



Invoice Scanner & Data Entry Agent

This document provides a step-by-step guide to creating a Copilot Studio agent that automatically extracts structured information from invoice PDFs and stores the results in Microsoft Dataverse. The solution integrates Power Apps, Dataverse, and Copilot Studio to streamline invoice processing and ensure data consistency.

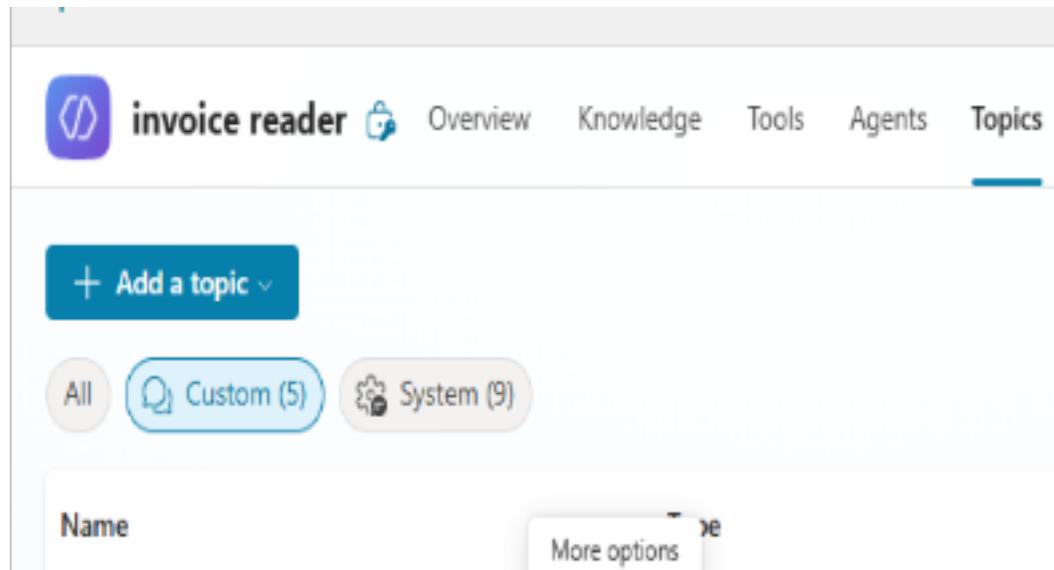
Step 1 – Create a Dataverse table in Power Apps

Navigate to **Power Apps → Tables → Start with a blank table.**

1. Create a table and assign it a name.
2. Add three columns:
 - o invoice_number
 - o invoice_date
 - o total_amount
3. Save the table.

Step 2 – Create a new Agent

1. Go to **Agent → New Agent.**
2. Configure the agent:
 - **Name:** Provide a meaningful name. Invoice Reader Agent
 - **Description:** This agent extracts invoice data and stores it in Dataverse.
 - **Instruction:** The agent identifies invoice PDFs, extracts the invoice number, invoice date, and invoice amount, and stores them in Dataverse.

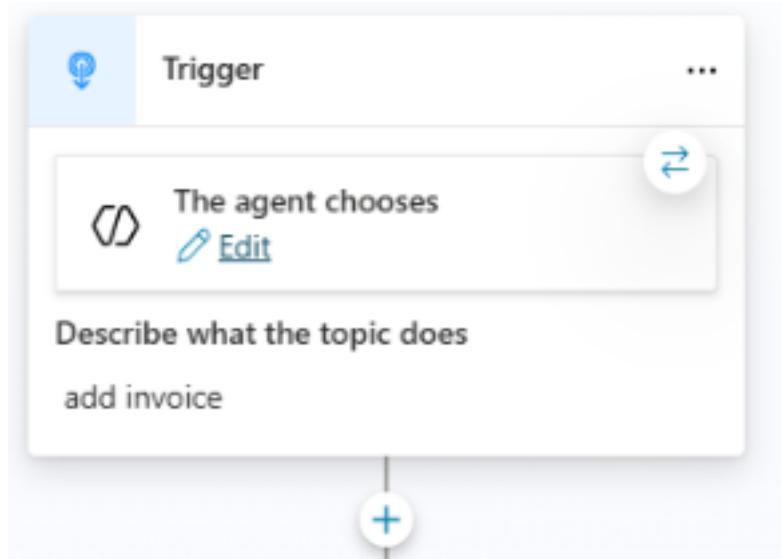


The screenshot shows the Cloud Alchemy Academy interface for the 'invoice reader' project. The 'Topics' tab is selected. A button '+ Add a topic' is visible. Below it, there are three filter buttons: 'All', 'Custom (5)', and 'System (9)'. The 'Custom (5)' button is highlighted with a blue border. A search bar labeled 'Name' is present, along with a 'More options' dropdown.

Step 3 – Create a topics

Add a new **Topic** to handle invoice-related processes.

Step 4 – Configure the trigger



The screenshot shows the 'Trigger' configuration screen. A box contains the text 'The agent chooses' with an 'Edit' link. Below the box, a text area says 'Describe what the topic does' followed by 'add invoice'. A large blue plus sign is at the bottom.

Provide a short, clear description of the topic.



Step 5 – To give the prompt to take the values

1. Click + (Plus) → Add a tool → New prompt.
2. Enter the following prompt:

You are a Gen-AI Agent that extracts structured data from invoices.

Given the text from an invoice, extract:

- Invoice Number
- Invoice Date
- Total Amount

Return the output in JSON format:

```
{  
"invoice_number": "...",  
"invoice_date": "...",  
"total_amount": "..."  
}
```

3. Add a document upload option: **Add content** → **Image or Document** → **Save**.

4. After saving, configure the input:

- Click ... (**More options**) → **Formula**.
- Enter the formula:
`First(System.Activity.Attachments).Value`
- Create a new variable for the output (e.g., var1).

step 6 – Display Extracted Text in Chat

1. Click + (Plus) → **Send a message**.
2. Select {x} → **var1.text** to display the extracted text.

step 7 – Parse the Extracted Values

1. Click + (Plus) → **Variable management** → **Parse value**.
2. Set the value to var1.text.
3. Choose **From sample data** → **Get schema from sample JSON**.
4. Paste the sample JSON:

```
{  
"invoice_number": "BPXINV-00550",  
"invoice_date": "23.05.2021",  
"total_amount": "6610.95"
```



}

5. Save the result in a new variable (e.g., var2).

Step 8 – Create Global Variables

1. Click + (Plus) → Variable management → Set a variable value.
2. Create a new variable.
3. Change its scope to **Global**.
4. Assign it an appropriate name (e.g., invoice_number).
5. Map the value to the corresponding parsed field (var2.invoice_number).
6. Repeat for invoice_date and total_amount.

Step 9 – Create the Dataverse Tool

1. Go to **Tools** → **Add a tool**.
2. Configure the tool:
 - **Connector:** Microsoft Dataverse → Add a new row to selected environment
 - **Name and Description:**
Whenever a PDF is uploaded, this tool identifies it as an invoice, extracts the invoice number, invoice date, and invoice amount, and stores them in Dataverse.
3. Configure inputs:
 - Set all values as **Custom values**.
 - Provide the environment and table name (matching the table created in Step 1).
 - Map invoice_number, invoice_date, and total_amount to their corresponding **Global variables**.
4. Under **Additional details**, select **Only when referenced by topic or agents**

Step 10 – Add the Tool to the Topic

1. Open the **Task** → **Invoice** flow.
2. At the end of the flow, click + (Plus) → **Add a tool** → **Tools** → **Select your created tool**.
3. Save the task.
4. Test by uploading an invoice PDF and typing “*Add invoice*”.
5. The agent will extract the data and insert it into the Dataverse table.