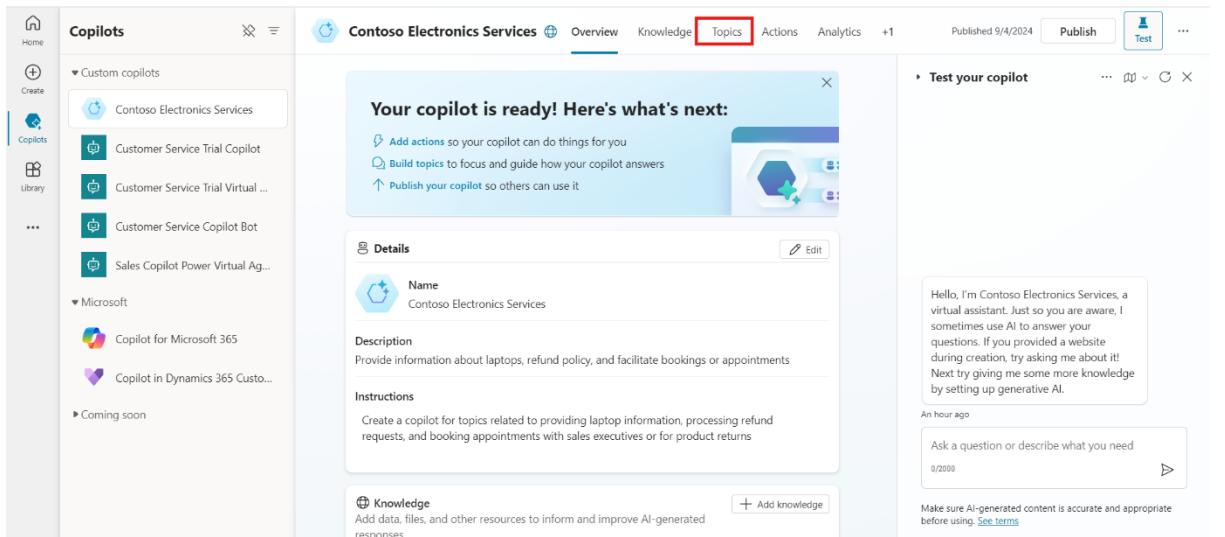
Make sure AI-generated content is accurate and appropriate before using. [See terms](#)

14. Click on the **Save** button to save your configurations for the "**Protection Plan**" topic.



Task 6: Configure the Conversation Start Topic

1. Navigate to Copilot Studio and select the Copilot you've created for this project.
2. In the top navigation bar, select **Topics**, which is located next to **Knowledge**.



3. In the Topics section and select the **System** option to view the available system topics.
4. Find and select the **Conversation Start** topic to open it.

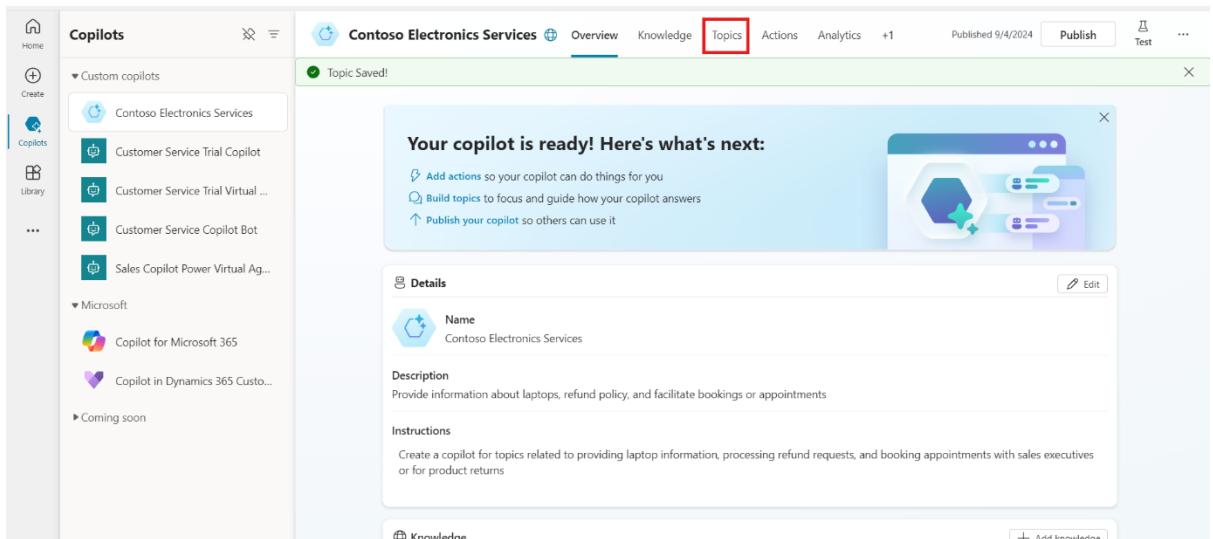
- Below the **Trigger** node, a message node is available. Replace the message with the given below content.

Hello! I am Contoso Virtual Agent. How May I Help You?

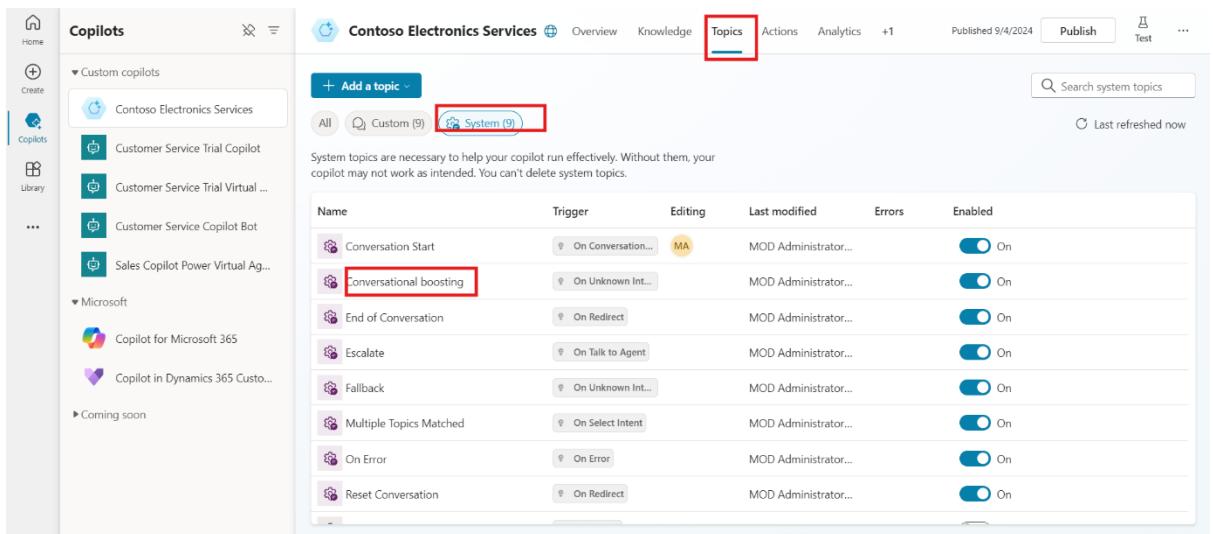
- Click the **Save** button to save your configuration.

Task 7: Configure the Conversational Boosting Topic

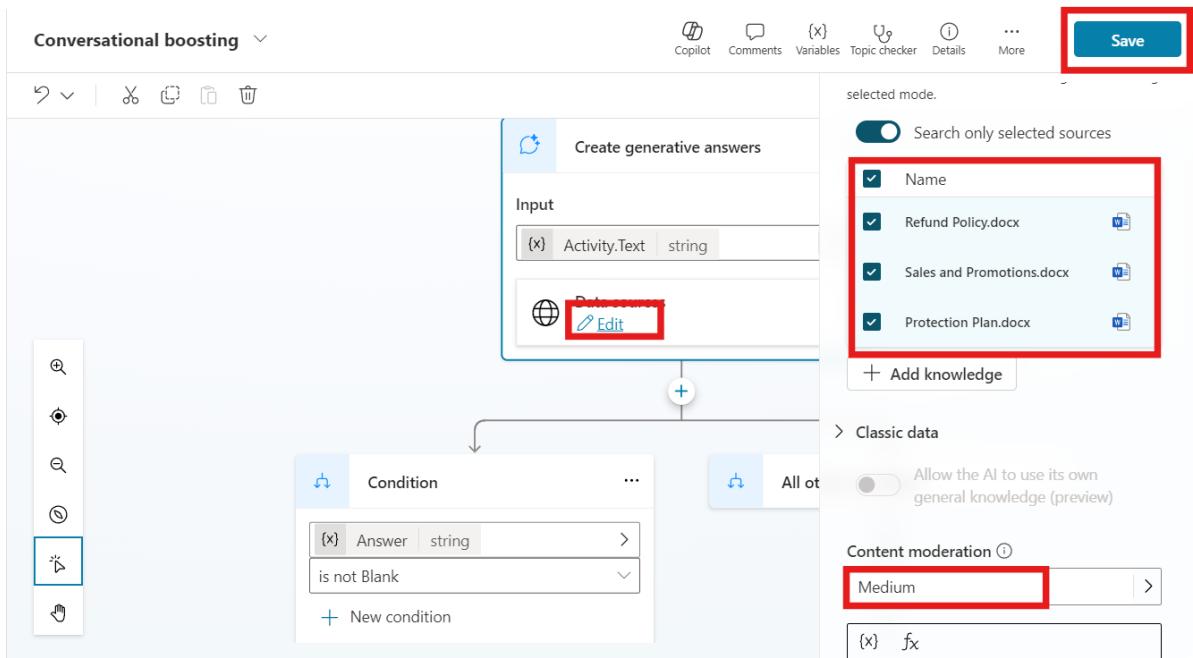
- Navigate to Copilot Studio and select the Copilot you've created for this project.
- In the top navigation bar, click on **Topics**, which is located next to **Knowledge**.



3. In the Topics section, select the **System** option to view the available system topics.
4. Find and select the **Conversational Boosting** topic to open it.



5. In the **Generative Answer** node, click on **Edit** below the data source section.
6. Toggle on the Search Only Selected Sources option.
7. Select the **Refund Policy, Protection Plan and Sales and Promotions** doc knowledge base as the sources for search from.
8. Scroll down in the Generative Answer properties window.
9. In the Content Moderation section, select the **medium** option for content moderation.
10. Close the Generative Answer properties window once you're done.
11. Click on the **Save** button to save the configuration.



Task 8: Use Generative Answers in the System Fallback Topic

1. In the Copilot pane on the left-hand side of the screen, select the copilot you've created to return to the **Knowledge** tab.
2. Select the Topics tab located at the top of the screen.

3. Within the Topics tab, select the **System** option to view the available system topics.
4. Find and select the **Fallback** topic to open it.

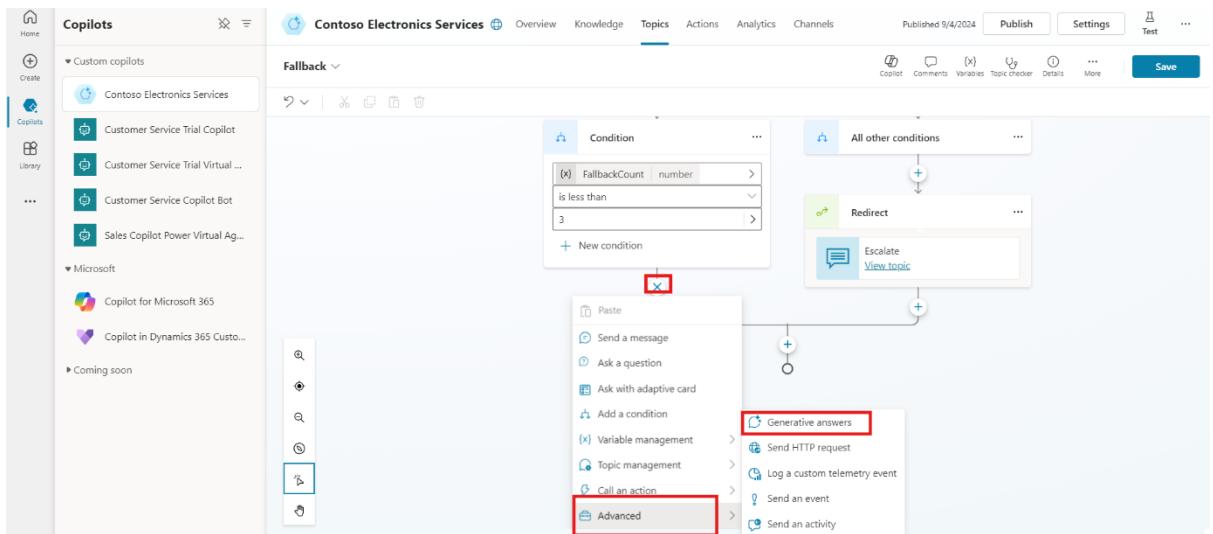
The screenshot shows the Microsoft Copilot Topics page for the 'Contoso Electronics Services' copilot. The 'Topics' tab is selected. Under the 'System (9)' tab, the 'Fallback' topic is highlighted with a red box. The table lists various system topics with their triggers, last modified dates, and enable status.

Name	Trigger	Last modified	Enabled
Book Appointments	Triggered by copilot	MOD Administrator...	On
Compare laptop	Triggered by copilot	MOD Administrator...	On
Conversation Start	On Conversation Start	MOD Administrator...	On
Conversational boosting	On Unknown Intent	MOD Administrator...	On
End of Conversation	On Redirect	MOD Administrator...	On
Escalate	On Talk to Agent	MOD Administrator...	On
Fallback	On Unknown Intent	MOD Administrator...	On
Goodbye	Triggered by copilot	MOD Administrator...	On
Greeting	Triggered by copilot	MOD Administrator...	On
Multiple Topics Matched	On Select Intent	MOD Administrator...	On
On Error	On Error	MOD Administrator...	On

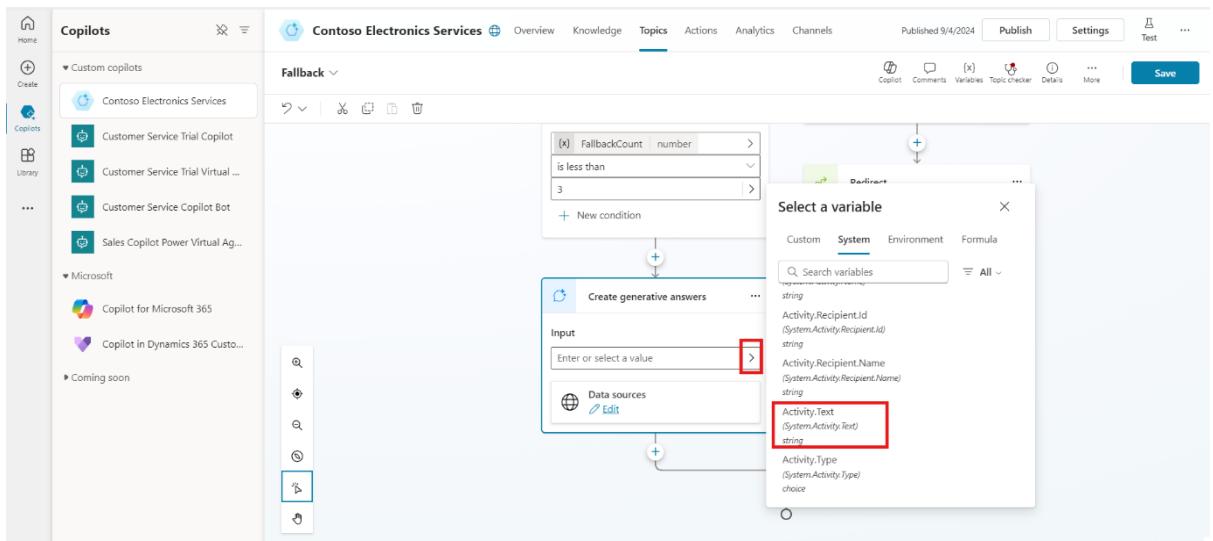
5. In the **Fallback** topic, locate the existing message node.
6. Click on the three dots (•••) in the top-right corner of the message node and select **Delete** to remove it.

The screenshot shows the Microsoft Copilot Flow builder for the 'Fallback' topic. The flow consists of a Condition node (FallobackCount < 3), an All other conditions node, and a Redirect node (Escalate). Below the flow, a Message node displays the text 'I'm sorry, I'm not sure how to help with...'. A context menu is open over the Message node, with the 'Delete' option highlighted with a red box.

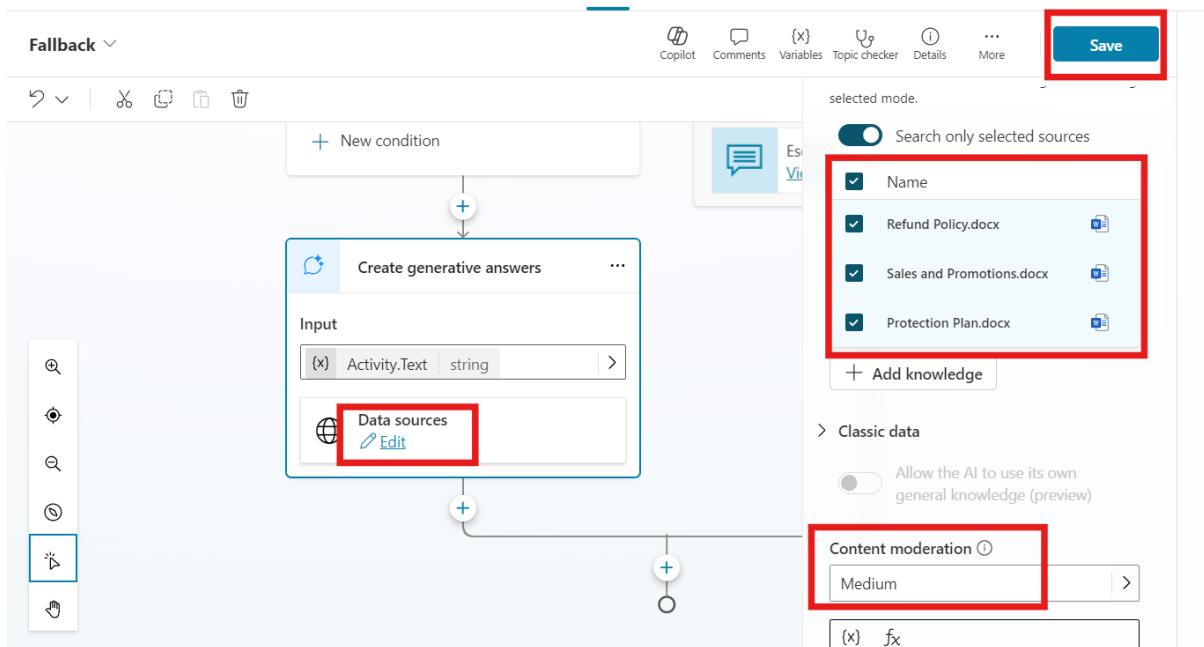
7. Below the Condition node, click on the + icon to add a new node. Select Advanced and then choose Generative answers from the options.



- In the Generative answers node, for the Input field, select **Activity.Text** from the system variables.

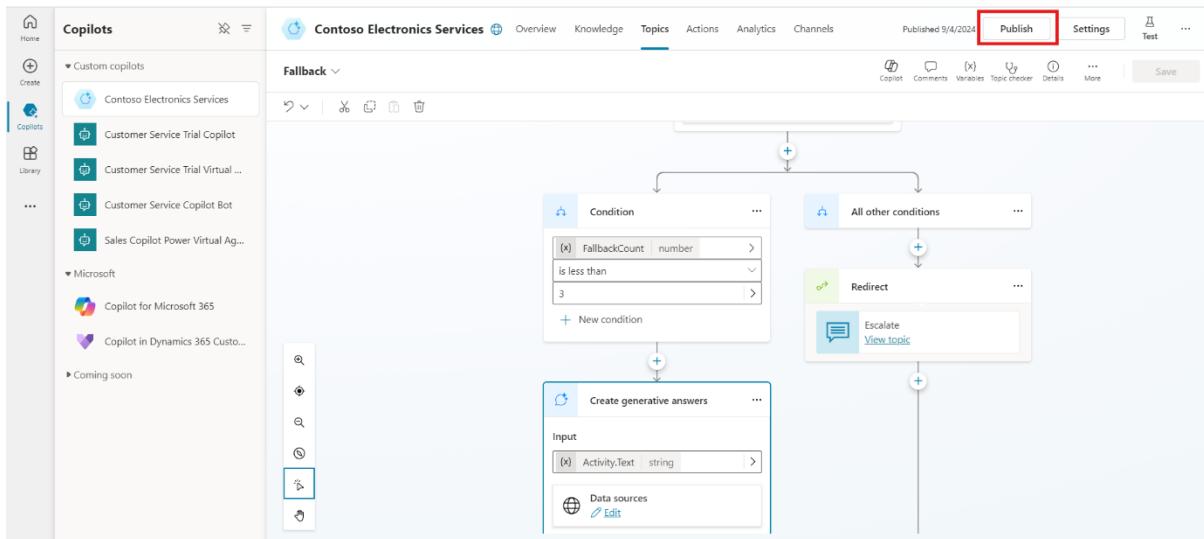


- Under the **Data sources** section, click on **Edit**.
- Toggle on **Search only selected sources** to ensure that the AI pulls information only from specific knowledge sources.
- From the list of available sources, select the **Refund Policy, Sales and Promotions and Protection Plan Doc** as the knowledge source.
- Deselect the option **Allow the AI to use its own general knowledge** to ensure the AI only uses the specified knowledge source.
- For Content moderation, select **Medium** to manage the level of content filtering.
- After completing the above steps, click **Save** to save the generative answers configuration for the Fallback topic.



Task 9: Publish the Copilot

1. In the Copilot Studio, find the **Publish** button. This button is typically placed on the right side of the window.
2. Click on the **Publish** button.
3. A confirmation window may appear; click **Publish** again to confirm.



Conclusion

After completing this exercise, you have gained the following knowledge:

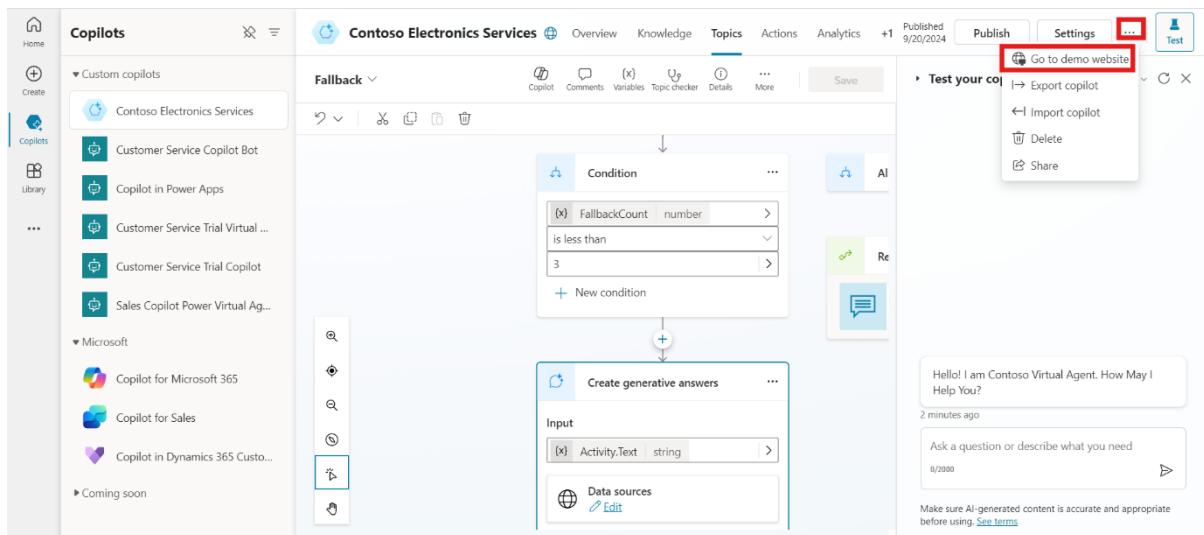
1. Successfully created and managed topics using Copilot Studio.
2. Configured advanced nodes like generative answers and adaptive cards.
3. Developed structured responses for topics like product information, deals, and appointments.
4. Applied real-world use cases for enhanced customer engagement through Copilot.
5. Gained a deeper understanding of how to automate and streamline customer service interactions using AI.

Test the Copilot

To test the functionalities of your Copilot and Power Automate flows, follow these steps:

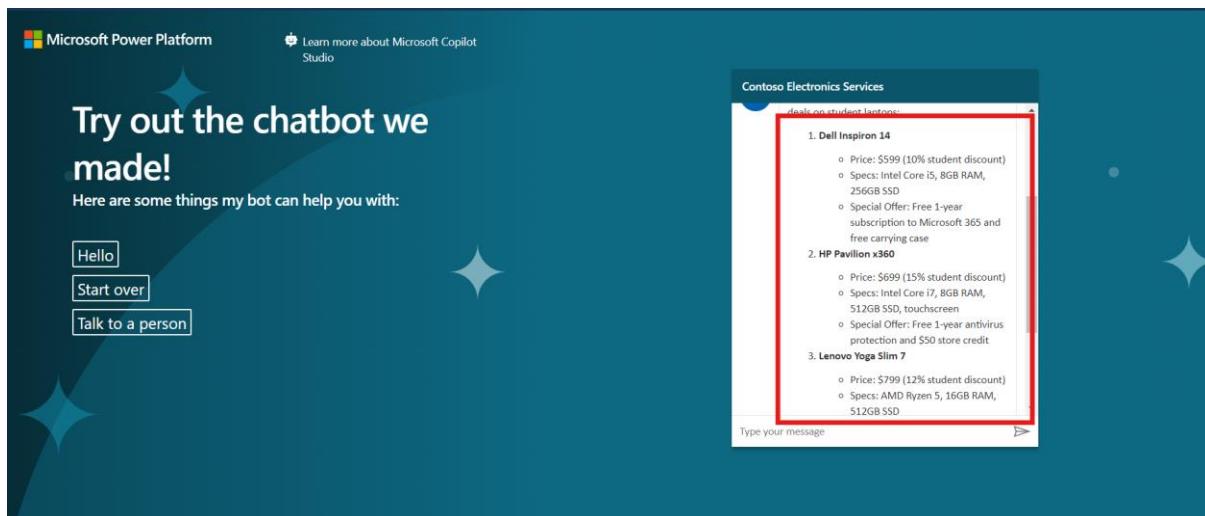
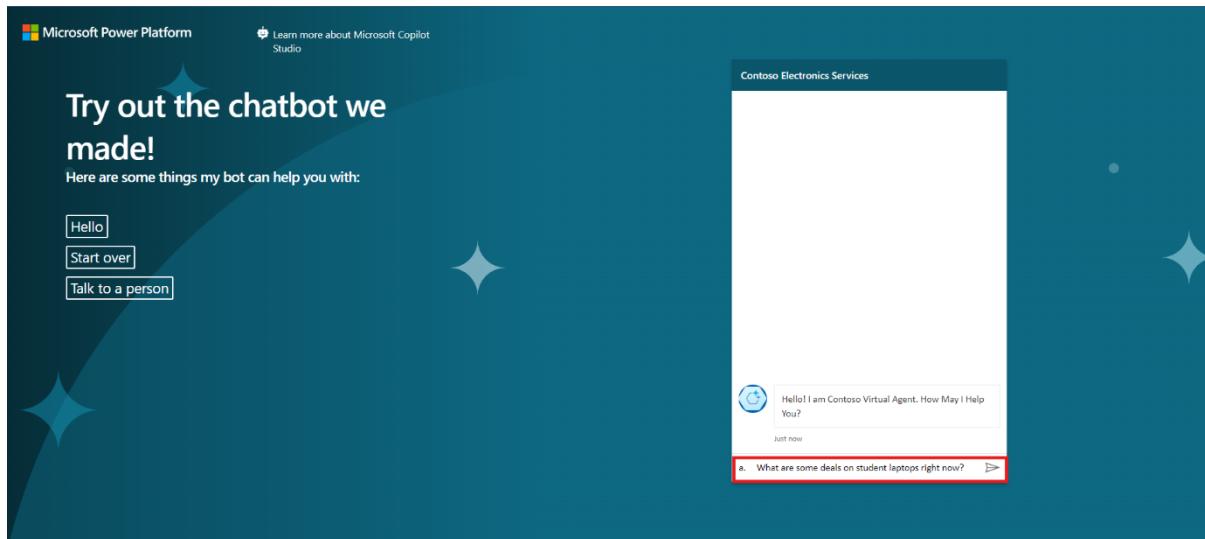
Click on the three-dot right side of the window and select **Go to demo website**. A demo website window will open start the conversation into the website chat window.

Note: Testing Copilot with the same prompt multiple times may yield varying responses due to contextual learning, dynamic data access, and inherent randomness in its output generation.

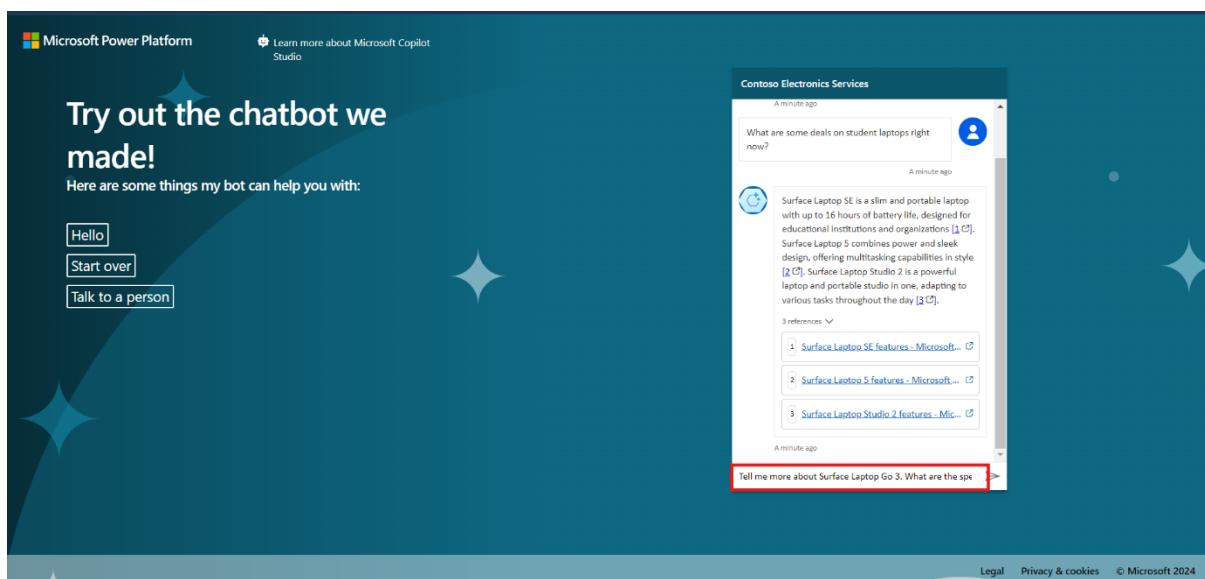


Once the demo website launch and message appear in chat box enter the following trigger phrases to test the topics you created:

1. What are some deals on student laptops right now?



2. Tell me more about Surface Laptop Go 3. What are the specs & cost?



The screenshot shows the Microsoft Power Platform interface on the left, featuring a dark teal background with white text. It includes the Microsoft Power Platform logo, a 'Learn more about Microsoft Copilot Studio' link, and a main heading 'Try out the chatbot we made!'. Below it, a sub-section says 'Here are some things my bot can help you with:' followed by three buttons: 'Hello', 'Start over', and 'Talk to a person'. On the right, a Microsoft Edge browser window is open to a page titled 'Contoso Electronics Services'. The page displays a document titled 'Sales%20and%20Promotions.docx' which contains information about the Surface Laptop Go 3. A red box highlights the 'Specifications' section, which lists the following details:

- Display: 12.4-inch PixelSense touchscreen (1536 x 1024 resolution)
- Processor: Intel Core i5-1035G1
- RAM: 4GB or 8GB
- Storage: 64GB eMMC, 128GB SSD, or 256GB SSD
- Graphics: Intel UHD Graphics
- Battery Life: Up to 13 hours of typical device usage
- Operating System: Windows 11 Home in S mode

Below the specifications, there is a note: 'The Surface Laptop Go 3 is a compact and affordable laptop designed for students and professionals. Here are the specifications and cost details.'

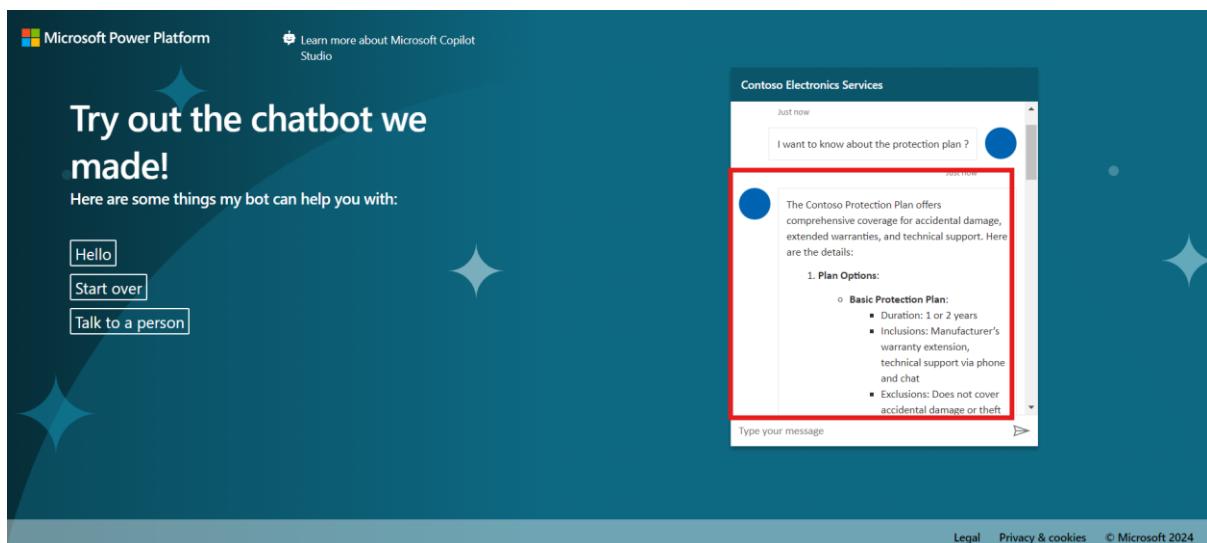
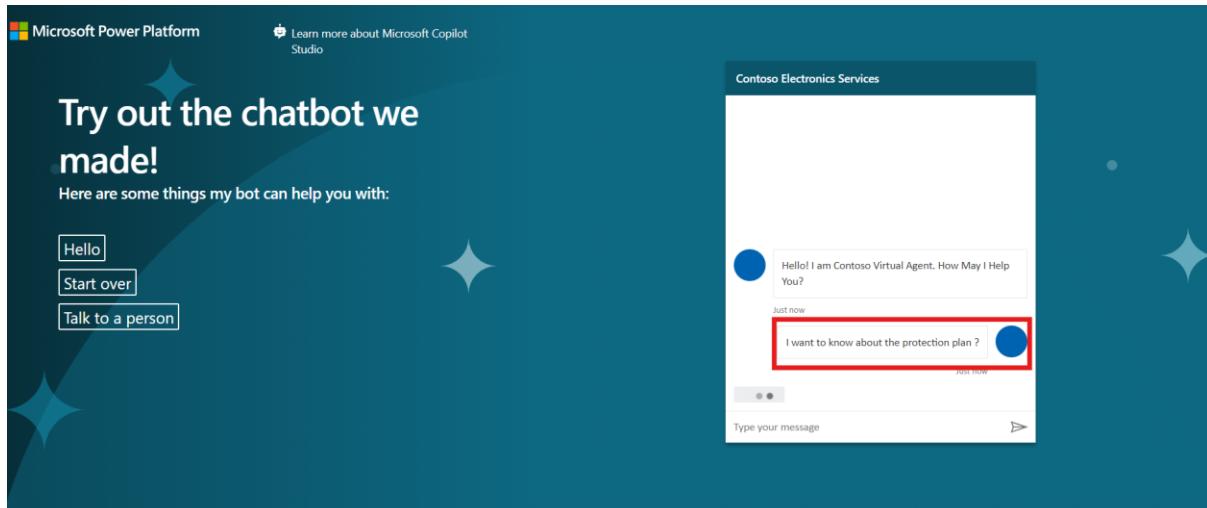
3. Compare laptop surface laptop go 3 and surface laptop studio 2.

The screenshot shows the Microsoft Power Platform interface on the left, similar to the first one but with a different query. It includes the Microsoft Power Platform logo, a 'Learn more about Microsoft Copilot Studio' link, and a main heading 'Try out the chatbot we made!'. Below it, a sub-section says 'Here are some things my bot can help you with:' followed by three buttons: 'Hello', 'Start over', and 'Talk to a person'. On the right, a Microsoft Edge browser window is open to a page titled 'Contoso Electronics Services'. The page displays a document titled 'Surface Laptop Go 3 features - Microsoft'. A red box highlights the beginning of the document content, which describes the Surface Laptop Go 3 as a light, portable laptop with a 12.4" PixelSense™ display, weighing 2.49 pounds. It features a Fingerprint Power Button with One Touch sign-in through Windows Hello, dual far-field Studio Mics, a 720p HD front-facing camera, and various ports like USB-A, USB-C, and a 3.5 mm headphone jack. The laptop comes with Windows 11 Home for consumer customers and Windows 11 Pro or Windows 10 Pro for commercial customers. It offers up to 15 hours of battery life and has a touchscreen display with Studio Mics and Omnisonic Speakers for video calls. Optional accessories include Surface Mobile Mouse, Surface Earbuds, and the Microsoft or Surface USB-C Travel Hub [1]. For pricing details, it's recommended to check the official Microsoft website or authorized retailers for the most up-to-date information.

The screenshot shows the Microsoft Power Platform interface on the left, with the same query as the previous screenshot. It includes the Microsoft Power Platform logo, a 'Learn more about Microsoft Copilot Studio' link, and a main heading 'Try out the chatbot we made!'. Below it, a sub-section says 'Here are some things my bot can help you with:' followed by three buttons: 'Hello', 'Start over', and 'Talk to a person'. On the right, a Microsoft Edge browser window is open to a page titled 'Contoso Electronics Services'. The page displays a document titled '3. Compare laptop surface laptop go 3 and surface laptop studio 2.'. A red box highlights the beginning of the document content, which states: 'The Surface Go 3 and the Surface Studio 2 are designed for different user needs and offer distinct features: Surface Go 3:'. Below this, a list of specifications for the Surface Go 3 is shown:

- Display: 10.5-inch PixelSense touchscreen (1920 x 1280 resolution)
- Processor: Intel Pentium Gold 6500Y or Intel Core i3
- RAM: 4GB or 8GB
- Storage: 64GB eMMC or 128GB SSD
- Battery Life: Up to 11 hours of usage
- Operating System: Windows 11 Home in S mode

- I want to know about the protection plan?

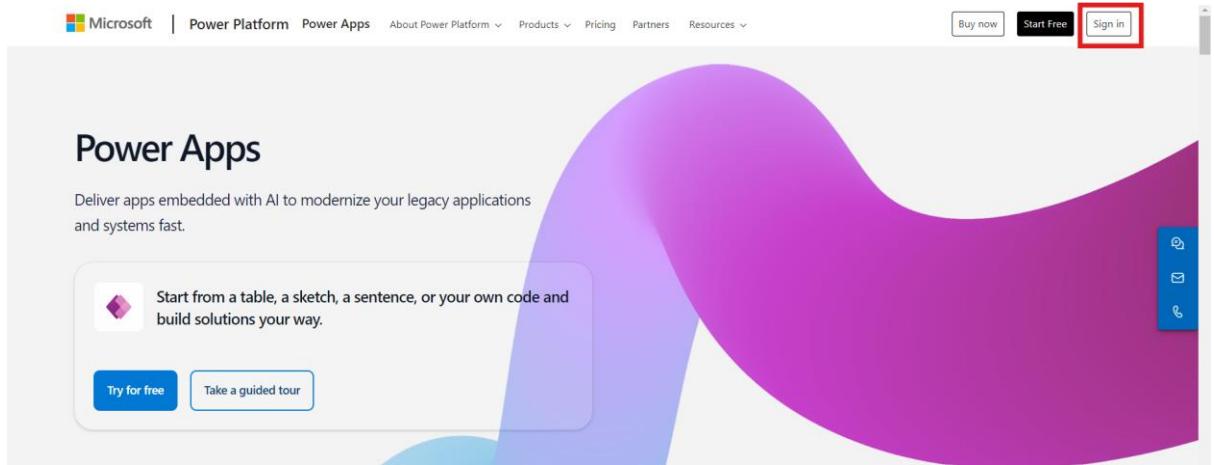


Exercise 3: Signup for Power App and Create Custom Table

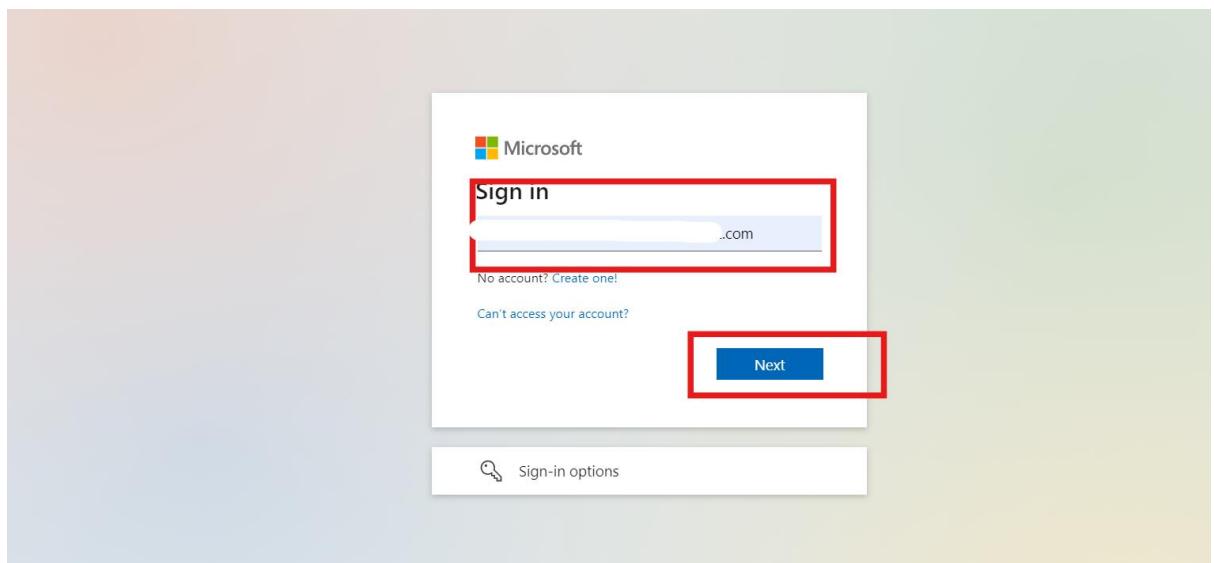
In this exercise, you'll learn how to sign up for Microsoft Power Apps and create a custom table by following a series of practical steps. The exercise begins with signing into the Power Apps platform using the same credentials as Copilot Studio and setting up the correct environment. From there, you'll be guided through creating a new solution and publisher within Power Apps. Once the solution is set, you will configure it as your preferred choice. Finally, the exercise walks you through the process of building a custom table, "Book Appointments," with specific columns to store appointment data. This hands-on exercise provides essential experience with Power Apps, helping you understand the core functionalities of creating and managing tables within a solution.

Task 1: Sign Up for Microsoft Power Apps

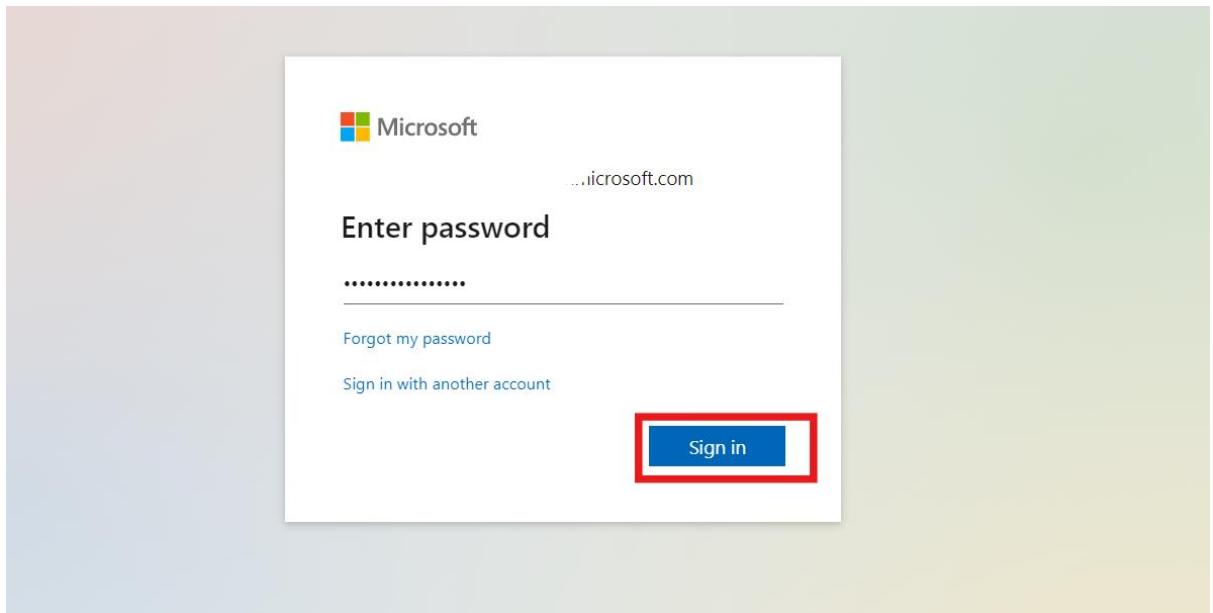
1. Open your web browser and go to the <https://powerapps.microsoft.com/free/> page and from top right corner click on **Sign In**



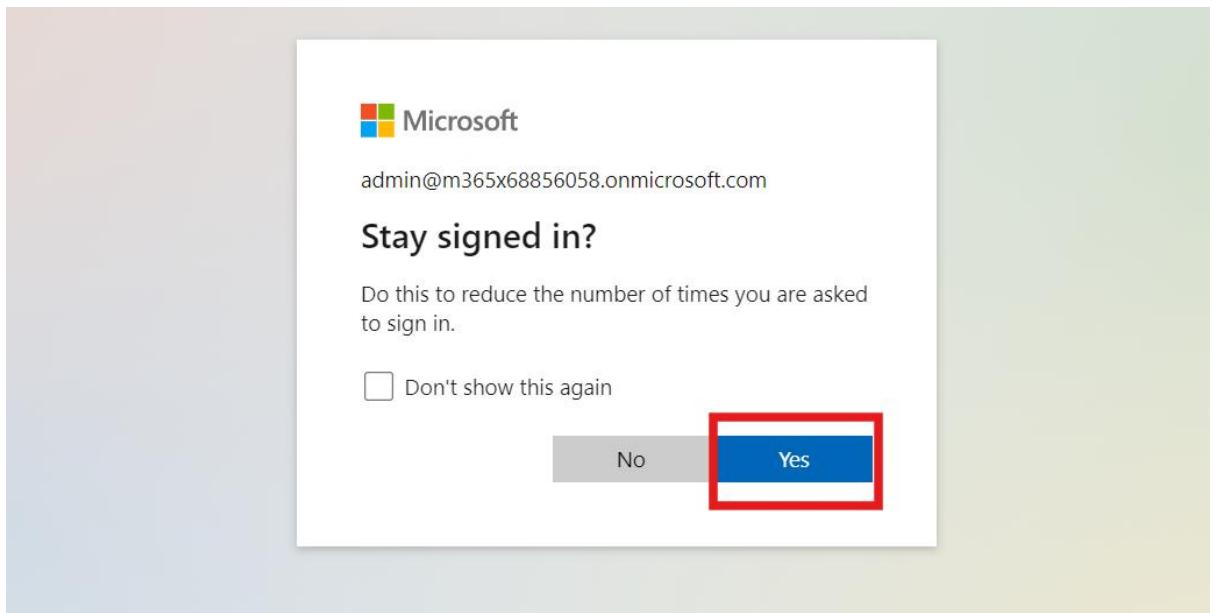
2. Enter your same **Email ID** which use in Copilot studio. And then click on the **Next**.



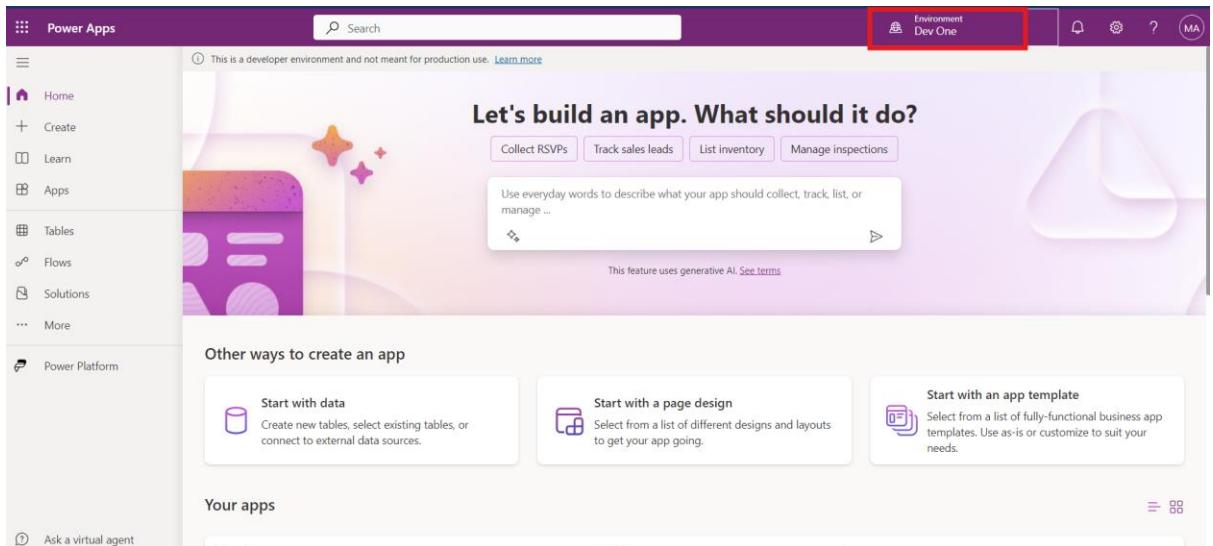
3. Enter the **Password** and click on **Sign In**.



4. If you receive a prompt stating that you already have a Microsoft account associated with the entered email address, select **Sign in**. Enter your same **ID and Password** when prompted.
5. After signing in, you may be prompted with an option to stay signed in. Select **Yes** to stay signed in for quicker access in the future.

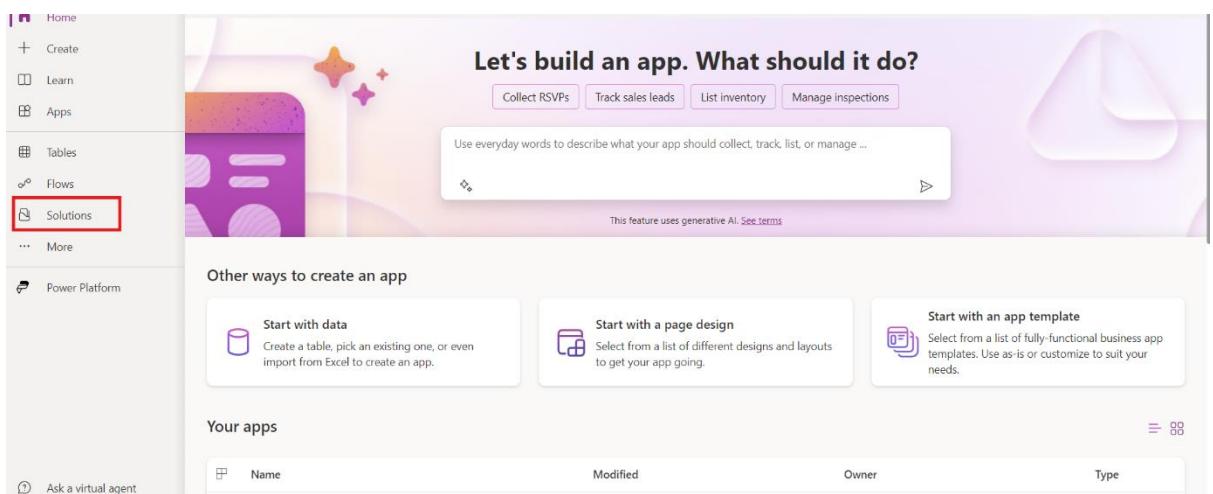


6. Once you're signed in, look at the top-right corner of the screen. Choose the environment, we use **Dev One** environment for this lab, participants can use any development environment. This is important for the next steps, as you'll need to select this environment when working in Power Apps.



Task 2: Create a Solution in Power Apps

- Once signed in Power Apps, In the left-hand navigation pane, find and select **Solutions**.



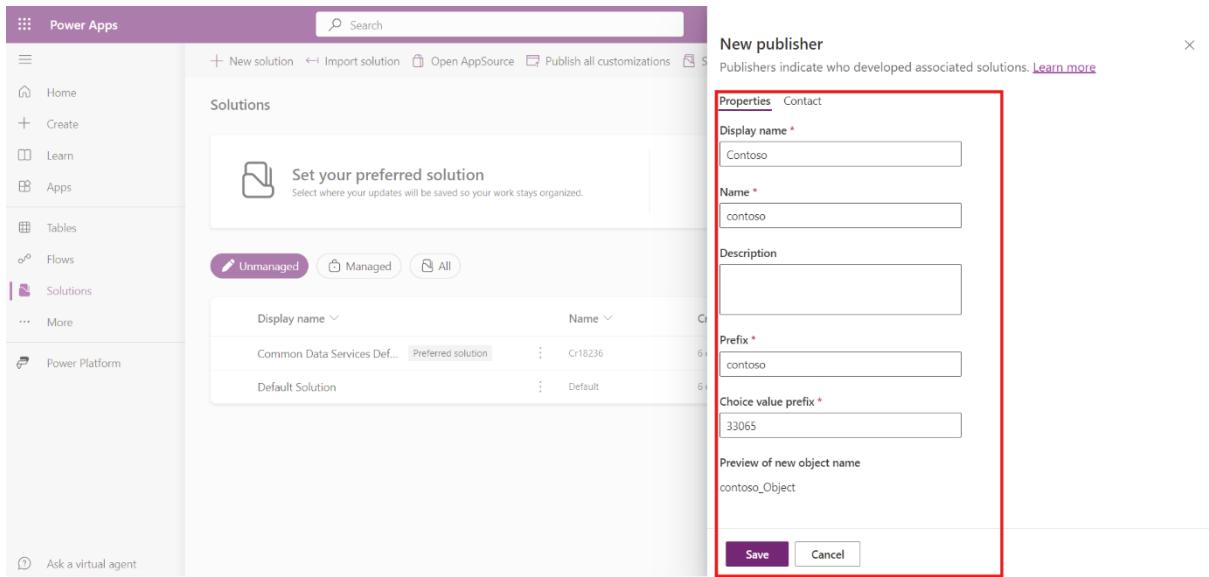
- Once in the Solutions section, click on + New solution to create a new solution.

The screenshot shows the Microsoft Power Platform Solutions page. On the left is a navigation sidebar with options like Home, Create, Learn, Apps, Tables, Flows, Solutions (which is selected), and More. The main area is titled 'Solutions' and contains a 'Set your preferred solution' dialog. This dialog has a note: 'Select where your updates will be saved so your work stays organized.' It shows the current preferred solution is 'Common Data Services Default Solution'. Below this is a table with columns: Display name, Name, Created, Version, Publisher, and Solution check. It lists two solutions: 'Common Data Services Def...' (Preferred solution) and 'Default Solution'. The 'Default Solution' row is selected.

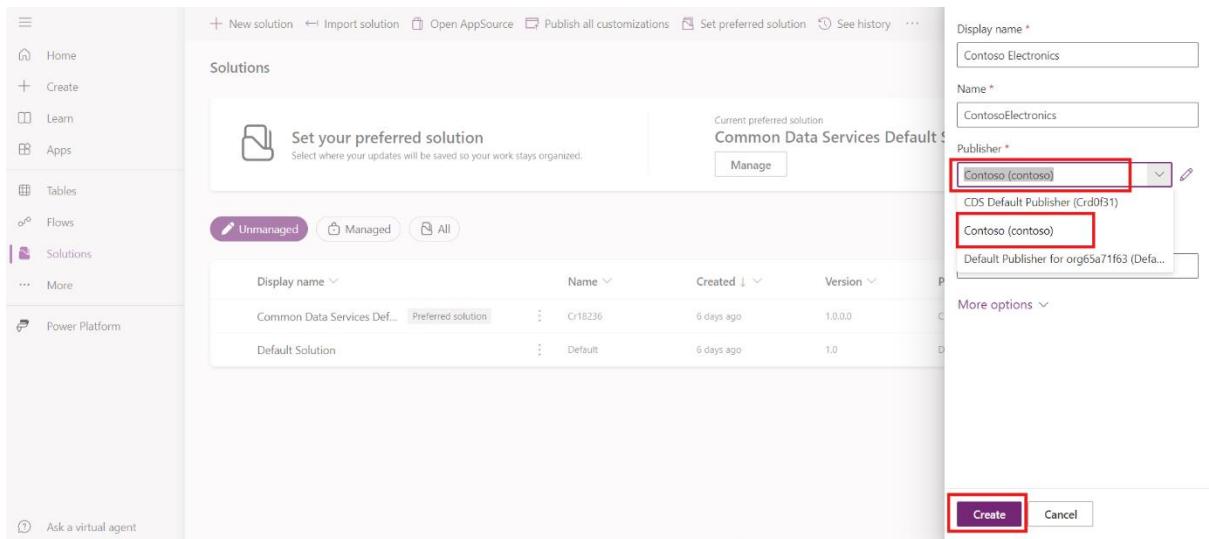
3. In the **New solution** form, enter **Contoso Electronics** as the Display Name for your solution. This name identifies your solution within the environment.
4. Next, you need to assign a publisher to your solution. Click on **+ New publisher** to create a new one.

The screenshot shows the 'New publisher' form. It has fields for 'Display name' (containing 'Contoso Electronics'), 'Name' (containing 'ContosoElectronics'), 'Publisher' (a dropdown menu with 'Select a Publisher' and a '+ New publisher' button highlighted with a red box), and 'Version' (containing '1.0.0.0'). At the bottom are 'Create' and 'Cancel' buttons.

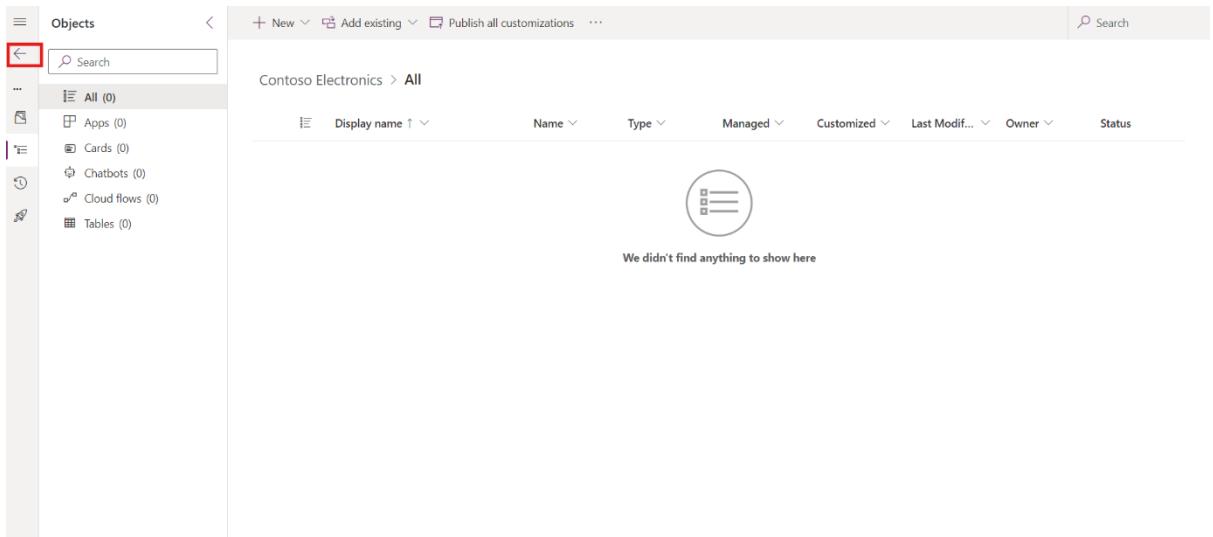
5. Fill in the following details in the publisher form:
 - a. **Display name:** Contoso
 - b. **Name:** contoso
 - c. **Prefix:** contoso
6. After entering these details, click **Save**.



7. Once the publisher is created, select **Contoso (contoso)** from the Publisher dropdown.
8. Click on **Create** to finalize your new solution.

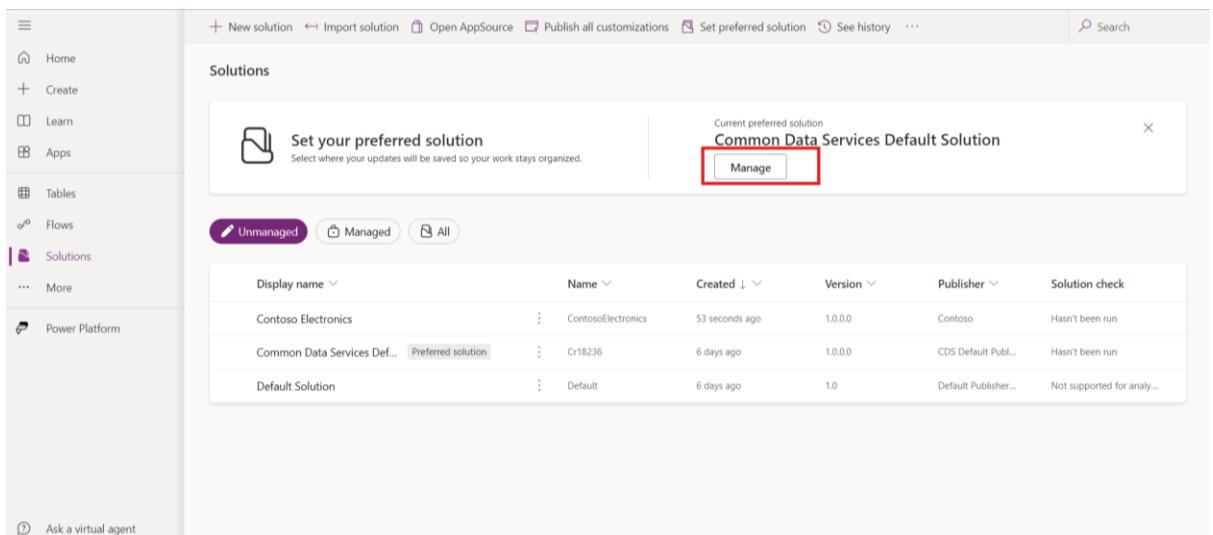


9. After creating your solution, click on **Back** in the left corner of the screen. This takes you back to the main Solutions page, where you can see your newly created solution listed.

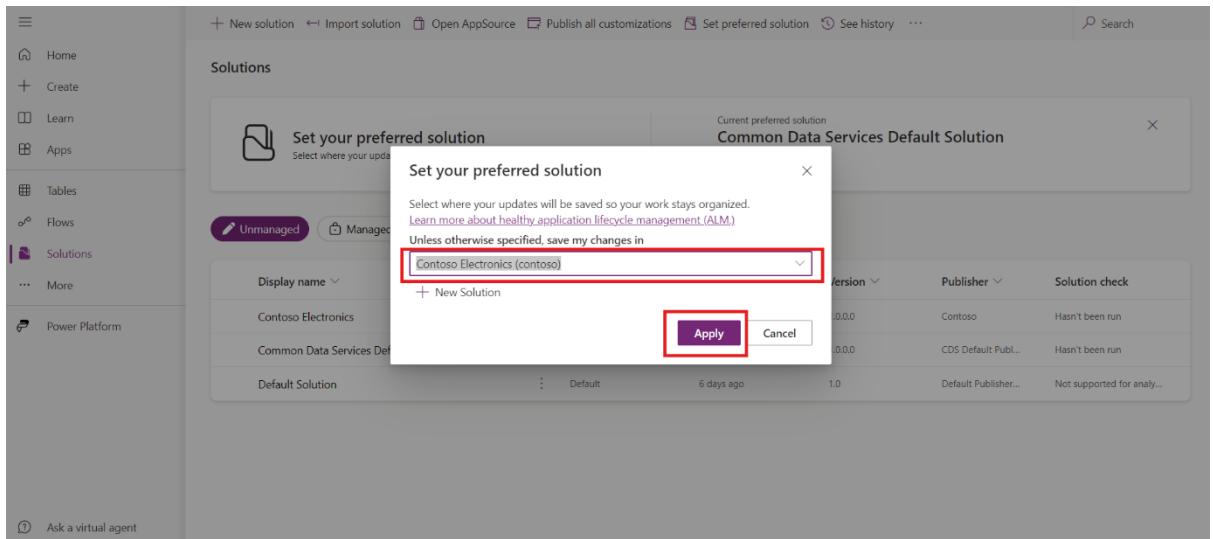


Task 3: Set the Preferred Solution

1. In the Power Apps Maker portal, navigate to the **Solutions** section in the left-hand menu.
2. Locate the option **Manage** under **Current preferred solution** and click on it.

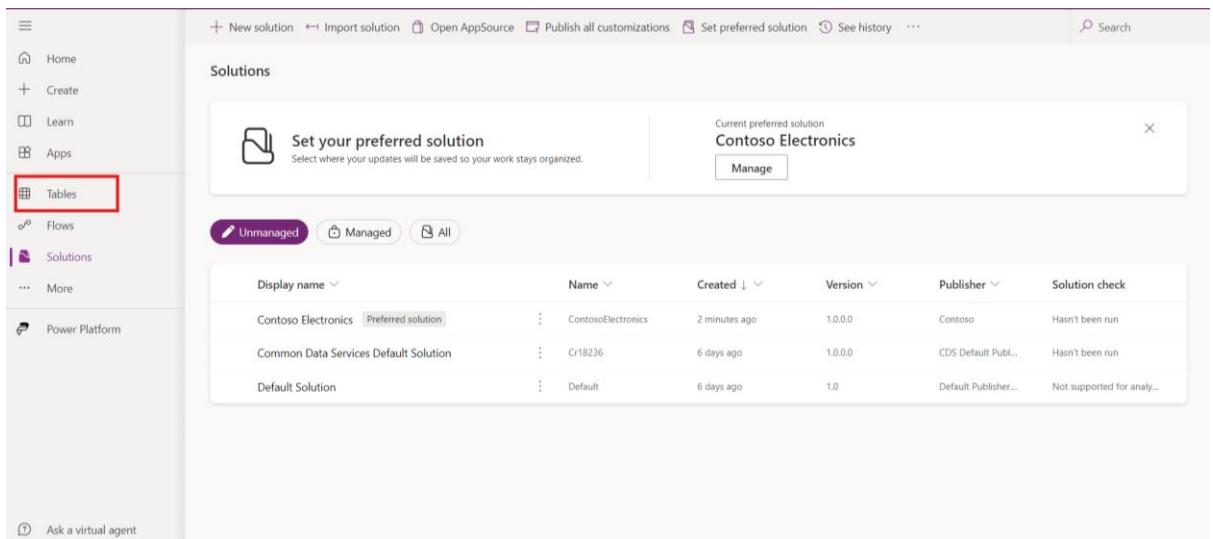


3. A list of available solutions will be displayed. Find and select **Contoso Electronic (contoso)** from the list.
4. Once selected, click on **Apply** to set this solution as your preferred choice.



Task 4: Create the "Book Appointments" Table

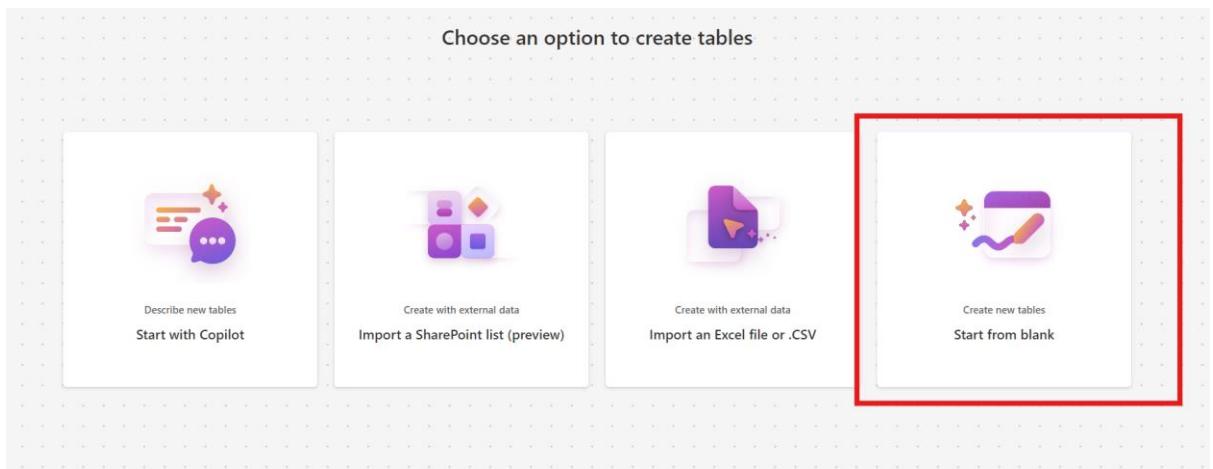
1. In the Power Apps Maker portal, select **Tables** from the left-hand navigation pane.



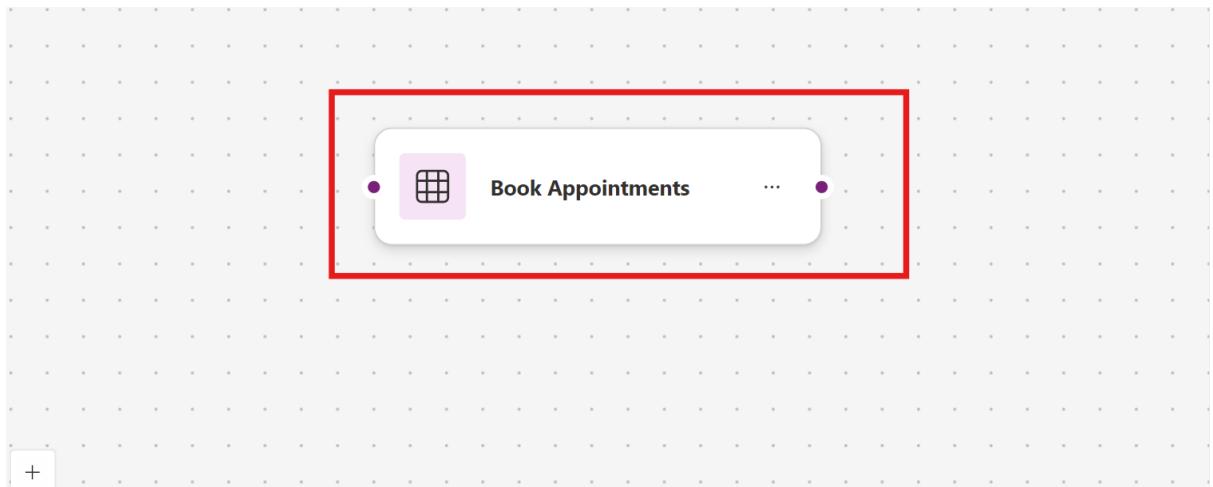
2. Click on **+ New table**, and then choose **Create new table** to start creating your new table.

The screenshot shows the Microsoft Power Platform Tables page. On the left, there's a sidebar with options like Home, Create, Learn, Apps, Tables, Flows, Solutions, More, and Power Platform. The 'Tables' section is selected. At the top, there are buttons for '+ New table', 'Import', 'Export', 'Analyze', and a search bar. A dropdown menu is open under '+ New table' with options: 'Create new tables' (highlighted with a red box), 'Set advanced properties', and 'Create a virtual table'. Below this is a table titled 'Table' with columns for Name, Type, Managed, Customized, Customizable, and Tags. It lists standard entities like Account, Address, Appointment, Attachment, Business Unit, and Contact. At the bottom left of the main area, there's a button 'Ask a virtual agent'.

3. Then select **Start from blank** to create a table.

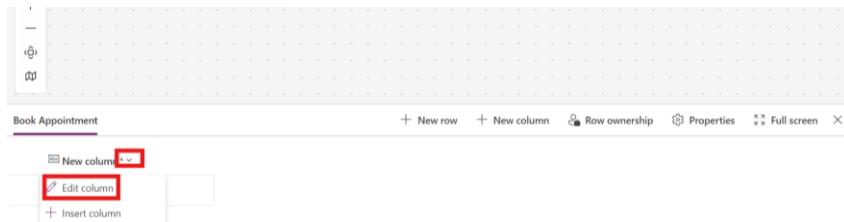


4. By default, the new table will be named "**Table1**." Double click on table name and rename it to **Book Appointments**.

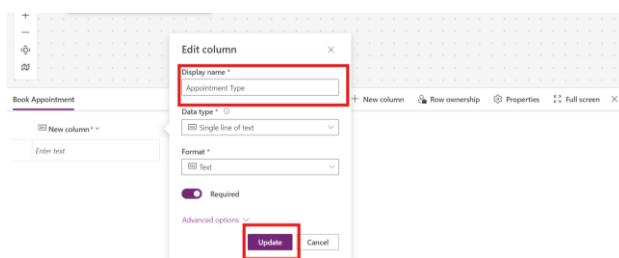


5. Appointment Type Column:

Click on the down arrow next to the first column, and then select the edit column button.

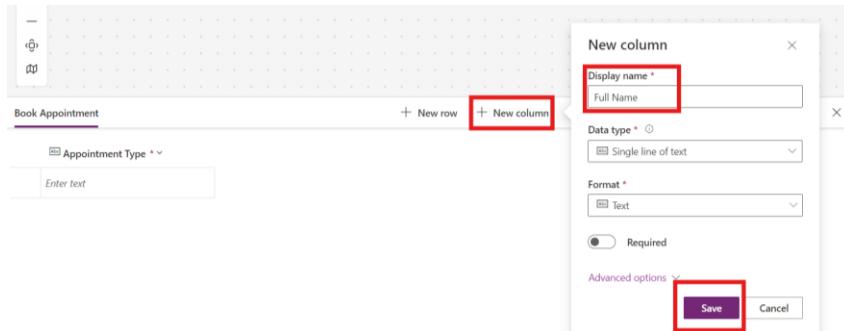


Change the display name to **Appointment Type** and click on **Update**.



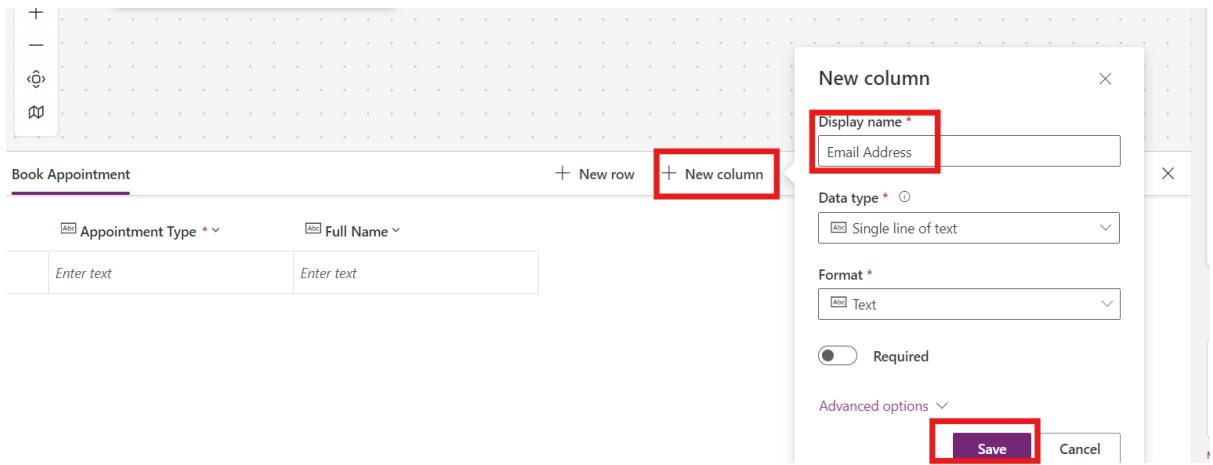
6. Full Name Column:

Click on the **+ New column** button, change the display name to **Full Name**, and save the column.



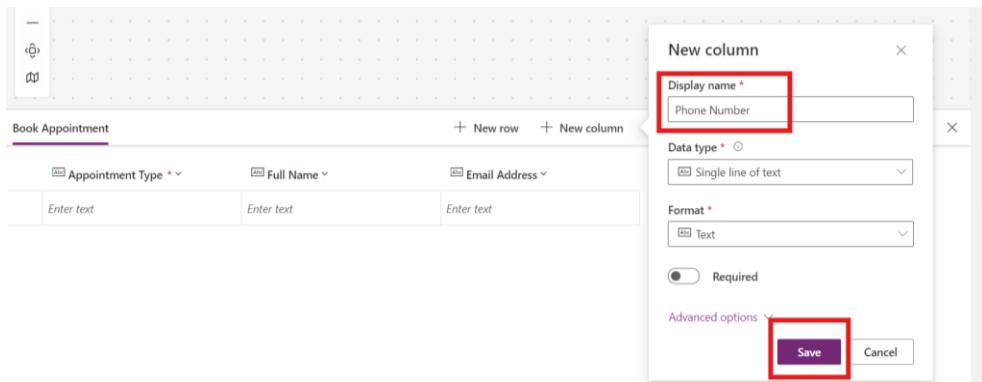
7. Email Address Column:

Click on the **+ New column** button, change the display name to **Email Address**, and save.



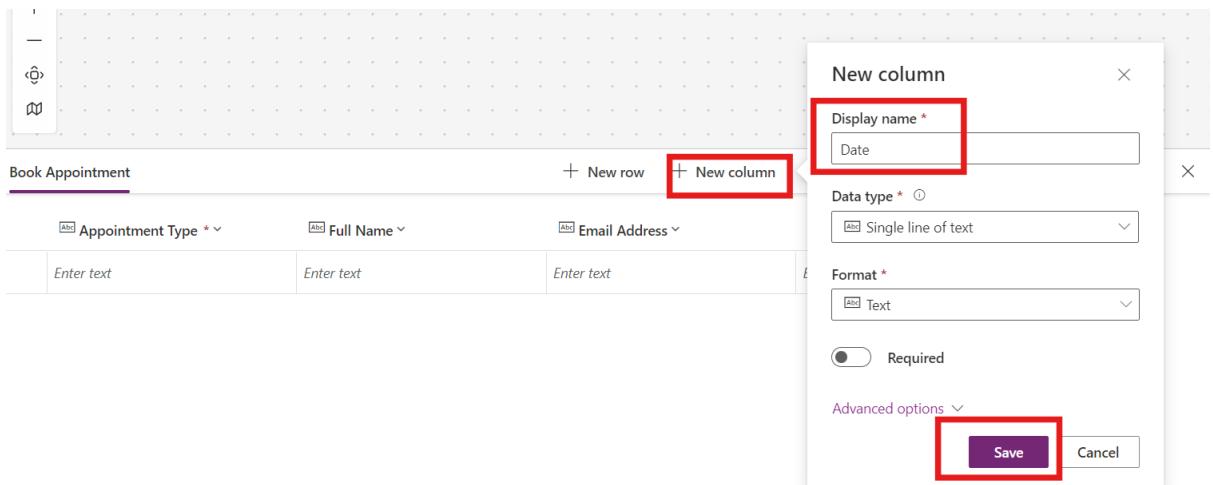
8. Phone Number Column:

Click on the **+ New column** button, change the display name to **Phone Number**, and save.



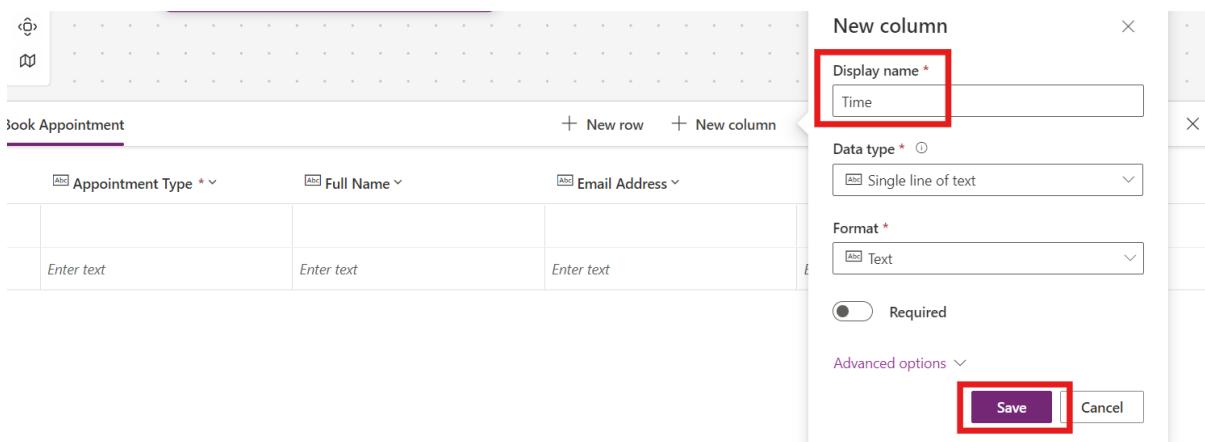
9. Date Column:

Click on the **+ New column** button, change the display name to **Date**, and save.

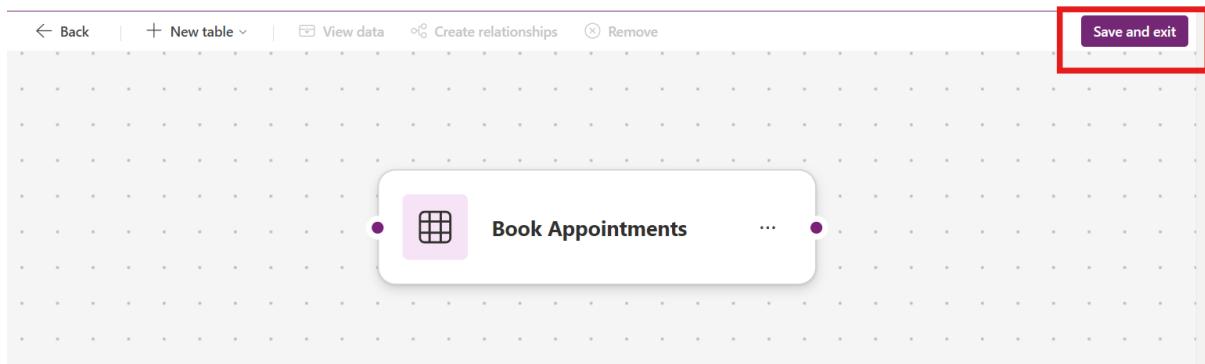


10. Time Column:

Click on the **+** (add column) button, change the display name to **Time**, and save.



- After adding all the necessary columns, click on the **Save and exit** button to finalize and create the "**Book Appointments**" table.



Conclusion

After completing this exercise, you have gained the following knowledge:

- Successfully signed up for Microsoft Power Apps using Copilot Studio credentials.
- Created a new solution named "Contoso Electronics" with a custom publisher.
- Set the "Contoso Electronics" solution as the preferred solution in Power Apps.
- Built a custom table called "Book Appointments" with the required columns for managing appointments.
- Acquired foundational knowledge of Power Apps' environment, solutions, and table creation process.

Exercise 4: Create Power Automate Flow and Integrate Actions

In this exercise, you will learn how to create a Power Automate flow and integrate it with a Copilot action to automate the process of booking appointments. By following the steps provided, you will configure a custom flow that captures appointment details like date, time, and contact information, and maps them into a Dataverse table. Once the flow is set up, you will integrate it within Copilot Studio, allowing Copilot to trigger the flow, gather input data from users, and complete the appointment booking process seamlessly.

Task 1: Create Power Automate Flow to Book an Appointment

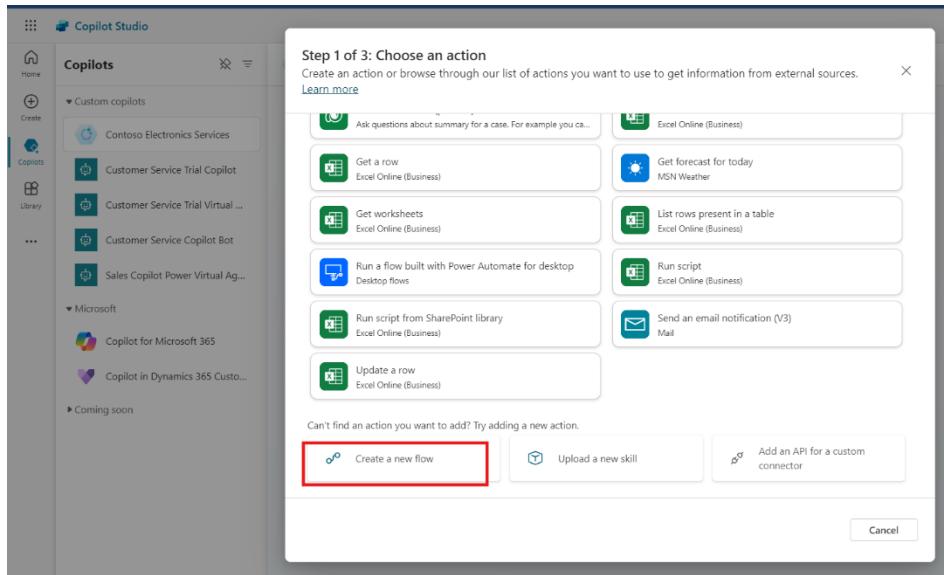
1. Go Back to Copilot studio Contoso Electronics Copilot, Select the **Actions** tab to start configuring actions for your Copilot.

The screenshot shows the Copilot studio interface for 'Contoso Electronics Services'. The left sidebar has 'Copilots' selected, showing a list of existing copilots: 'Contoso Electronics Services', 'Customer Service Trial Copilot', 'Customer Service Trial Virtual ...', 'Customer Service Copilot Bot', and 'Sales Copilot Power Virtual Ag...'. Below this are sections for 'Microsoft' (Copilot for Microsoft 365, Copilot in Dynamics 365 Custo...) and 'Coming soon'. The main area is titled 'Your copilot is ready! Here's what's next:' and includes three steps: 'Add actions so your copilot can do things for you', 'Build topics to focus and guide how your copilot answers', and 'Publish your copilot so others can use it'. A large central box is titled 'Details' and contains fields for 'Name' (set to 'Contoso Electronics Services'), 'Description' (providing info about laptops, refund policy, and bookings), and 'Instructions' (describing the copilot's purpose). A 'Knowledge' section lists a file 'Contoso Returns Policy for customers.docx' and has a toggle switch for 'Disabled' which is currently off. The top navigation bar includes tabs for Overview, Knowledge, Topics, **Actions**, Analytics, Channels, Publish, Settings, and Test.

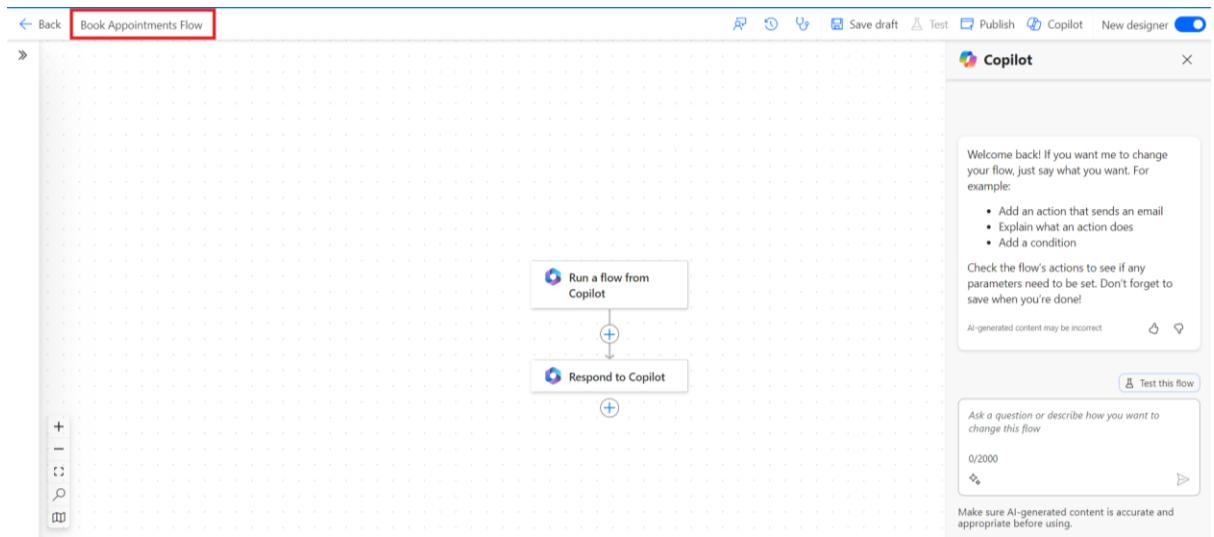
2. Click on **+ Add an action**.

The screenshot shows the same Copilot studio interface for 'Contoso Electronics Services'. The 'Actions' tab is still selected. The main area now displays a large lightning bolt icon and the text 'Create your first action'. Below it is a sub-instruction: 'Add actions to empower the AI to complete specific tasks for improved engagement.' A prominent red box highlights the blue 'Add an action' button. At the bottom of the screen, a small note says 'This AI-powered feature is currently in preview. See terms.'

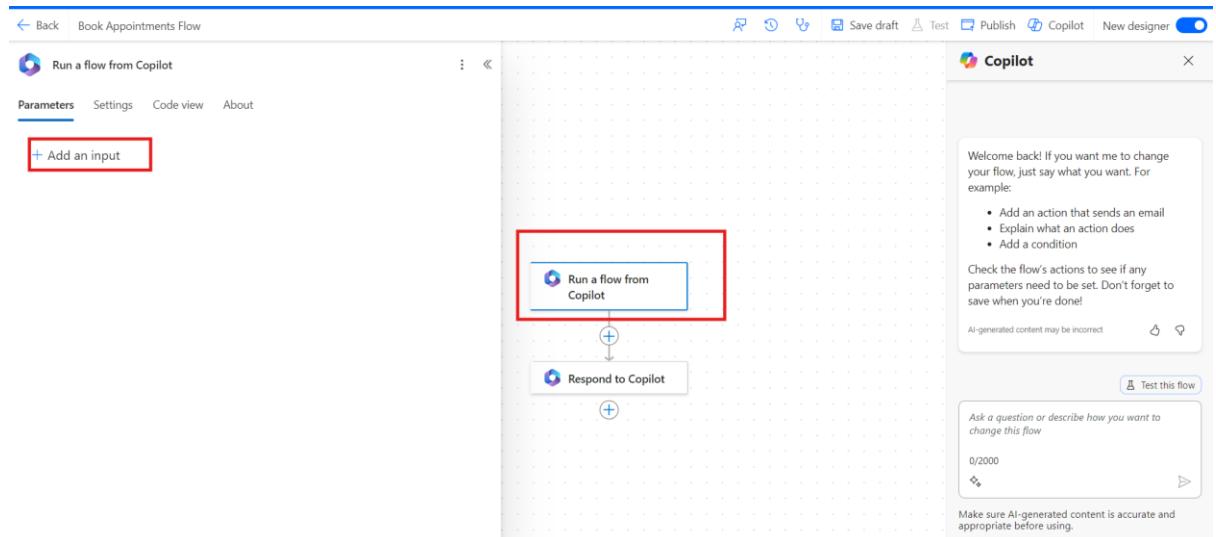
3. Scroll down and select **Create a new flow** a new Power Automate flow window will pop up. Check the environment of power automate from top right corner, if correct environment (Dev One) not selected, please select the correct environment.



4. Select **Run a flow from copilot** from top left corner and rename the flow as **Book Appointments Flow**.

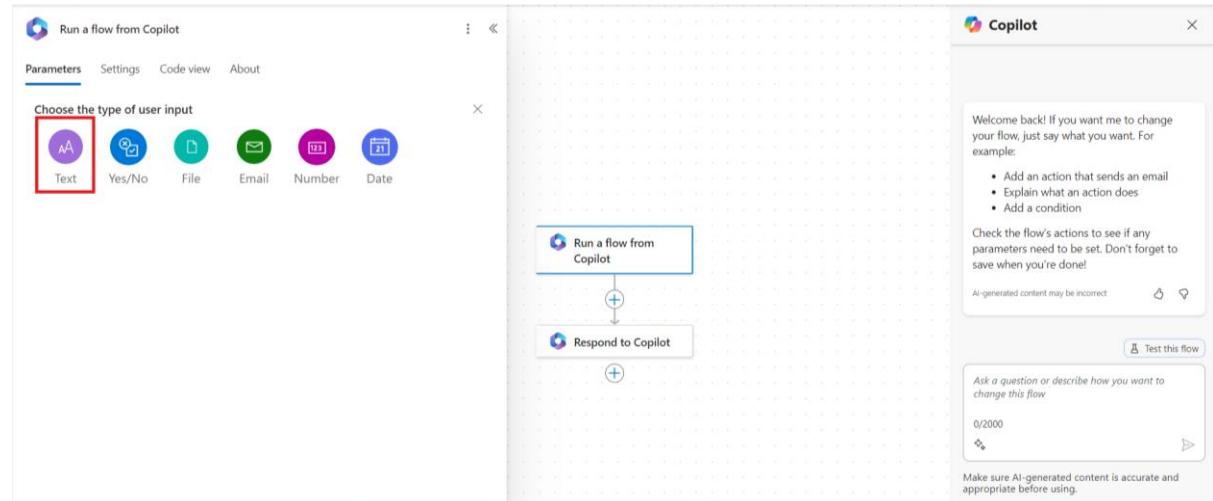


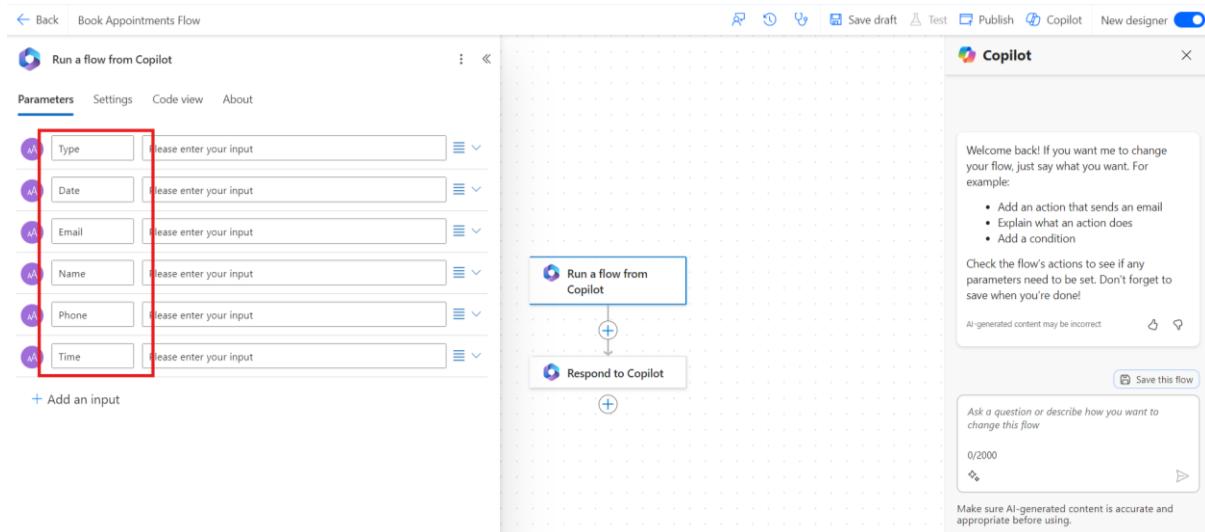
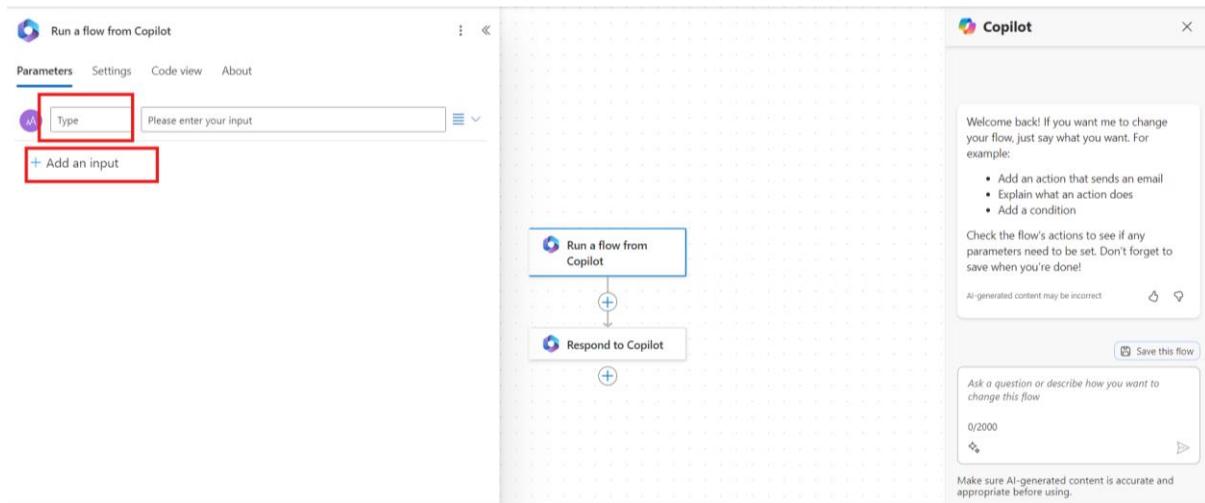
5. Select the trigger step "**Run a flow from Copilot**," and then select **+ Add an input**.



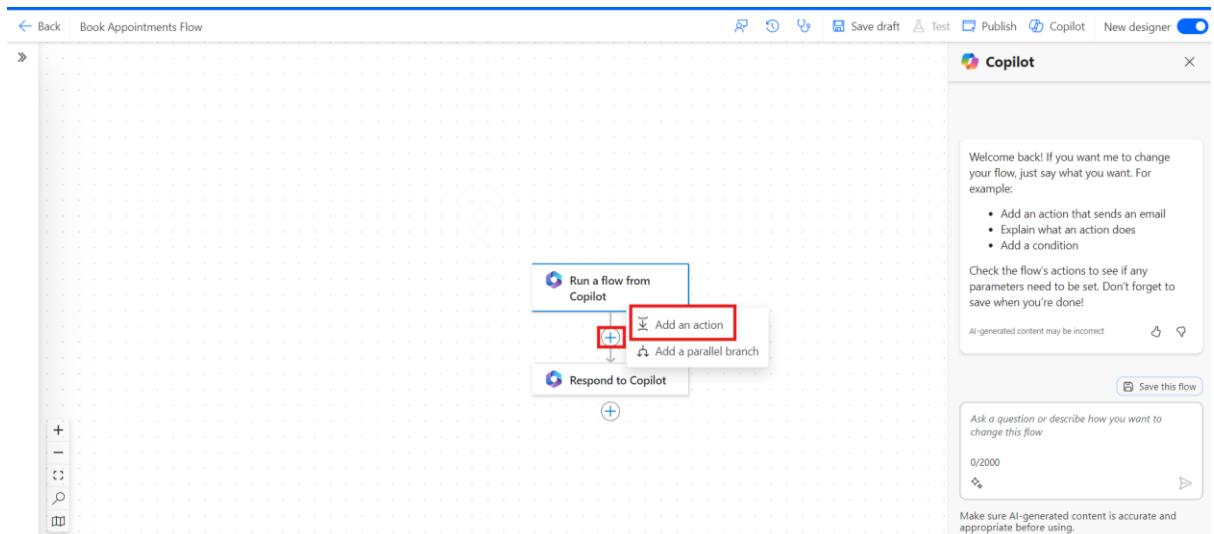
6. Select **Text** for the input type and configure the following inputs by repeating the process:

- a. Enter **Type** in input field for Appointment Type
- b. Enter **Date** in input field for Appointment Date
- c. Enter **Email** in input field for Email Address
- d. Enter **Name** in input field for Full Name
- e. Enter **Phone** in input field for Phone Number
- f. Enter **Time** in input field for Appointment Time

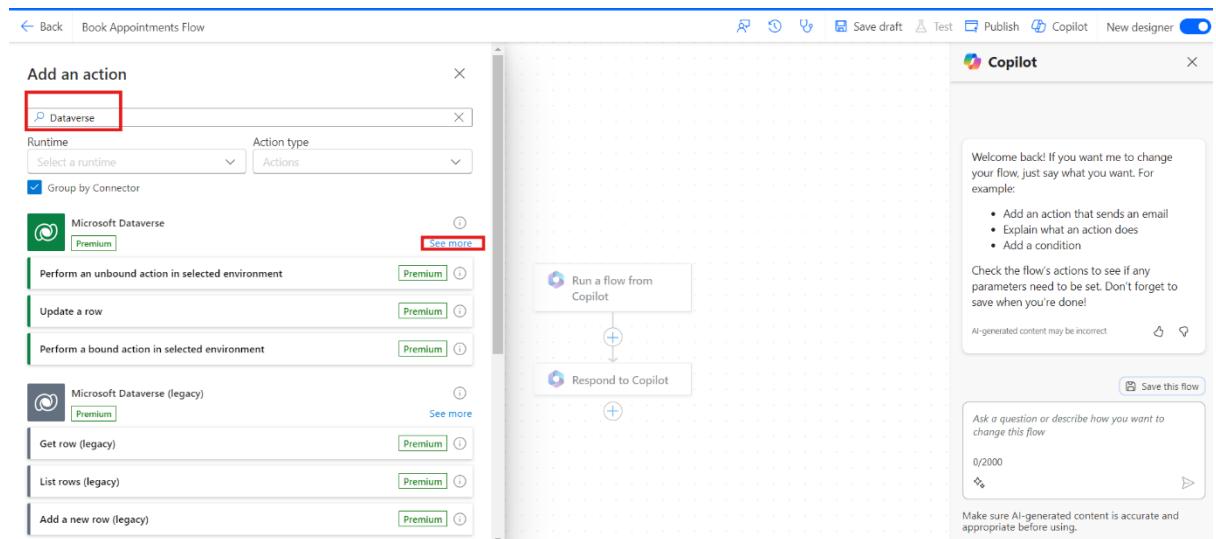




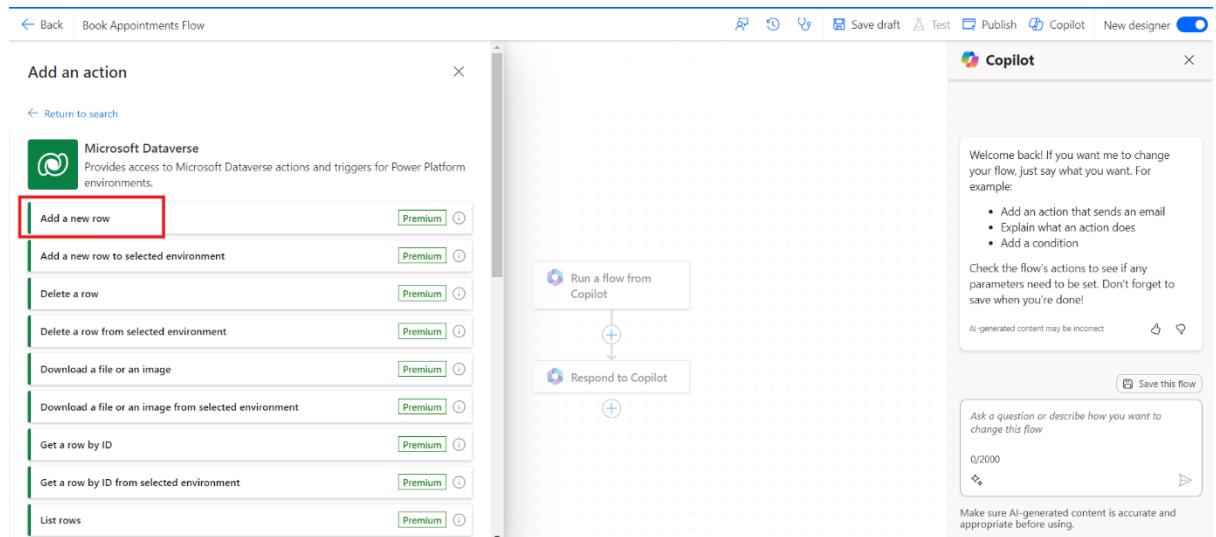
7. Click on the **+** icon between the two steps in the flow and select **Add an action**.



- In the **Search** field, type **Dataverse** and select **See more** for the Dataverse connector.



- Select **Add a new row** action.



- Login with the same credential for the Oath Sign.

- Choose **Book Appointments** for the table name.

Welcome back! If you want me to change your flow, just say what you want. For example:

- Add an action that sends an email
- Explain what an action does
- Add a condition

Check the flow's actions to see if any parameters need to be set. Don't forget to save when you're done!

AI-generated content may be incorrect.

Save this flow

Ask a question or describe how you want to change this flow

0/2000

Make sure AI-generated content is accurate and appropriate before using.

12. Select **Show all** to see all available fields.

Welcome back! If you want me to change your flow, just say what you want. For example:

- Add an action that sends an email
- Explain what an action does
- Add a condition

Check the flow's actions to see if any parameters need to be set. Don't forget to save when you're done!

AI-generated content may be incorrect.

Save this flow

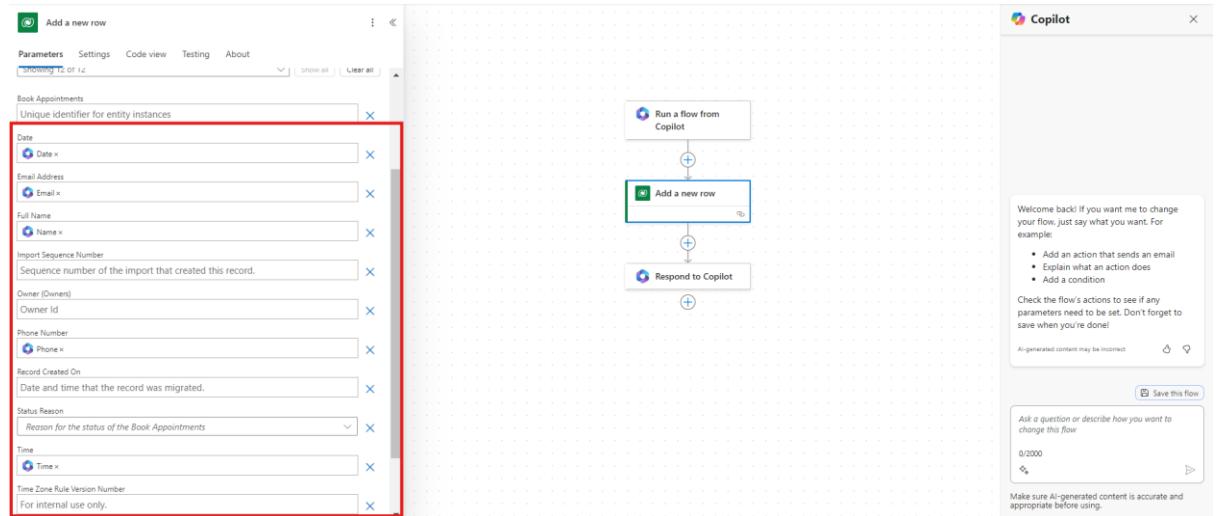
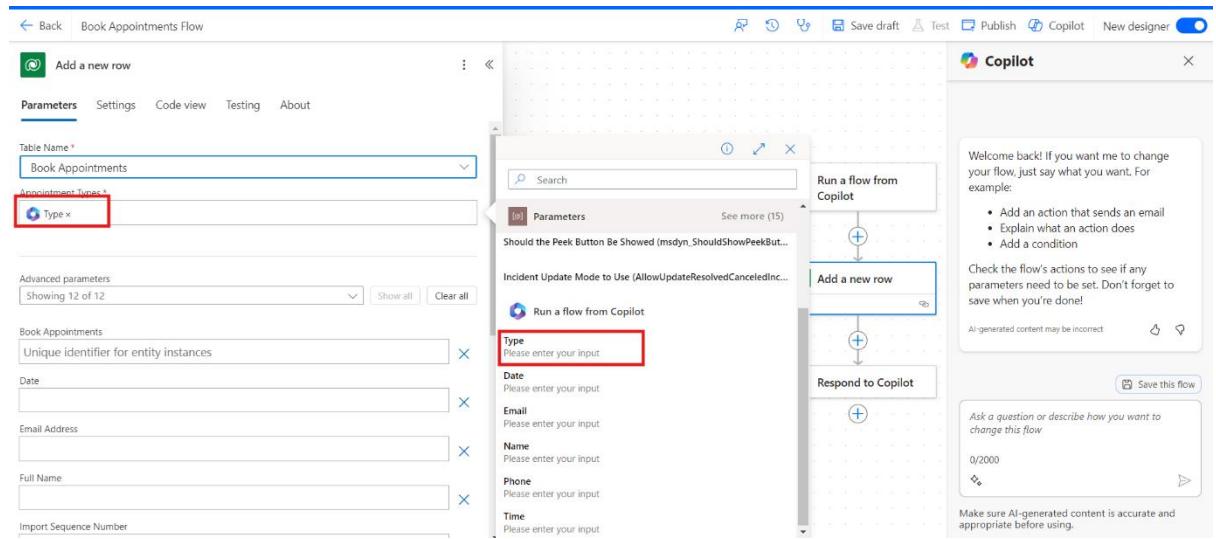
Ask a question or describe how you want to change this flow

0/2000

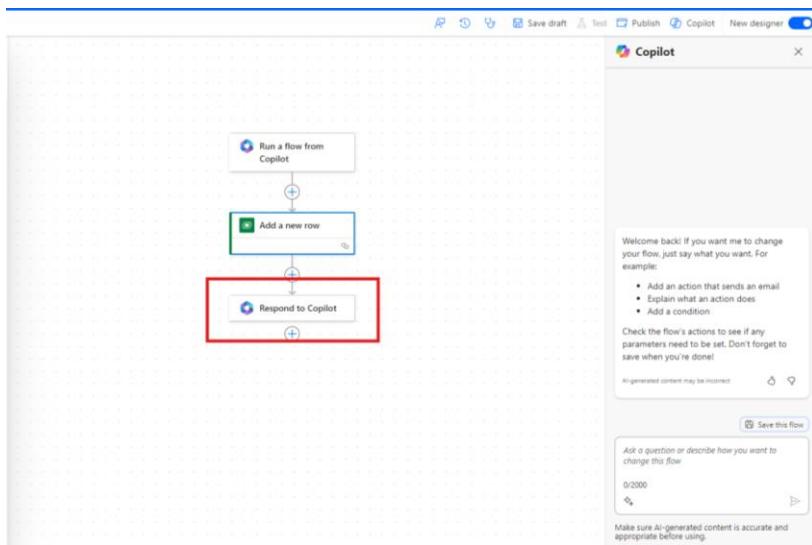
Make sure AI-generated content is accurate and appropriate before using.

13. Use **Dynamic content** to map each input parameter to the corresponding field:

- Type Dynamic Input → **Appointment Type** Parameter
- Date Dynamic Input → **Appointment Date** Parameter
- Email Dynamic Input → **Email Address** Parameter
- Name Dynamic Input → **Full Name** Parameter
- Phone Dynamic Input → **Phone Number** Parameter
- Time Dynamic Input → **Appointment Time** Parameter

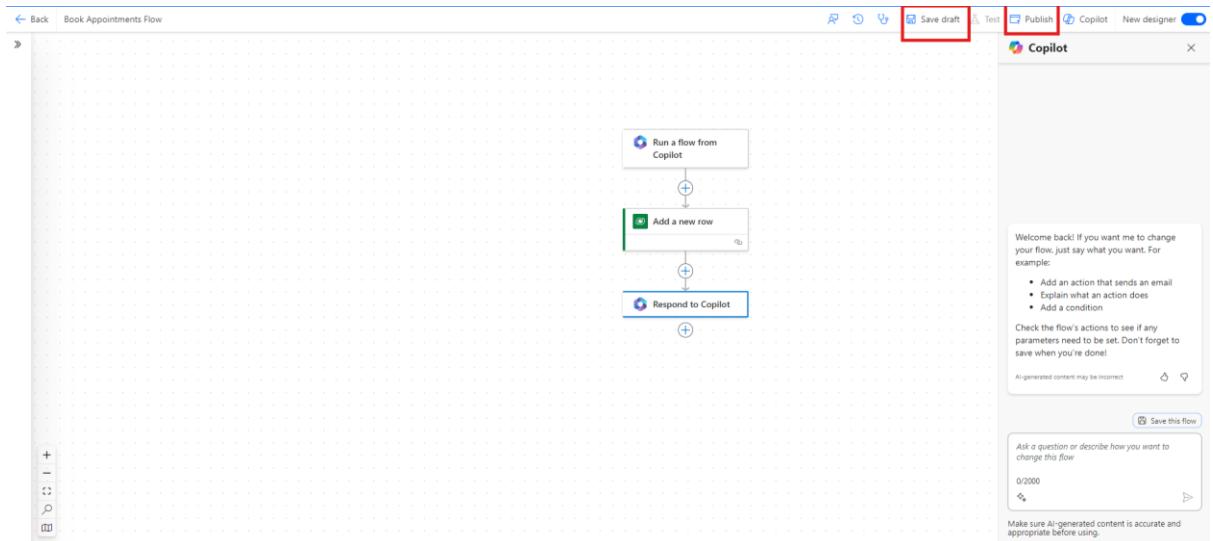


14. Select **Respond to Copilot** action.



15. Click on **Settings**.
16. Ensure that **Asynchronous Response** is set to **Off**.

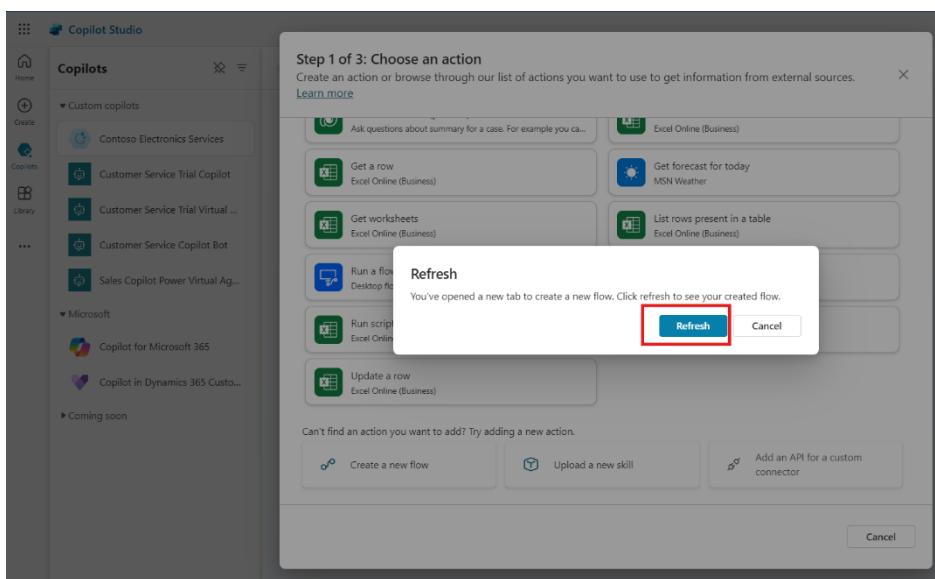
17. Select **Save draft**.
18. Then, click on **Publish**.



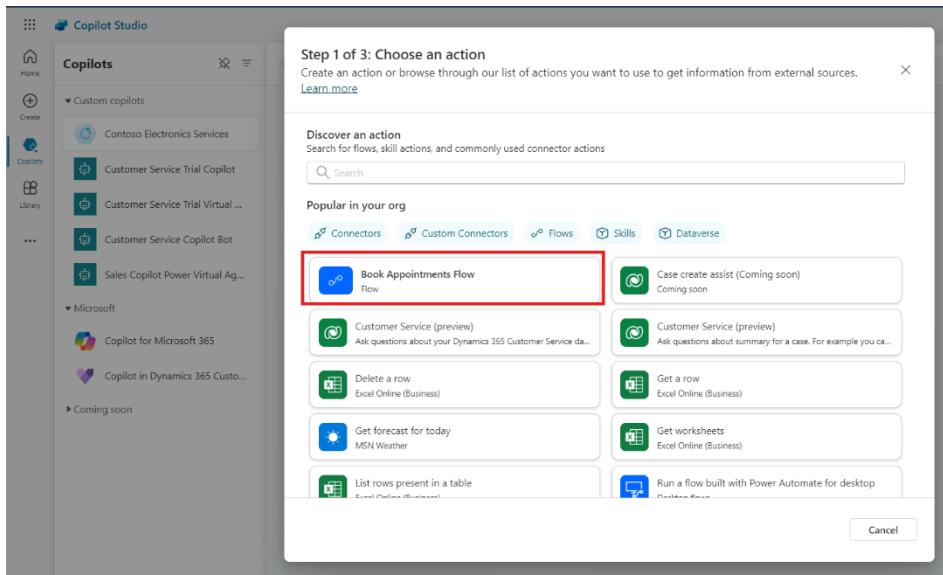
- Once the flow is published, close the Power Automate and return to Copilot Studio.

Task 2: Create Action in Copilot for Book Appointments

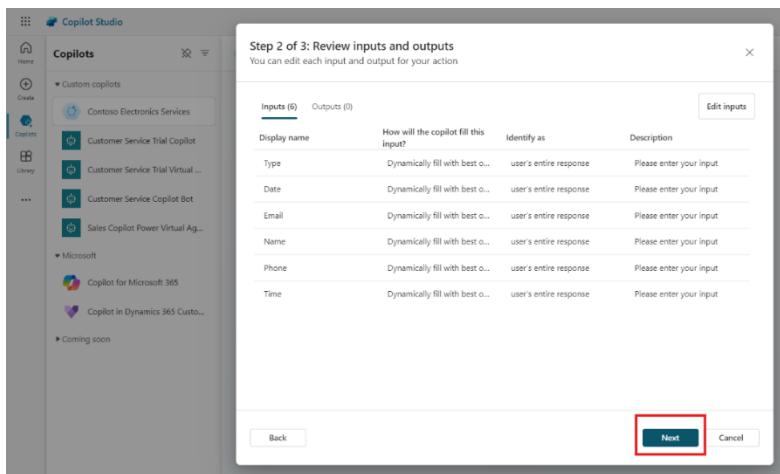
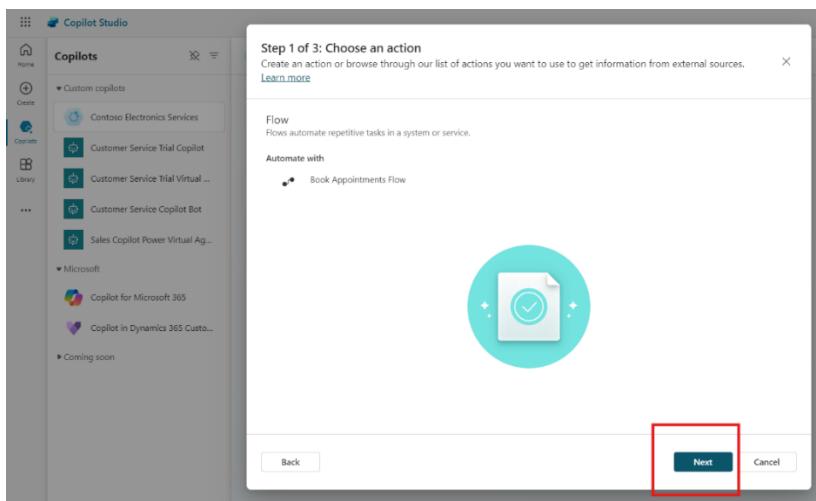
- Go to copilot window and click on **Refresh**, (If the Copilot window was closed, reopen it and navigate back to the **Copilot Studio**, go to the **Actions** tab and click on **+ Add an action**.)

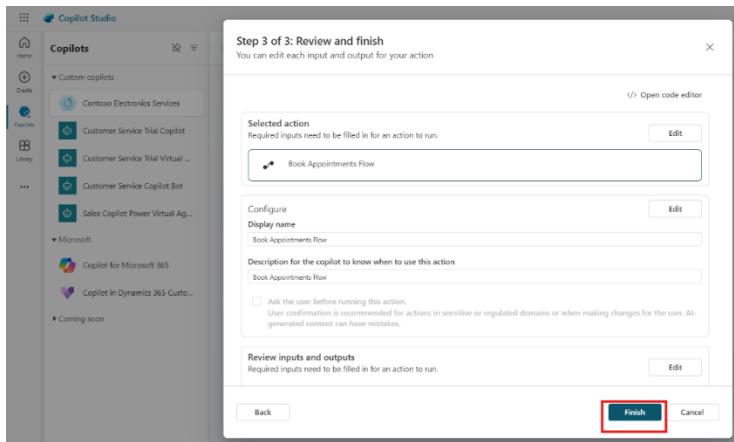


- In the "**Choose an action**" window, select the **Book Appointments Flow** you created.



3. Click on **Next**, **next** then **Next** again, and finally **Finish**. The flow will now be added as an action.





4. Navigate to the **Topics** section and select the **Book Appointments** topic.

Name	Trigger	Last modified	Enabled
Book Appointments	Triggered by cop...	MOD Administrator...	<input checked="" type="checkbox"/> On
Compare laptop	Triggered by cop...	MOD Administrator...	<input checked="" type="checkbox"/> On
Conversation Start	On Conversation...	MOD Administrator...	<input checked="" type="checkbox"/> On
Conversational boosting	On Unknown Int...	MOD Administrator...	<input checked="" type="checkbox"/> On
End of Conversation	On Redirect	MOD Administrator...	<input checked="" type="checkbox"/> On
Escalate	On Talk to Agent	MOD Administrator...	<input checked="" type="checkbox"/> On
Fallback	On Unknown Int...	MOD Administrator...	<input checked="" type="checkbox"/> On
Goodbye	Triggered by cop...	MOD Administrator...	<input checked="" type="checkbox"/> On
Greeting	Triggered by cop...	MOD Administrator...	<input checked="" type="checkbox"/> On
Multiple Topics Matched	On Select Intent	MOD Administrator...	<input checked="" type="checkbox"/> On
On Error	On Error	MOD Administrator...	<input checked="" type="checkbox"/> On

5. Below the Adaptive Card node, click on the + sign to create a new node.
6. Select **Call an action**. Choose the **Book Appointments Flow**. This action will now be added below the Adaptive Card node.

7. In the action node, you need to map each input field to the appropriate variable created by the Adaptive Card:
- Type** Input: Click on the input field, then select **Appointmenttype** from the custom variables.
 - Date** Input: Click on the input field, then select **appointmentDate** from the custom variables.
 - Email** Input: Click on the input field, then select **contactEmail** from the custom variables.
 - Name** Input: Click on the input field, then select **fullName** from the custom variables.
 - Phone** Input: Click on the input field, then select **contactPhone** from the custom variables.
 - Time** Input: Click on the input field, then select **appointmenttime** from the custom variables.

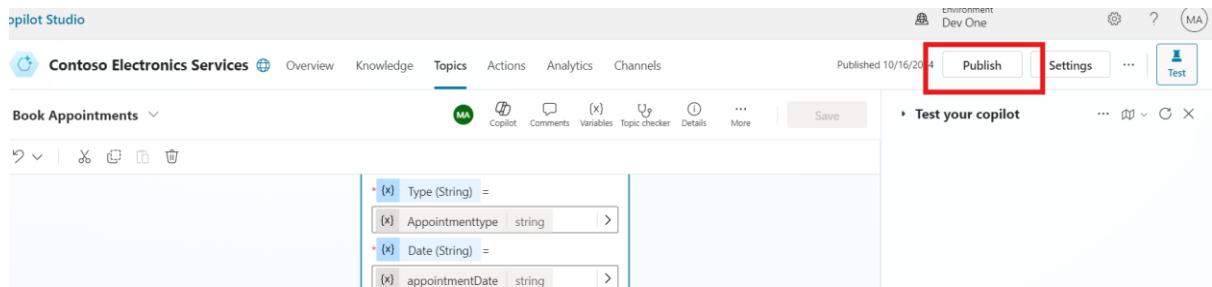
The screenshot shows the Microsoft Copilot interface for 'Contoso Electronics Services'. On the left, there's a sidebar with 'Copilots' and a list of existing copilots. The main area shows a flow named 'Book Appointments'. A modal window titled 'Select a variable' is open, listing custom variables: Appointmenttype, Date, Email, Name, Phone, and Time. The 'Appointmenttype' variable is highlighted with a red box.

8. After mapping all the variables, click on the **Save** button to save the topic configuration.

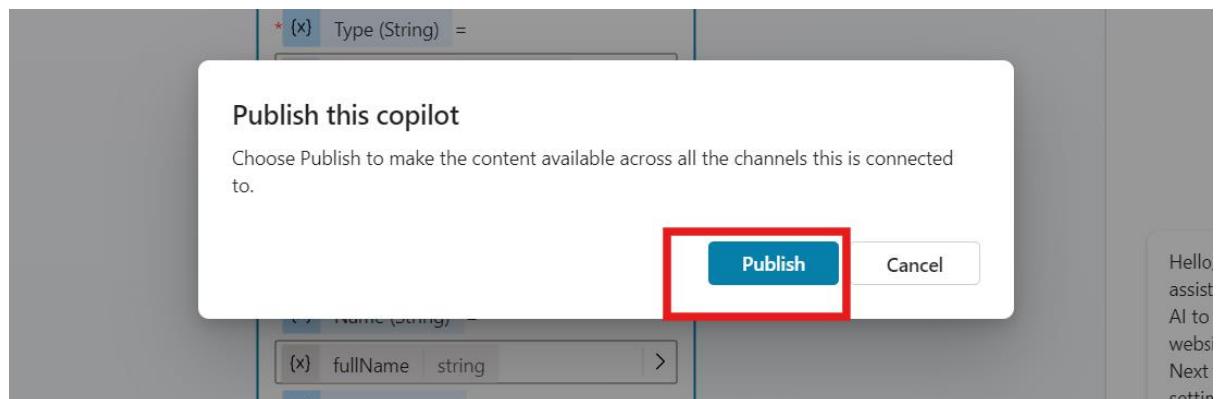
The screenshot shows the Microsoft Copilot interface for 'Contoso Electronics Services'. The 'Book Appointments' flow is displayed. The 'Save' button at the top right of the configuration area is highlighted with a red box.

Task 5: Publish the copilot

1. From top right corner, go to publish and click on it.



2. Then again click publish for confirmation.



Conclusion

After completing this exercise, you have gained the following knowledge:

1. Successfully created a Power Automate flow named **Book Appointments Flow**.
2. Configured multiple input fields such as appointment type, date, and contact details.
3. Mapped the inputs to corresponding Dataverse fields for appointment booking.
4. Integrated the flow with Copilot Studio by adding it as an action.
5. Ensured correct mapping of input variables within the Copilot topic.
6. Published the flow and tested it within the Copilot environment for seamless integration.

Test Copilot

To test the functionalities of your Copilot and Power Automate flows, follow these steps:

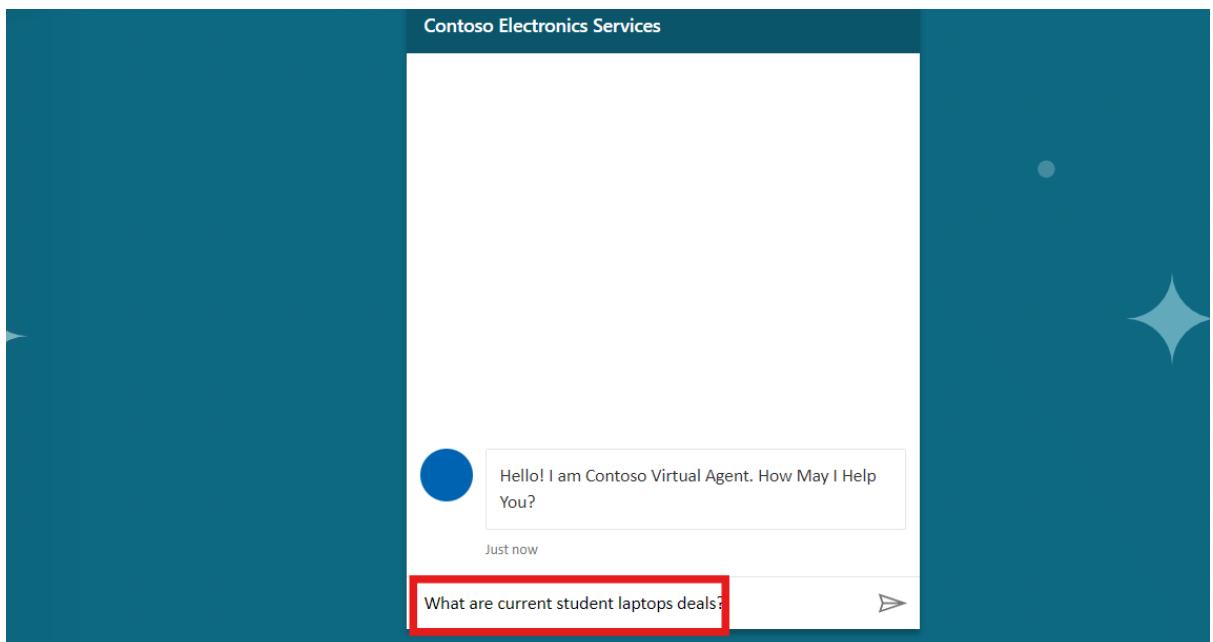
Click on the three-dot right side of the window and select **Go to demo website**. A demo website window will open start the conversation into the website chat window.

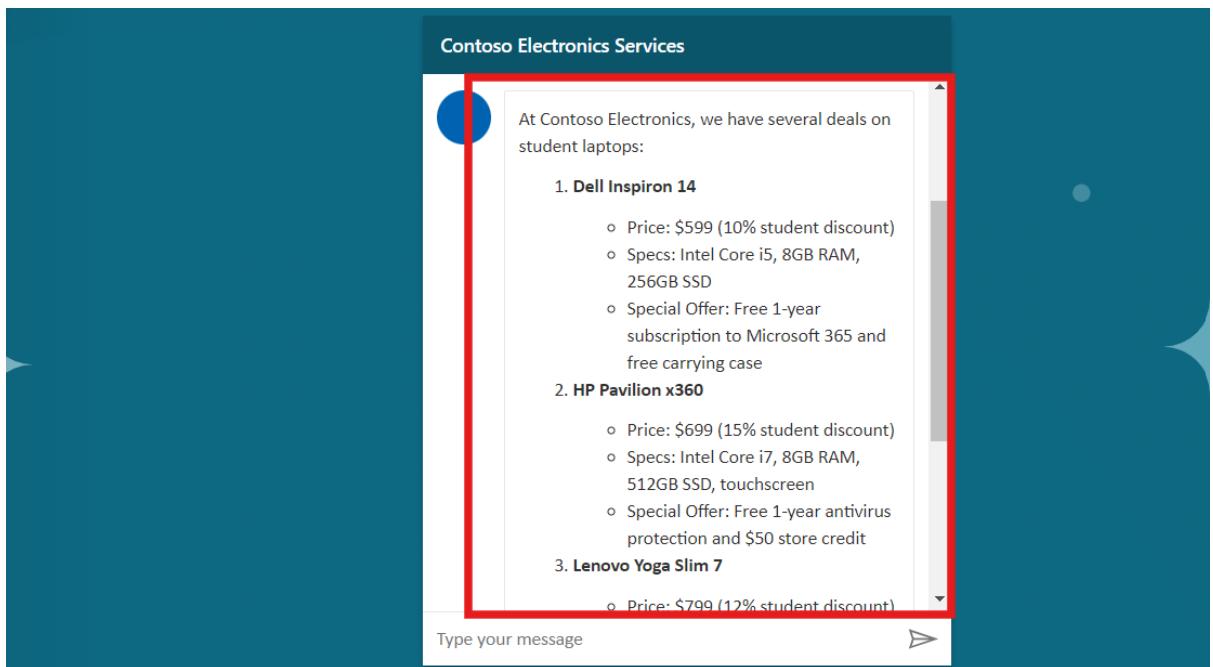
Note: Testing Copilot with the same prompt multiple times may yield varying responses due to contextual learning, dynamic data access, and inherent randomness in its output generation.

The screenshot shows the Microsoft Copilot interface. On the left, there's a sidebar with 'Copilots' (Home, Create, Library), 'Custom copilots' (Contoso Electronics Services, Customer Service Copilot Bot, Copilot in Power Apps, Customer Service Trial Virtual Agent, Customer Service Trial Copilot, Sales Copilot Power Virtual Agent), 'Microsoft' (Copilot for Microsoft 365, Copilot for Sales, Copilot in Dynamics 365 Customer Engagement), and 'Coming soon'. The main area is titled 'Contoso Electronics Services' with tabs for Overview, Knowledge, Topics (selected), Actions, Analytics, and a 'Published 9/20/2024' status. The 'Topics' section contains a 'Fallback' card with a condition 'FallbackCount > is less than 3' and an 'AI' card for 'Create generative answers' with input 'Activity.Text' and data sources. The right side has a 'Test your copilot' menu with options like Go to demo website (highlighted with a red box), Publish, Settings, Test, Export copilot, Import copilot, Delete, and Share. A message box at the bottom says 'Hello! I am Contoso Virtual Agent. How May I Help You?' with a timestamp '2 minutes ago'.

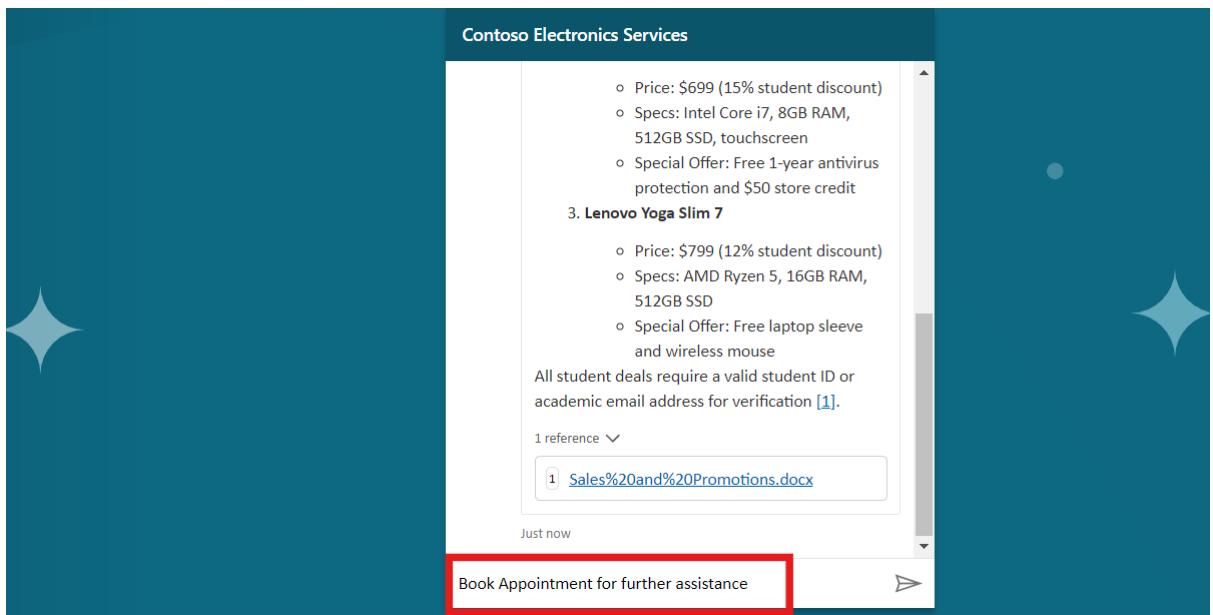
Once the demo website launch and message appear in chat box enter the following trigger phrases to test the topics you created

1. What are current student laptops deals?

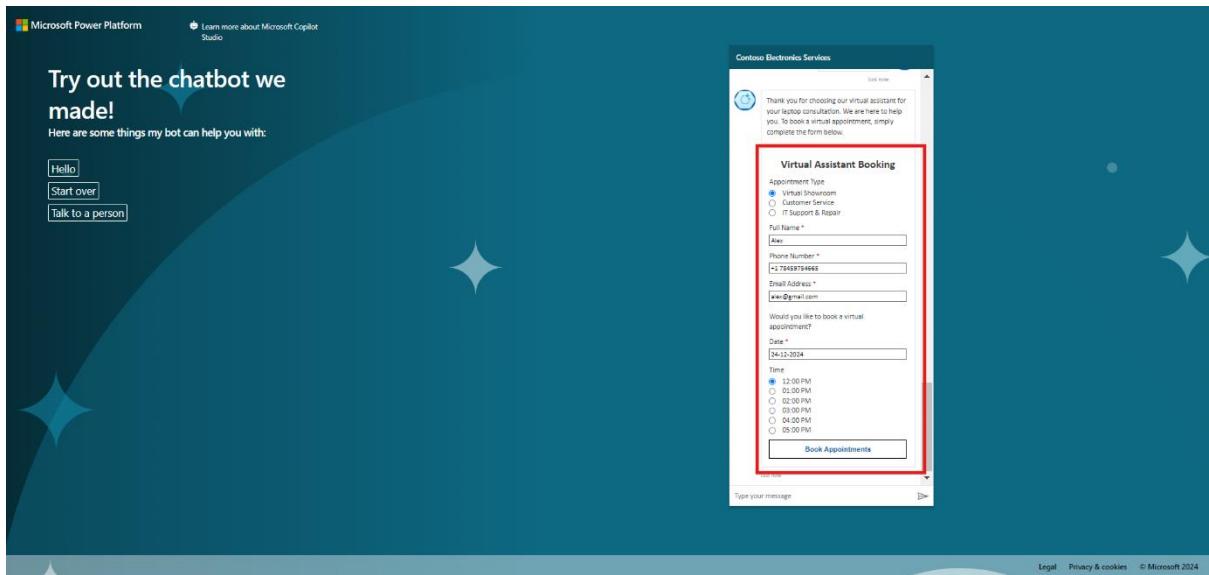




2. Book Appointment for further assistance



Fill the complete form and click on the **Book Appointments**



Ensure that the details entered in the Appointment Booking are accurately reflected in the "Book Appointments" table in Power Apps.

This screenshot shows the Microsoft Power Platform Tables view. The left sidebar has sections for Home, Create, Learn, Apps, Tables (selected), Flows, Solutions, More, and Power Platform. Under Tables, it lists Tables, Flows, and Solutions. A "Ask a virtual agent" button is also present. The main area shows the "Tables > Book Appointments" page. It includes a "Table properties" section with Name (Book Appointments), Primary column (Appointment Types), Type (Standard), Last modified (18 hours ago), and a "Schema" section with Columns, Relationships, and Keys. Below this is a "Book Appointments columns and data" grid. The grid shows three rows of data: "Virtual Showroom" on 24-09-2024, "Virtual Showroom" on 24-12-2024, and "Virtual Showroom" on 24-12-2024 (highlighted with a red box). The columns are Appointment Types, Date, Email Address, and Full Name. There are buttons for "Update forms and views", "Edit", and "+" at the top right of the grid.

Exercise 5: Create Power Apps Table for Refund Requests

In this exercise, you will learn how to create a custom table in Power Apps for managing refund requests. The table will store key details such as customer information, purchase data, and refund-related entries. By following these steps, you'll understand how to add columns for specific data fields like Full Name, Email, Order Number, and more. This hands-on task will provide you with essential knowledge on table creation and column management within Power Apps, preparing you to efficiently handle refund processes in a structured format.

1. Navigate to Power Apps. In the Power Apps Maker portal, select **Tables** from the left-hand navigation pane.

The screenshot shows the Power Apps Maker portal interface. On the left, there's a navigation sidebar with options like Home, Create, Learn, Apps, Tables (which is highlighted with a red box), Flows, Solutions, More, and Power Platform. The main area is titled 'Solutions' and contains a section for 'Set your preferred solution'. It lists three solutions: 'Contoso Electronics' (Preferred solution), 'Common Data Services Default Solution', and 'Default Solution'. There are tabs for 'Unmanaged', 'Managed', and 'All'.

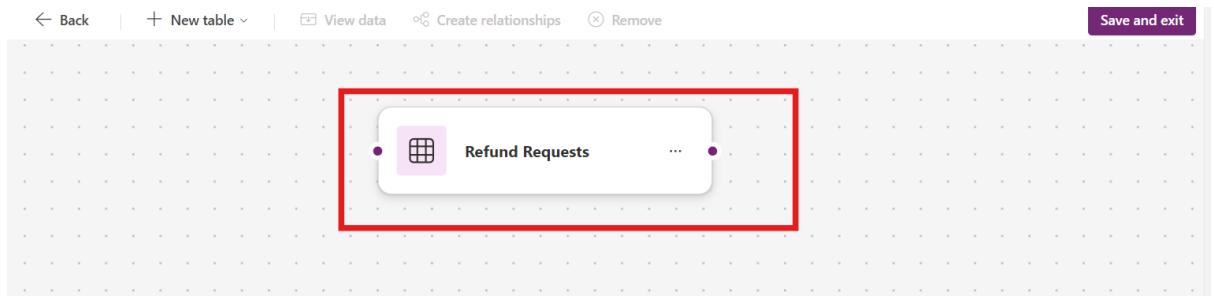
2. Click on **+ New table**, and then choose **Create new table** to start creating your new table.

This screenshot shows the same Power Apps Maker portal interface as the previous one, but with a different focus. The 'Tables' option in the sidebar is still selected. In the top bar, the '+ New table' button is highlighted with a red box. A dropdown menu appears, showing 'Create new tables' (which is also highlighted with a red box) and other options like 'Set advanced properties' and 'Create a virtual table'. Below this, a table lists various standard tables: Account, Address, Appointment, Attachment, Business Unit, and Contact. The table has columns for Name, Type, Managed, Customized, Customizable, and Tags.

3. Then select **Start from blank** to create a table.

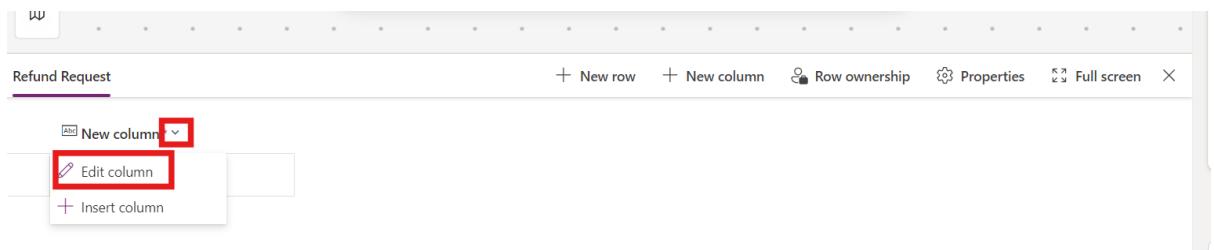
This screenshot shows a 'Choose an option to create tables' dialog. It presents four options in cards: 'Describe new tables Start with Copilot', 'Create with external data Import a SharePoint list (preview)', 'Create with external data Import an Excel file or .CSV', and 'Create new tables Start from blank'. The fourth card, 'Create new tables Start from blank', is highlighted with a red box.

4. By default, the new table will be named "**Table1.**" Double click on Table 1 name and rename it to **Refund Requests**,

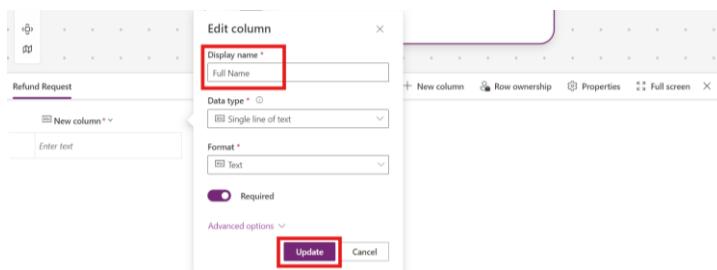


5. **Full Name Column:**

Click on the down arrow next to the first column, and then select the edit column button.

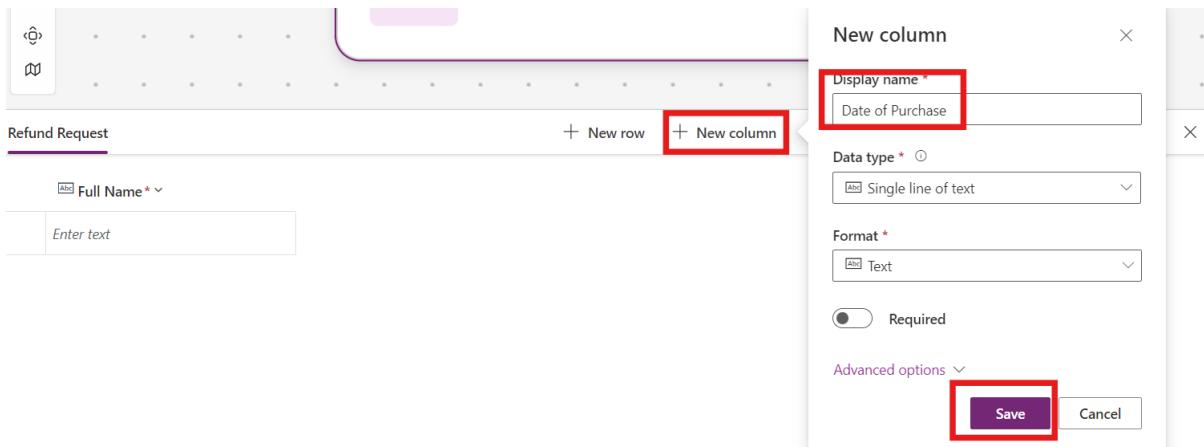


Change the display name to **Full Name** and click on **Update**.



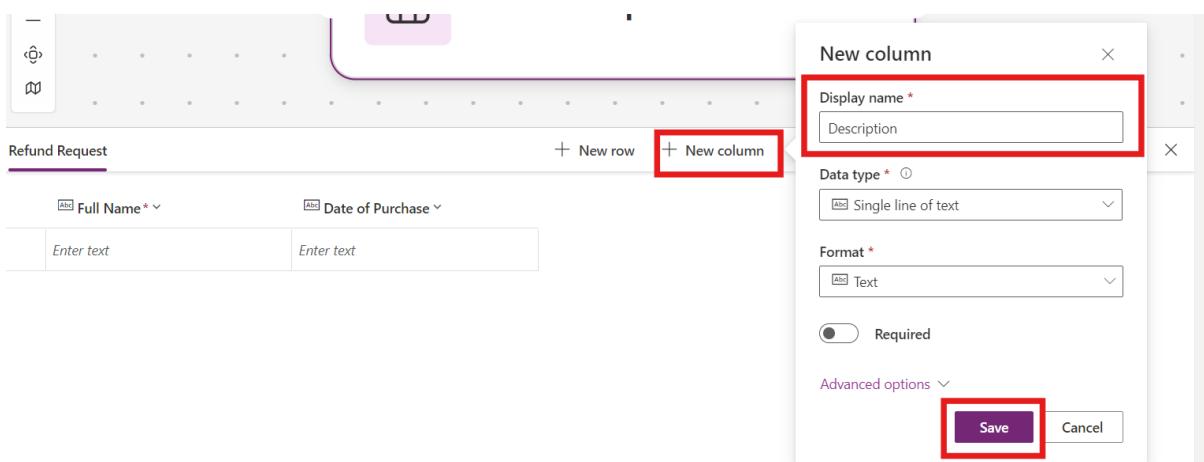
6. **Date of Purchase Column:**

Click on the **+ New column** button, change the display name to **Date of Purchase**, and save.



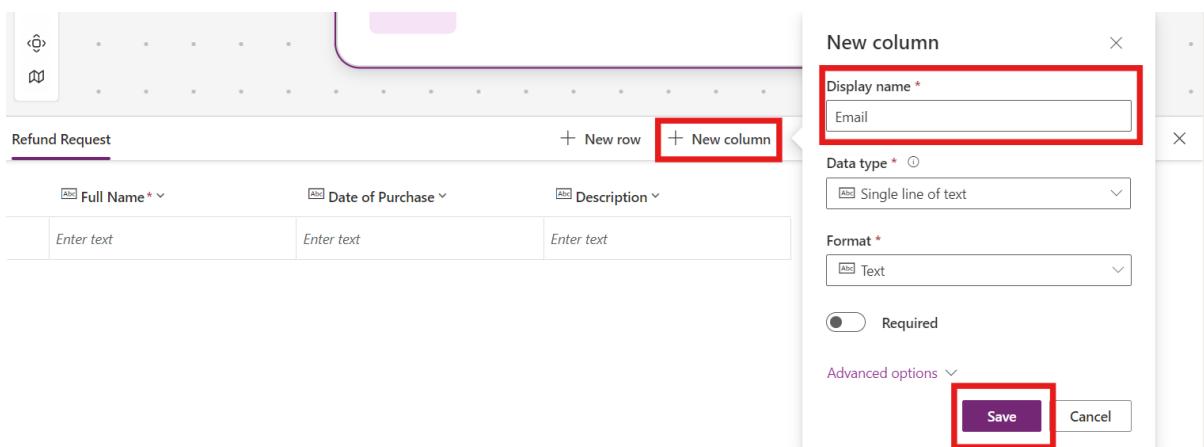
7. Description Column:

Click on the **+ New column** button, change the display name to **Description**, and save.



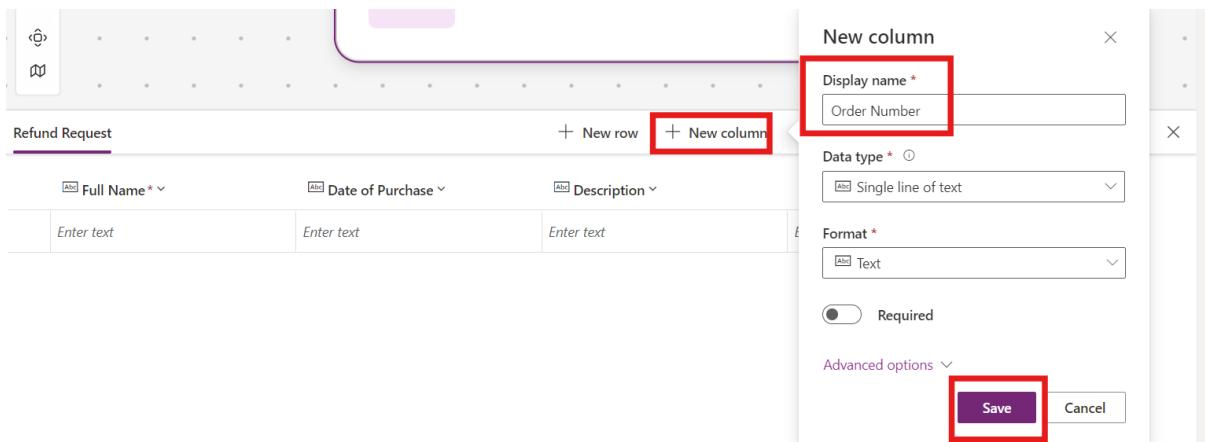
8. Email Column:

Click on the **+ New column** button, change the display name to **Email**, and save.



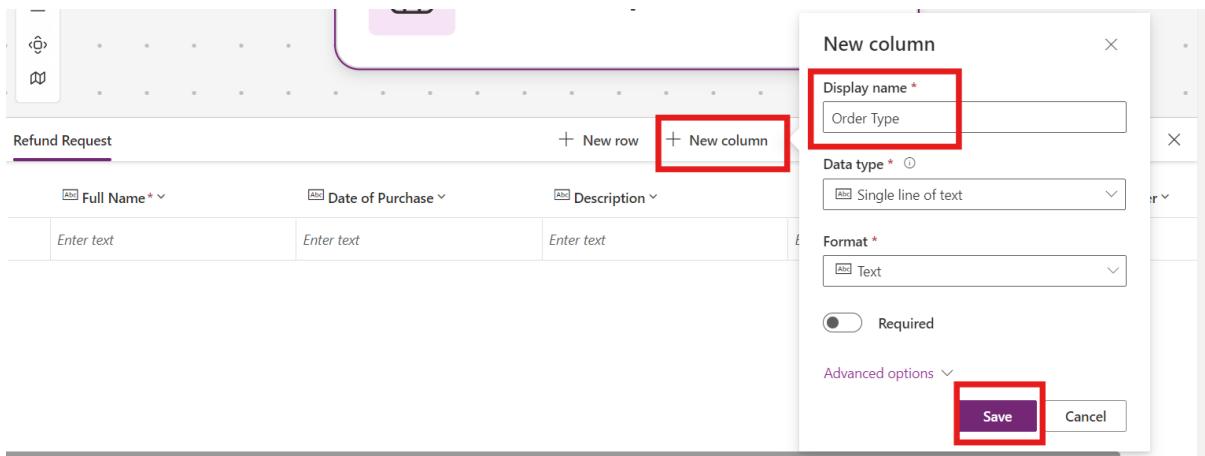
9. Order Number Column:

Click on the **+ New column** button, change the display name to **Order Number**, and save.



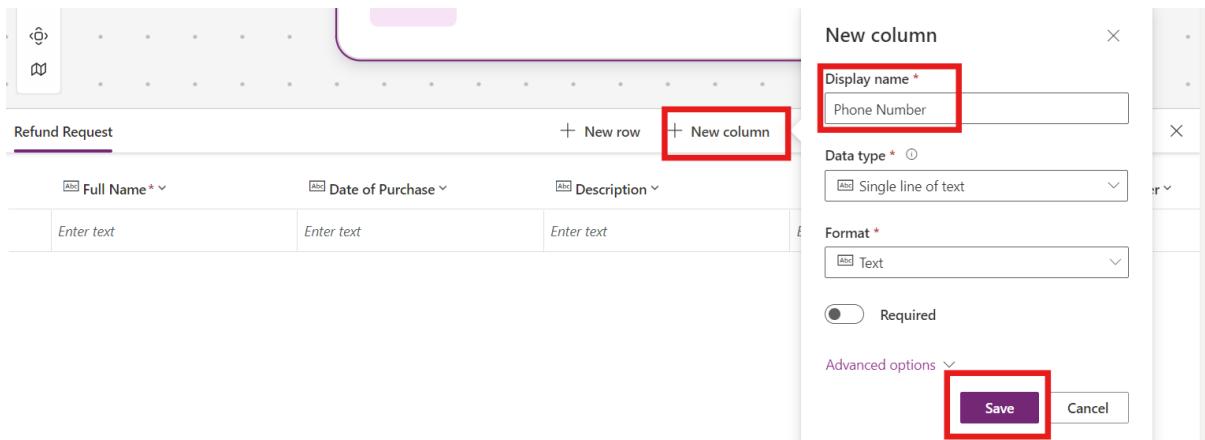
10. Order Type Column:

Click on the **+ New column** button, change the display name to **Order Type**, and save.



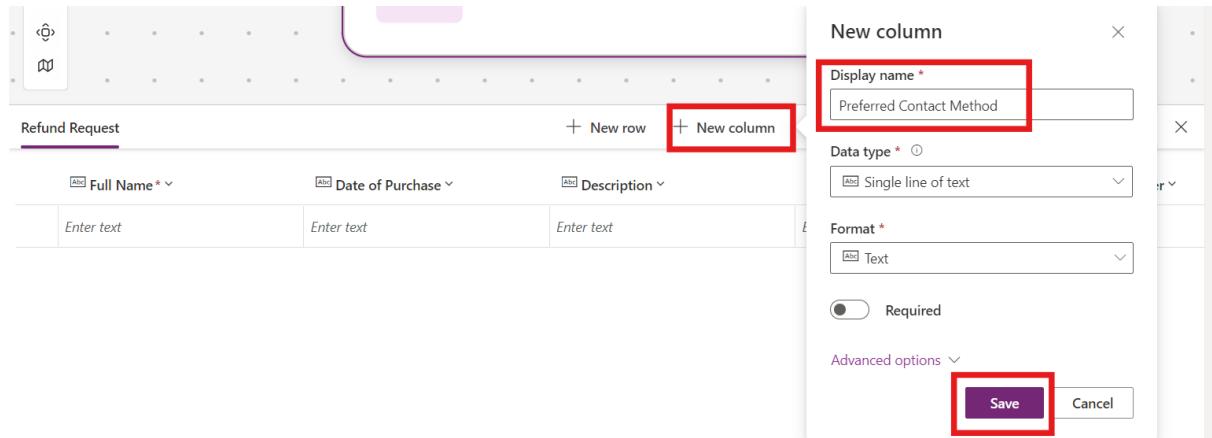
11. Phone Number Column:

Click on the **+ New column** button, change the display name to **Phone Number**, and save.



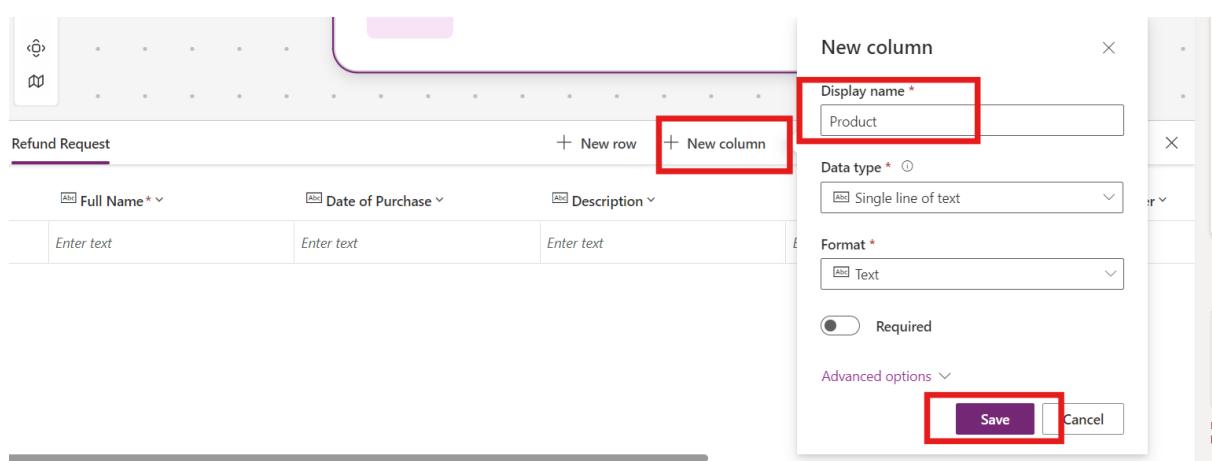
12. Preferred Contact Method Column:

Click on the **+ New column** button, change the display name to **Preferred Contact Method**, and save.



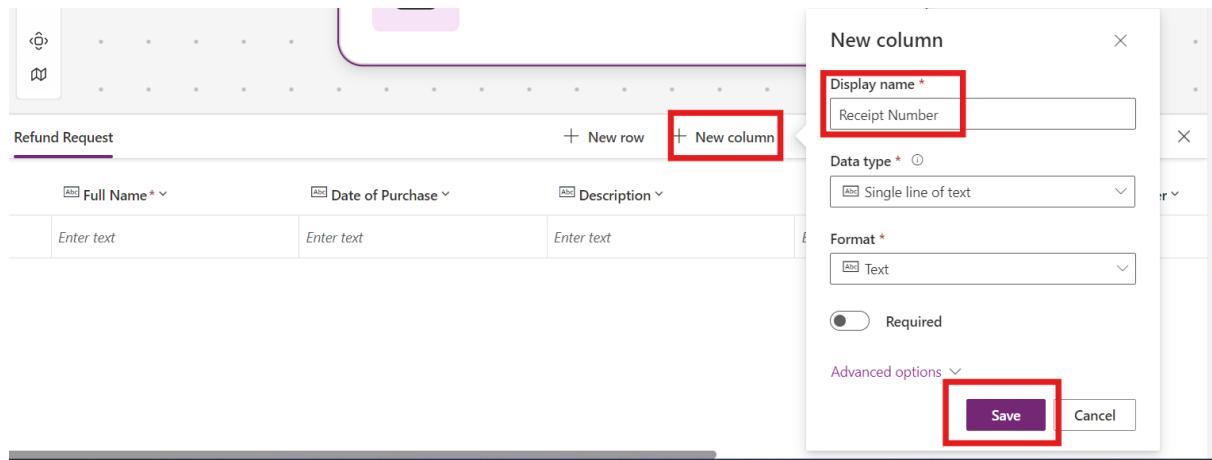
13. Product Column:

Click on the **+ New column** button, change the display name to **Product**, and save.



14. Receipt Number Column:

Click on the **+ New column** button, change the display name to **Receipt Number**, and save.



- After adding all the necessary columns, click on the **Save and exit** button to finalize and create the "**Refund Request**" table.

The screenshot shows the Microsoft Power Apps Studio interface. On the left, there's a table named "Refund Request" with three columns: "Full Name *", "Date of Purchase *", and "Description *". A modal window titled "New column" is open on the right, allowing the creation of a new column named "Receipt Number" with a data type of "Single line of text" and a format of "Text". The "Required" checkbox is checked. At the bottom of the modal are "Save" and "Cancel" buttons, with "Save" being highlighted.

Conclusion

After completing this exercise, you have gained the following knowledge:

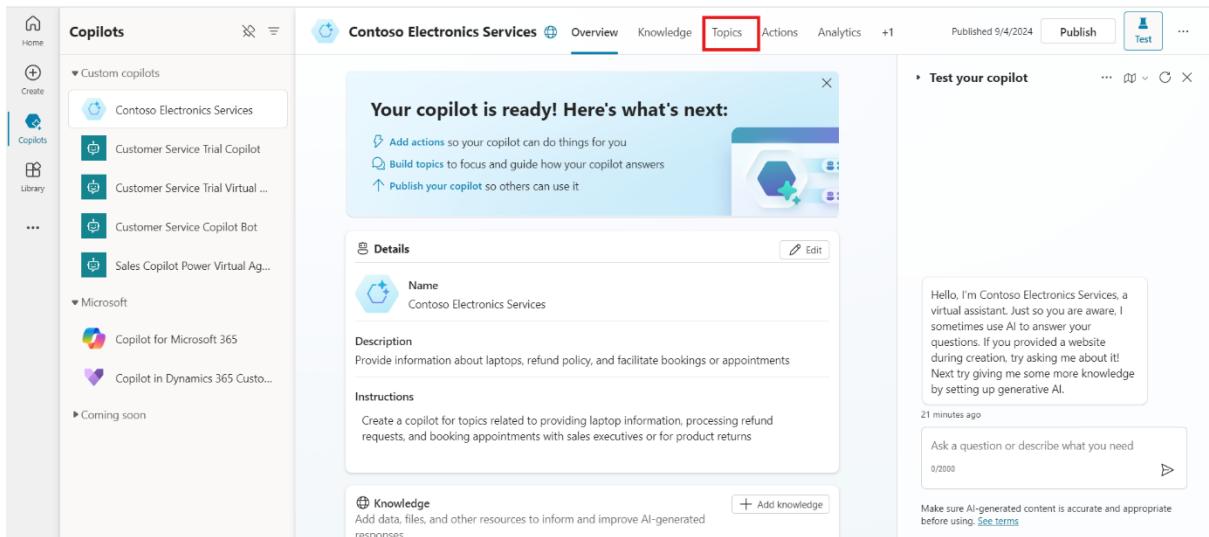
- Successfully created a custom "Refund Requests" table.
- Learned how to rename default table names and columns.
- Gained experience adding new columns for various refund request details.
- Saved the table for future use in handling refund-related data in Power Apps.

Exercise 6: Create and Manage Topics for Refund Request and Policy Information

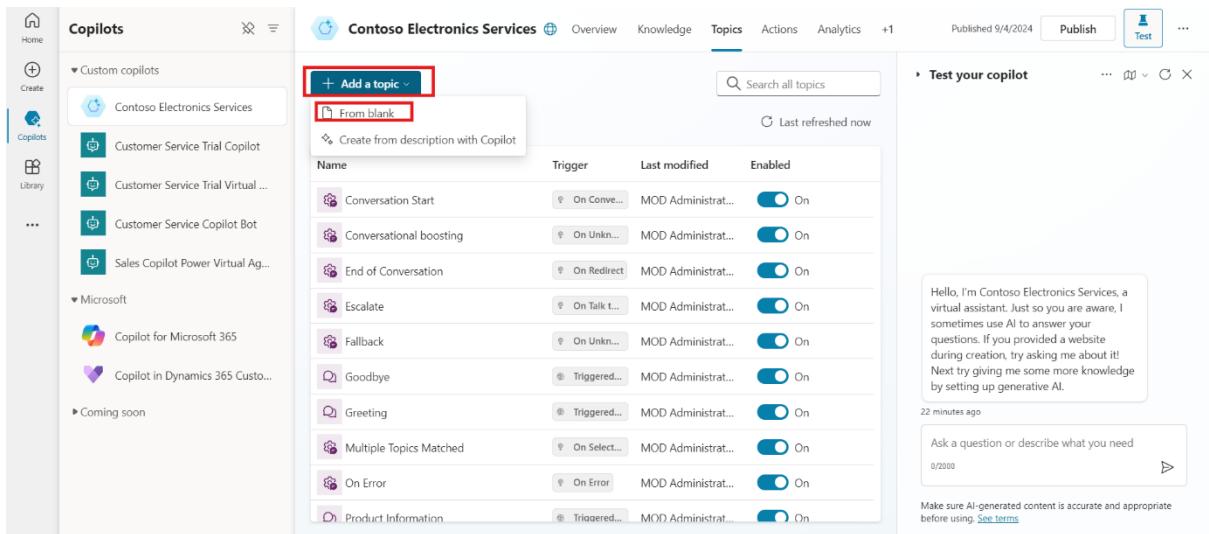
In this exercise, you will create and manage two essential topics using Copilot Studio for Contoso Electronics. The first topic will provide information on the company's refund and return policies, while the second will enable customers to submit a refund request. Through step-by-step tasks, you will learn how to configure trigger phrases, generative answers, and adaptive cards, which will enhance the customer support experience by streamlining the handling of refund-related queries. By the end of this exercise, you will have built robust automation flows to efficiently manage refund and return inquiries.

Task 1: Create a Topic "Refund or Return Policy Information"

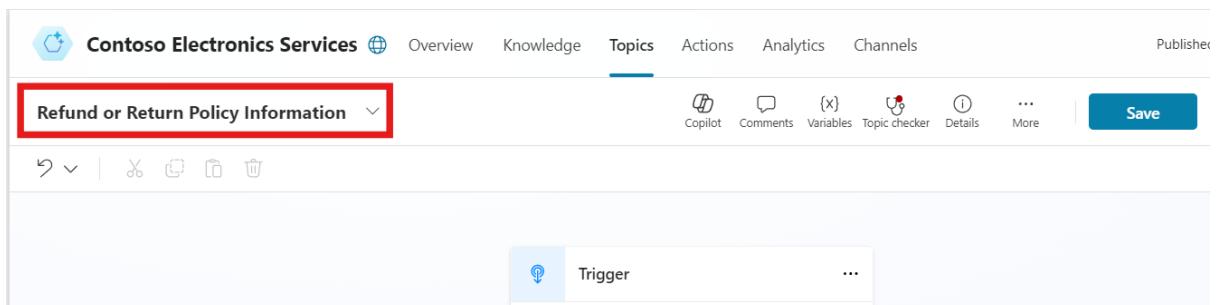
- Open Copilot Studio and select the **Contoso Electronics Service** copilot.
- In the top bar, select **Topics** which is located next to **Knowledge**.



- Click on **+ Add a topic** to create a new topic. Choose **From blank** to start with a blank template.

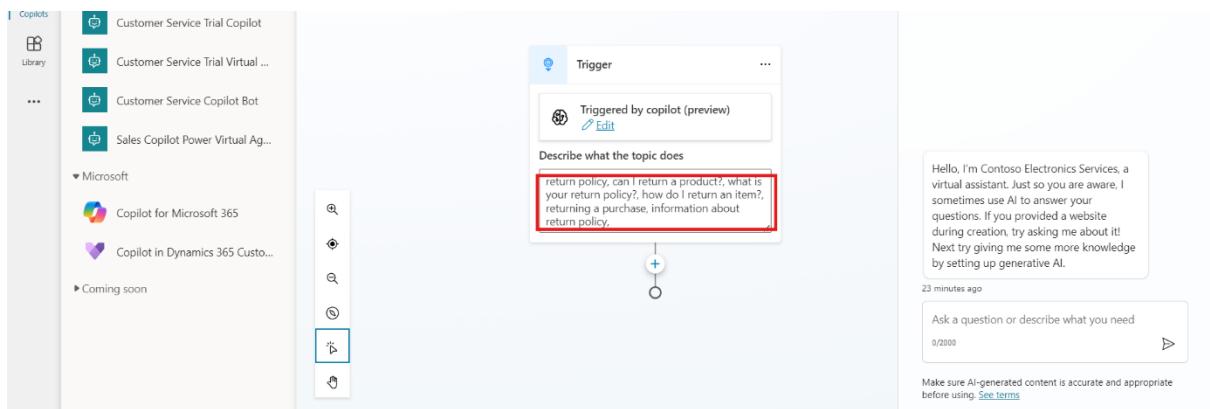


- In the new topic canvas, at the top of the screen, enter the name of the topic "**Refund or Return Policy Information**".

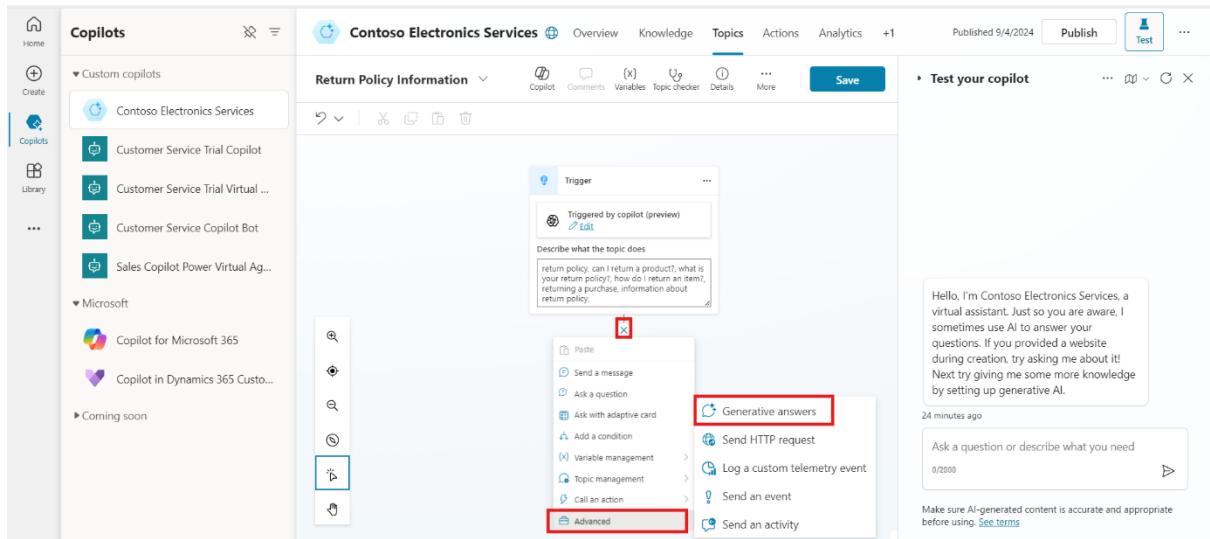


- In the canvas, you'll see a **Trigger node**. In the **Describe** section, enter the following phrases to trigger this topic:

Refund policy, Return policy, Can I return a product, What is your return policy, How do I return an item, Returning a purchase, Information about return policy,



- Below the Trigger node, click on the + sign to create a new node. Select **Advanced options**, then choose **Generative Answer**. A Generative Answer node will be created.



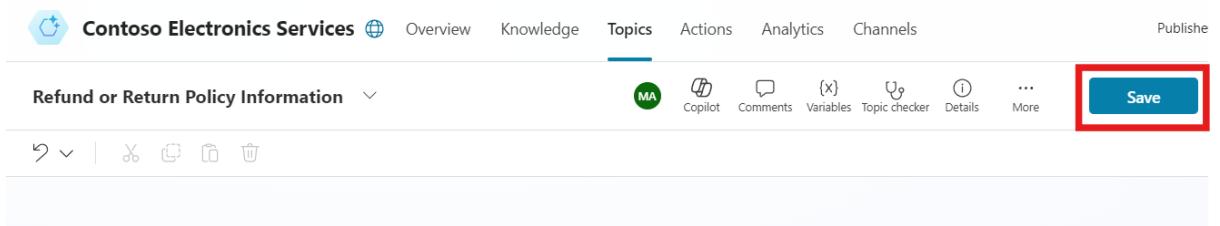
- In the Generative Answer node, click on the **Input** option variable window will open.
- In the variable window, select **System** and scroll down to choose **Activity.Text**.

The screenshot shows the Microsoft Copilot interface. On the left, there's a sidebar with 'Copilots' listed under 'Custom copilots'. The main area shows a topic titled 'Return Policy Information' with a 'Create generative answers' node. The 'Data sources' section is highlighted with a red box, showing 'Refund Policy.docx' selected. A preview window on the right shows a sample response from the AI.

9. In the Generative Answer node, click on the **Edit** option in the **Data Source** section.
10. Enable the option **Search only selected sources**.
11. Choose the **Refund Policy** Doc from the options displayed and scroll down.
12. In the **Content Moderation** section, select **Medium**.
13. Scroll up and click on the **(X)** to close Create generative answer properties window.

The screenshot shows the 'Refund or Return Policy Information' topic configuration. It includes sections for 'Edit', 'Describe what the topic does', 'Create generative answers' (with 'Activity.Text' input), 'Data sources' (with 'Edit' button highlighted), 'Search only selected sources' (checkbox checked), 'Name' (checkboxes for 'Refund Policy.docx', 'Sales and Promotions.docx', and 'Protection Plan.docx'), 'Add knowledge' (button), 'Classic data' (button), 'Allow the AI to use its own general knowledge (preview)' (checkbox), 'Content moderation' (set to 'Medium'), and a formula bar at the bottom.

14. Click on the **Save** button to save your configurations for the "**Refund or Return Policy Information**" topic.



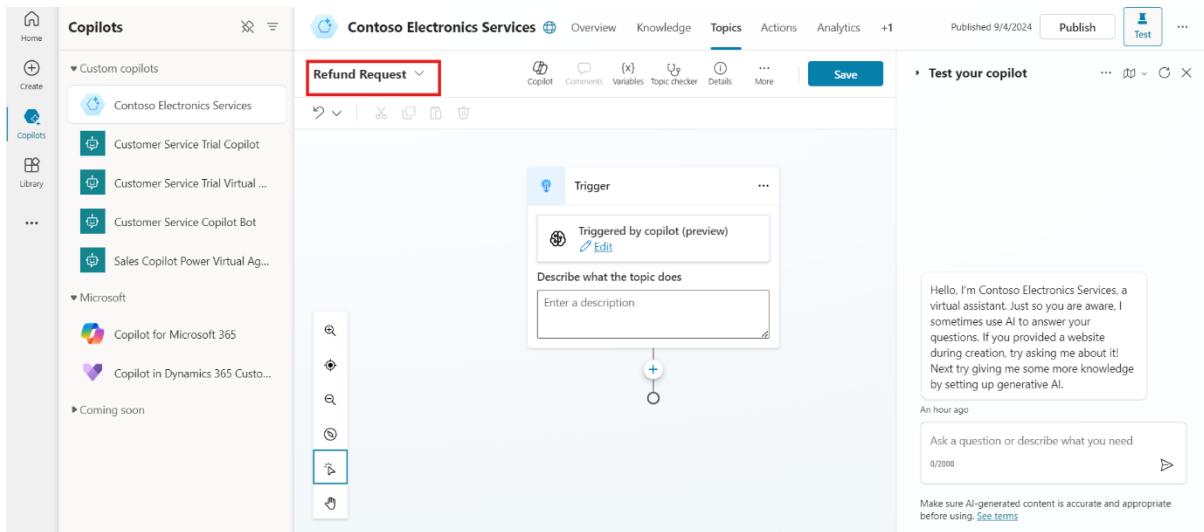
Task 2: Create a Topic "Refund Request"

1. Open **Copilot Studio** and select the copilot you've created for this project.
2. In the top bar, select **Topics** which is located next to **Knowledge**.

3. Click on **+ Add a topic** to create a new topic. Choose **From blank** to start with a blank template.

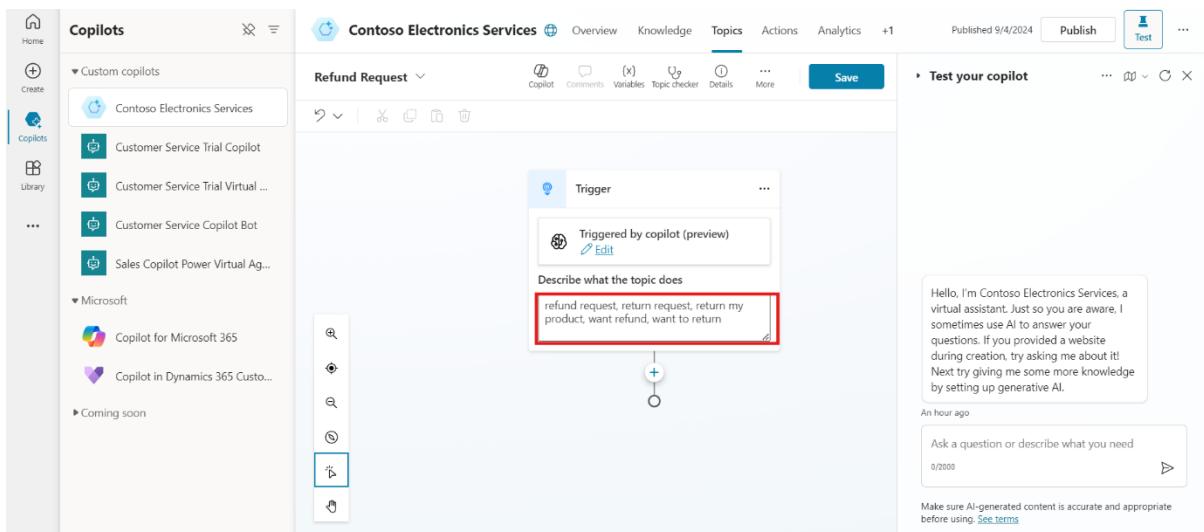
Name	Trigger	Editing	Last modified	Errors	Enabled
Book Appoi...	Trigger...		MOD Administrat...		<input checked="" type="checkbox"/> On
Compare la...	Trigger...		MOD Administrat...		<input checked="" type="checkbox"/> On
Goodbye	Trigger...		MOD Administrat...		<input checked="" type="checkbox"/> On
Greeting	Trigger...		MOD Administrat...		<input checked="" type="checkbox"/> On
Product Info...	Trigger...		MOD Administrat...		<input checked="" type="checkbox"/> On
Return Polic...	Trigger...		MOD Administrat...		<input checked="" type="checkbox"/> On
Start Over	Trigger...		MOD Administrat...		<input checked="" type="checkbox"/> On
Thank you	Trigger...		MOD Administrat...		<input checked="" type="checkbox"/> On

4. In the new topic canvas, at the top of the screen, enter the name "**Refund Request**".



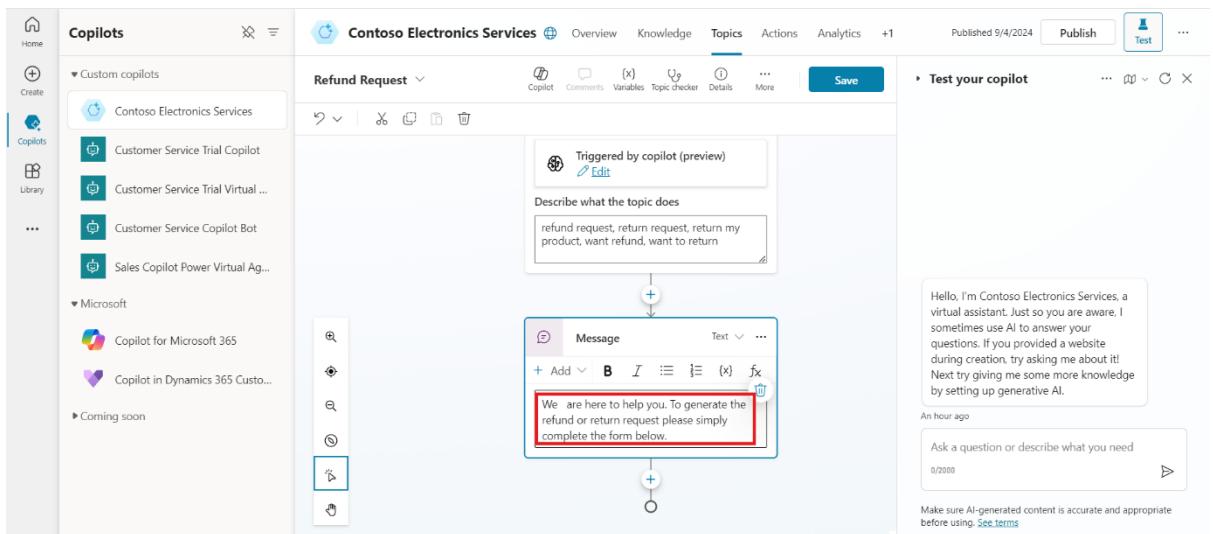
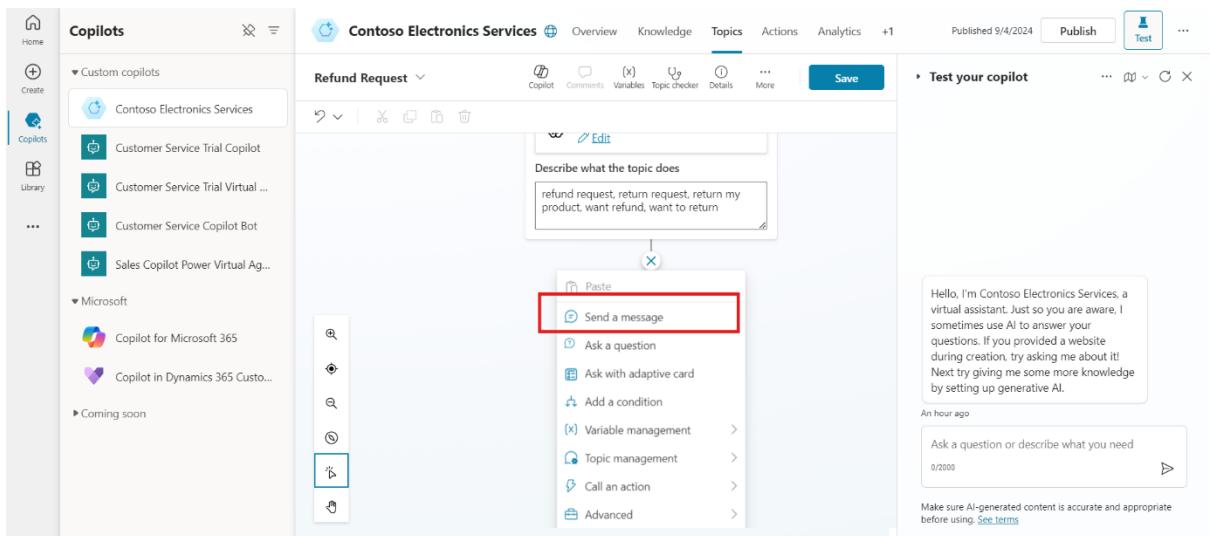
5. In the canvas, you'll see a **Trigger node**. In the **Describe** section, enter the following phrases to trigger this topic:

refund request, return request, return my product, want refund, want to return

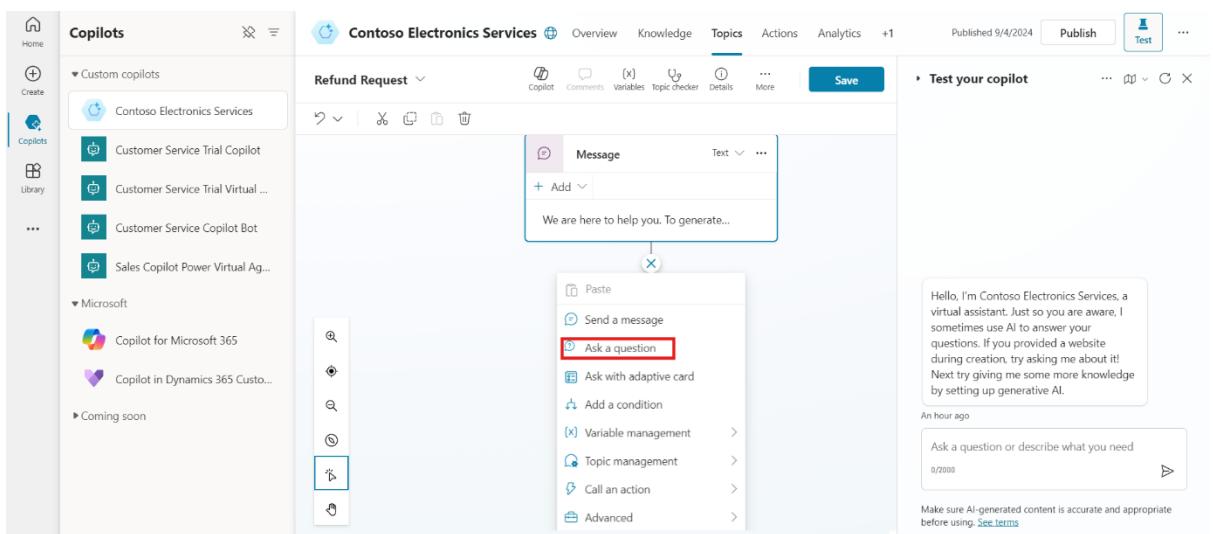


6. Below the Trigger node, click on the + sign to create a new node. Select **Send a Message**. A **Message Node** will be created. In the Message node, enter the following text:

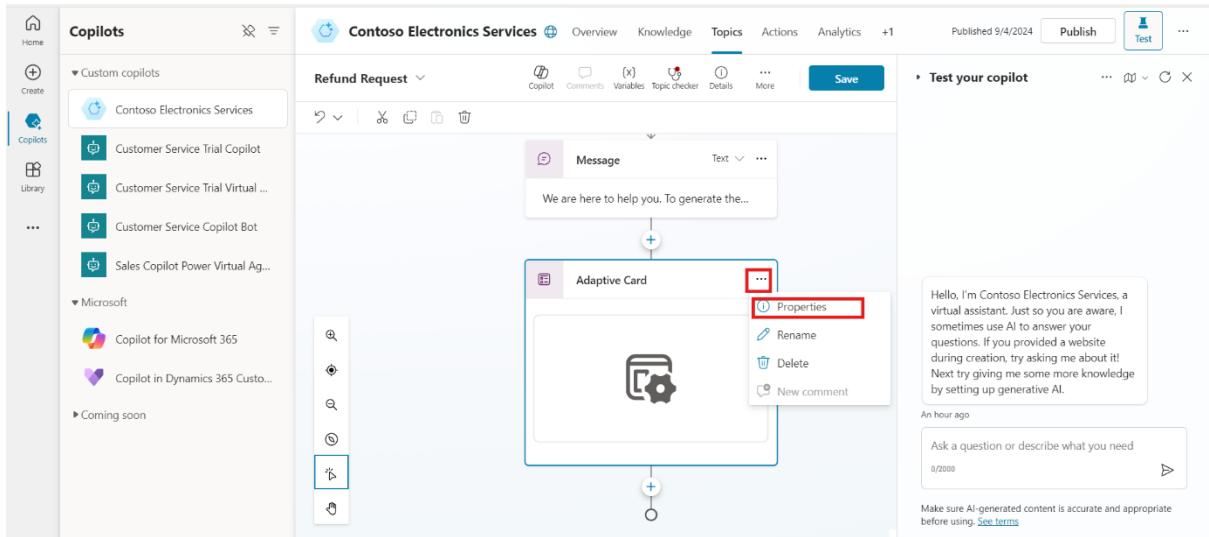
We are here to help you. To generate the refund or return request simply complete the form below.



7. Below the Message node, click on the + sign to create a new node. Select **Ask with Adaptive Card**. An Adaptive Card Node will be created.



8. In the Adaptive Card node, select the **three dots** (More Options) and then select **Properties**.



9. In the Adaptive Card properties, below the **Edit JSON** paste the provided JSON code to create the adaptive card.

```
{
  "$schema": "http://adaptivecards.io/schemas/adaptive-card.json",
  "type": "AdaptiveCard",
  "version": "1.4",
  "body": [
    {
      "type": "TextBlock",
      "text": "Purchase Refund and Exchange Form",
      "weight": "Bolder",
      "size": "Large",
      "horizontalAlignment": "Center"
    },
    {
      "type": "Input.Text",
      "id": "fullName",
      "placeholder": "Enter your full name",
      "label": "Full Name",
      "isRequired": true,
      "errorMessage": "Full Name is required."
    },
    {
      "type": "Input.Text",
      "id": "email",
      "placeholder": "Enter your email address",
      "label": "Email",
      "isMultiLine": true
    }
  ]
}
```

```
"style": "Email",
"isRequired": true,
"errorMessage": "Email is required."
},
{
  "type": "Input.Text",
  "id": "phoneNumber",
  "placeholder": "Enter your phone number",
  "label": "Phone Number",
  "style": "Tel",
  "isRequired": true,
  "errorMessage": "Phone Number is required."
},
{
  "type": "Input.Text",
  "id": "product",
  "placeholder": "Enter the product name or description",
  "label": "Product",
  "isRequired": true,
  "errorMessage": "Product is required."
},
{
  "type": "Input.ChoiceSet",
  "id": "contactMethod",
  "label": "Preferred Contact Method",
  "style": "expanded",
  "choices": [
    {
      "title": "Phone",
      "value": "Phone"
    },
    {
      "title": "Email",
      "value": "Email"
    }
  ],
  "isRequired": true,
  "errorMessage": "Preferred Contact Method is required."
},
{
  "type": "Input.ChoiceSet",
  "id": "orderType",
  "label": "Order Type",
  "style": "expanded",
  "choices": [
    {

```

```
        "title": "In Store",
        "value": "In Store"
    },
    {
        "title": "Online",
        "value": "Online"
    }
],
{
    "isRequired": true,
    "errorMessage": "Order Type is required."
},
{
    "type": "Input.Text",
    "id": "receiptNumber",
    "placeholder": "Enter the receipt number",
    "label": "Receipt Number",
    "isRequired": true,
    "errorMessage": "Receipt Number is required."
},
{
    "type": "Input.Text",
    "id": "orderNumber",
    "placeholder": "Enter the order number",
    "label": "Order Number",
    "isRequired": true,
    "errorMessage": "Order Number is required."
},
{
    "type": "Input.Text",
    "placeholder": "Enter the Purchase Date",
    "id": "purchaseDate",
    "label": "Purchase Date",
    "isRequired": true,
    "errorMessage": "Purchase Date Required."
},
{
    "type": "Input.Text",
    "id": "description",
    "placeholder": "Provide a brief description of the issue or reason for return/exchange",
    "label": "Description",
    "isMultiline": true,
    "isRequired": true,
    "errorMessage": "Description is required."
}
],
"actions": [
```

```
{
  "type": "Action.Submit",
  "title": "Submit",
  "data": {
    "action": "submitRefundExchange"
  }
}
]
```

The screenshot shows the Microsoft Copilot interface for 'Contoso Electronics Services'. On the left, there's a sidebar with 'Copilots' and various copilot options. The main area shows a 'Refund Request' form with fields like 'Full Name', 'Email', 'Phone Number', 'Product', 'Preferred Contact I', 'Order Type', and 'Receipt Number'. To the right of the form is the 'Adaptive Card Node properties' pane. It contains an 'Edit JSON' section with the following code:

```

{
  "body": [
    {
      "type": "Text", "text": "Hello, I'm Contoso Electronics Services, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI."
    }
  ],
  "actions": [
    {
      "type": "Action.Submit", "title": "Submit", "data": { "action": "submitRefundExchange" } }
  ]
}

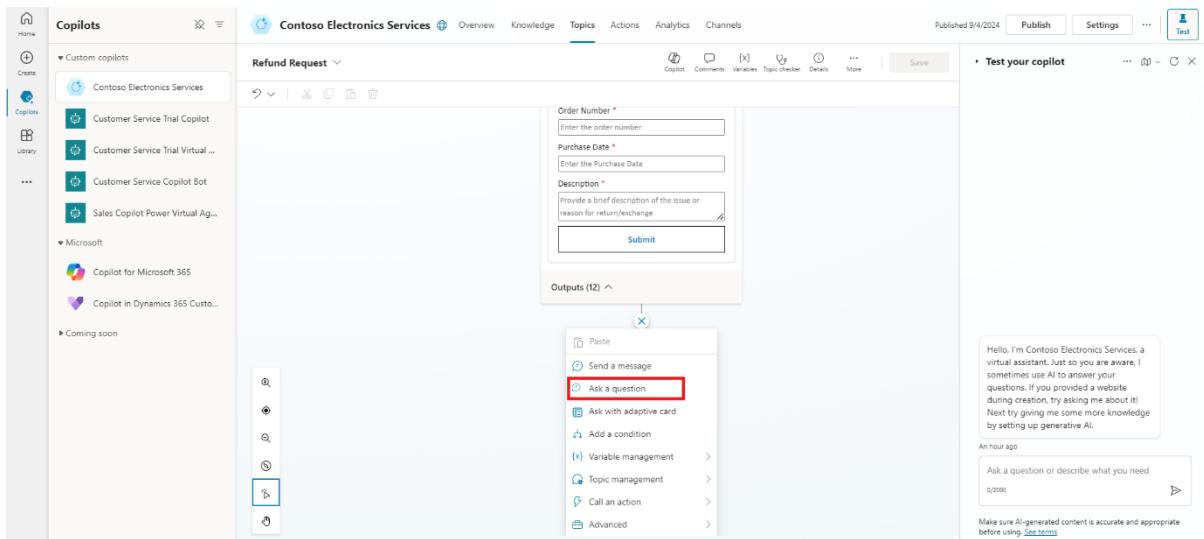
```

Below the JSON editor, there's a checkbox for 'Allow switching to another topic' and a note about AI-generated content. At the bottom of the pane are 'Edit schema' and 'Save' buttons.

10. Select **Variables** to open the Variables pane.
11. Check the boxes on the right-hand side for the all-topic variables.
12. Click on **Save** to save your variable settings.

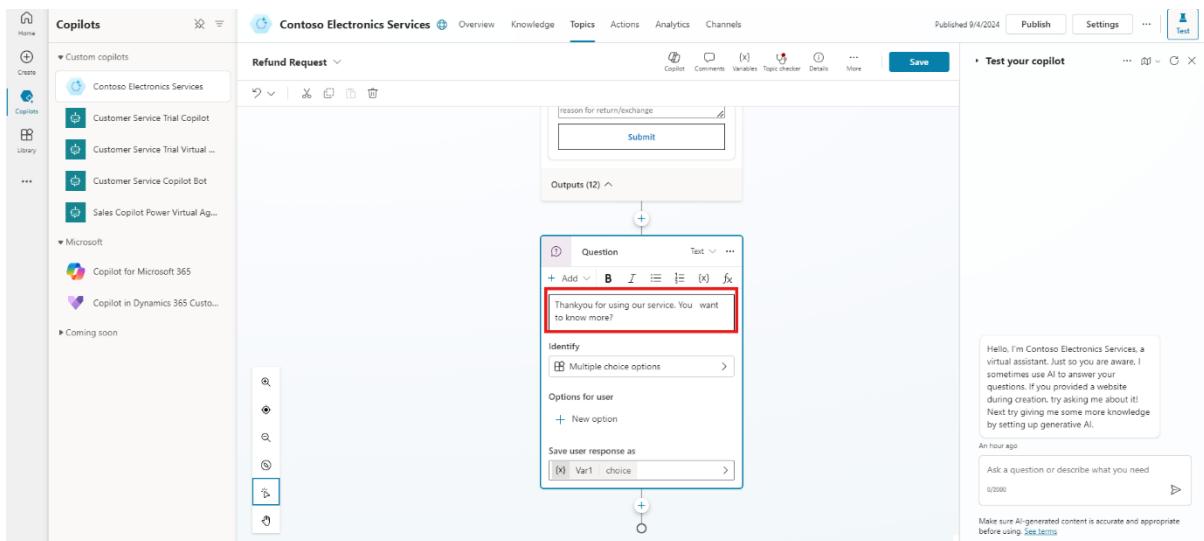
The screenshot shows the Microsoft Copilot interface for 'Contoso Electronics Services'. The 'Variables' pane is open on the right, showing a list of variables under 'Topic (12)'. The variables listed are: action, actionSubmitId, contactMethod, description, email, fullname, orderNumber, orderType, phoneNumber, product, purchaseDate, receiptNumber, and Global. Each variable has a checkbox next to it, which is checked for most of them. A red box highlights the 'Topic (12)' section. The 'Save' button at the top right of the Variables pane is also highlighted with a red box.

13. Below the adaptive card node, click on the + sign to create a new node. Select **Ask a Question, a Question Node** will be created.



14. In the Ask Question node message field, enter the message.

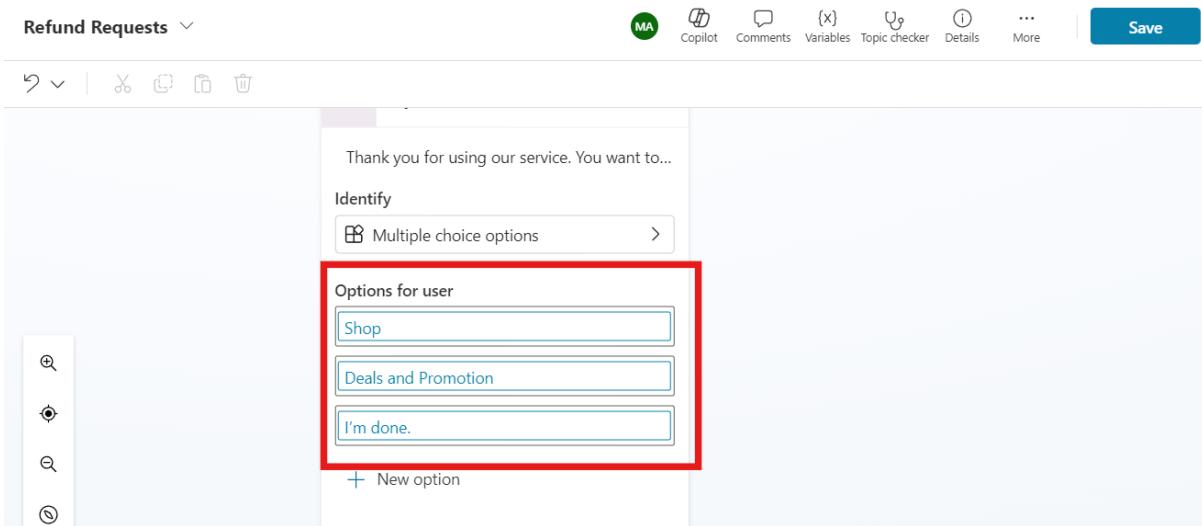
Thank you for using our service. You want to know more?



15. In the Question node, select **Multiple Choice as the identify.**

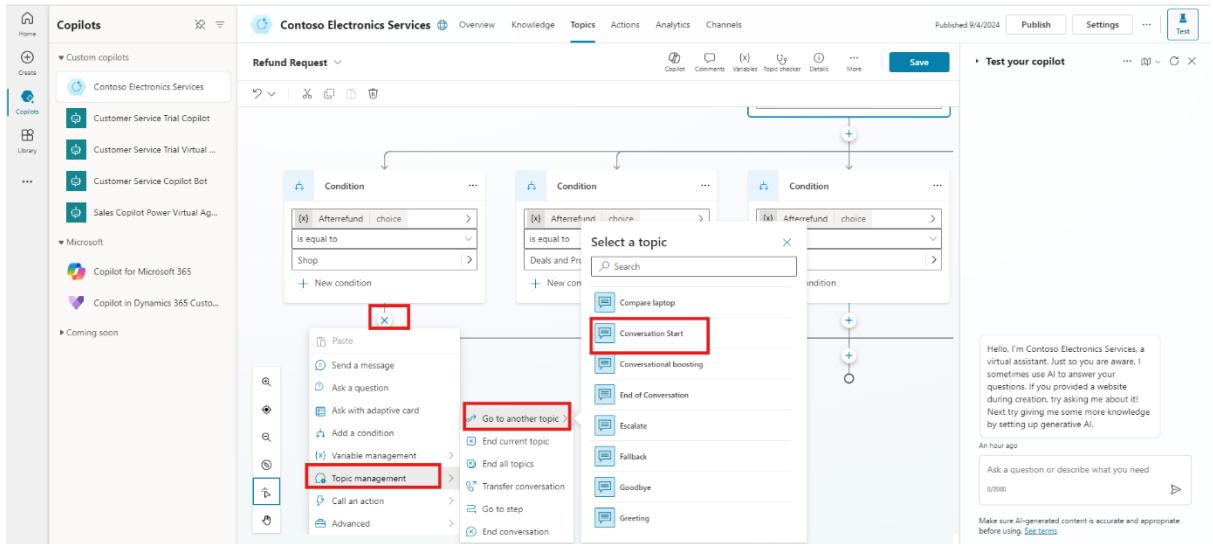
16. In the **Options for user section, enter the following choices:**

- Shop
- Deals and Promotion
- I'm done.

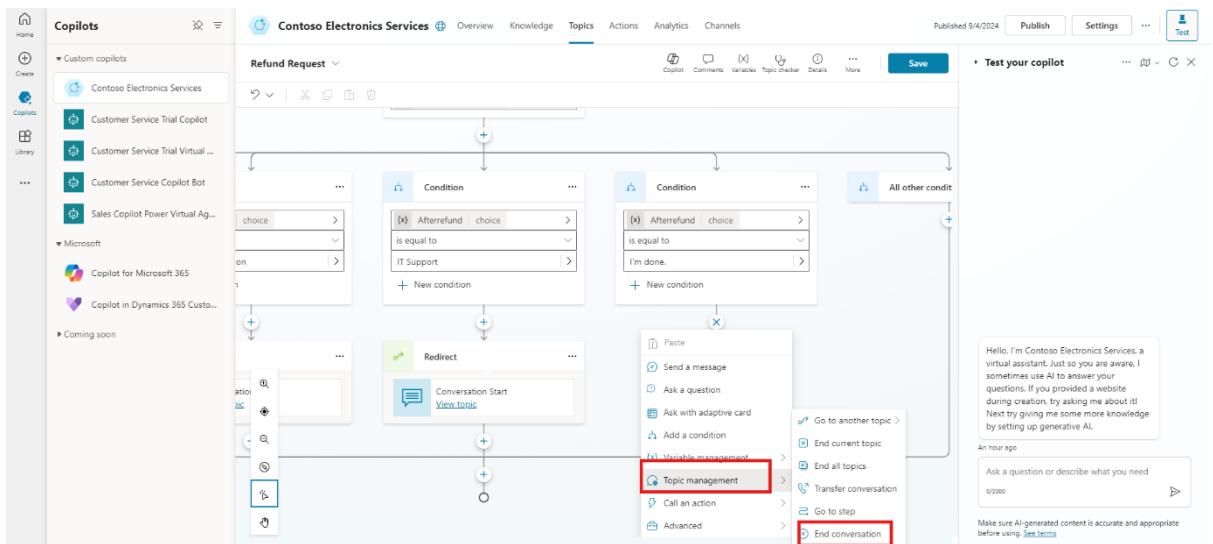


17. Below **Save the user's response** a new variable creates (Var1), click on the variable name variable properties window will open, where you can rename the variable name with **Afterrefund**.

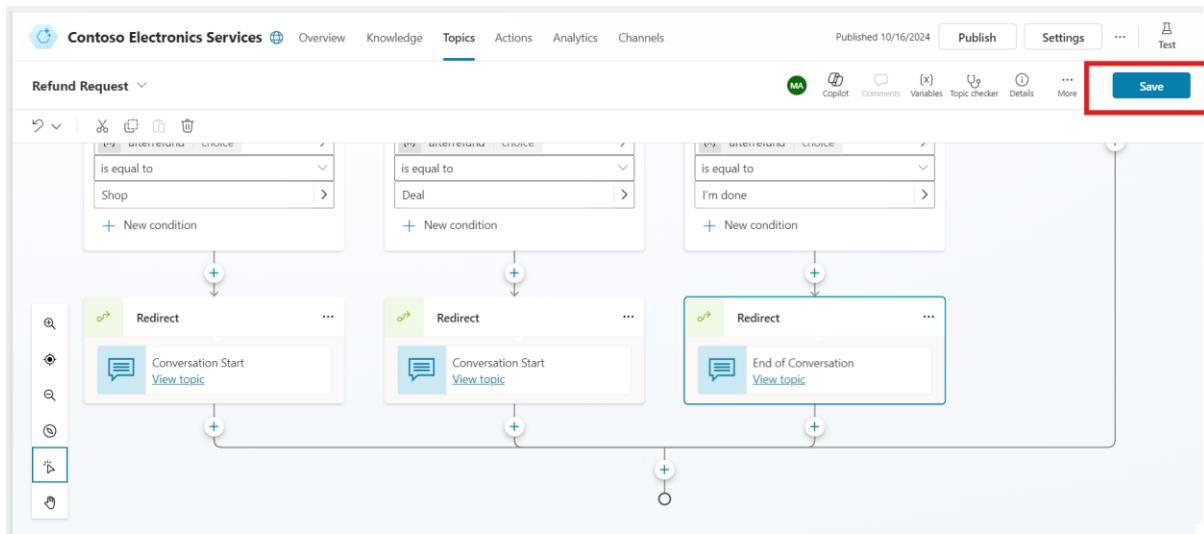
18. Click the (X) to close the variable properties window.
 19. Under the **Shop and Deals and Promotion** condition, click on the + sign on each condition and select **Topic Management** for each, then choose **Go to Another Topic**. A topic selection window will open—search for **Conversation Start** and select the **Conversation Start** topic.



- For **I'm done** option, click on the + sign and select **Topic Management** for each, then choose **Go to Another Topic** and select **End Conversation**.



- Once all nodes are configured, click on **Save** to finalize and save your "**Refund Requests**" topic.



Conclusion

After completing this exercise, you have gained the following knowledge:

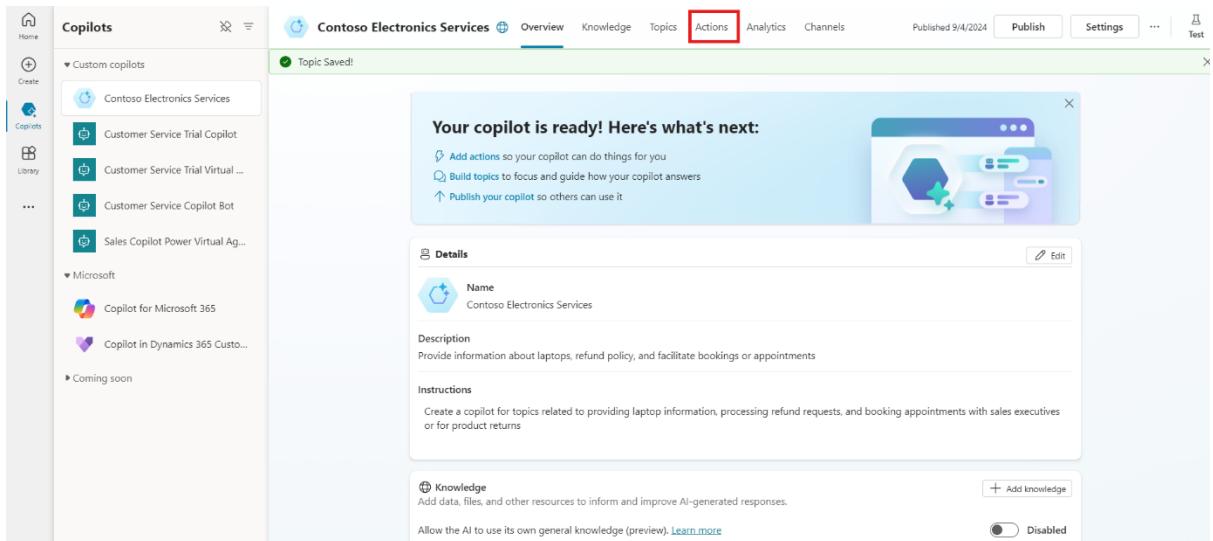
1. Successfully created a "Refund or Return Policy Information" topic with trigger phrases and generative answers.
2. Built a "Refund Request" topic that allows users to submit refund forms using adaptive cards.
3. Implemented a decision flow to guide users based on their needs.
4. Configured system variables and integrated adaptive cards with JSON.
5. Achieved enhanced customer experience through automated responses and topic management in Copilot Studio.

Exercise 7: Create Power Automate Flow and Action for Refund Requests

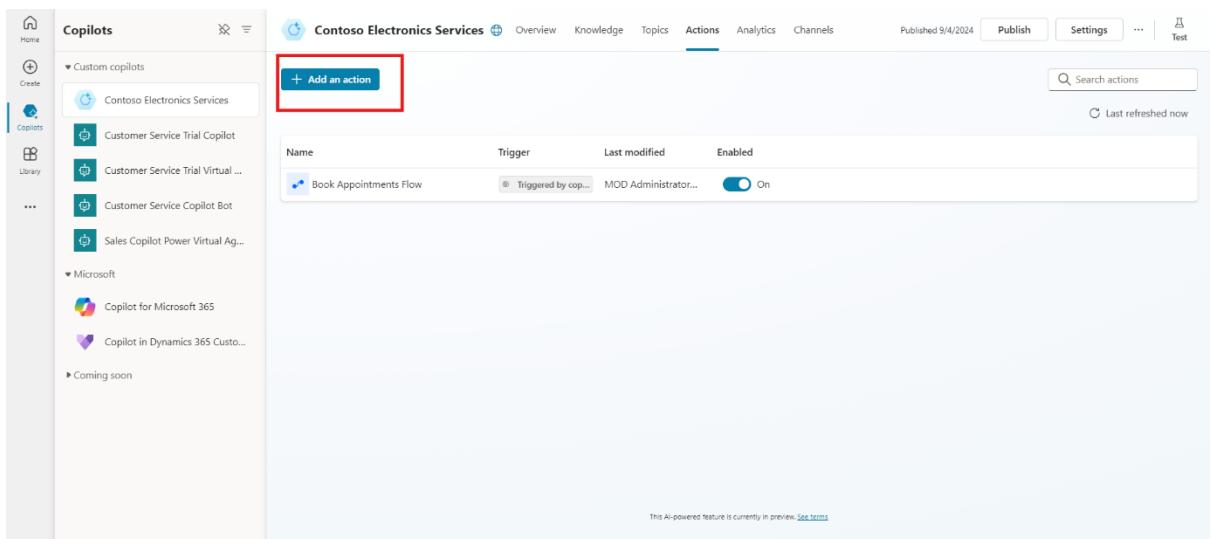
In this exercise, participants will create a Power Automate flow designed to handle refund requests, enhancing efficiency in processing customer inquiries. The first task involves setting up a flow that collects essential information such as the customer's name, email, phone number, purchase date, and order details. By utilizing the Dataverse connector, the collected data will be stored in a designated Refund Requests table, ensuring organized management of refund inquiries. Following this, participants will integrate the newly created flow into the Copilot Studio by defining specific actions that streamline the interaction with customers. This exercise not only reinforces practical skills in Power Automate but also demonstrates how to leverage Copilot functionalities to enhance user experience and operational efficiency.

Task 1: Create Power Automate Flow to Refund Request Flow

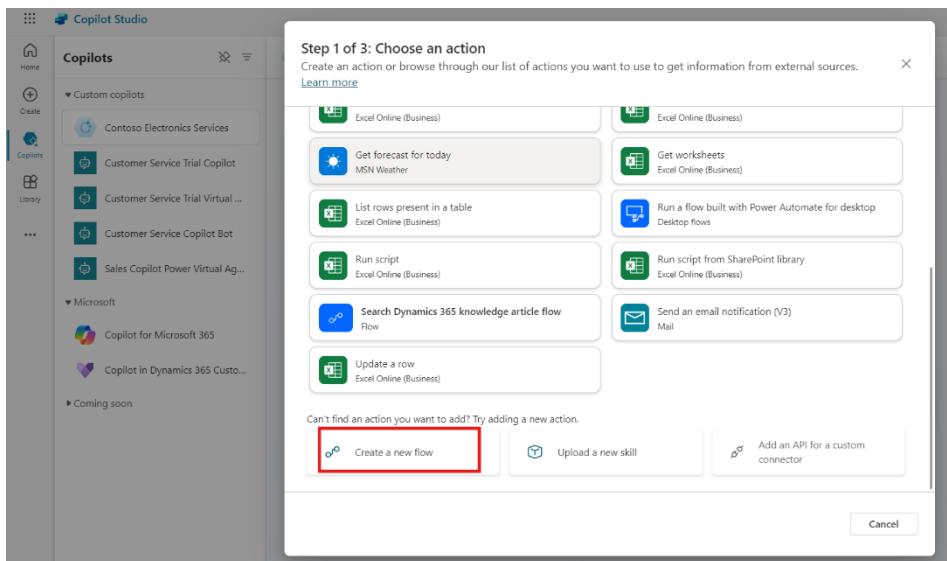
1. Select the **Actions** tab to start configuring actions for your Copilot.



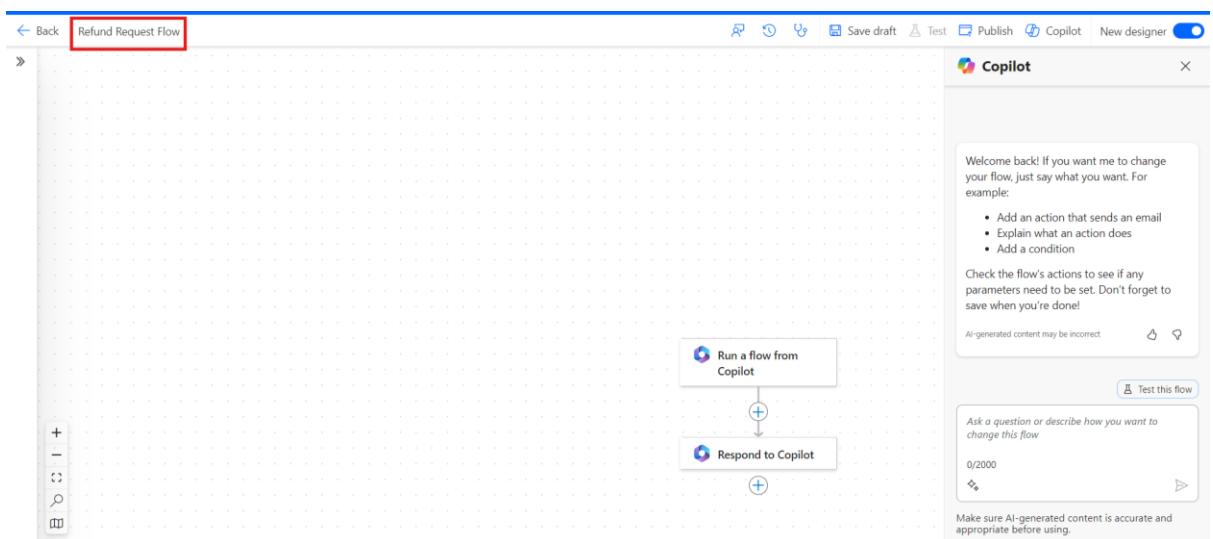
2. Click on + Add an action.



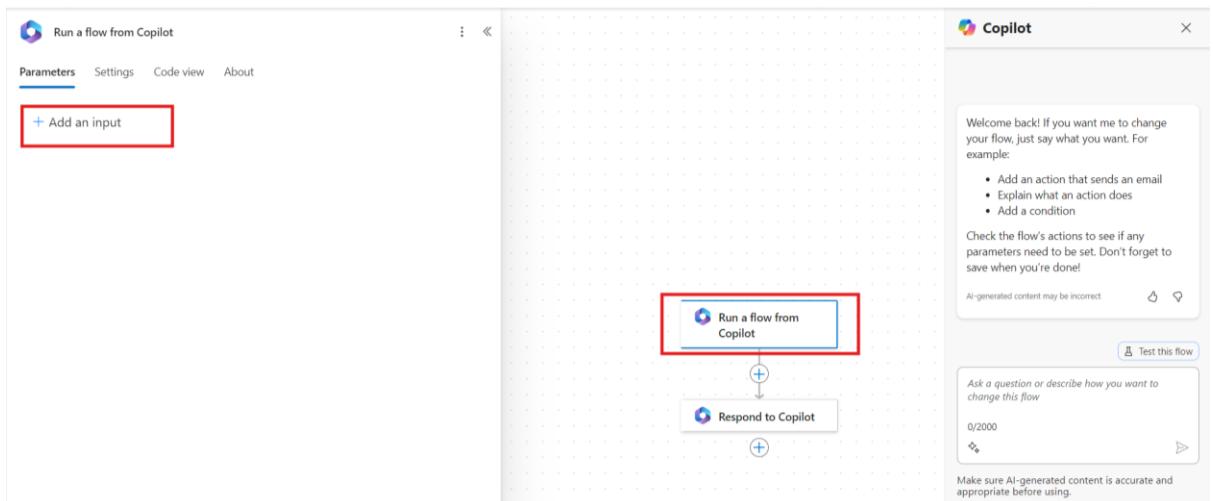
3. Scroll down and select **Create a new flow** a new Power Automate flow window will pop up. Check the environment from top right corner, if correct environment (Dev One) not selected, please select the correct environment.



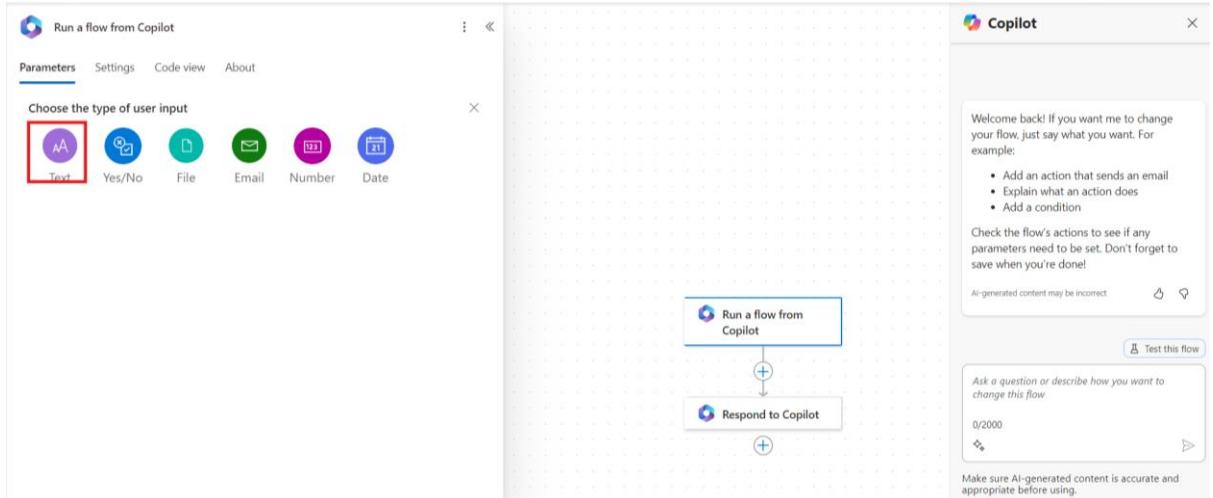
4. Select **Run a flow from copilot** from top left corner and rename the flow as **Refund Request Flow**.

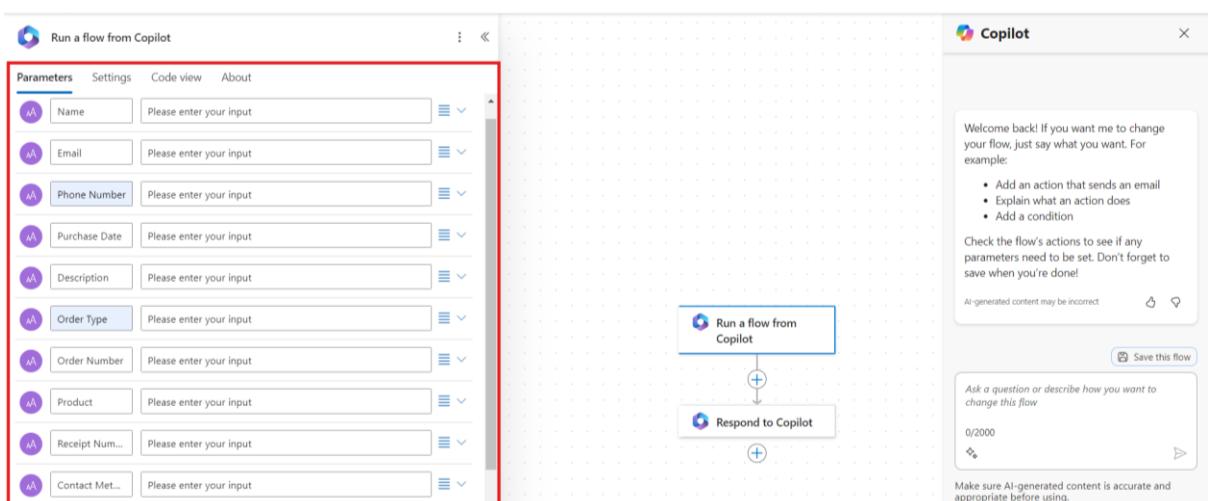
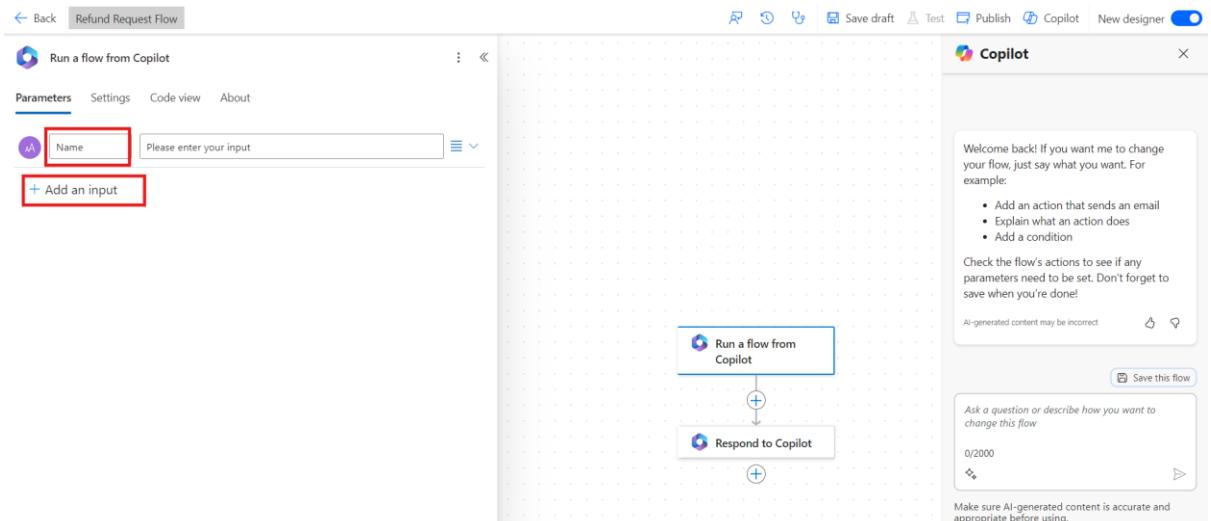


5. In the trigger step "**Run a flow from Copilot**," select **+ Add an input**.

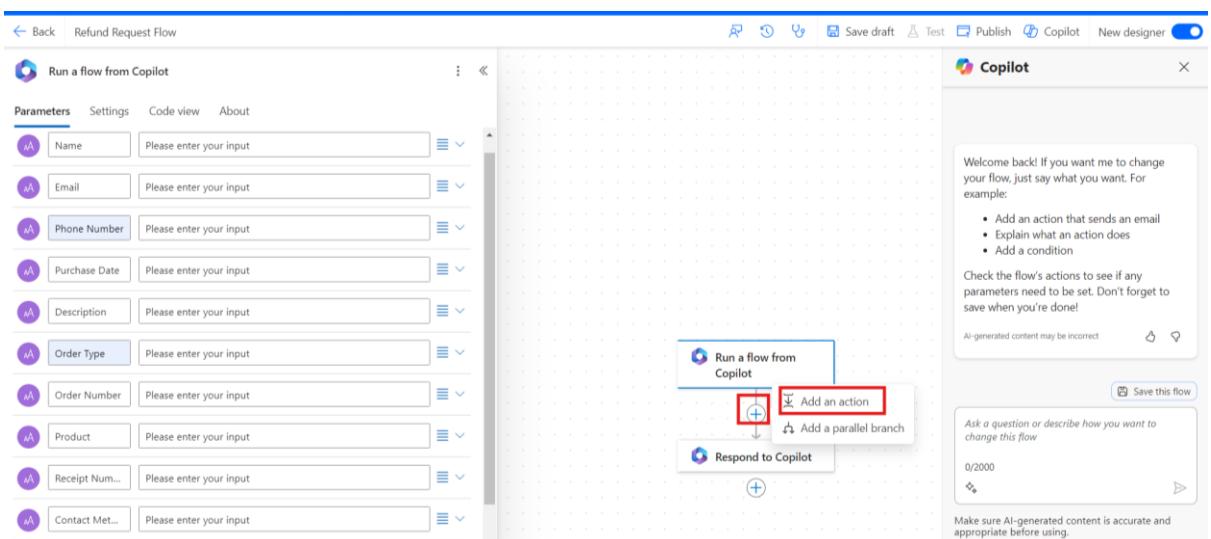


6. Select **Text** for the input type and configure the following inputs by repeating the process:
 - a. Enter **Name** in Input for Full Name
 - b. Enter **Email** in Input for Email
 - c. Enter **Phone Number** in Input for Phone Number
 - d. Enter **Purchase Date** in Input for Date of Purchase
 - e. Enter **Description** in Input for Description
 - f. Enter **Order Number** in Input for Order Number
 - g. Enter **Order Type** in Input for Order Type
 - h. Enter **Product** in Input for Product
 - i. Enter **Receipt Number** in Input for Appointment Type
 - j. Enter **Contact Method** in Input for Preferred Contact Method





7. Click on the **+** icon between the two steps in the flow and select **Add an action**.



8. In the **Search** field, type **Dataverse** and select **See more** for the Dataverse connector.

Add an action

Dataverse

Runtime: Select a runtime | Action type: Actions | Group by Connector

Microsoft Dataverse (Premium)

- Perform an unbound action in selected environment
- Perform a background operation (preview)
- Update a row
- Microsoft Dataverse (legacy) (Premium)**
- Get row (legacy)
- Add a new row (legacy)
- List rows (legacy)

See more

Copilot

Welcome back! If you want me to change your flow, just say what you want. For example:

- Add an action that sends an email
- Explain what an action does
- Add a condition

Check the flow's actions to see if any parameters need to be set. Don't forget to save when you're done!

Save this flow

Ask a question or describe how you want to change this flow

0/2000

Make sure AI-generated content is accurate and appropriate before using.

9. Select **Add a new row** action.

Add an action

Microsoft Dataverse

Provides access to Microsoft Dataverse actions and triggers for Power Platform environments.

- Add a new row (Premium)**
- Add a new row to selected environment
- Delete a row
- Delete a row from selected environment
- Download a file or an image
- Download a file or an image from selected environment
- Get a row by ID
- Get a row by ID from selected environment
- List rows

See more

Copilot

Welcome back! If you want me to change your flow, just say what you want. For example:

- Add an action that sends an email
- Explain what an action does
- Add a condition

Check the flow's actions to see if any parameters need to be set. Don't forget to save when you're done!

Save this flow

Ask a question or describe how you want to change this flow

0/2000

Make sure AI-generated content is accurate and appropriate before using.

10. Choose **Refund Requests** for the table name.

Add a new row

Parameters | Settings | Code view | Testing | About

Table Name: **Refund Requests**

Use "Refund" as a custom value

Enter custom value

Advanced parameters

Showing 0 of 16

Connected to Microsoft Dataverse ContosoElectronics-ab5a6. Change connection reference

Copilot

Welcome back! If you want me to change your flow, just say what you want. For example:

- Add an action that sends an email
- Explain what an action does
- Add a condition

Check the flow's actions to see if any parameters need to be set. Don't forget to save when you're done!

Save this flow

Ask a question or describe how you want to change this flow

0/2000

Make sure AI-generated content is accurate and appropriate before using.

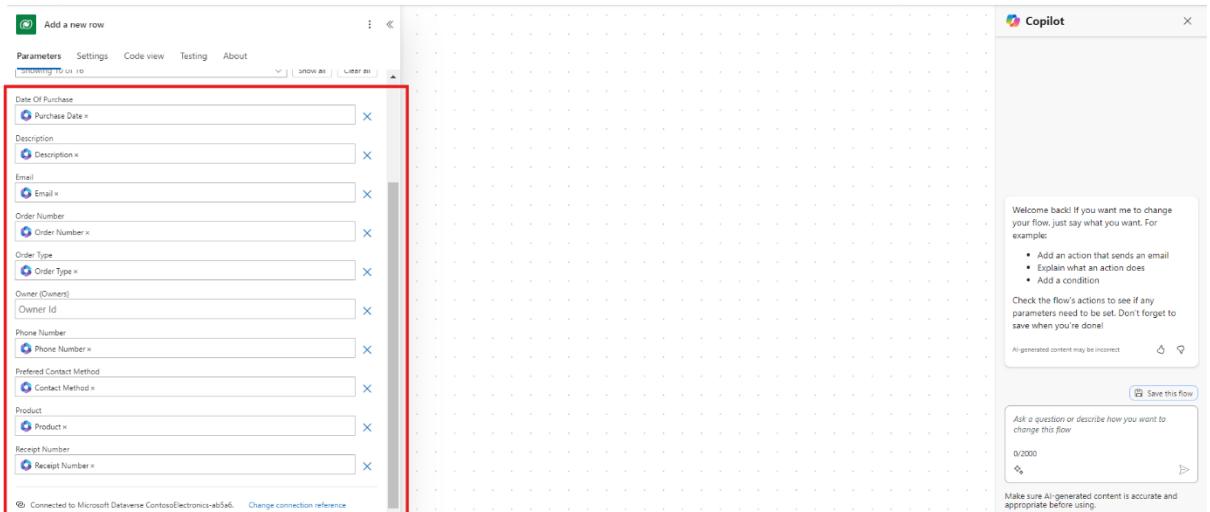
11. Select **Show all** to see all available fields.

The screenshot shows the Microsoft Power Automate Copilot interface. On the left, there's a 'Parameters' section with a 'Table Name' dropdown set to 'Refund Requests' and an 'Advanced parameters' dropdown showing 0 of 16 items. A red box highlights the 'Show all' button. On the right, a flow diagram is displayed. It starts with a 'Run a flow from Copilot' action, followed by an 'Add a new row' action, and ends with a 'Respond to Copilot' action. The 'Add a new row' step has a red box around its input field. The Copilot sidebar on the right provides welcome instructions and a save button.

12. Use **Dynamic content** to map each input parameter to the corresponding field:

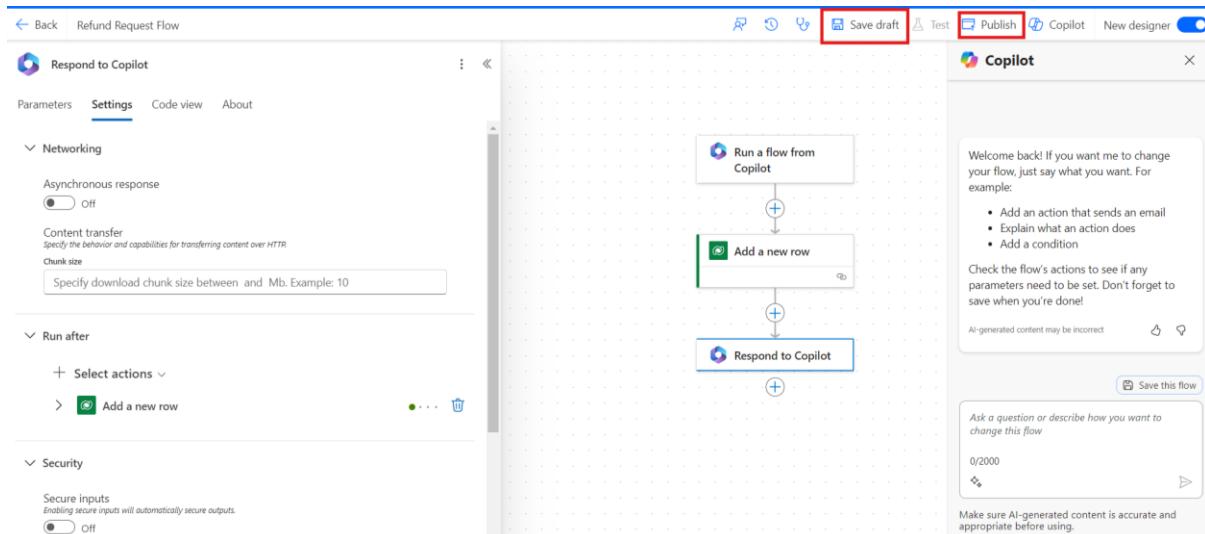
- Name** Dynamic Input → **Full Name** Parameter.
- Purchase Date** Dynamic Input → **Date of Purchase** Parameter.
- Description** Dynamic Input → **Description** Parameter.
- Email** Dynamic Input → **Email** Parameter.
- Order Number** Dynamic Input → **Order Number** Parameter.
- Order Type** Dynamic Input → **Order Type** Parameter.
- Phone Number** Dynamic Input → **Phone Number** Parameter.
- Product** Dynamic Input → **Product** Parameter.
- Receipt Number** Dynamic Input → **Receipt Number** Parameter.
- Contact Method** Dynamic Input → **Preferred Contact Method** Parameter.

This screenshot is similar to the one above but focuses on mapping the 'Name' parameter. In the 'Parameters' section, the 'Name' input field is highlighted with a red box. In the flow diagram, the 'Name' input field in the 'Add a new row' action is also highlighted with a red box. The rest of the interface and sidebar are identical to the previous screenshot.



13. Select **Respond to Copilot** action.
14. Click on **Settings**.
15. Ensure that **Asynchronous Response** is set to **Off**.

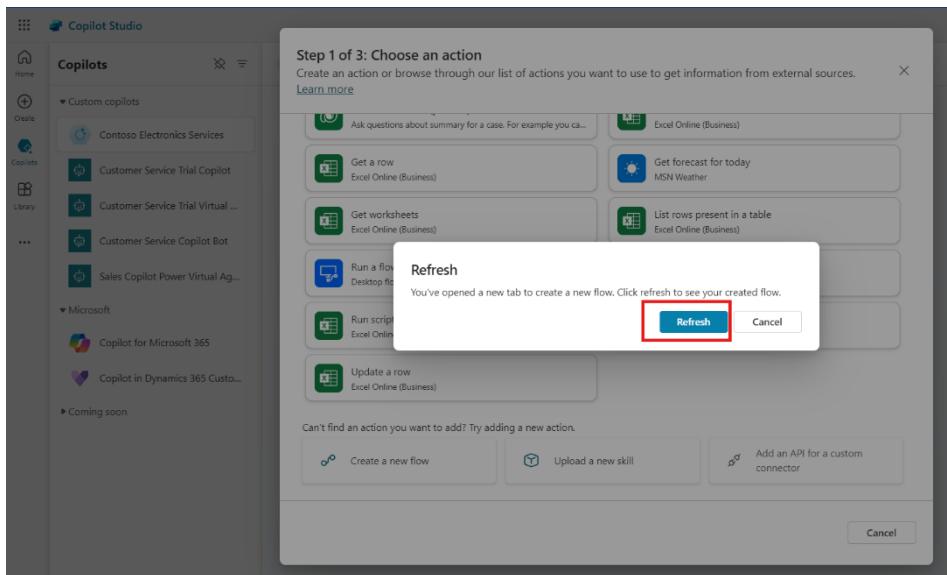
16. Select **Save draft**. Then, click on **Publish**.



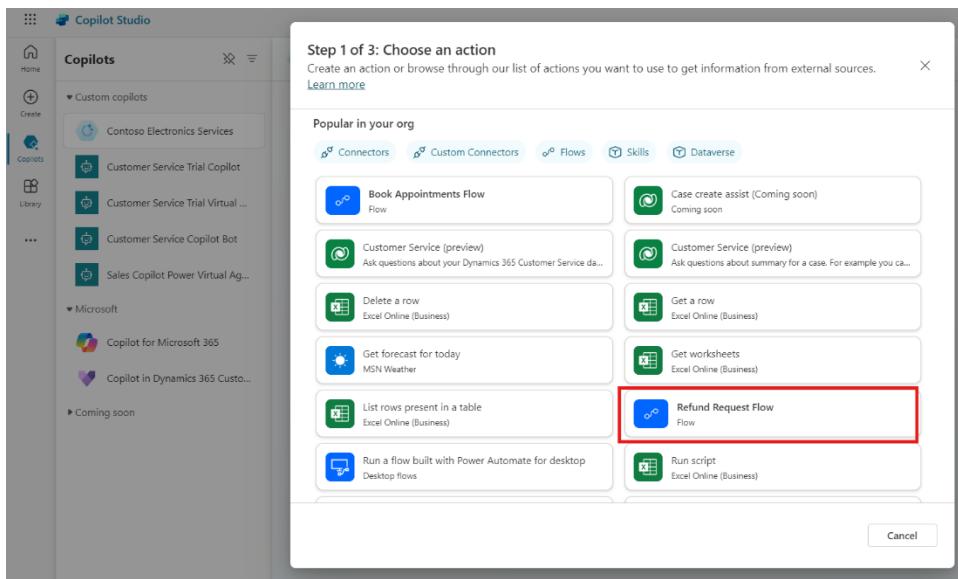
- Once the flow is published, close the Power Automate tab to return to Copilot Studio.

Task 2: Create Action in Copilot for Refund Requests

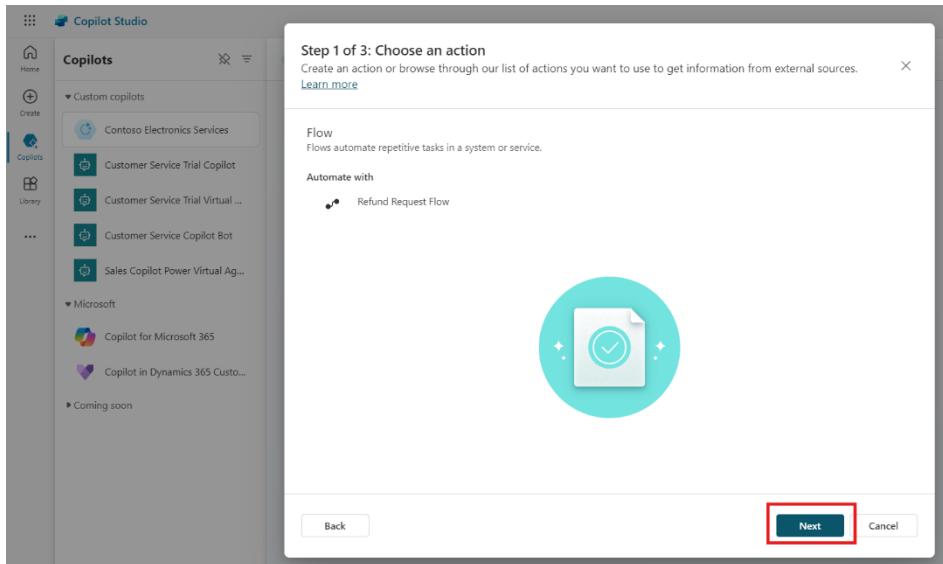
- Go to copilot window and click on **Refresh**, (If the Copilot window was closed, reopen it and navigate back to the **Copilot Studio**. Go to the **Actions** tab and click on **+ Add an action**.)



- In the "Choose an action" window, select the **Refund Requests Flow** you created.



3. Click on **Next**, **next** then **Next** again, and finally **Finish**. The flow will now be added as an action.



Step 2 of 3: Review inputs and outputs

You can edit each input and output for your action

Inputs (10)	Outputs (0)	Edit inputs	
Display name	How will the copilot fill this input?	Identify as	Description
Name	Dynamically fill with best o...	user's entire response	Please enter your input
Email	Dynamically fill with best o...	user's entire response	Please enter your input
Phone Number	Dynamically fill with best o...	user's entire response	Please enter your input
Purchase Date	Dynamically fill with best o...	user's entire response	Please enter your input
Description	Dynamically fill with best o...	user's entire response	Please enter your input
Order Type	Dynamically fill with best o...	user's entire response	Please enter your input

Step 3 of 3: Review and finish

You can edit each input and output for your action

Selected action
Required inputs need to be filled in for an action to run.

Refund Request Flow

Configure

Display name
Refund Request Flow

Description for the copilot to know when to use this action
Refund Request Flow

Ask the user before running this action.
User confirmation is recommended for actions in sensitive or regulated domains or when making changes for the user. AI-generated content can have mistakes.

Review inputs and outputs
Required inputs need to be filled in for an action to run.

Next **Finish** **Cancel**

4. Navigate to the **Topics** section. Select the **Refund Request** topic.

Topics

Contoso Electronics Services

Topics Actions Analytics Channels Published 5/4/2024 Publish Settings Test

Custom topics

+ Add a topic

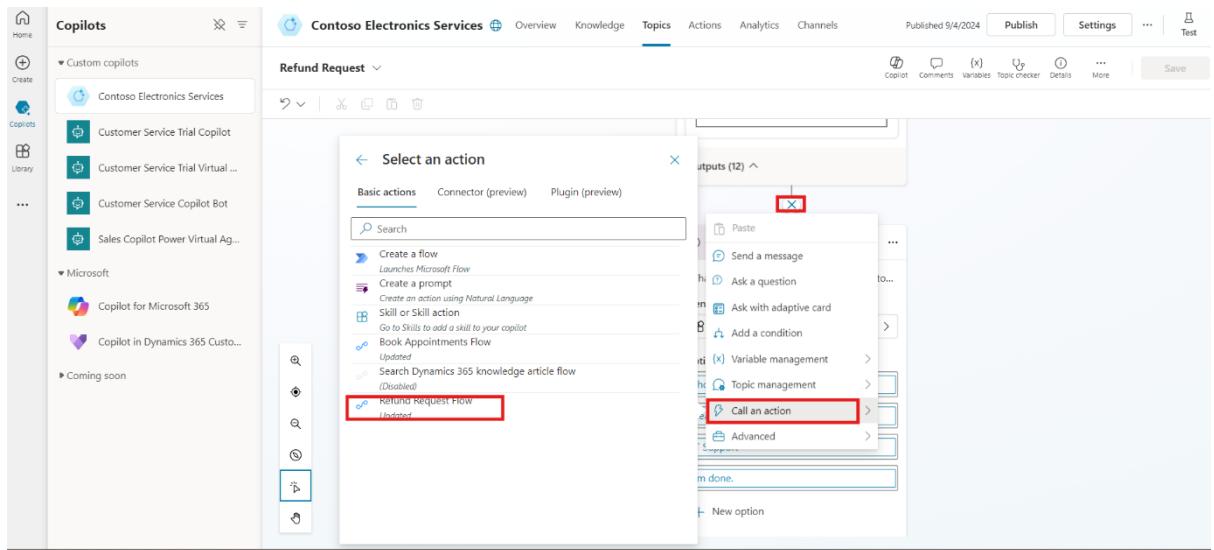
All Custom (9) System (9)

Name	Trigger	Editing	Last modified	Errors	Enabled
Book Appointments	Triggered by cop...	MA	MOD Administrator...		On
Compare laptop	Triggered by cop...		MOD Administrator...		On
Goodbye	Triggered by cop...		MOD Administrator...		On
Greeting	Triggered by cop...		MOD Administrator...		On
Product Information	Triggered by cop...		MOD Administrator...		On
Refund Request	Triggered by cop...		MOD Administrator...		On
Return Policy Information	Triggered by cop...		MOD Administrator...		On
Start Over	Triggered by cop...		MOD Administrator...		On
Thank you	Triggered by cop...		MOD Administrator...		On

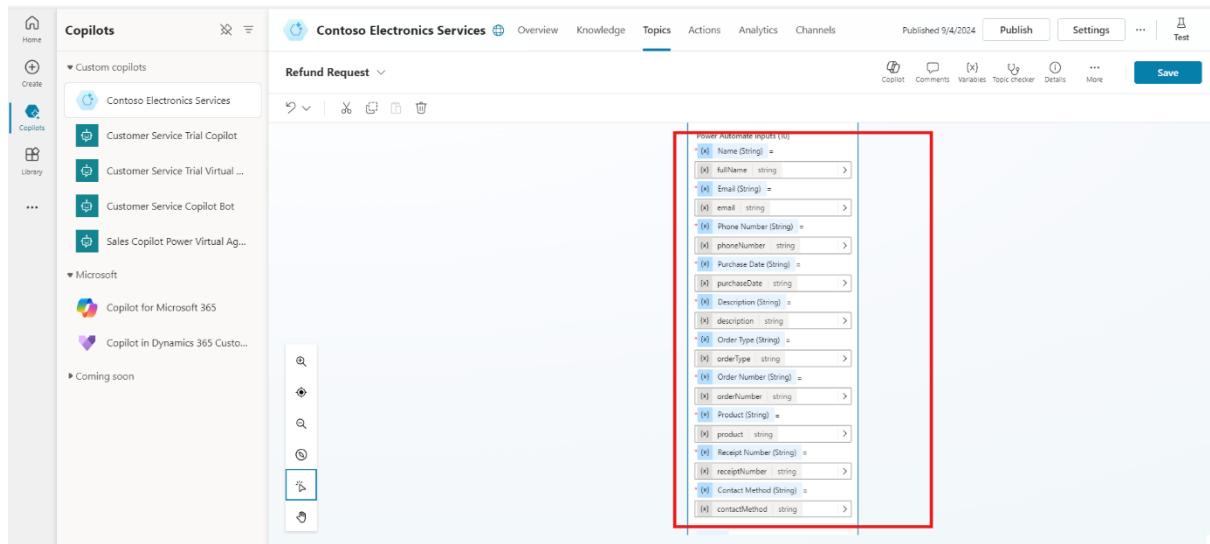
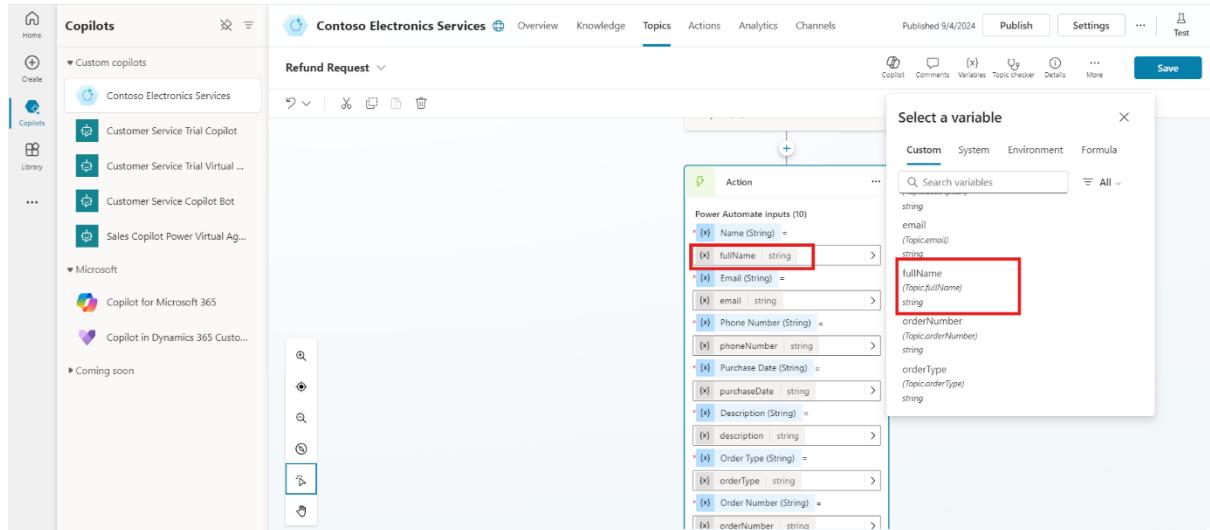
Search custom topics

Last refreshed now

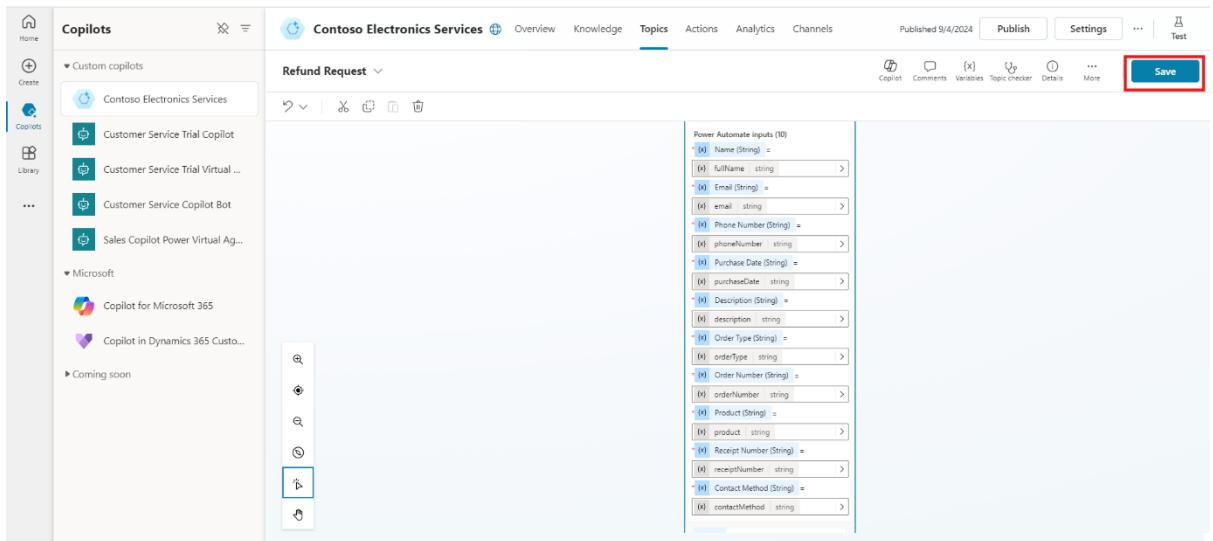
5. Below the Adaptive Card node, click on the + sign to create a new node select **Call an action**. Choose the **Refund Requests Flow**. This action will now be added below the Adaptive Card node.



6. In the action node, you need to map each input field to the appropriate variable created by the Adaptive Card:
- Name** Input: Click on the input field, then select **fullname** from the custom variables.
 - Email** Input: Click on the input field, then select **email** from the custom variables.
 - Phone Number** Input: Click on the input field, then select **phoneNumber** from the custom variables.
 - Product** Input: Click on the input field, then select **product** from the custom variables.
 - Contact Method** Input: Click on the input field, then select **contactMethod** from the custom variables.
 - Order Type** Input: Click on the input field, then select **orderType** from the custom variables.
 - Receipt Number** Input: Click on the input field, then select **receiptNumber** from the custom variables.
 - Order Number** Input: Click on the input field, then select **orderNumber** from the custom variables.
 - Purchase Date** Input: Click on the input field, then select **purchaseDate** from the custom variables.
 - Description** Input: Click on the input field, then select **description** from the custom variables.

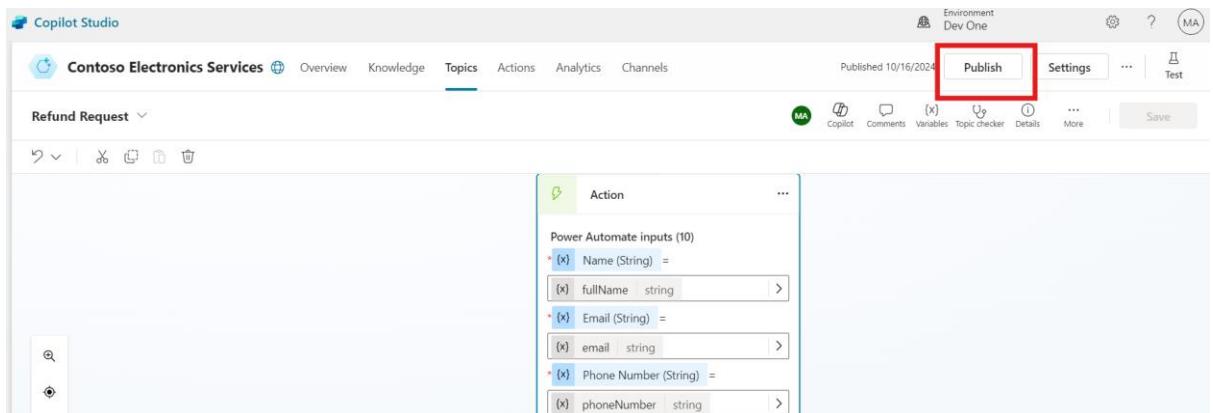


7. After mapping all the variables, click on the **Save** button to save the topic configuration.

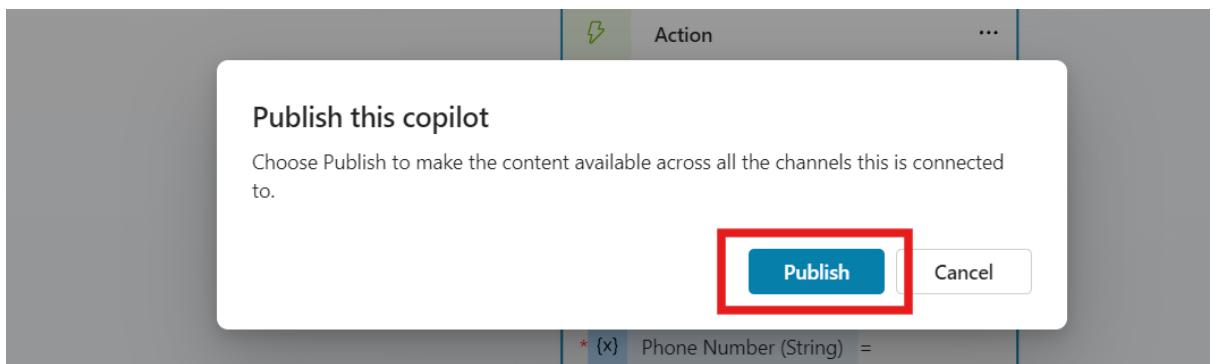


Task 3: Publish Your Copilot

- From the top right corner, Click on the **Publish** button to start the publishing process.



- A confirmation dialog may appear. Select **Publish** again to finalize and publish your copilot.



Conclusion

After completing this exercise, you have gained the following knowledge:

1. Successfully created a Power Automate flow for refund requests.
2. Configured input parameters for customer details.
3. Mapped inputs to corresponding fields in the Dataverse Refund Requests table.
4. Integrated the flow into Copilot Studio by creating actions for refund requests.
5. Published the Copilot for user accessibility.

Final Test

Exercise 6: Test Your Copilot

To test the functionalities of your Copilot and Power Automate flows, follow these steps:

Click on the three-dot right side of the window and select **Go to demo website**. A demo website window will open start the conversation into the website chat window.

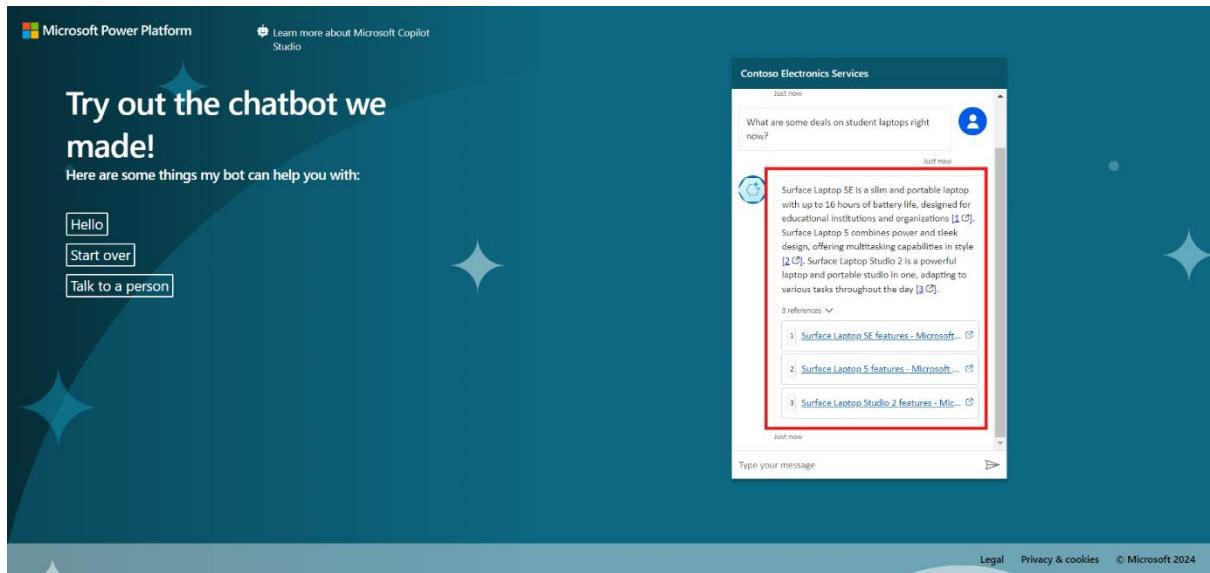
Note: Testing Copilot with the same prompt multiple times may yield varying responses due to contextual learning, dynamic data access, and inherent randomness in its output generation.

The screenshot shows the Microsoft Copilot interface. On the left, there's a sidebar with options like 'Home', 'Create', 'Copilots', and a 'Library'. The main area displays a 'Copilots' card for 'Contoso Electronics Services'. The card includes a 'Test' button with a red border and a tooltip that reads 'Start a conversation with your copilot'. Below the card, there's a 'Details' section with fields for 'Name' (Contoso Electronics Services), 'Description' (Provide information about laptops, refund policy, and facilitate bookings or appointments), and 'Instructions' (Create a copilot for topics related to providing laptop information, processing refund requests, and booking appointments with sales executives or for product returns). At the bottom, there's a 'Knowledge' section with a '+ Add knowledge' button.

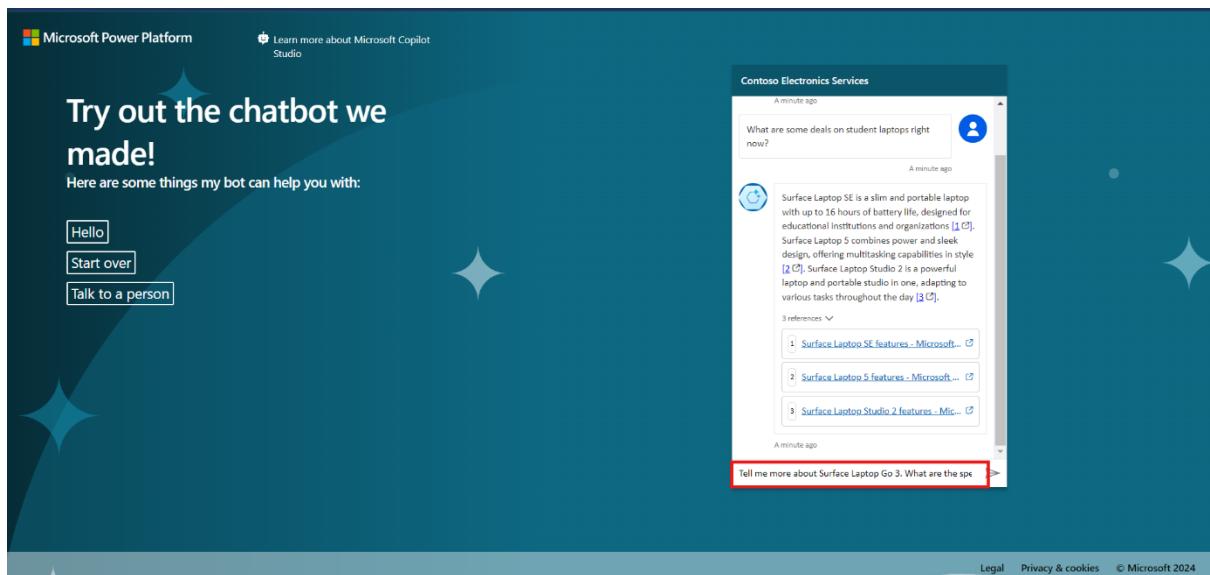
The screenshot shows the Microsoft Power Platform website. At the top left is the Microsoft Power Platform logo. To its right is a link to "Learn more about Microsoft Copilot Studio". Below the logo, a large heading says "Try out the chatbot we made!". Underneath it, a subtext reads "Here are some things my bot can help you with:". Three buttons are listed: "Hello", "Start over", and "Talk to a person". On the right side, there is a preview window titled "Contoso Electronics Services" showing a conversation with a bot named "Contoso Virtual Agent". The bot's message is: "Hello! I am Contoso Virtual Agent. How May I Help You?". The timestamp is "2 minutes ago". Below the message is a text input field with placeholder text "Type your message" and a send button icon. At the bottom right of the page are links for "Legal", "Privacy & cookies", and "© Microsoft 2024".

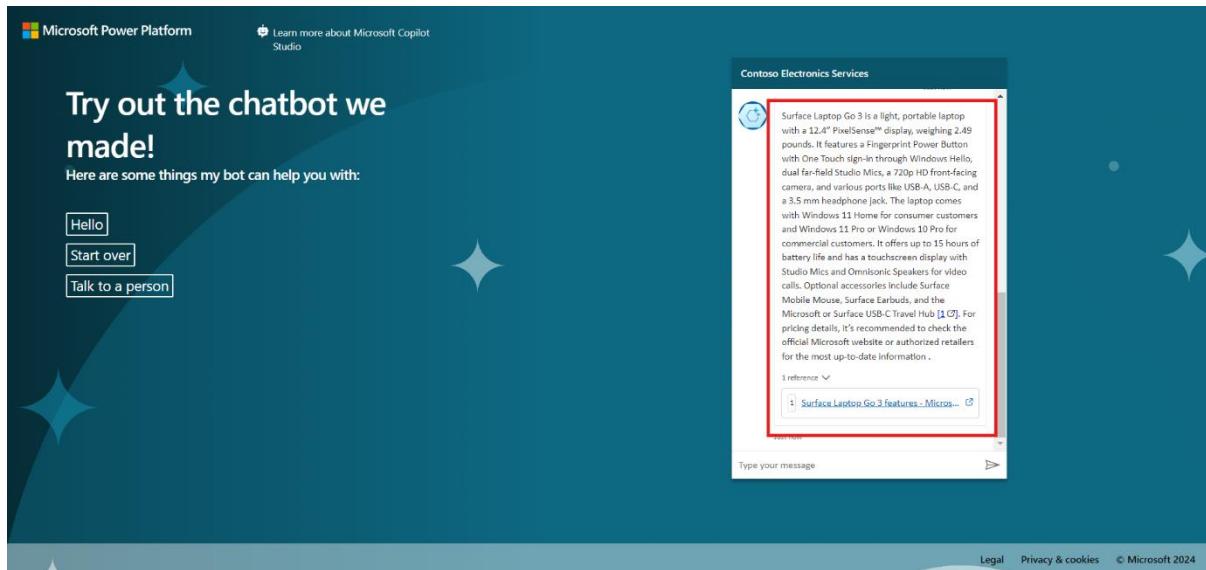
1. What are some deals on student laptops right now?

This screenshot is identical to the one above, showing the Microsoft Power Platform website with the "Try out the chatbot we made!" section. The right side shows the "Contoso Electronics Services" chat window. A user message "a. What are some deals on student laptops right now?" is highlighted with a red rectangle. The bot's response "Hello! I am Contoso Virtual Agent. How May I Help You?" is visible below it.

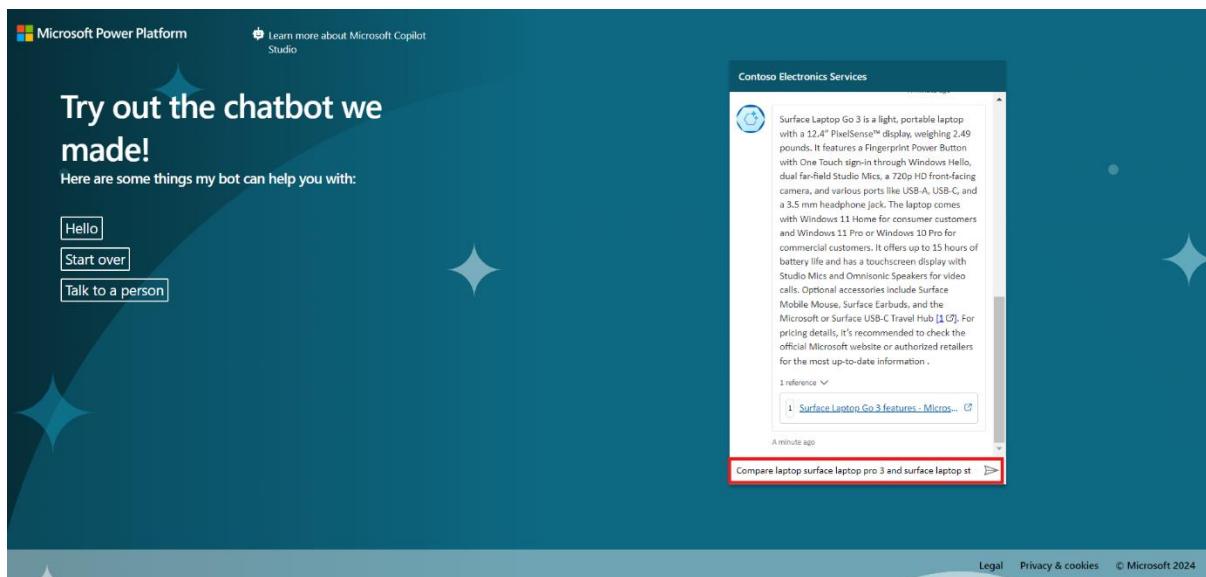


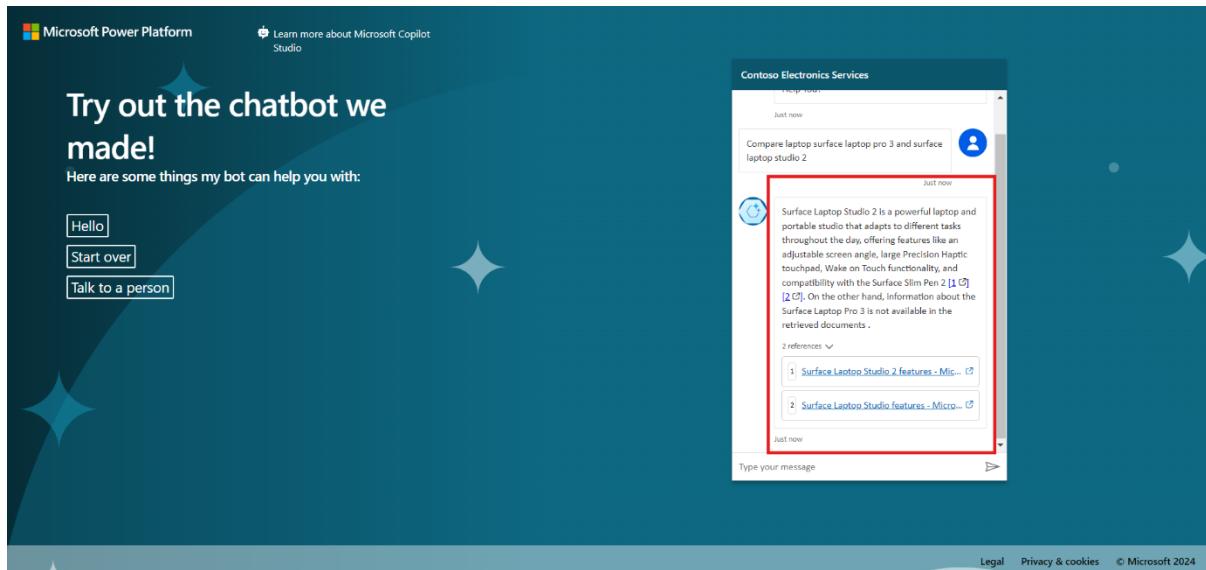
2. Tell me more about Surface Laptop Go 3. What are the specs & cost?



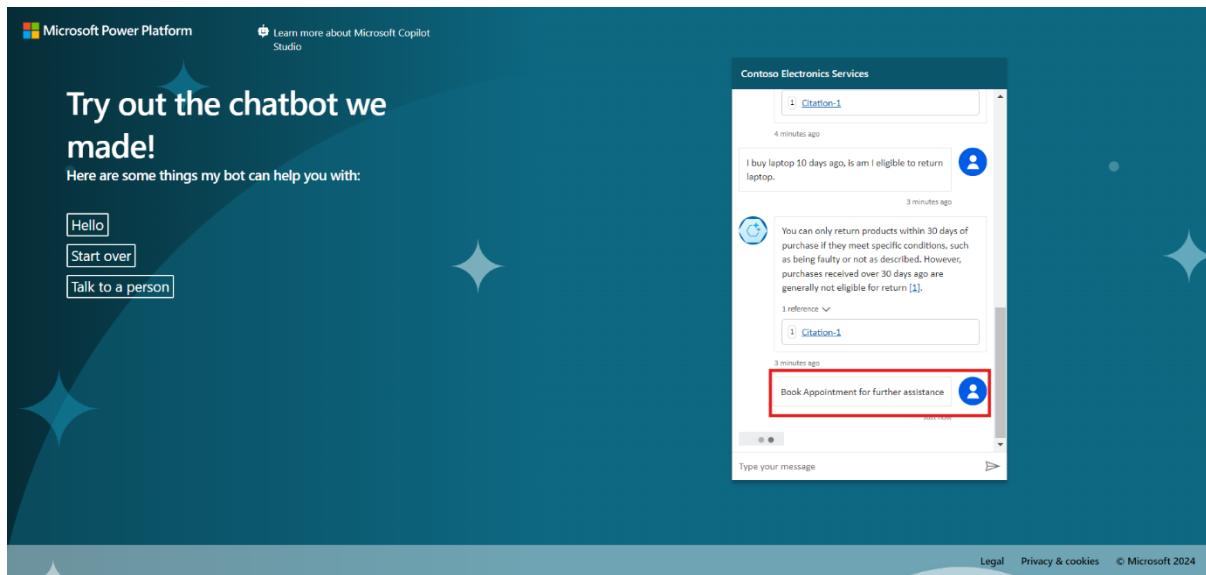


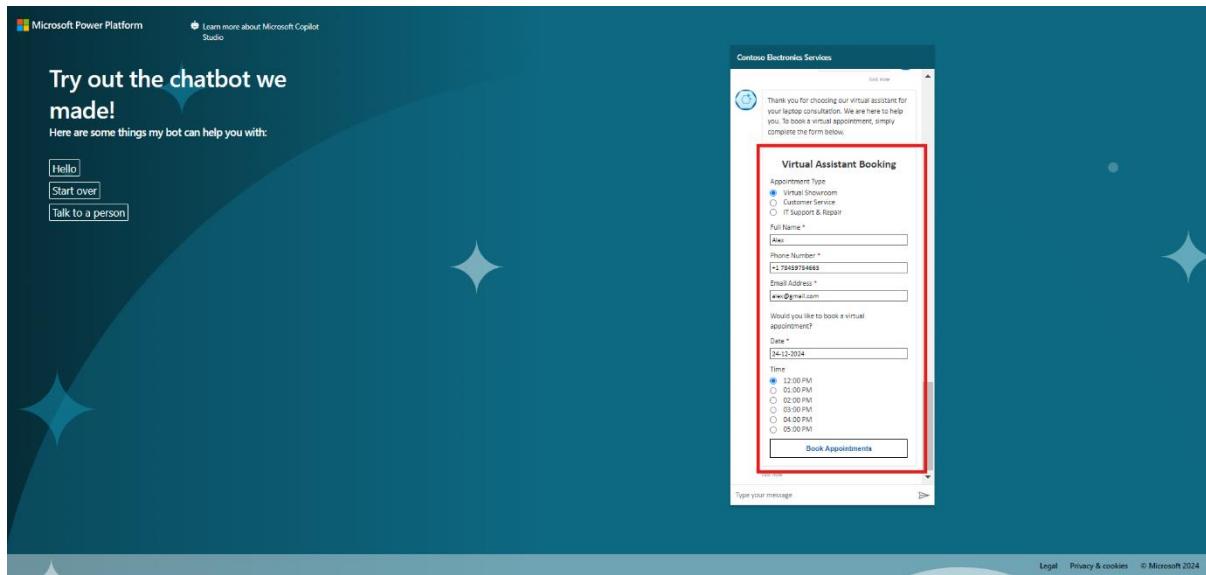
3. Compare laptop surface laptop pro 3 and surface laptop studio 2.





4. Book Appointment for further assistance

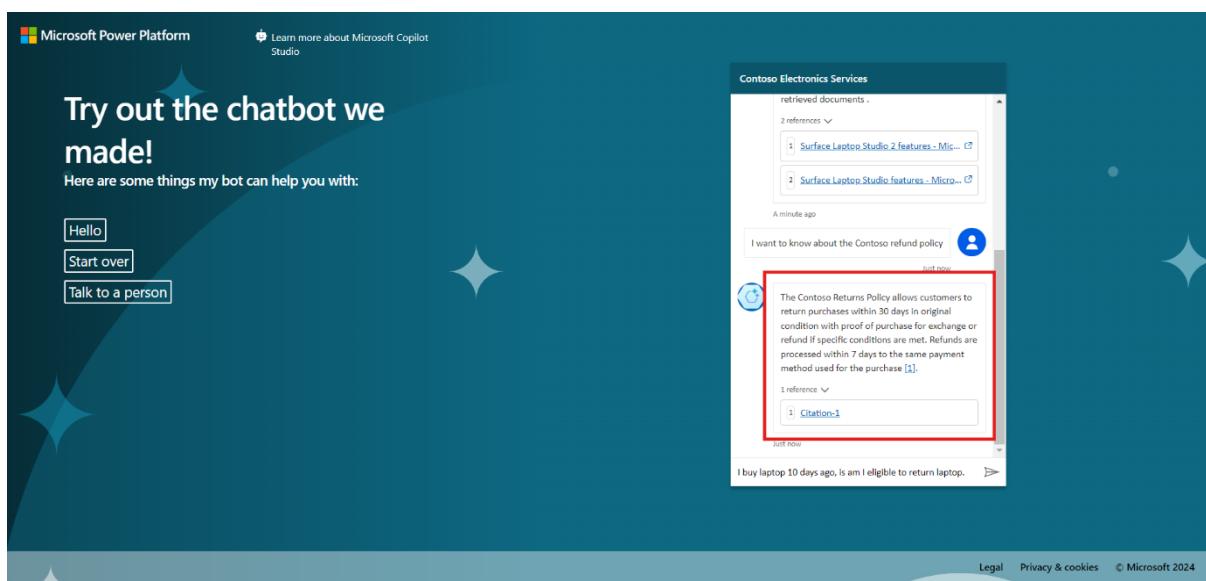
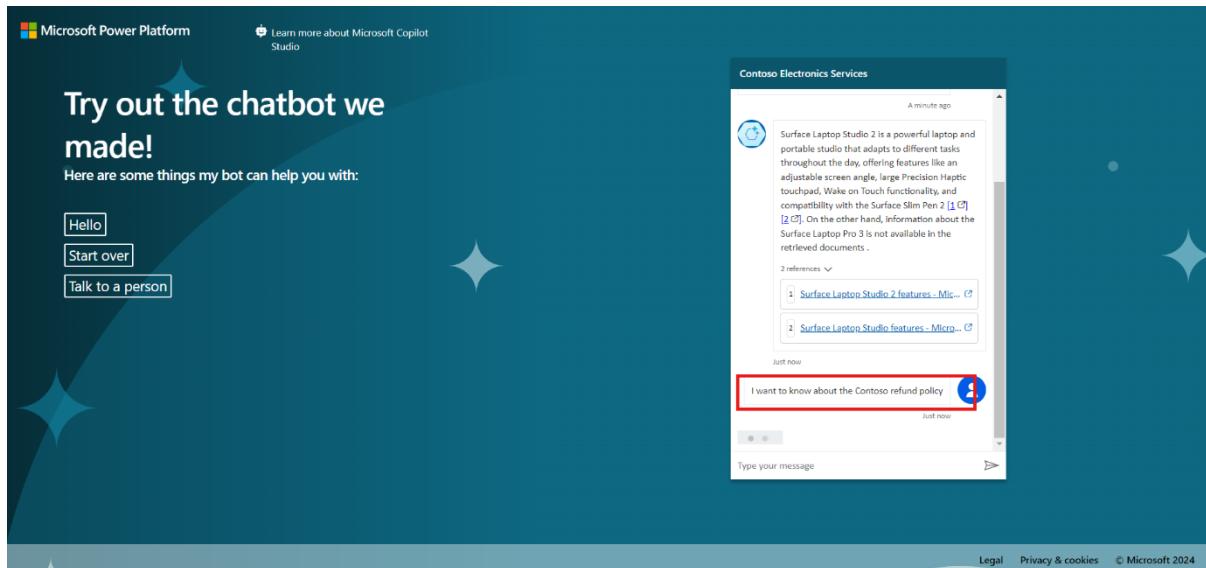




5. Ensure that the details entered in the Appointment Booking are accurately reflected in the "Book Appointments" table in Power Apps.

The screenshot shows the Microsoft Power Platform Tables blade. The left sidebar includes Home, Create, Learn, Apps, Tables (selected), Flows, Solutions, More, and Power Platform. Under Tables, it lists Flows, Solutions, and More. The main area shows the "Tables > Book Appointments" page. It has sections for Table properties (Name: Book Appointments, Primary column: Appointment Types, Type: Standard, Last modified: 18 hours ago), Schema (Columns, Relationships, Keys), Data experiences (Forms, Views, Charts, Dashboards), and Customizations (Business rules, Commands). Below this is a grid titled "Book Appointments columns and data" with columns for Appointment Types, Date, Email Address, and Full Name. A row for "Virtual Showroom" on 24-12-2024 with email "alex@demo.com" and name "Alex" is highlighted with a red border.

6. I want to know about the Contoso refund policy.



7. I bought a laptop 10 days ago. Am I eligible to return it?

 Microsoft Power Platform

 Learn more about Microsoft Copilot Studio

Try out the chatbot we made!

Here are some things my bot can help you with:

Hello
Start over
Talk to a person

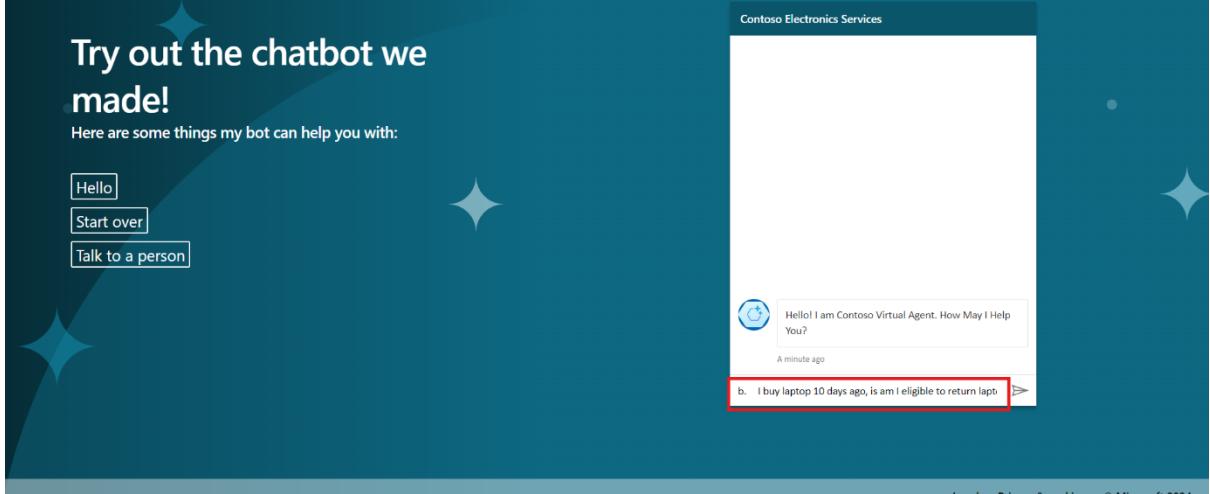
Contoso Electronics Services

 Hello! I am Contoso Virtual Agent. How May I Help You?

A minute ago

b. I buy laptop 10 days ago, is am I eligible to return laptop. 

Legal Privacy & cookies © Microsoft 2024



 Microsoft Power Platform

 Learn more about Microsoft Copilot Studio

Try out the chatbot we made!

Here are some things my bot can help you with:

Hello
Start over
Talk to a person

Contoso Electronics Services

 condition with proof of purchase for exchange or refund if specific conditions are met. Refunds are processed within 7 days to the same payment method used for the purchase [1].

1 reference ▾

 1 Citation-1

A minute ago

I buy laptop 10 days ago, is am I eligible to return laptop. 

Just now

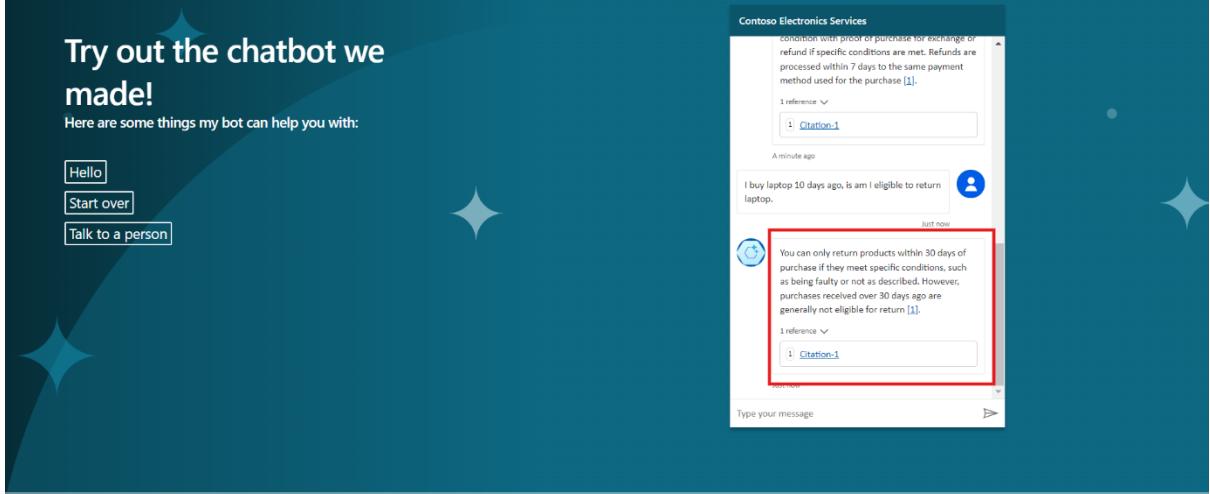
 You can only return products within 30 days of purchase if they meet specific conditions, such as being faulty or not as described. However, purchases received over 30 days ago are generally not eligible for return [1].

1 reference ▾

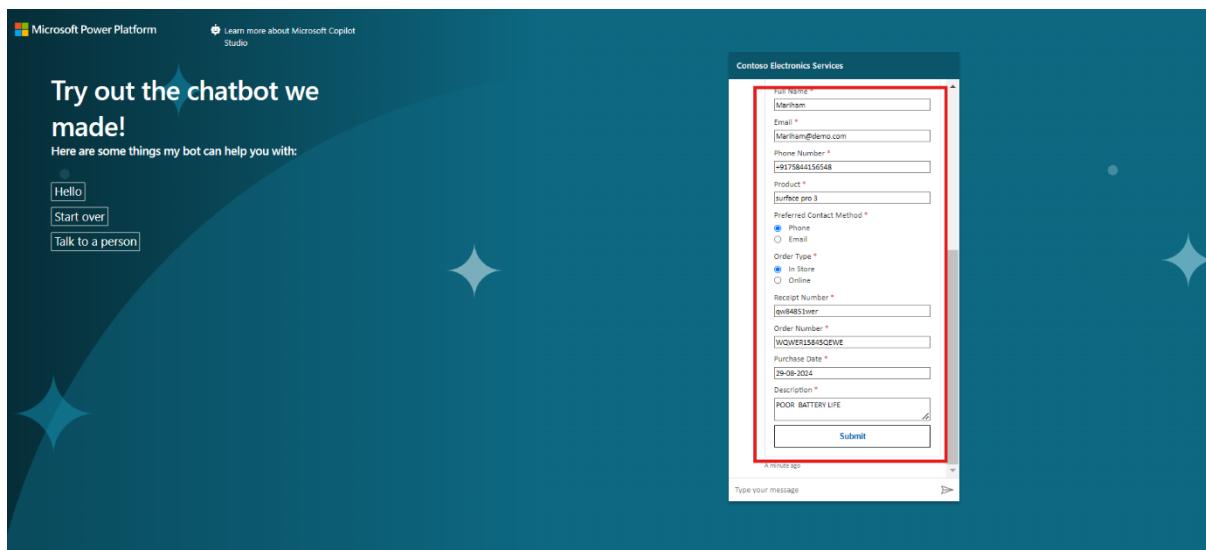
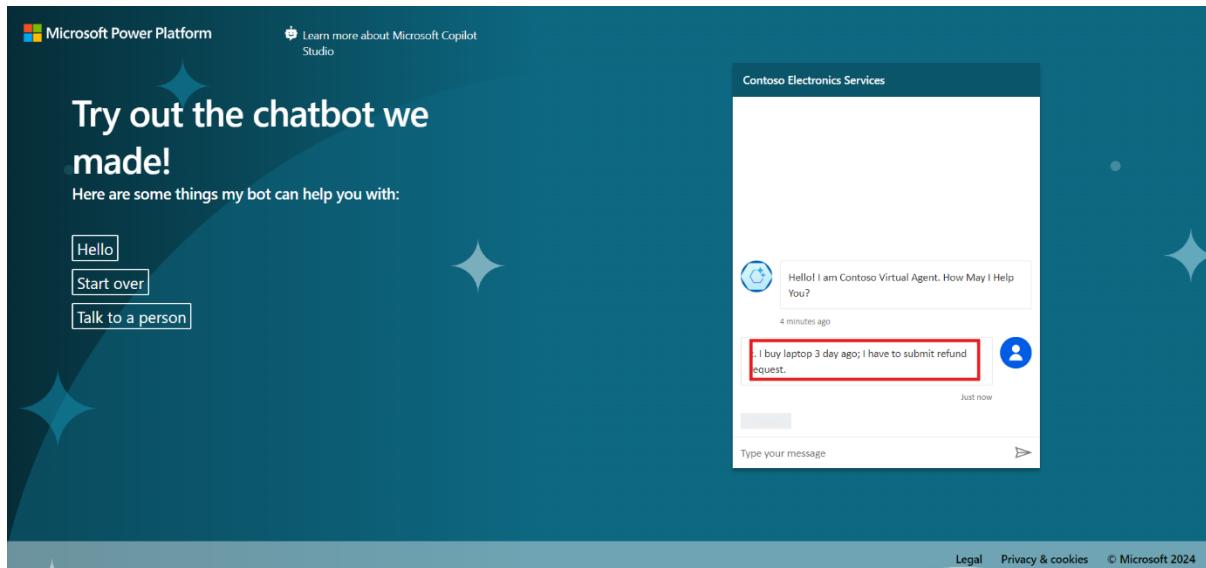
 1 Citation-1

Type your message 

Legal Privacy & cookies © Microsoft 2024



8. I buy laptop 3 day ago; I have to submit refund request.



9. Ensure that the details entered in the Appointment Booking are accurately reflected in the "Refund Requests" table in Power Apps.

Screenshot of the Microsoft Power Platform canvas interface showing the 'Refund Requests' table.

Table properties:

- Name: Refund Requests
- Primary column: Full Name
- Type: Standard
- Last modified: 18 hours ago

Schema:

- Columns
- Relationships
- Keys

Data experiences:

- Forms
- Views
- Charts
- Dashboards

Customizations:

- Business rules
- Commands

Refund Requests columns and data:

Full Name	Date of Purchase	Description	Order Number	10 more
Mariham	29-08-2024	POOR BATTERY LIFE	WQWER15845QEWE	Edit
Enter text	Enter text	Enter text	Enter text	+

Actions:

- New
- Edit
- Create an app
- Using this table
- Import
- Export
- Advanced
- Delete

Power Platform:

- Home
- Create
- Learn
- Apps
- Tables
- Flows
- Solutions
- More

Bottom bar:

- Ask a virtual agent