

# Power Platform + AI: Get Future-Ready & Accelerate Innovation

## Business Use Case: IT Help Desk Solution

In this workshop, we'll develop an AI-powered Help Desk Service solution designed to streamline IT support, automate ticket routing/troubleshooting, and enhance user experiences through predictive insights and intelligent automation. This solution will incorporate Power Apps for user interactions, AI Builder for automating ticket classification & routing, Copilot Studio for creating a sophisticated AI-driven support assistant, Azure OpenAI for natural language processing and AI Search powered custom connector for quick information retrieval.

### Lab 2: Automating Ticket Classification and Routing to IT Support with AI Builder (60 mins)

- **Objective:** Leverage AI Builder to automatically classify and route incoming tickets to the appropriate support teams and enhance the experience for IT staff.
- **Tasks:**
  - Create AI Prompt needed for this lab
  - Use AI Builder to analyze the content of tickets and automatically classify them (e.g., network issues, software problems, hardware failures).
  - Use Power Automate to assign/email tickets to the appropriate IT personnel based on the issue category/severity with a summary from the AI builder output.
- **Outcome:** The Help Desk app will now automatically classify tickets and provide IT staff with intelligent insights.

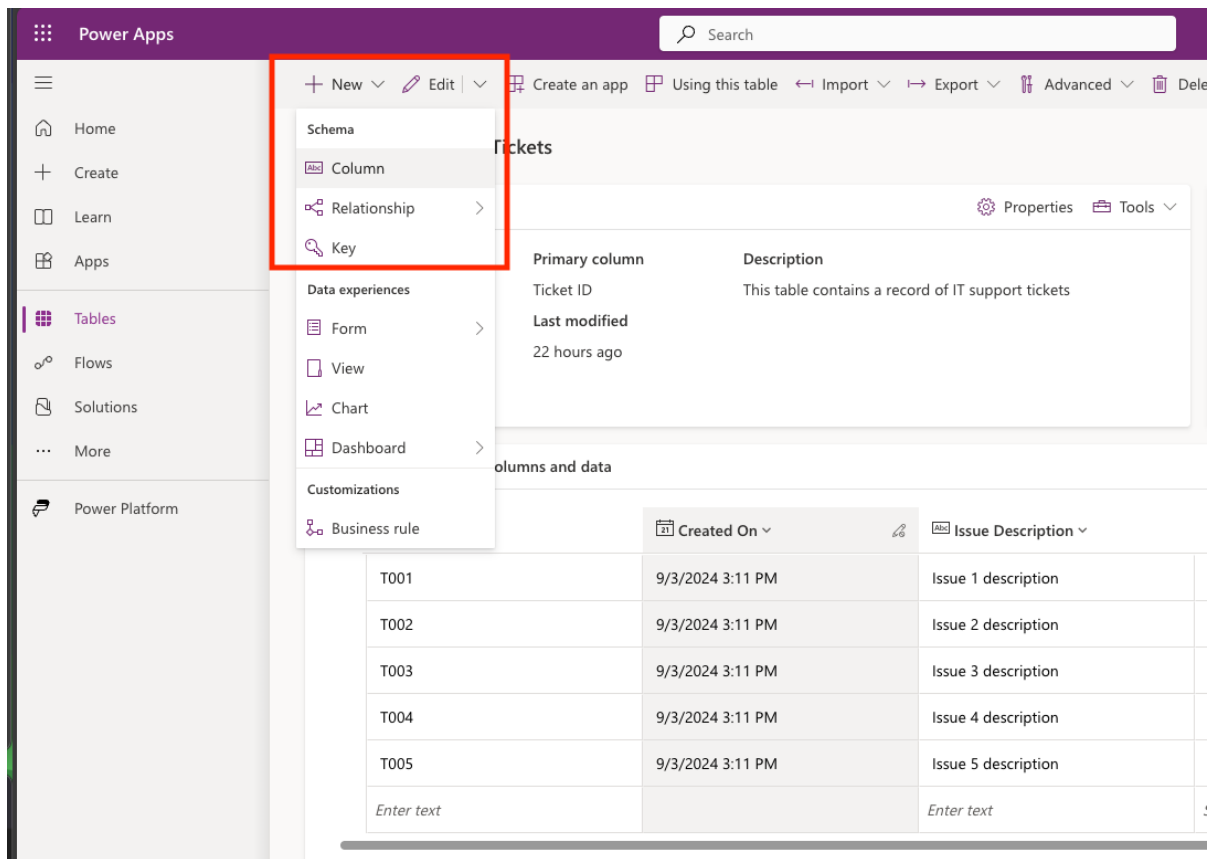
## Modify the Dataverse Table

We will be using AI to automatically classify and route the help desk tickets to the appropriate staff. Before we do this, we need a place to store the AI generated data in our table. We want to separate this from the original data entered. These steps will show how to add additional columns to store the data.

1. Go to make.powerapps.com and confirm that you are in your environment. Select the Tables tab on the left-hand side of the screen.
2. Select the table that you created in the previous lab

Table	Name	Type	Managed	Customized	Customizable	Tags
Account	account	Standard	Yes	No	Yes	Core
Address	customeraddress	Standard	Yes	No	Yes	Standard
Appointment	appointment	Activity	Yes	No	Yes	Productivity
Attachment	activitymimeattachment	Standard	Yes	No	Yes	Productivity
Business Unit	businessunit	Standard	Yes	No	Yes	Standard
Contact	contact	Standard	Yes	No	Yes	Core
Currency	transactioncurrency	Standard	Yes	No	Yes	Standard
Email	email	Activity	Yes	No	Yes	Productivity
Email Template	template	Standard	Yes	No	Yes	Standard
Fax	fax	Activity	Yes	No	Yes	Productivity
Feedback	feedback	Standard	Yes	No	Yes	KB
IT Support Tickets	cre43_supporttickets	Standard	No	Yes	Yes	Custom
Letter	letter	Activity	Yes	No	Yes	Productivity
Mailbox	mailbox	Standard	Yes	No	Yes	Configuration

- Click the **NEW** button and select **COLUMN**



- Enter in the following information in the New Column panel:

Display Name	AIClassification
Description	Shows the AI Generated Classification for the Ticket
Data Type	Multiple lines of text (plain text)
Format	Text
Required	Optional

- Expand out the Advanced Options tab
- Change the Maximum character count to 4000

## 7. Click **SAVE**

**Edit column** ×

Previously called fields. [Learn more](#)

**Display name \***

AIClassification

**Description ⓘ**

Shows the AI Generated Classification for the Ticket

**Data type \* ⓘ**

Multiple lines of text

**Format \***

Text

**Required ⓘ**

Optional

☒ **Searchable ⓘ**

**Advanced options ^**

**Schema name \* ⓘ**

cre43\_AIClassification

**Logical name**

cre43\_aiclassification

**Maximum character count \***

4000

**Input method editor (IME) mode \***

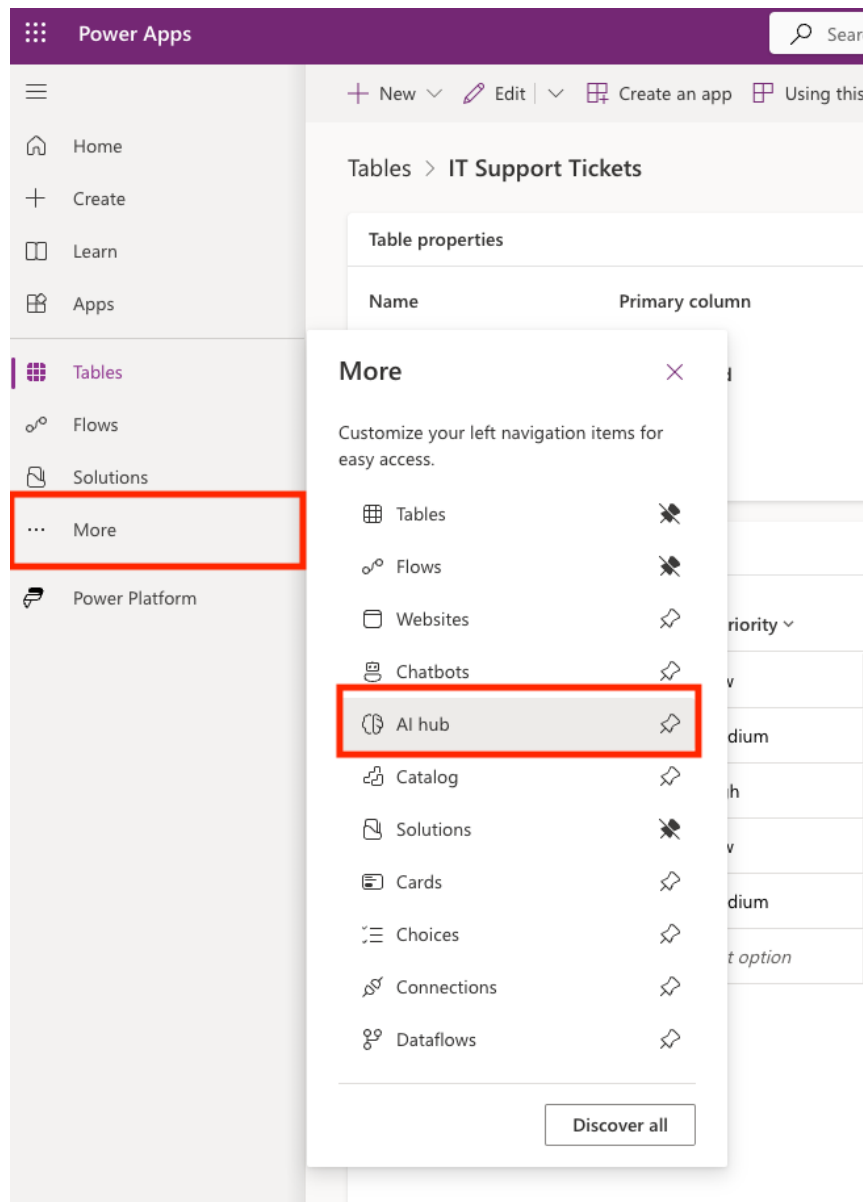
Auto

**Save** **Cancel**

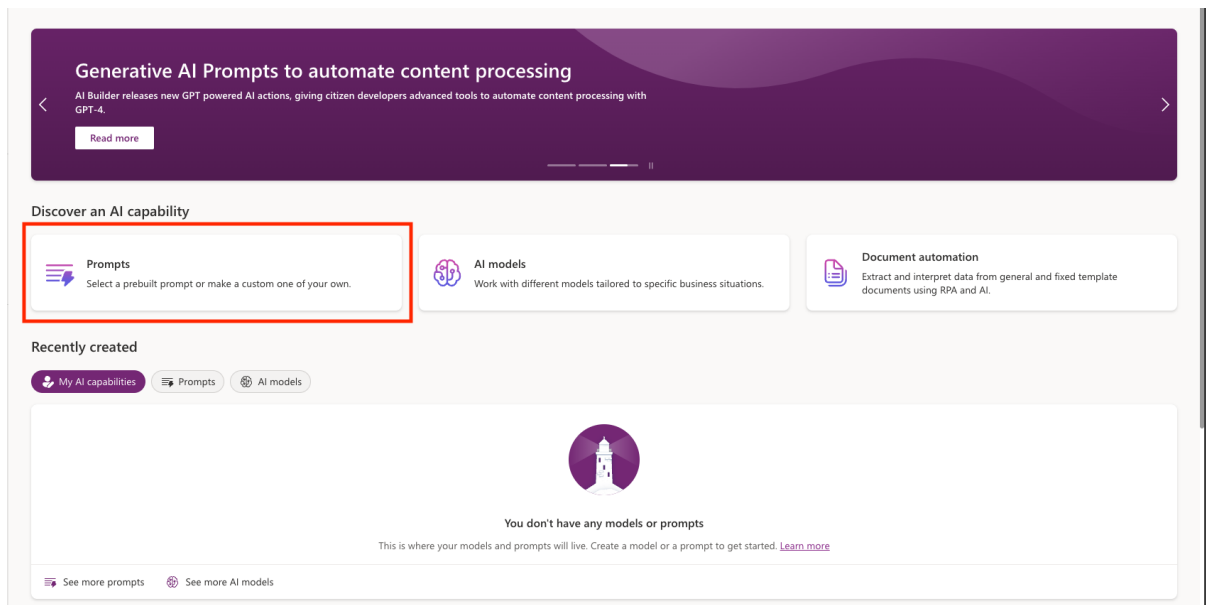
## Create the AI Prompt

Now we'll create an AI prompt that can review the ticket and add a classification, technology used and summary to be used in the ticket routing

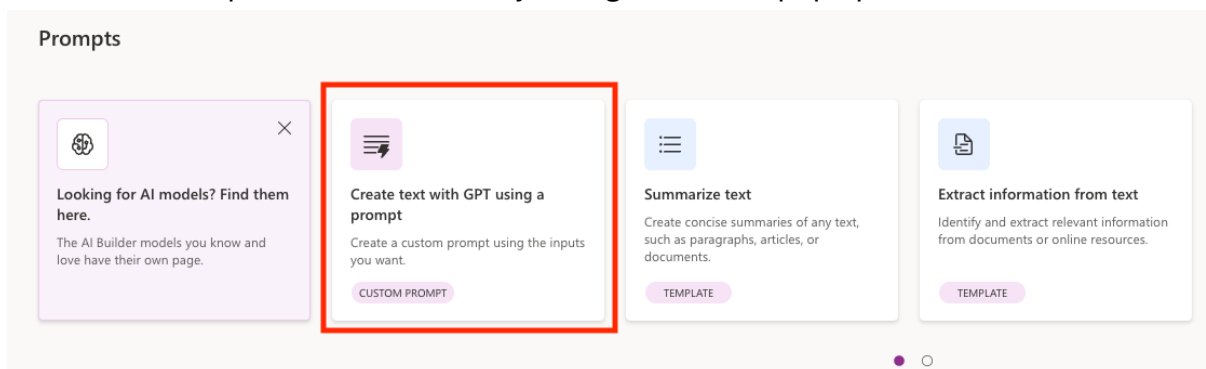
1. From the Power Apps portal, select “..More” from the left navigation menu and select **AI HUB** from the list of option



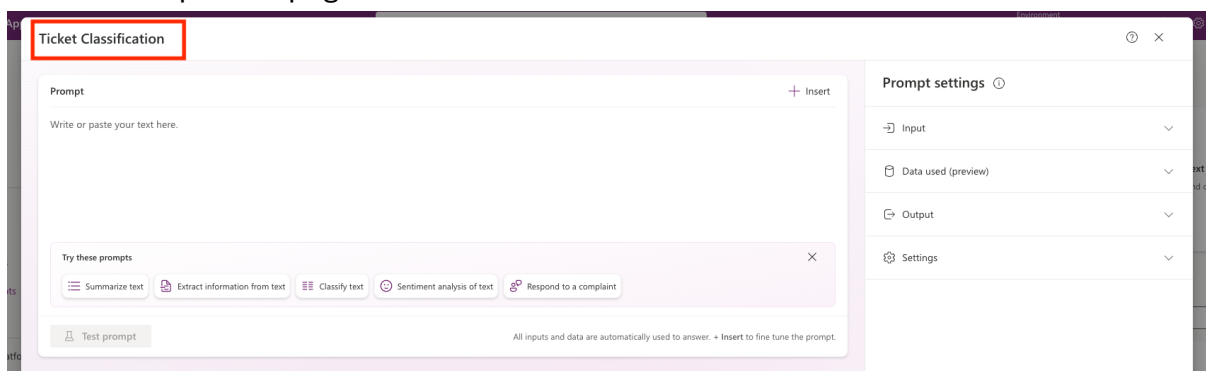
2. Select the **PROMPTS** tab to go to the AI Prompts screen



3. Select **Create text with GPT using a prompt** from the list of options to create a new custom AI Prompt. \*\* close out of any dialog boxes that pop up

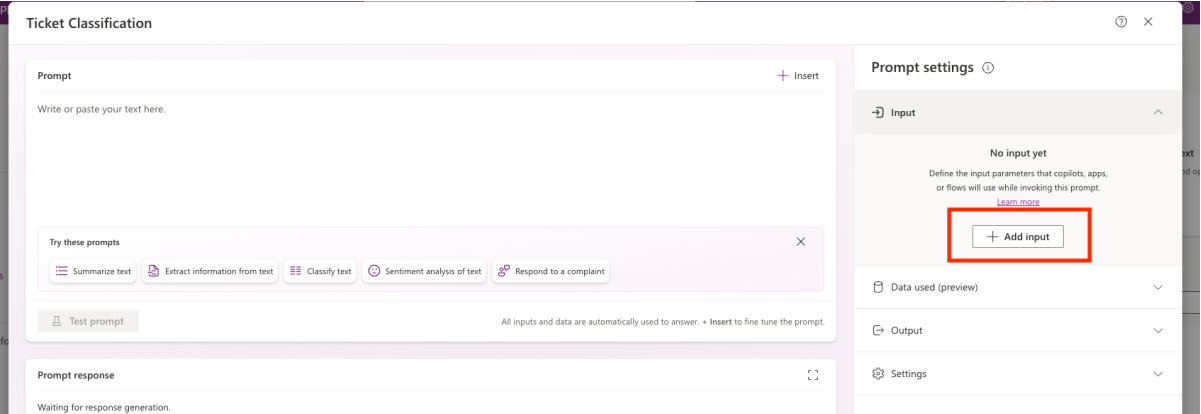


4. Rename the prompt to “Ticket Classification” by replacing the “Custom prompt...” text at the top of the page



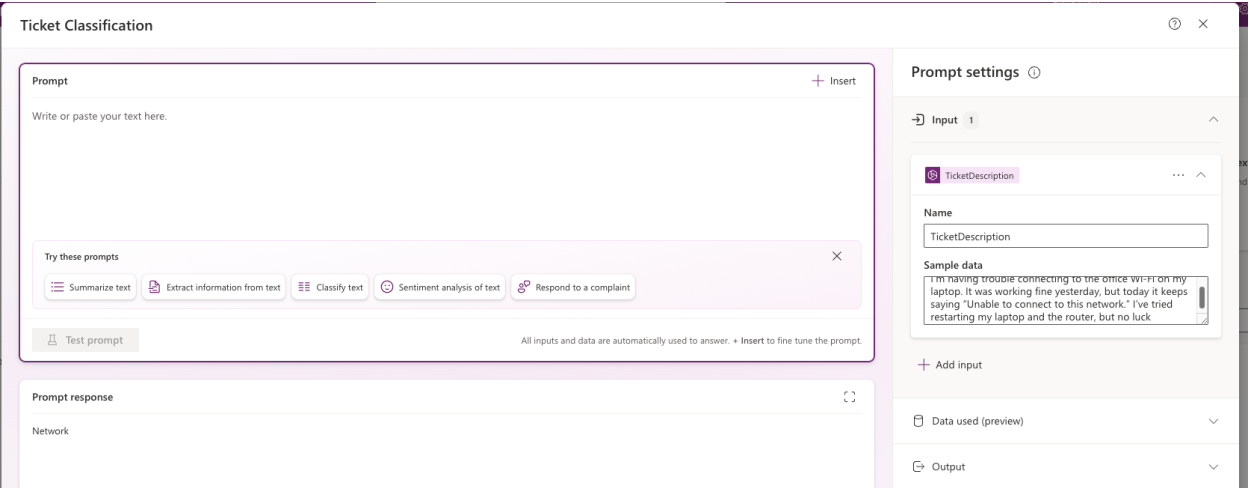
5. Before we build out the prompt itself, we need to define inputs which are dynamic values that we will pass into our prompt from our ticketing system. To do this,

expand out the Input tab and select the **Add Input** button



6. Fill out the input as follows:

Name	TicketDescription
Sample Data	I'm having trouble connecting to the office Wi-Fi on my laptop. It was working fine yesterday, but today it keeps saying "Unable to connect to this network." I've tried restarting my laptop and the router, but no luck

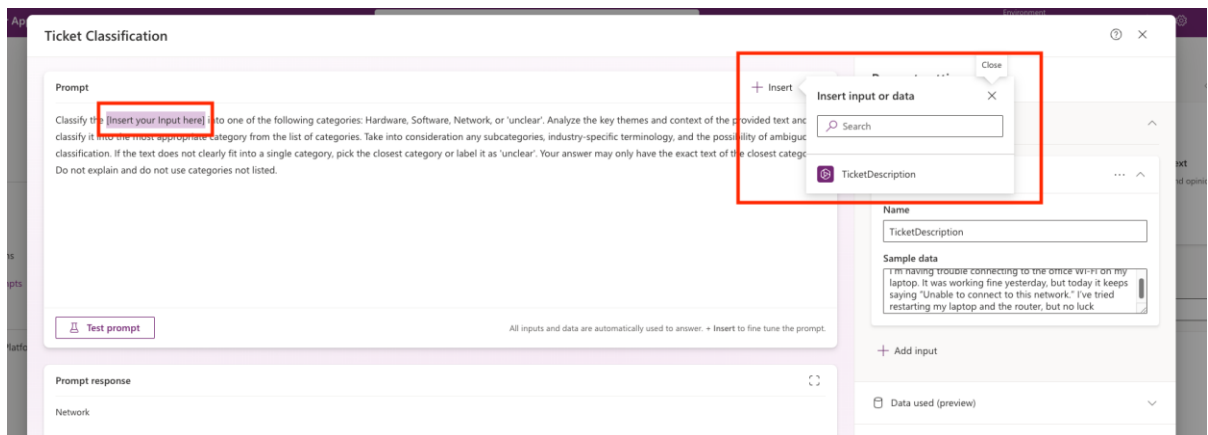


7. Now we'll create the prompt. In the Prompt text box, paste the following prompt:

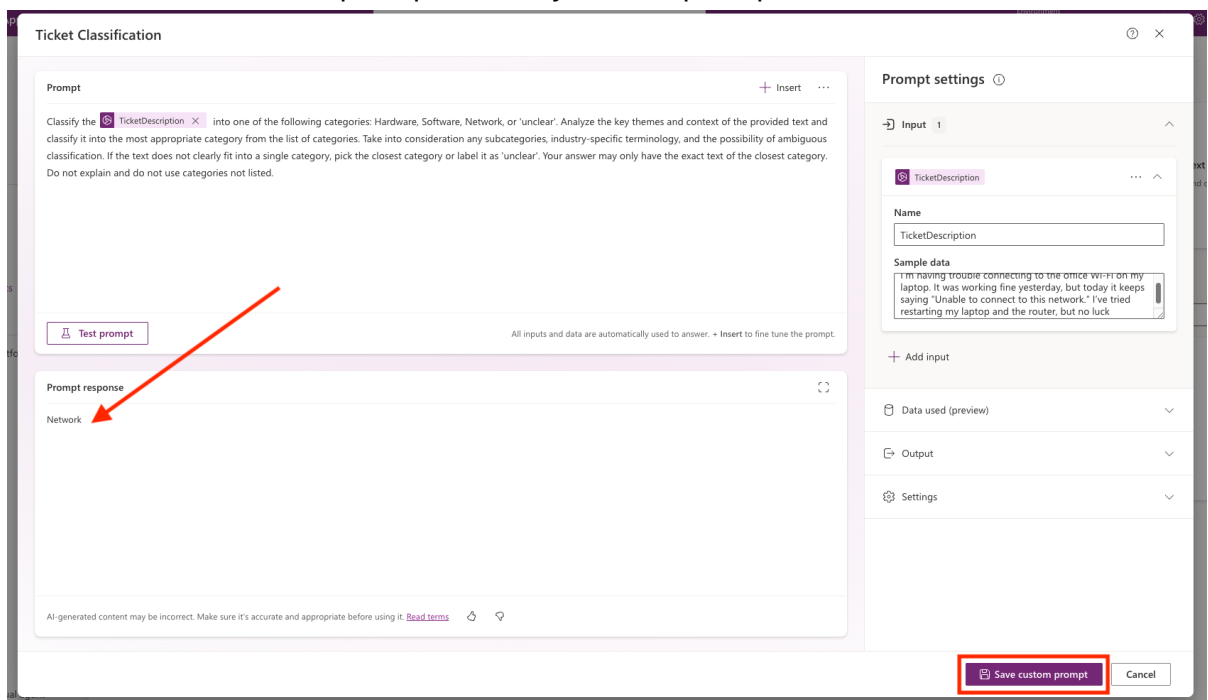
Classify the [Insert your Input here] into one of the following categories: Hardware, Software, Network, or 'unclear'. Analyze the key themes and context of the provided text and classify it into the most appropriate category from the list of categories. Take into consideration any subcategories, industry-specific terminology, and the possibility of ambiguous classification. If the text does not clearly fit into a single

category, pick the closest category or label it as 'unclear'. Your answer may only have the exact text of the closest category. Do not explain and do not use categories not listed.

- Where it has [Insert your input here] in the prompt, replace that with the Input you added in the step above by highlighting the text in the prompt and selecting the TicketDescription Input.



- Now you are ready to test the prompt! Just click the **Test Prompt** button and it should reply with a single word answer of “Network”, automatically getting the ticket category based on the description.
- Now click Save Custom prompt to save your new prompt





11. When it's done saving, click the X button to close out of the prompt window. You'll see your new prompt listed in the "My Prompts" section of the AI Prompts page. Now it's ready to use in a Flow

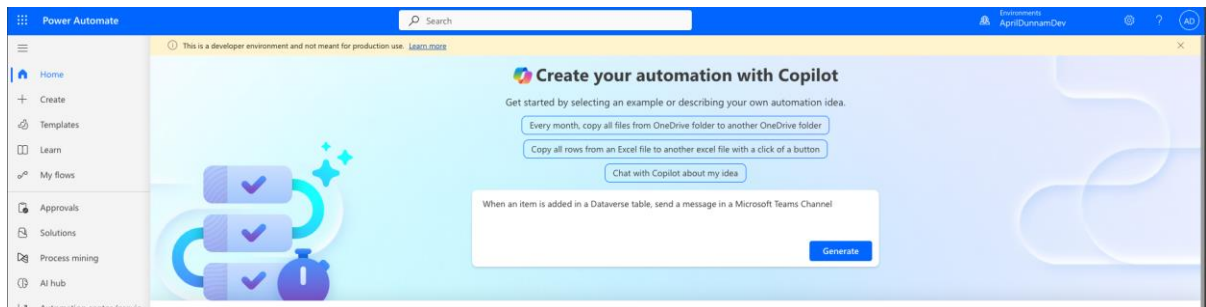
## Creating the Flow to Classify and Route Tickets

Now that we have our AI Prompt, we want to use that in a Flow so that when a Ticket is created, the flow automatically kicks off, gets the classification and routes it to the necessary help desk personnel.

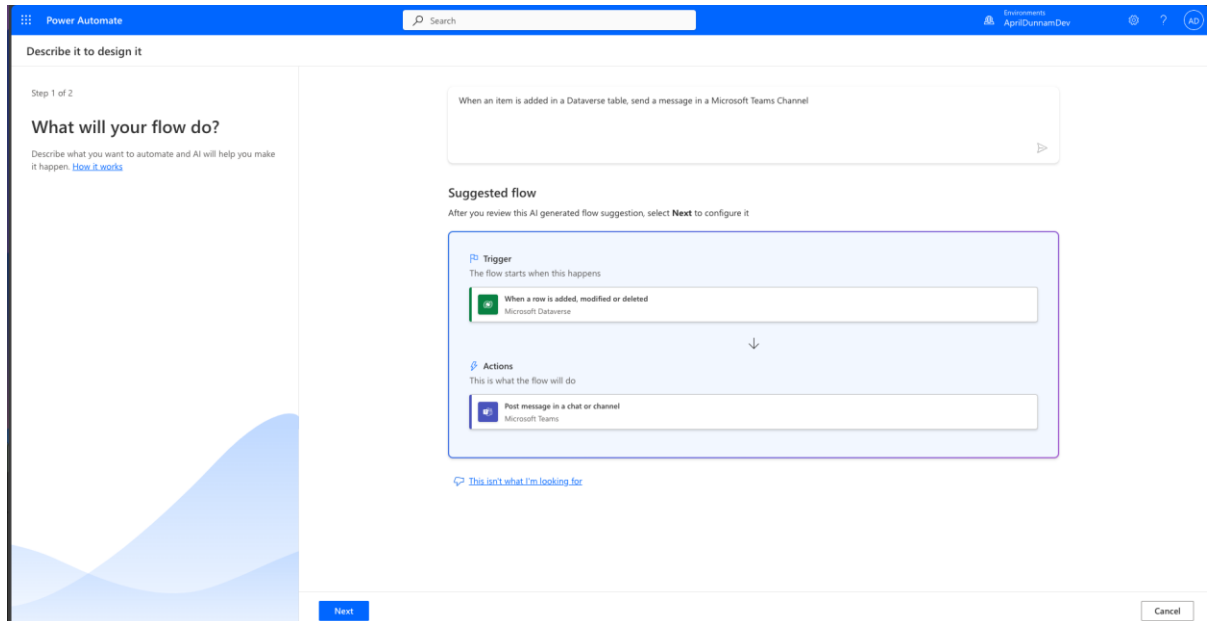
### *Create the basic flow structure with Copilot*

1. In your browser, navigate to [make.powerautomate.com](https://make.powerautomate.com). Make sure you are in your environment.
2. We'll use Copilot to help us get started. In the prompt window, enter the following prompt and press **ENTER**

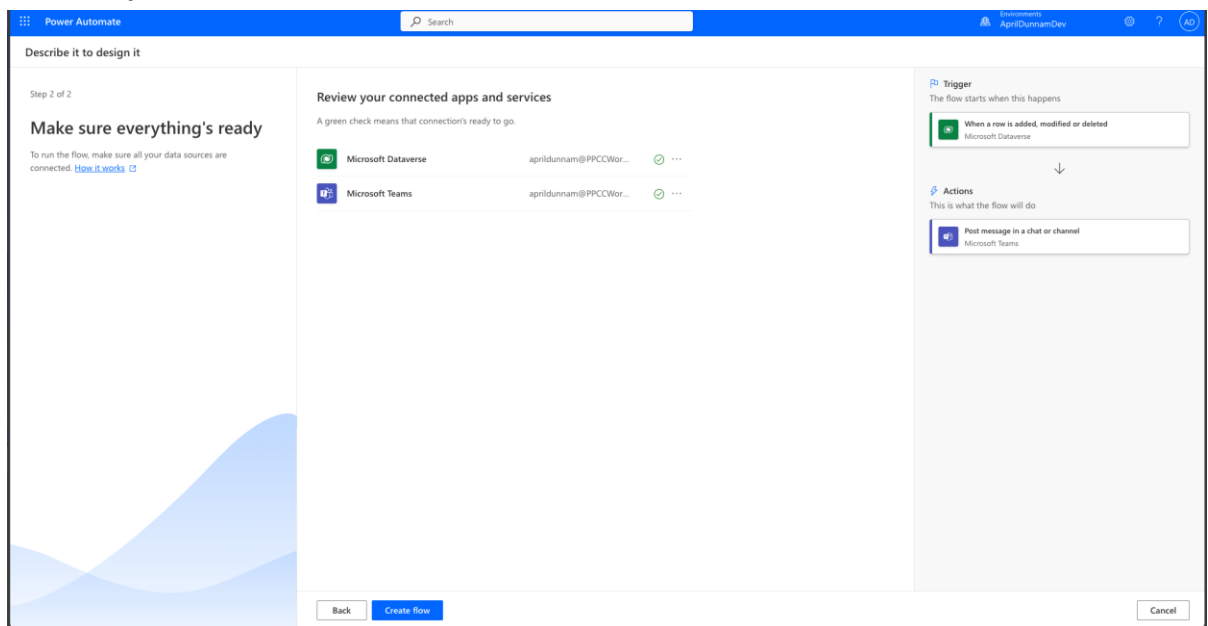
When an item is added in a Dataverse table, send a message in a Microsoft Teams Channel



3. Verify the suggested Flow which should match the screenshot below and click NEXT



4. Validate your connections and click CREATE FLOW



5. Select the "When a row is added, modified or deleted" trigger and validate that the Change Type is set to "Added" and select your Tickets Table from the Dropdown.

Ensure that the trigger is configured exactly as shown below

The screenshot shows the Power Automate interface for configuring a flow. The title bar indicates the flow is named "When an item is added in a Dataverse table, send a message in a Microsoft Teams Channel". The left pane shows the configuration for the trigger "When a row is added, modified or deleted". The configuration is as follows:

- Change Type \***: Added
- Table Name \***: IT Support Tickets
- Scope \***: Business unit
- Select Columns**: Enter a comma-separated list of column unique names. The flow triggers if any of th...
- Filter Rows**: Odata expression to limit rows that can trigger the flow, eg. statecode eq 0
- Advanced parameters**: Showing 0 of 2

The right pane shows the flow canvas with the trigger connected to the next action, "Post message in a chat or channel".

6. Select the “Power a message in a chat or channel” action. Select “IT” in the Team dropdown and “General” in the Channel dropdown. Look at the screenshot below and make sure the action is configured exactly as shown. We will modify this in future steps.

The screenshot shows the Power Automate interface for configuring a flow. The title bar indicates the flow is named "When an item is added in a Dataverse table, send a message in a Microsoft Teams Channel". The left pane shows the configuration for the action "Post message in a chat or channel". The configuration is as follows:

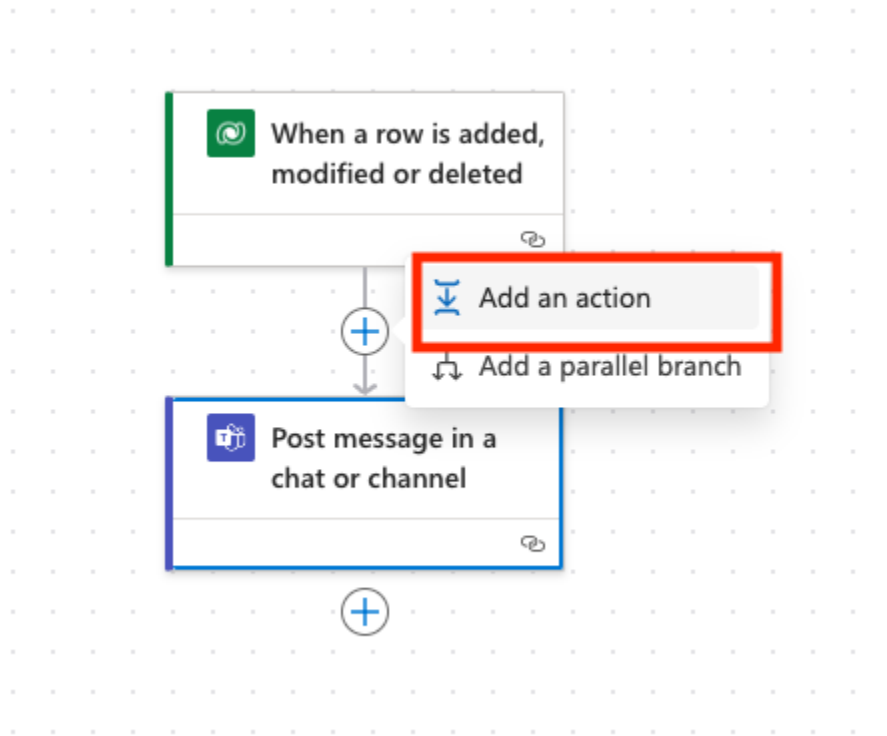
- Post As \***: Flow bot
- Post In \***: Channel
- Team \***: IT
- Channel \***: General
- Message \***: An item has been added in the Dataverse table. Please check.

The right pane shows the flow canvas with the trigger connected to the action.

7. Click SAVE to save the flow

#### *Call the AI Prompt*

1. Click the plus button between the Dataverse trigger and Teams action and select “Add an Action”



2. Select AI Builder from the list of Actions

Add an action


×

Search

Runtime


Select a runtime


▼




AI Builder


In-app






Approvals






Azure DevOps


Premium






Control


In-app







Desktop flows


Premium







Excel Online (Business)






Excel Online For Business






Mail



3. Select Create text with GPT using a prompt

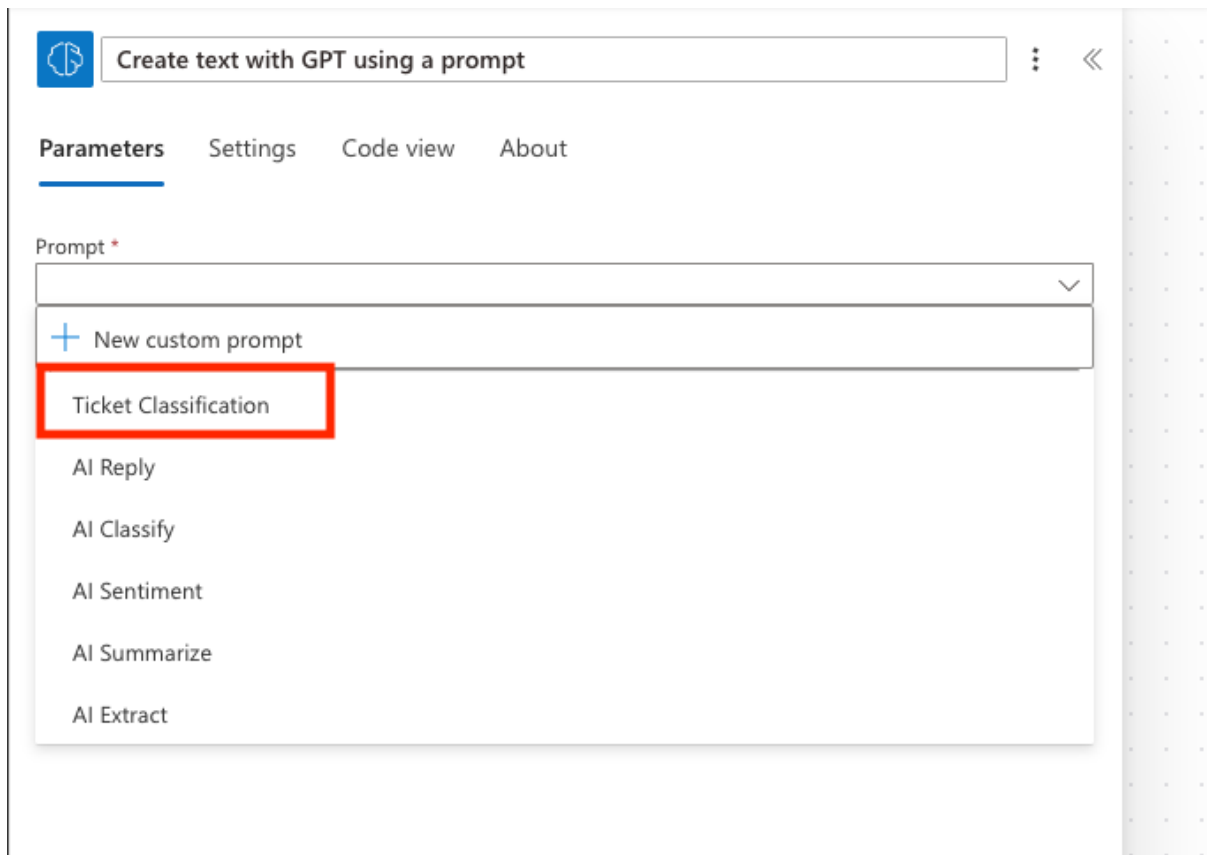
### Add an action ×

[← Return to search](#)

 **AI Builder**

- Analyze positive or negative sentiment in text In-app i
- Classify text into categories with one of your custom models In-app i
- Classify text into categories with the standard model Preview In-app i
- Create text with GPT using a prompt** In-app i
- Detect and count objects in images In-app i
- Detect the language being used in text In-app i
- Extract entities from text with one of your custom models In-app i
- Extract entities from text with the standard model In-app i
- Extract information from business card In-app i
- Extract information from documents In-app i

4. In the dropdown, select your TicketClassification Prompt



The screenshot shows a web interface for creating text with GPT using a prompt. At the top, there is a header bar with a logo on the left and the text "Create text with GPT using a prompt" in the center. To the right of the header are three vertical dots and a double arrow icon. Below the header, there are four tabs: "Parameters", "Settings", "Code view", and "About". The "Parameters" tab is currently selected and underlined. Under the "Parameters" tab, there is a section labeled "Prompt \*". Below this label is a dropdown menu. The dropdown menu is open, showing a list of options. The first option is "+ New custom prompt". The second option, "Ticket Classification", is highlighted with a red rectangular box. Below "Ticket Classification" are five other options: "AI Reply", "AI Classify", "AI Sentiment", "AI Summarize", and "AI Extract".

- Click into the TicketDescription Input and select the Lightning Bolt icon to open the dynamic content window

Create text with GPT using a prompt

Parameters Settings Code view About

Prompt \*

Ticket Classification

Edit

TicketDescription \*

Advanced parameters

Showing 0 of 1

Show all Clear all

Connected to aprildunnam@PPCCWorkshop12.onmicrosoft.com. [Change connection](#)

- Search for "Description" and select the Issue Description column

Create text with GPT using a prompt

Parameters Settings Code view About

Prompt \*

Ticket Classification

Edit

TicketDescription \*

'TicketDescription' is required.

Advanced parameters

Showing 0 of 1

Show all Clear all

Connected to aprildunnam@PPCCWorkshop12.onmicrosoft.com. [Change connection](#)

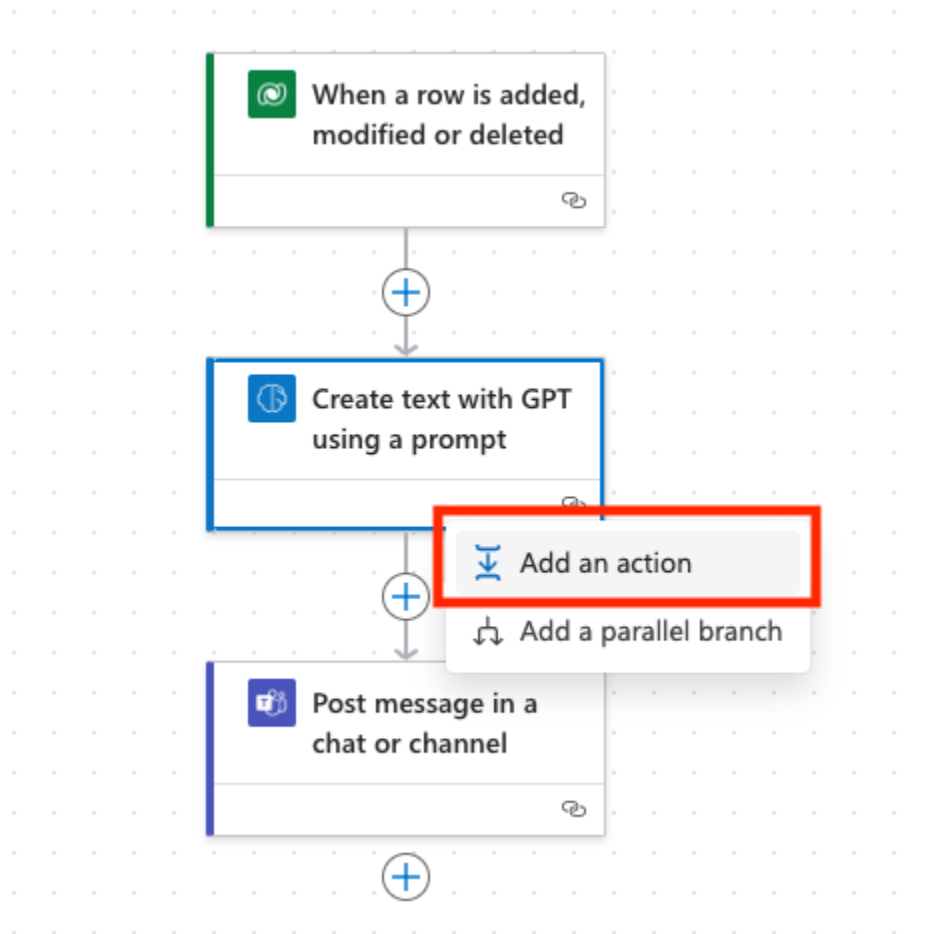
description

When a row is added, modified or deleted

Issue Description



- Click the plus button after the AI Prompt action and choose “Add an Action”



- Search for "Switch" and select the Switch action

Add an action

switch

Runtime

Select a runtime

Action type

Actions

☒ Group by Connector

Control

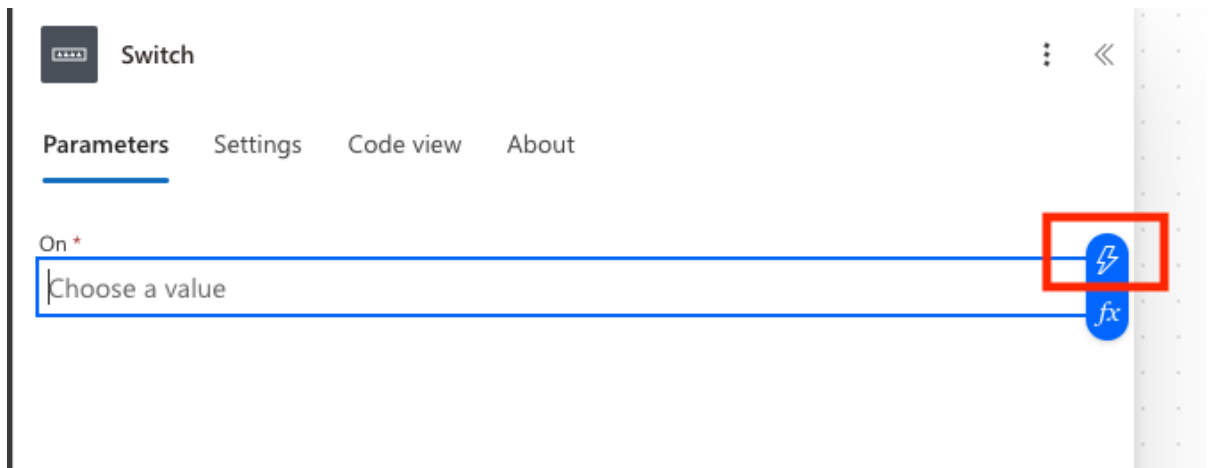
In-app

Switch

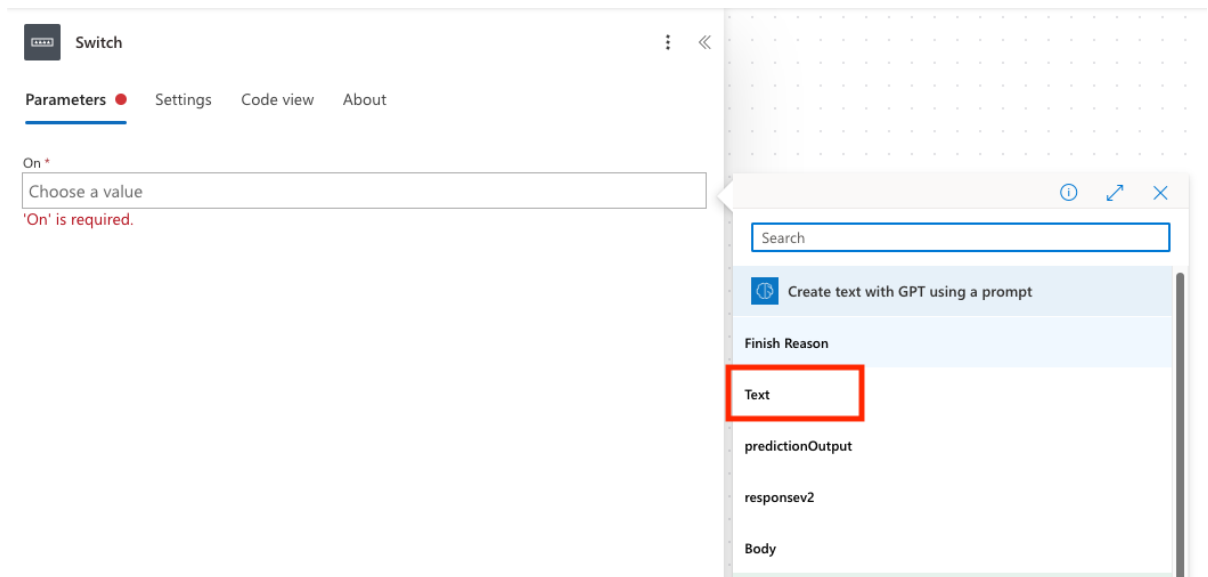
In-app

See more

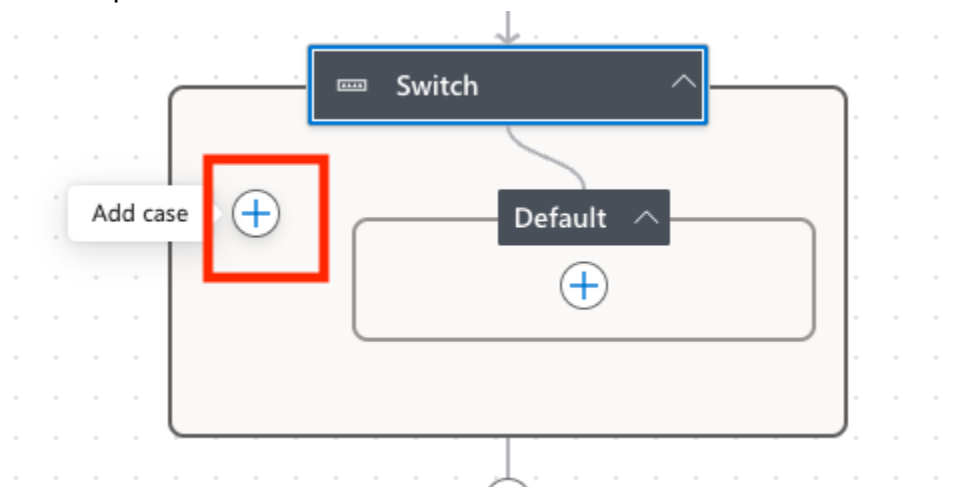
9. Click into the “On” input for the action and select the lightning bolt icon



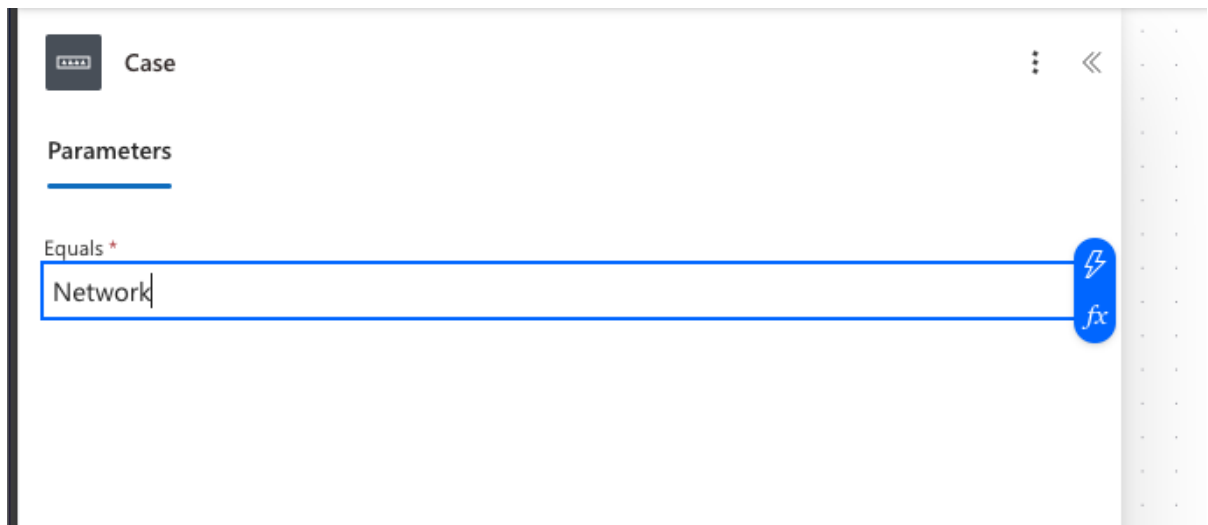
10. Select the “Text” property from the “Create text with GPT using a Prompt” action



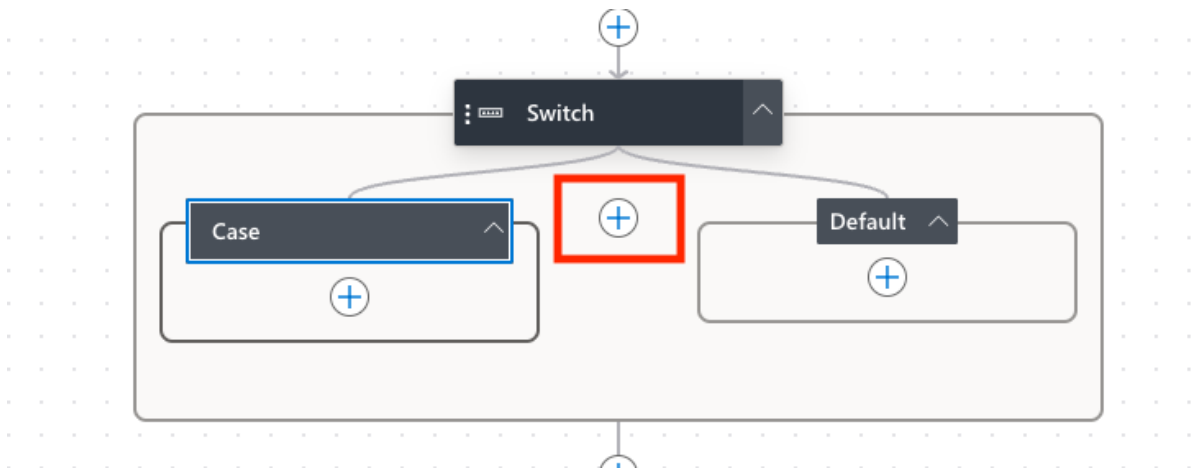
11. Click the plus button in the Switch action



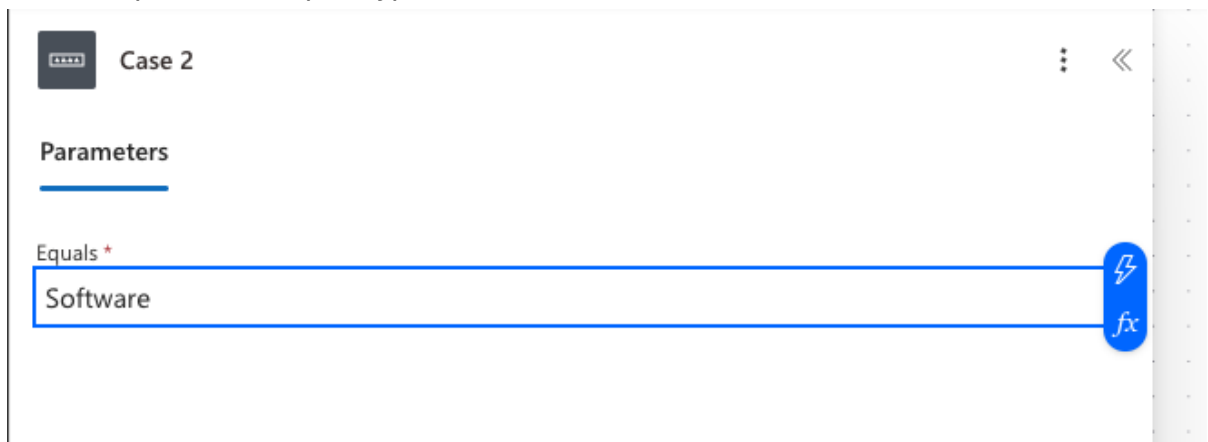
12. In the “Equals” text input, type Network



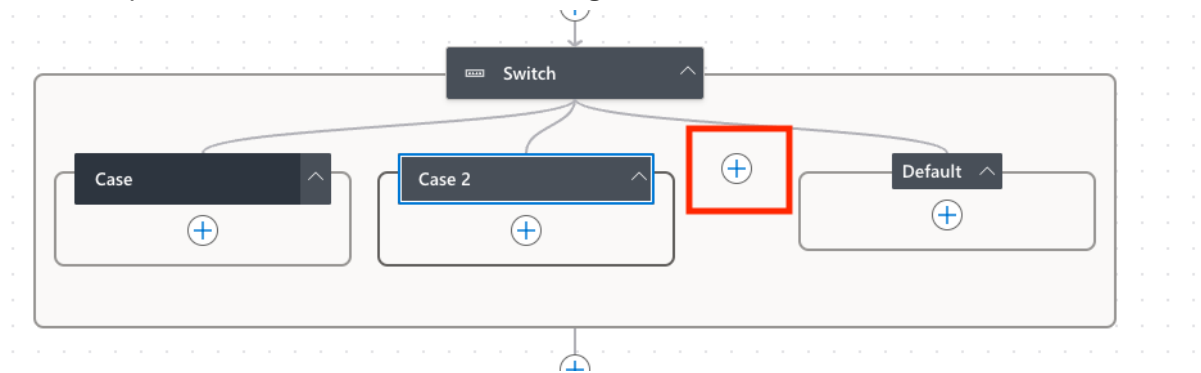
13. Click the plus button in the Switch action again



14. In the “Equals” text input, type Software



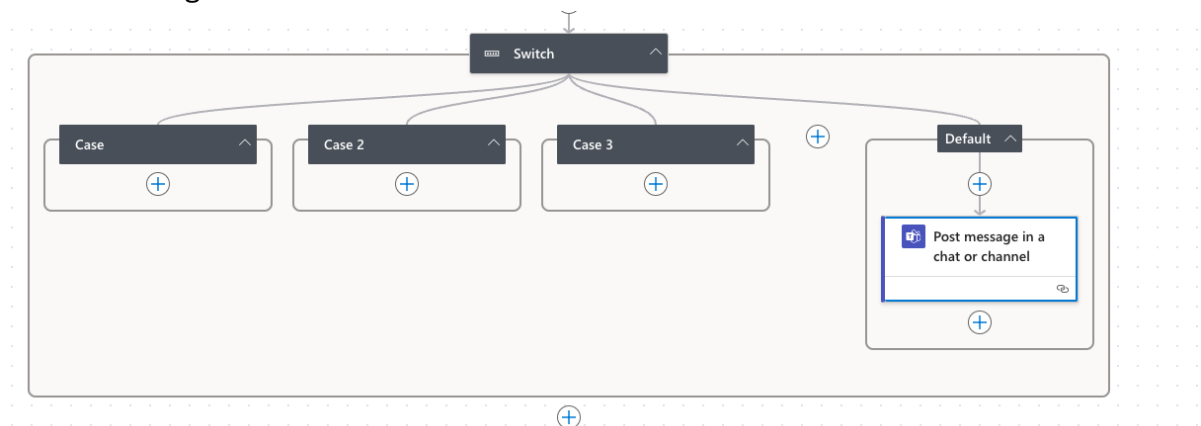
15. Click the plus button in the Switch action again



16. In the “Equals” text input, type Hardware

The screenshot shows the 'Case 3' configuration screen. Under the 'Parameters' section, the 'Equals' text input is highlighted with a blue border and contains the text 'Hardware'. To the right of the input is a blue button with a lightning bolt icon and the text 'fx'.

17. You now have a unique case for each possible classification so you can route the Teams message to different people based on the classification! Now, move the Post a message in a chat or channel action to the Default Case



18. Click on the Post message in a chat or channel action and paste the following text in the Message property:

A new ticket has been created:

Submitted By:

Priority:

Description:

19. Place your cursor after the Submitted By text and click the lightning bolt icon

20. Search for “Submitter” and select the Submitter property from the Dataverse trigger

The image displays two parts of the Microsoft Power Automate interface. On the left, the 'Post message in a chat or channel' action is configured with the following parameters:

- Post As \***: Flow bot
- Post In \***: Channel
- Team \***: IT
- Channel \***: General
- Message \***:  
A new ticket as been created:  
Submitted By:  
Priority:  
Description:

On the right, a flow diagram is shown with the following steps:

- When a row is added, modified or deleted
- Create text with GPT using a prompt
- Switch

A search window is open over the 'Switch' step, showing a search for 'submitt'. The results list 'When a row is added, modified or deleted' with the property 'Submitter' selected.

21. Place your cursor after the Priority text and click the lightning bolt icon

22. Search for "Priority" and select the Priority property from the Dataverse trigger

The screenshot displays the Power Automate interface. On the left, the 'Post message in a chat or channel' action is configured with the following parameters:

- Post As \***: Flow bot
- Post In \***: Channel
- Team \***: IT
- Channel \***: General
- Message \***:  
A new ticket as been created:  
Submitted By: Submitter x  
Priority:  
Description:

At the bottom, it shows the connection: 'Connected to aprildunnam@PPCCWorkshop12.onmicrosoft.com. [Change connection](#)'.

On the right, a flow diagram is visible. It starts with a trigger 'When a row is added, modified or deleted', followed by an action 'Create text with GPT using a prompt', and then a 'Switch' action. A search box is open over the 'When a row is added, modified or deleted' trigger, showing the search results for 'Priority' and 'Issue Description'.

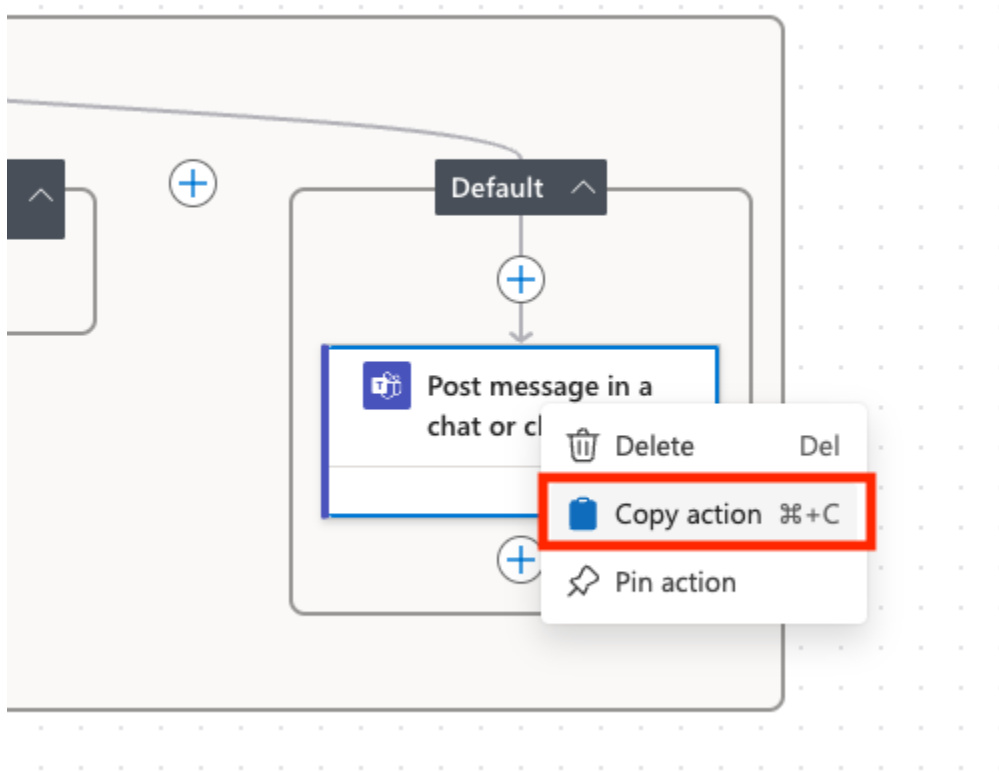
23. Place your cursor after the Description text and click the lightning bolt icon

24. Search for “Description” and select the Description property from the Dataverse trigger. Confirm that your message property looks like the screenshot below

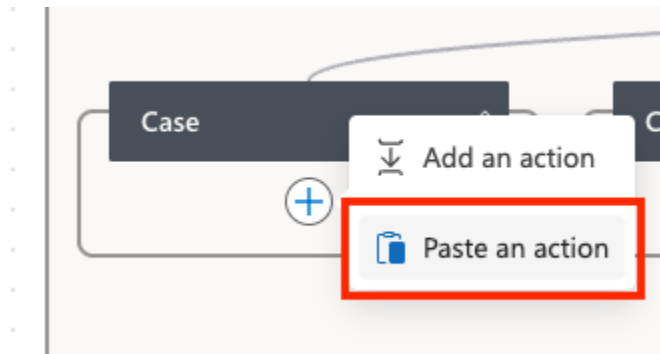
The image shows two parts of the Microsoft Power Automate interface. On the left is the configuration pane for a 'Post message in a chat or channel' action. It includes tabs for Parameters, Settings, Code view, Testing, and About. The Parameters tab is active, showing fields for 'Post As' (Flow bot), 'Post In' (Channel), 'Team' (IT), and 'Channel' (General). The 'Message' field contains a text template with placeholders for 'Submitted By:', 'Priority:', and 'Description:'. At the bottom, it shows a connection to 'aprilidunnam@PPCCWorkshop12.onmicrosoft.com'.

On the right is a screenshot of a flow canvas. The flow starts with a trigger 'When a row is added, modified or deleted', followed by a connector, then an action 'Create text with GPT using a prompt', another connector, and finally a 'Switch' action. A context menu is open over the first trigger, showing a search for 'Description' and listing properties from the 'IT Support Tickets' entity: Submitter, Issue Description, Status, and Status Reason.

25. Right click on the Post message in a chat or channel action and select “Copy Action”




26. Click the plus button inside the Case action and select “Paste Action”



27. Configure this action to match the screenshot below, changing the channel to Network Issues and updating the first line of the description to say “A new network



support ticket has been created”

 Post message in a chat or channel-copy

Parameters

Settings

Code view

Testing

About

Post As \*

Flow bot

Post In \*

Channel

Team \*

IT

Channel \*

Network Issues

Message \*

Normal

Arial


15px


**B**




*I*


U

**A**

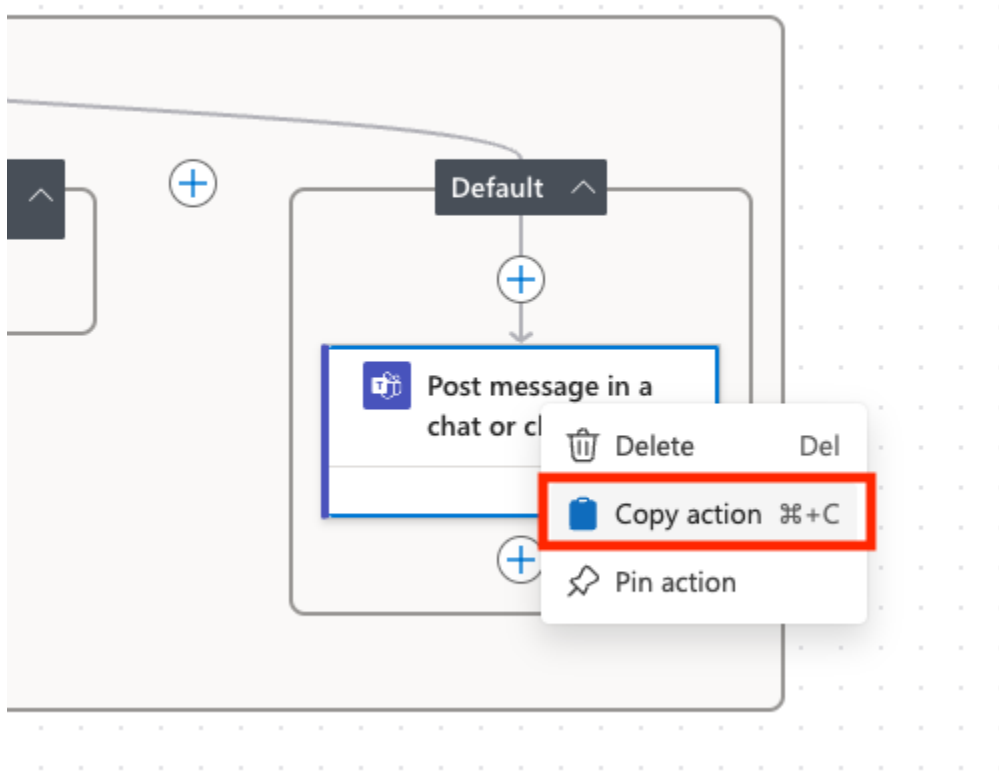




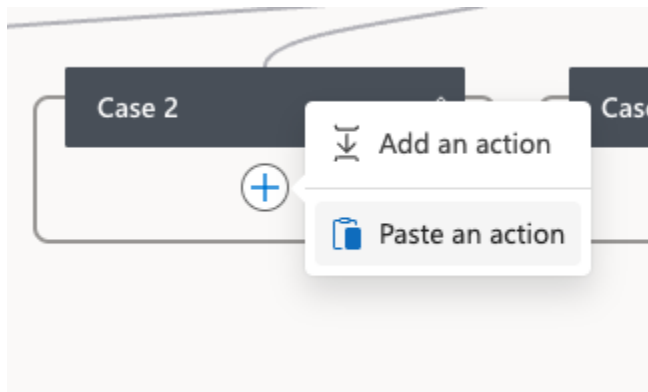
A new network support ticket as been created:  
Submitted By:  Submitter ×  
Priority:  Priority ×  
Description:  Issue Description ×



28. Right click on the Post message in a chat or channel action and select “Copy Action”



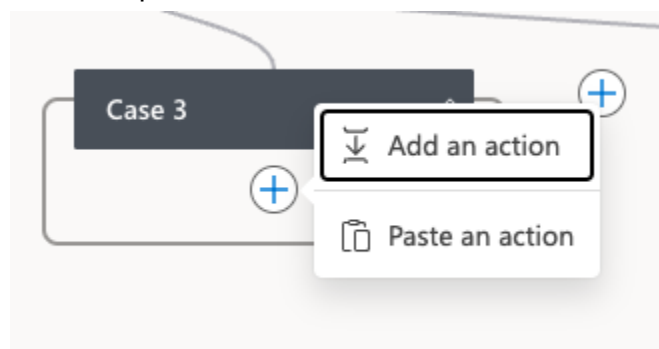
29. Click the plus button inside the Case 2 action and select “Paste Action”



30. Configure this action to match the screenshot below, changing the channel to Software Issues and updating the first line of the description to say “A new software

support ticket has been created”

31. Click the plus button inside the Case 3 action and select “Paste Action”



32. Configure this action to match the screenshot below, changing the channel to Network Issues and updating the first line of the description to say “A new hardware

support ticket has been created”

Post message in a chat or channel-copy-copy

Parameters Settings Code view Testing About

Post As \*  
Flow bot

Post In \*  
Channel

Team \*  
IT

Channel \*  
Hardware Issues

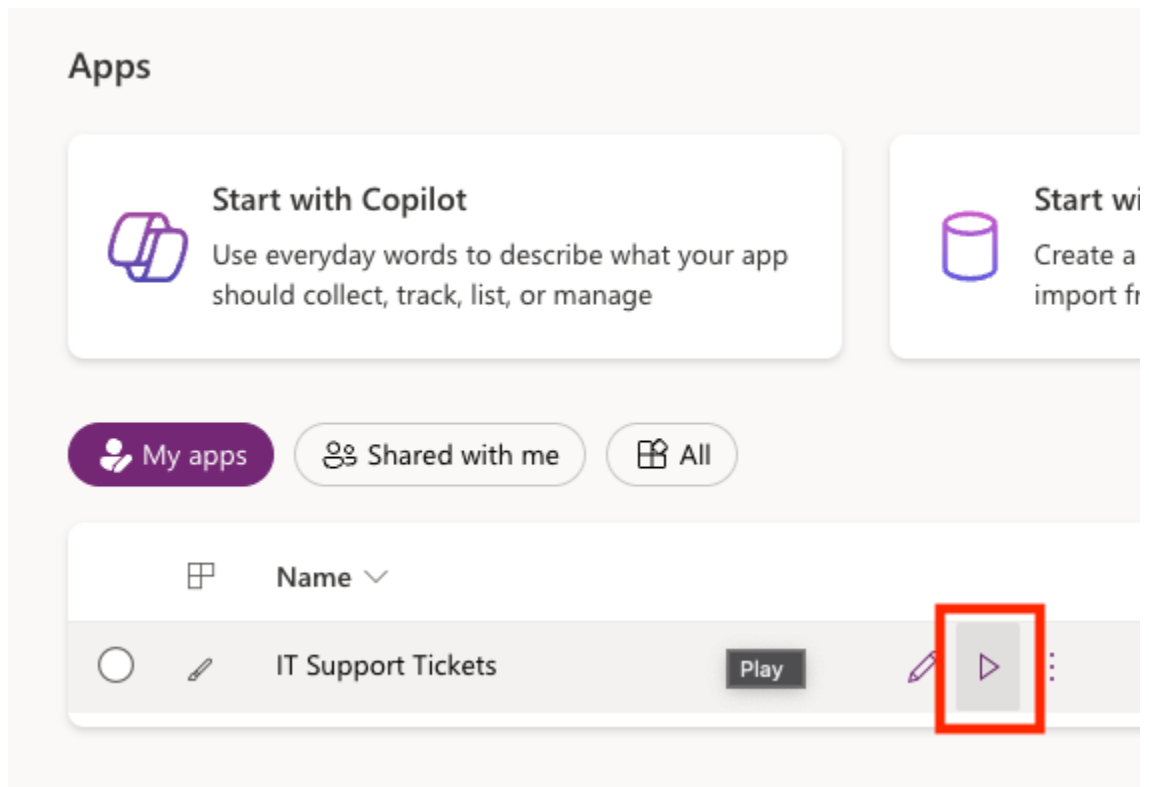
Message \*  
A new hardware support network support ticket as been created:  
  
Submitted By: [Avatar] Submitter x  
  
Priority: [Avatar] Priority x  
  
Description: [Avatar] Issue Description x

33. Click Save to save your Flow

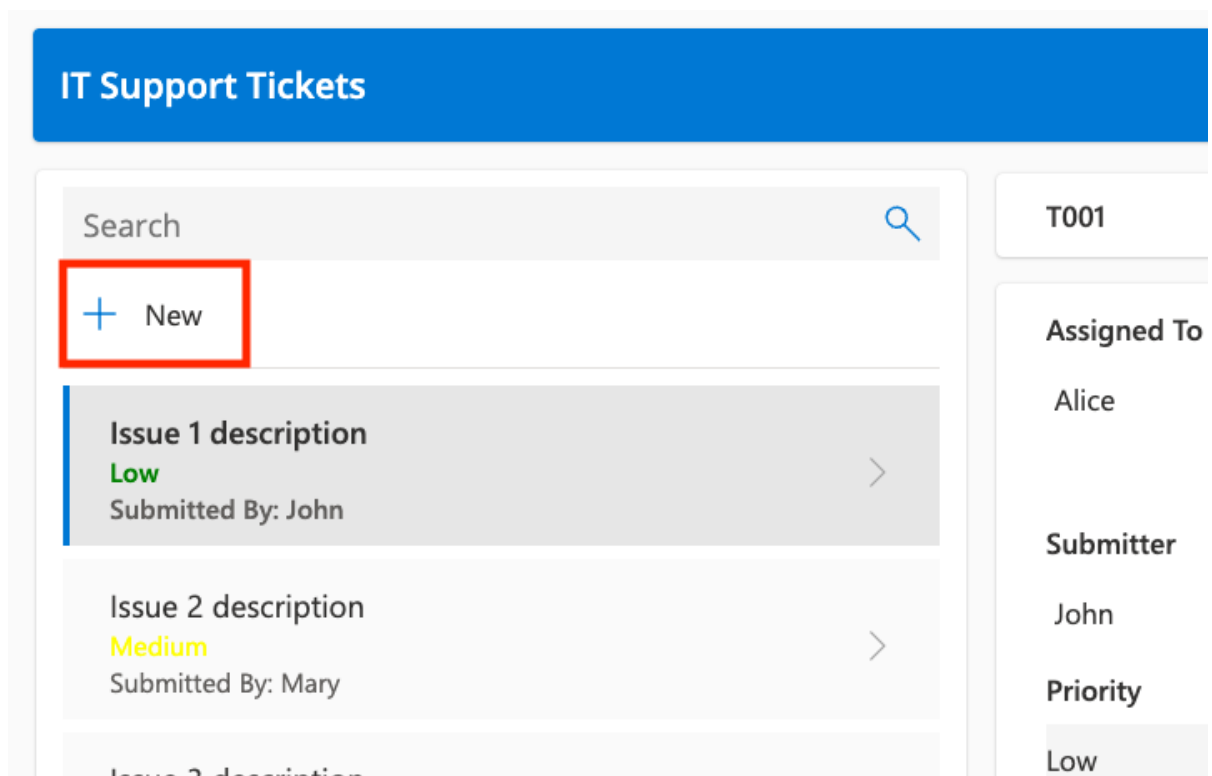
## Testing the Flow

Now you'll do a test to make sure the flow is working.

1. Go to make.powerapps.com. Click the play button next to the app you created in the first lab



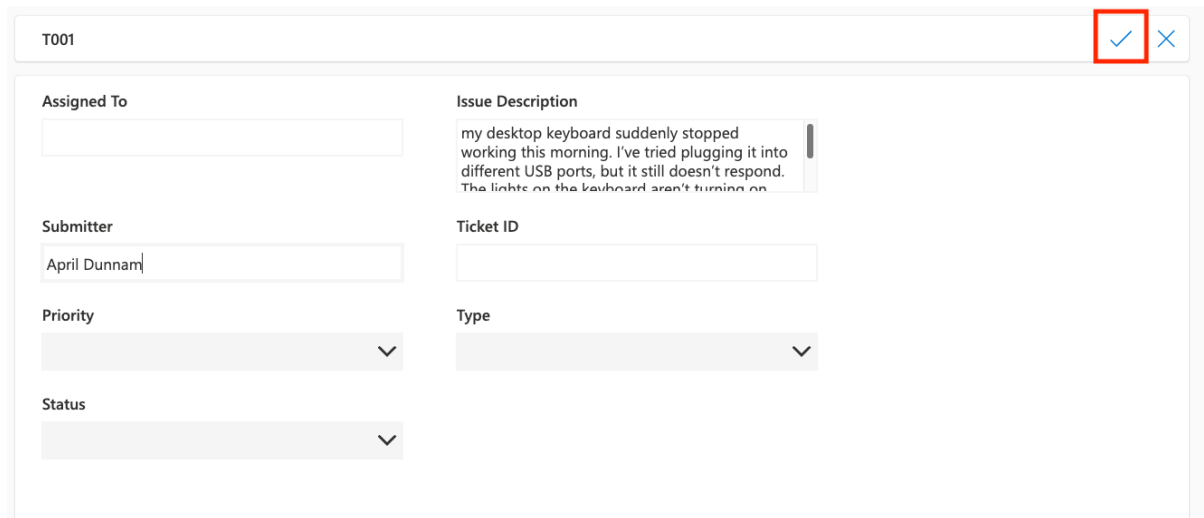
2. Click the New Button to add a new item



- Fill out the form with the following information. Do not fill out any other information other than these two fields:

Submitter	Use your name
Issue Description	My desktop keyboard suddenly stopped working this morning. I've tried plugging it into different USB ports, but it still doesn't respond. The lights on the keyboard aren't turning on either. Could someone please assist me with this issue
Priority	Low

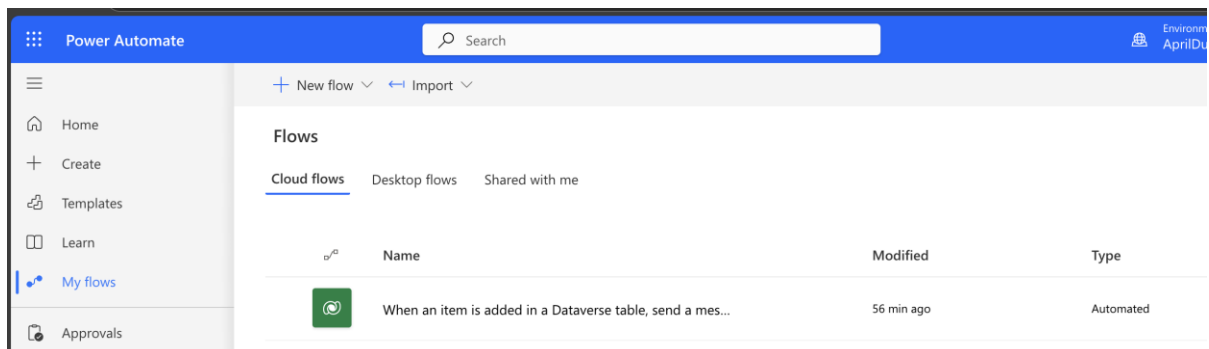
- Click the Check Mark icon to save



The screenshot shows a form titled 'T001' with a red box around a blue checkmark icon in the top right corner. The form contains the following fields:

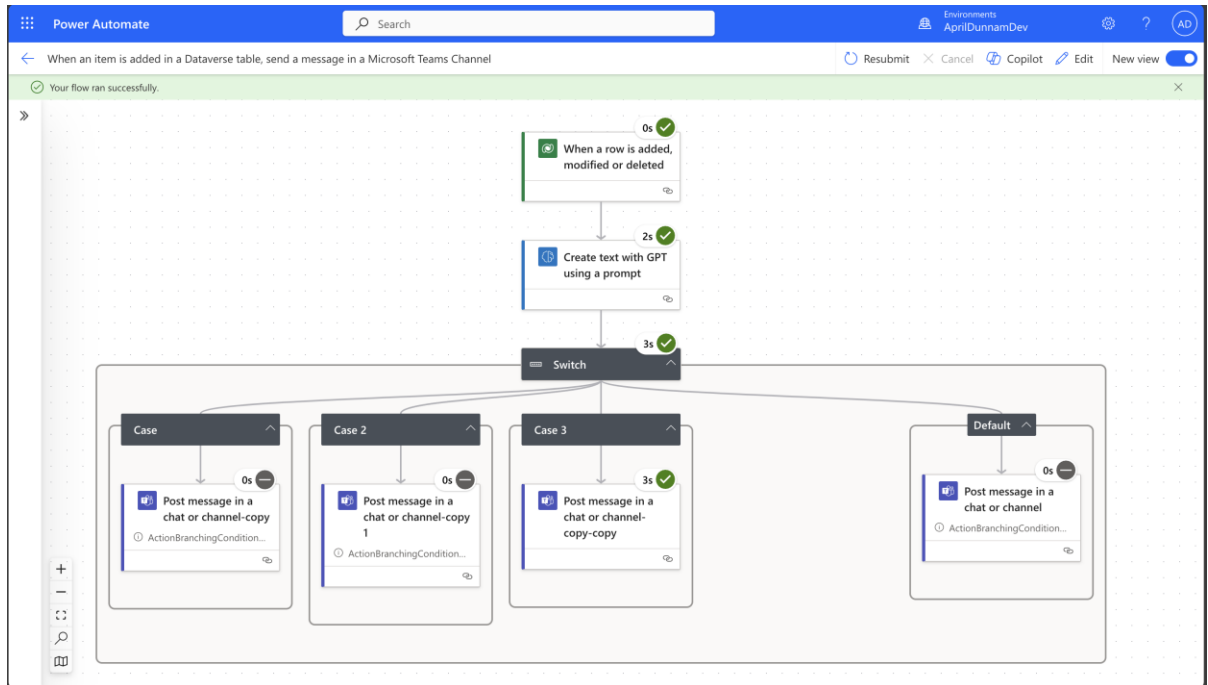
- Assigned To: [Empty text box]
- Issue Description: my desktop keyboard suddenly stopped working this morning. I've tried plugging it into different USB ports, but it still doesn't respond. The lights on the keyboard aren't turning on.
- Submitter: April Dunnam
- Ticket ID: [Empty text box]
- Priority: [Dropdown menu]
- Type: [Dropdown menu]
- Status: [Dropdown menu]

- Go back to make.powerautomate.com
- Click on the My Flows tab and select the name of the flow you created in the previous steps

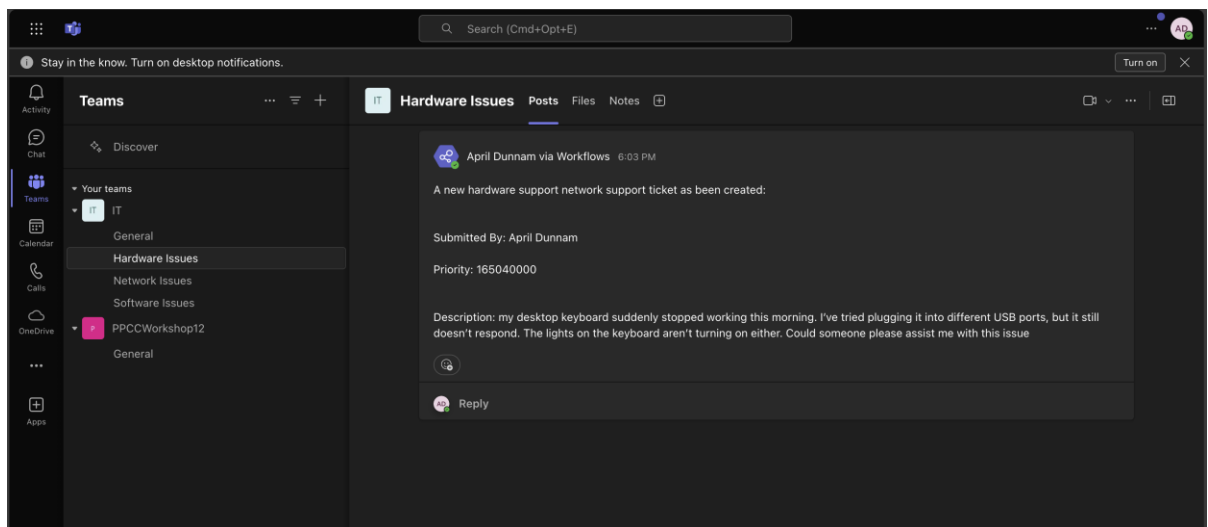


- Look at the Run History. You should see a flow run with "Succeeded" next to it. Click on the item in the Run History to see what the flow did. You can select each

item and see the outputs



- Go to <https://teams.microsoft.com/v2/?clientexperience=t2> and select the Teams tab. Select the IT team and Hardware Issue channel and you should see your notification there. Note: It may show up in a different channel if you put in a different prompt in the previous step depending on the classification it made.



- Congratulations! You just used AI in Power Automate to automatically classify and route your support tickets!