Empower Makers Session Workshop

Session Date: 10/6/23

Table of Contents

Overview

Situational Scenario: Support case management

Contoso software receives thousands of daily support cases from their customers which are managed in a legacy system.

The time to response gradually increased in the past years and CSAT collapsed.

Claudia: CIO	**Chris: Customer Support Champion**
	
Claudia launched an initiative to refresh and improve the efficiency of existing solutions. She acquired Microsoft Power Platform licenses to enable every team in the organization to autonomously perform the appropriate changes	Chris is on point to address the case management improvements. He has a clear understanding on what could be improved and is learning how to achieve it with Microsoft Power Platform

What do you need

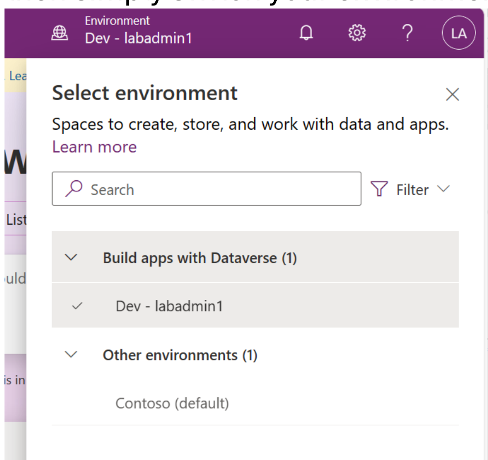
Login & Environment

For the workshop you'll use a demo tenant with these login credentials below

In incognito mode,

- Go to https://make.preview.powerapps.com/
    - Be sure to use make.**Preview**.powerapps.com
- **Login**: Use the "labadmin[#]" from your Post-It note and log in using this format and domain labadminNNN@M365x14796634.onmicrosoft.com
- **Password**: test@word1

- Make sure you are using the **Developer** environment, and ***NOT*** the **Default** environment.
    - If you see this default environment,
    

    - then simply switch your environment by clicking [**Environment]**
    

    -

Data setup

Download from : https://aka.ms/csexcel.mppc23

Exercise 1: Create a Power App using Copilot

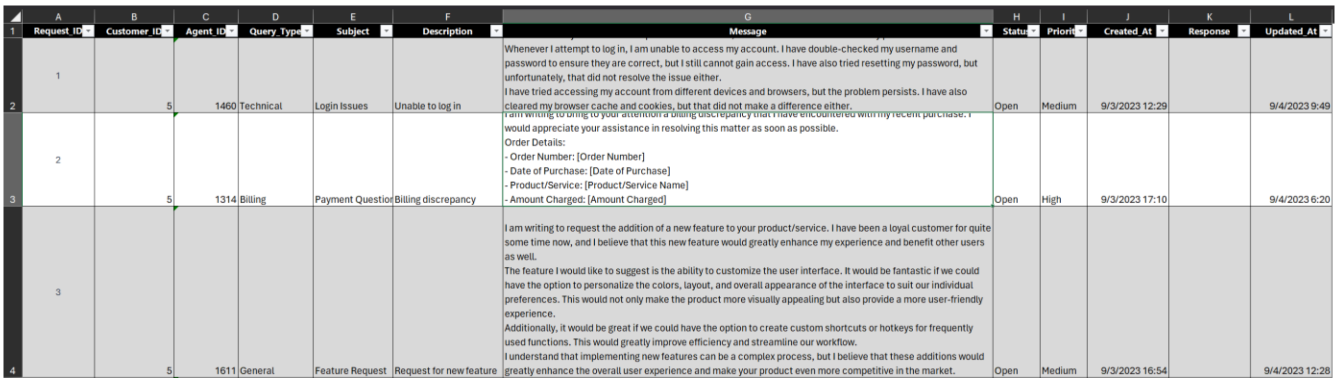
Scenario

Chris exported the existing support cases log into an Excel file.

Let's use Power Apps Copilot to create a Customer Support app for agents

1. Import the data from Excel into Dataverse
2. Create a Support Ticket app
3. Customize the app with Copilot

Excel file and schema



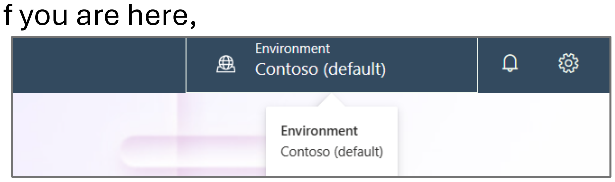
Request_ID	Customer_ID	Agent_ID	Query_Type	Subject	Description	Message	Statu	Priorit	Created_At	Response	Updated_At
1	5	1460	Technical	Login Issues	Unable to log in	Whenever I attempt to log in, I am unable to access my account. I have double-checked my username and password to ensure they are correct, but I still cannot gain access. I have also tried resetting my password, but unfortunately, that did not resolve the issue either. I have tried accessing my account from different devices and browsers, but the problem persists. I have also cleared my browser cache and cookies, but that did not make a difference either.	Open	Medium	9/3/2023 12:29		9/4/2023 9:49
2	5	1314	Billing	Payment Questior	Billing discrepancy	I am writing to bring to your attention a billing discrepancy that I have encountered with my recent purchase. I would appreciate your assistance in resolving this matter as soon as possible. Order Details: - Order Number: [Order Number] - Date of Purchase: [Date of Purchase] - Product/Service: [Product/Service Name] - Amount Charged: [Amount Charged]	Open	High	9/3/2023 17:10		9/4/2023 6:20
3	5	1611	General	Feature Request	Request for new feature	I am writing to request the addition of a new feature to your product/service. I have been a loyal customer for quite some time now, and I believe that this new feature would greatly enhance my experience and benefit other users as well. The feature I would like to suggest is the ability to customize the user interface. It would be fantastic if we could have the option to personalize the colors, layout, and overall appearance of the interface to suit our individual preferences. This would not only make the product more visually appealing but also provide a more user-friendly experience. Additionally, it would be great if we could have the option to create custom shortcuts or hotkeys for frequently used functions. This would greatly improve efficiency and streamline our workflow. I understand that implementing new features can be a complex process, but I believe that these additions would greatly enhance the overall user experience and make your product even more competitive in the market.	Open	Medium	9/3/2023 16:54		9/4/2023 12:28

Download from : *https://aka.ms/csexcel.mppc23*

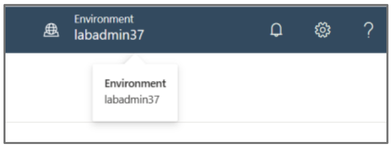
Steps

1. Go to Power Apps and select the environment
   a. In incognito mode,
   b. Go to https://make.preview.powerapps.com/
   c. Be sure to use make.**Preview**.powerapps.com
   d. **Login**: Use the "labadmin[#]" from your Post-It note and log in using this format and domain: labadminNNNN@M365x14796634.onmicrosoft.com
   e. **Password**: test@word1

2. Make sure you are using the **Developer** environment ("**labadmin#**"), and **NOT** the **Default** environment.
   a. If you are here,

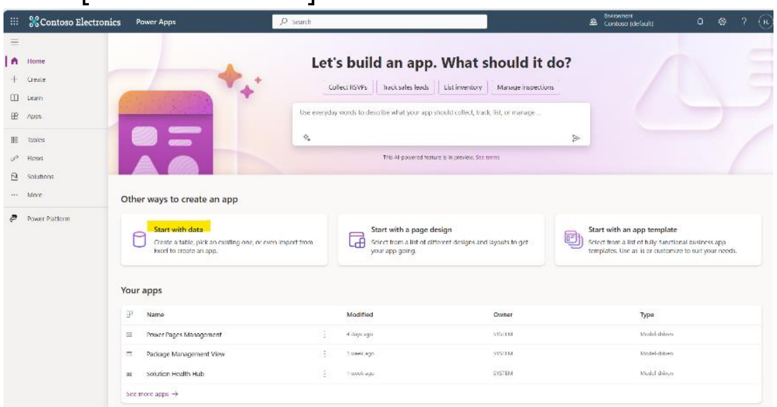


   b. then simply switch your environment to **labadmin#** by clicking [**Environment]**

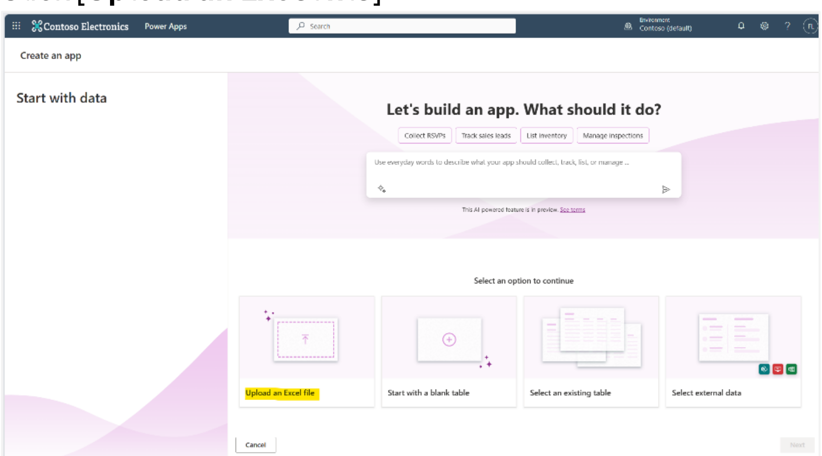
c. 

3. Upload an Excel file

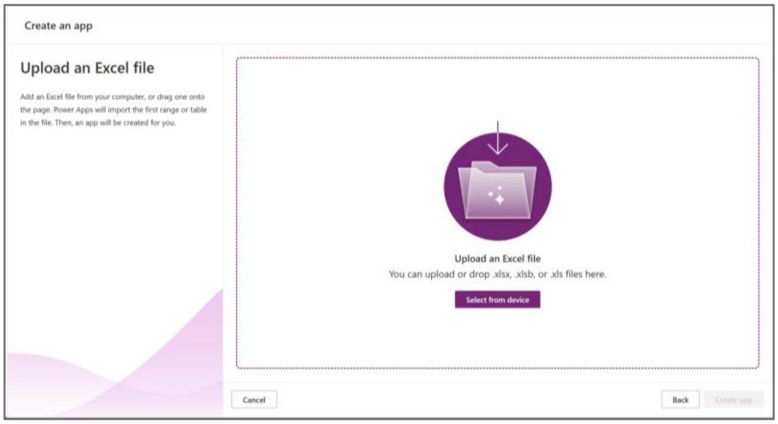
   a. Click [**Start with Data**]



   b. Click [**Upload an Excel file**]

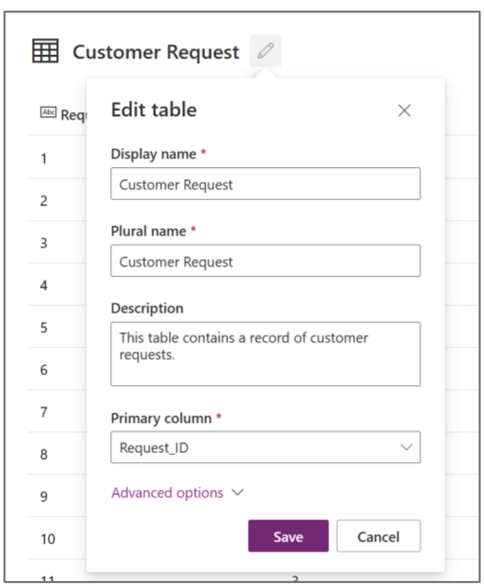


   c. Select the Excel file



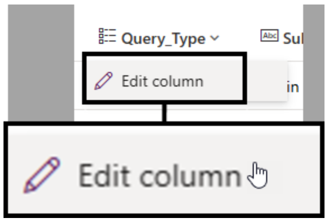
d. Copilot will generate a table preview for you. Let’s review the data and make a few adjustments.

e. Note: Please leave the Table name as Customer Request (we will refer to it in a later Lab)



f. Make changes to the following columns:

i. [**Query_Type**] > Change type to **Choice> Choice**



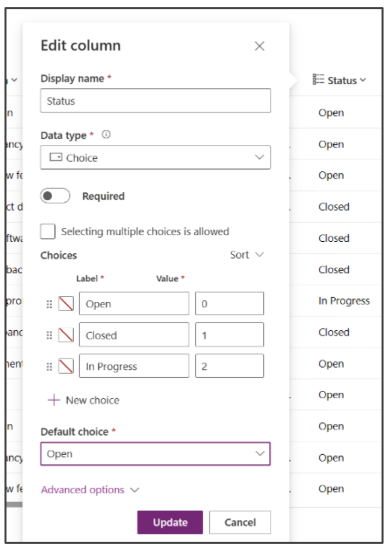
ii. **[Description]** > Change type to **Text>**Multiple line of text-**Plain Text**.

iii. **[Subject]** > Change type to **Text>**Single line of text-**Plain Text**.

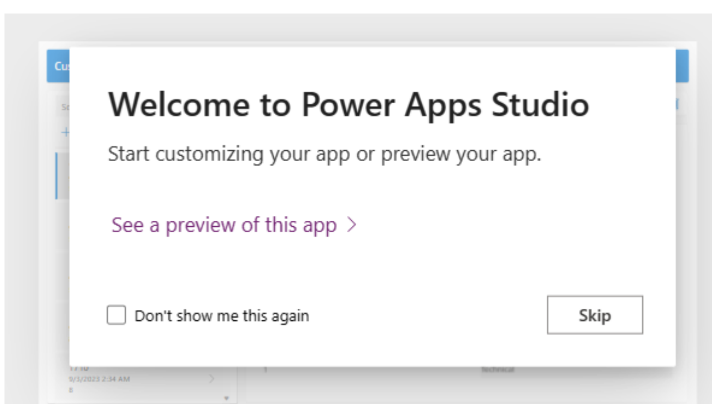
iv. **[Response]** > Change type to **Text>**Multiple line of text-**Plain Text**.

v. **[Status]** > Change type to **Choice> Choice**. Set default to **Open**

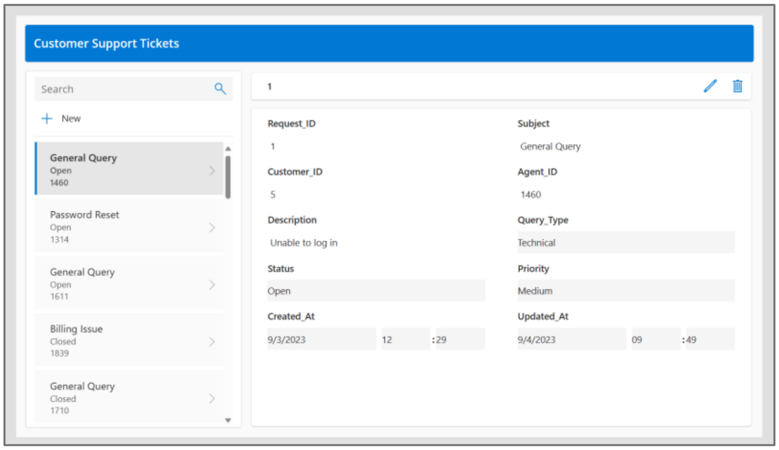
vi. **[Priority]** > Change type to **Choice> Choice**. Set default to **Medium**



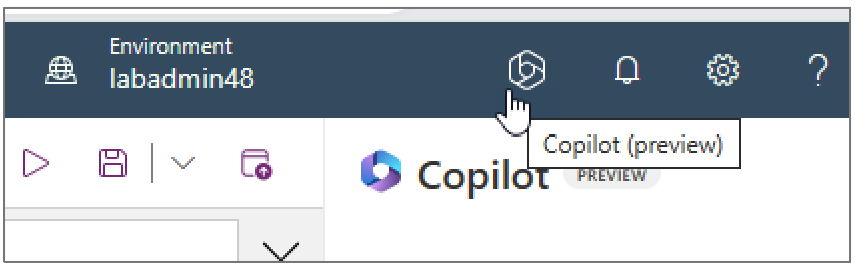
4. Click [**Create app**] at the bottom right to proceed to the app designer
5. Click [**Skip**]



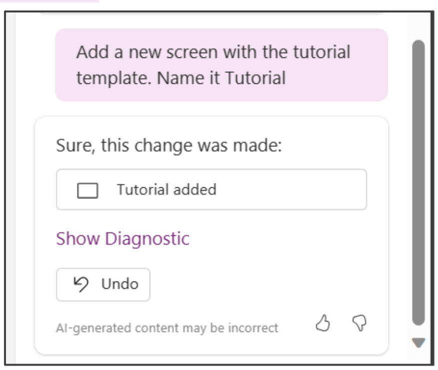
6. The Canvas studio will load and you’re ready to edit your app



7. Next, let’s customize the app and add a screen
    a. The support agents may want to see a tutorial about the app
    b. Click the Copilot icon in the command bar

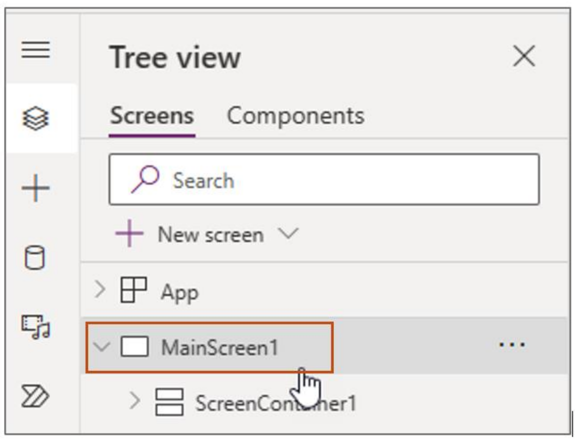


    c. Tell Copilot to “Add a new screen with the tutorial template. Name it TutorialScreen1”

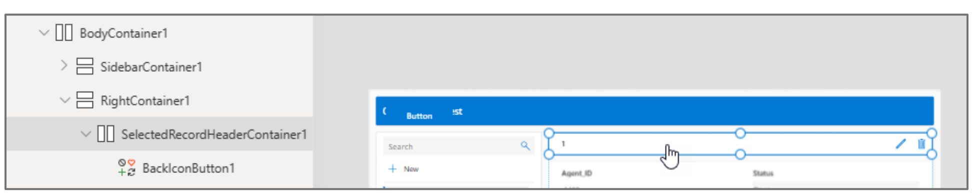


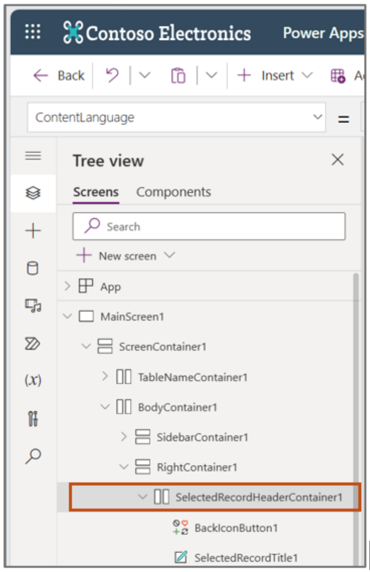
    d. Copilot will create a new template screen called [**TutorialScreen1**]

8. Let's add a button that helps users navigate to that screen
    a. Go back to the prior screen by selecting [**MainScreen1]** in the Tree View on the left navigation menu.



    b. Add a button called **Tutorial** to the selected container by doing the following:
        i. In the Tree View, select [**SelectedRecordHeaderContainer1].** This is the name of the container above the form control.

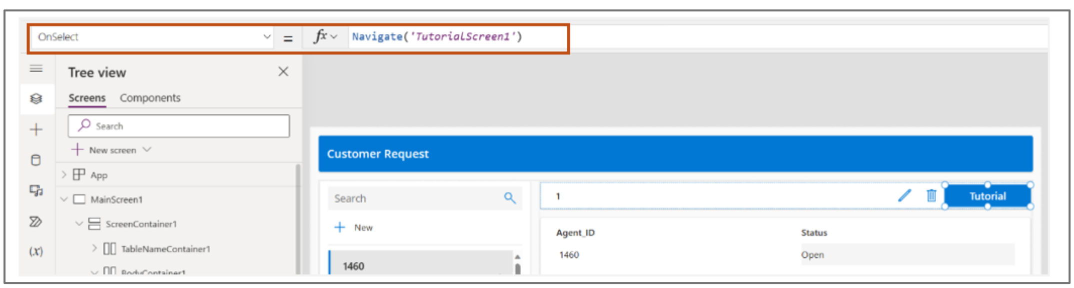




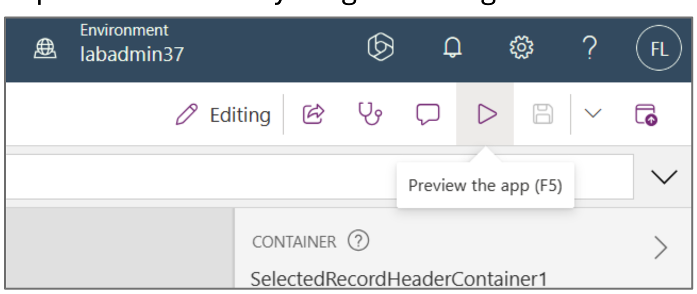
ii. Tell Copilot: "Add a button named Tutorial in the selected container"

c. Program the **Tutorial** button to navigate to **TutorialScreen1**
   Tell Copilot: "When clicking on button Tutorial go to TutorialScreen1"

d. To verify this, select the **Tutorial** button. Choose the [**OnSelect**] property in the formula bar near the top of the screen



9. Save your app by clicking the save ( ) icon in the top right corner.
10. Play your app to preview how everything works together. Click the icon.



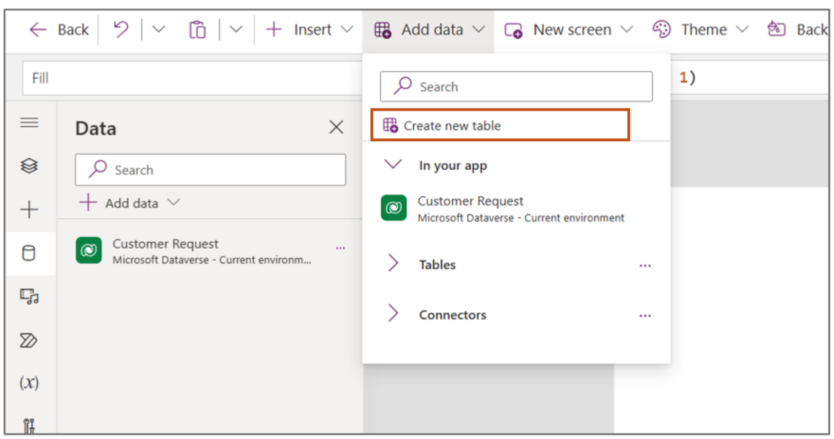
11. Use Copilot to learn more about **PowerFX** functions
    a. The **Tutorial** button uses the function *Navigate*

    b. Find out more about the PowerFX *Navigate* function by asking Copilot: "What does the Navigate function do?"

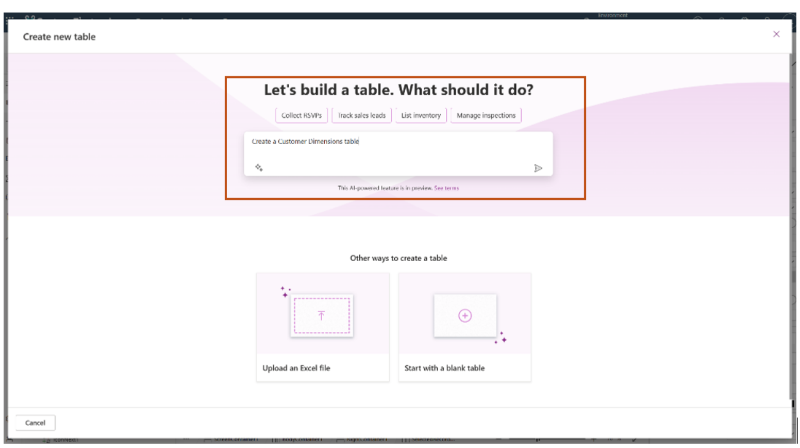
12. In the sections below we'll explore how adding a Copilot control in the app will allow users to ask questions of the Support data. Stay tuned!

Bonus:

13. Can you add a button to the Tutorial screen that takes the user back to the Main screen?
    a. Try mentioning the button's name in the Copilot request
14. Want to try using natural language to create a new table?
    a. Click [**Add Data**] in the top command bar and then [**Create new table**]
        i. Hint: If the **[Add Data]** option is disabled, click [**MainScreen1]** in the Tree View and try again



    b. Think of a table that you'd like to create, like "Customer Dimensions" or "Account Contacts." Describe your new table in the text box.



Notes:

1. Using Copilot to edit your app is in preview and continuously improving.
2. You can modify various controls, like containers, screen, galleries, forms, buttons, labels, and inputs. For more info see
3. Use natural language to edit an app using the Copilot panel - Power Apps | Microsoft Learn

Exercise 2: Create a Power Pages site using Copilot

Scenario

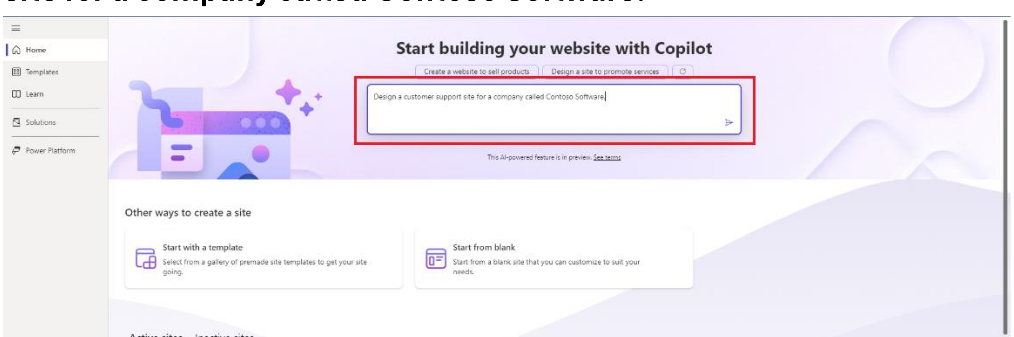
Let’s create a Power Pages site for customers to submit their inquiries to Contoso Software.   In this exercise, you will use Copilot to:

1. Create a site.
2. Apply site theming.
3. Create new pages and make edits.
4. Create and add a multi-step form.
5. Add code for form validation.

Steps

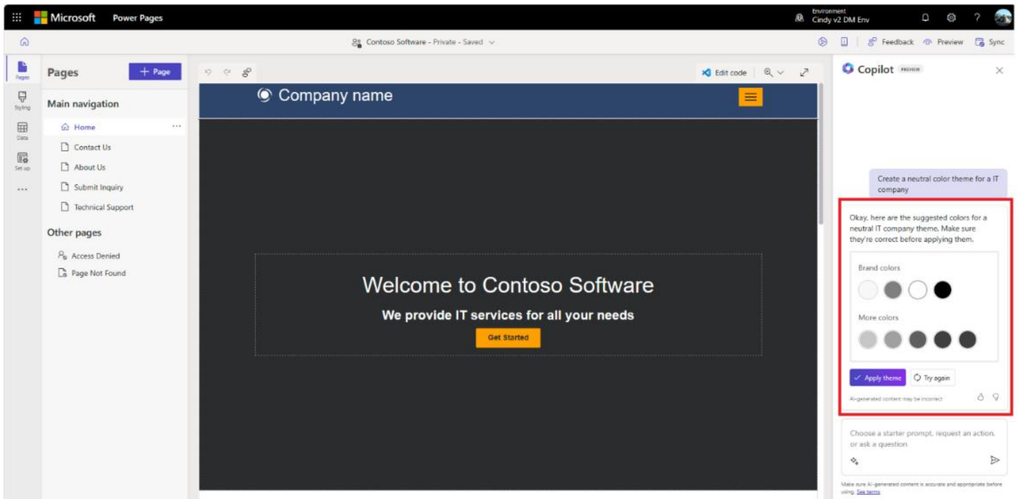
1. Create a site with Copilot
    a. Navigate to **make.powerpages.microsoft.com** in a new browser tab in incognito window.
    You should be signed into the same account and selected the same environment as the previous lab:
    Login: Use the labadminNNNN@M365x14796634.onmicrosoft.com
    Password: test@word1
    Environment: labadminNNNN (not Default environment)

    b. On the Power Pages homepage, describe the site you want to build in the Copilot input field, and hit <enter>. Example: **Design a customer support site for a company called Contoso Software.**

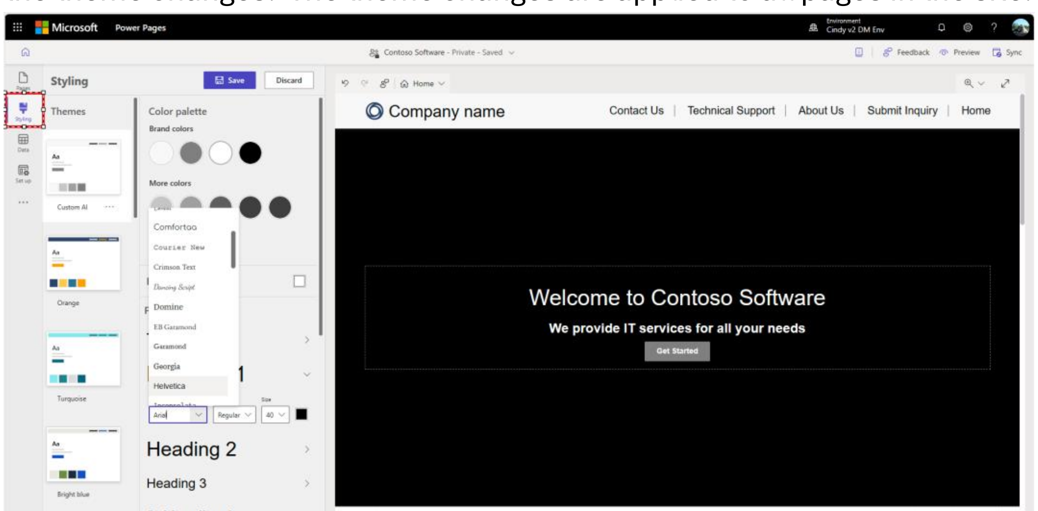


    c. Follow the 3 step site creation experience, where you can preview and revise (1) the site name and URL, (2) homepage design, and (3) create a sitemap. This kicks off site provisioning. Design Studio will open once the site is created.

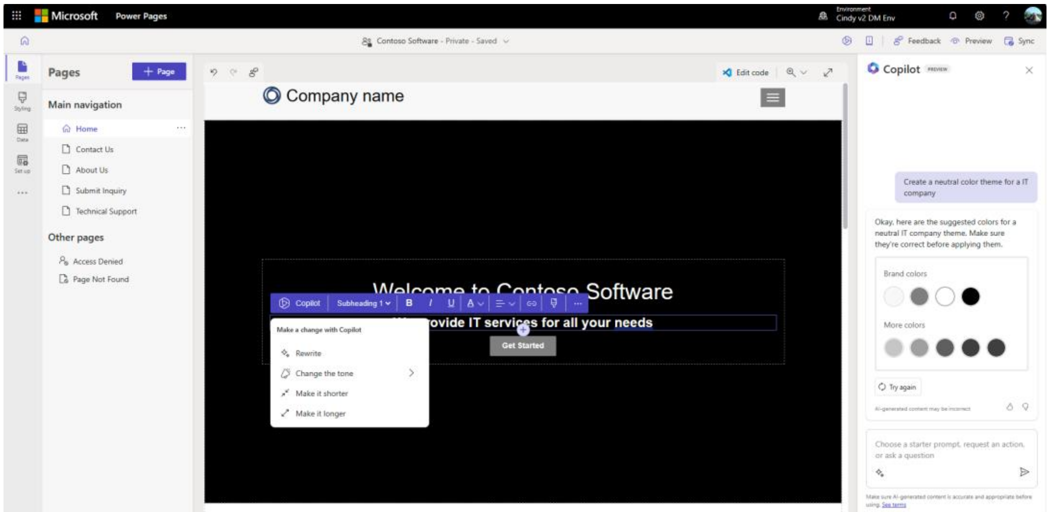
2. Design your site theme
    a. Create a theme for your site using the Copilot side car. In the Copilot input field, type ***Create a neutral color theme for an IT company*** and hit <enter>.
    b. Review the theme, and click on “Apply Theme” to apply the theme to all pages in the site.



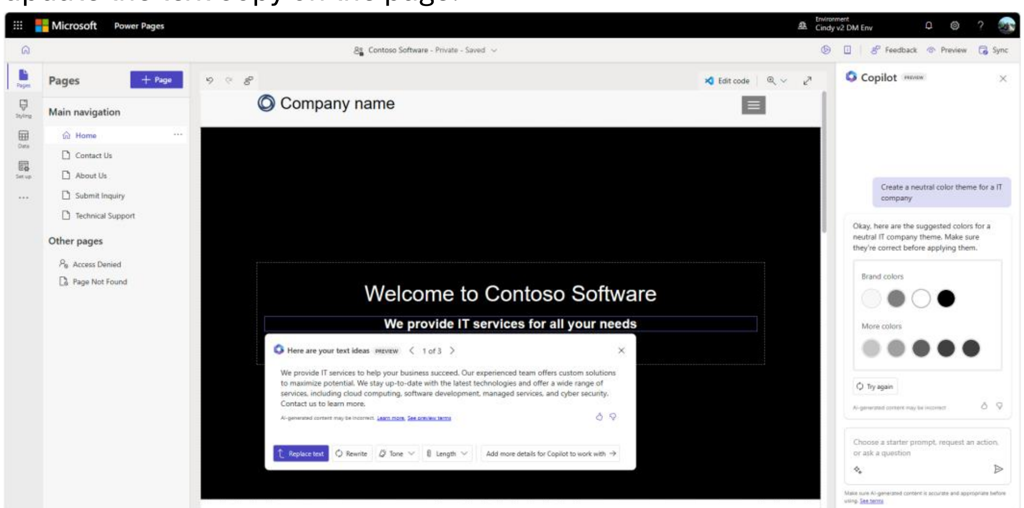
    c. Go to the Styling Workspace and edit the “Custom AI” theme. For example, change the Heading 1 font style from Arial to Helvetica. Hit “Save” to save the theme changes. The theme changes are applied to all pages in the site.



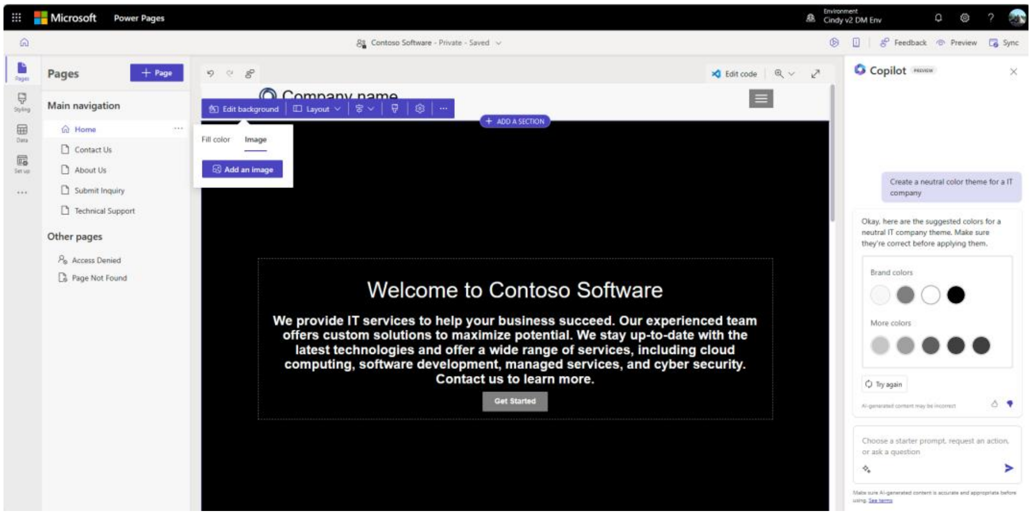
3. Edit pages with Copilot and WYSIWYG editor
    a. Go to Pages Workspace, select a text component on the home page. In the toolbar, click on “Copilot” -> Make it longer.



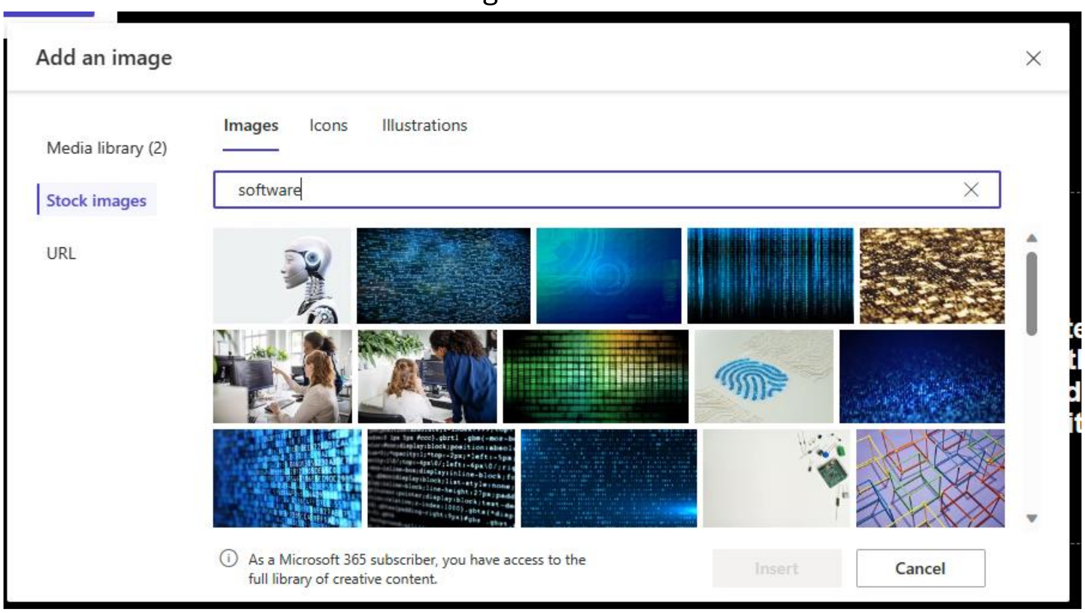
b. Review and revise the text by adjusting the tone and/or length, review the multiple string suggestions, or provide more details. Click "Replace text" to update the text copy on the page.



c. Edit Copilot created pages with the WYSIWYG editor. Let's change the section background. Select the section and click "Edit background" in the toolbar. In the pop-up, click the "Image" tab and click "Add an Image".

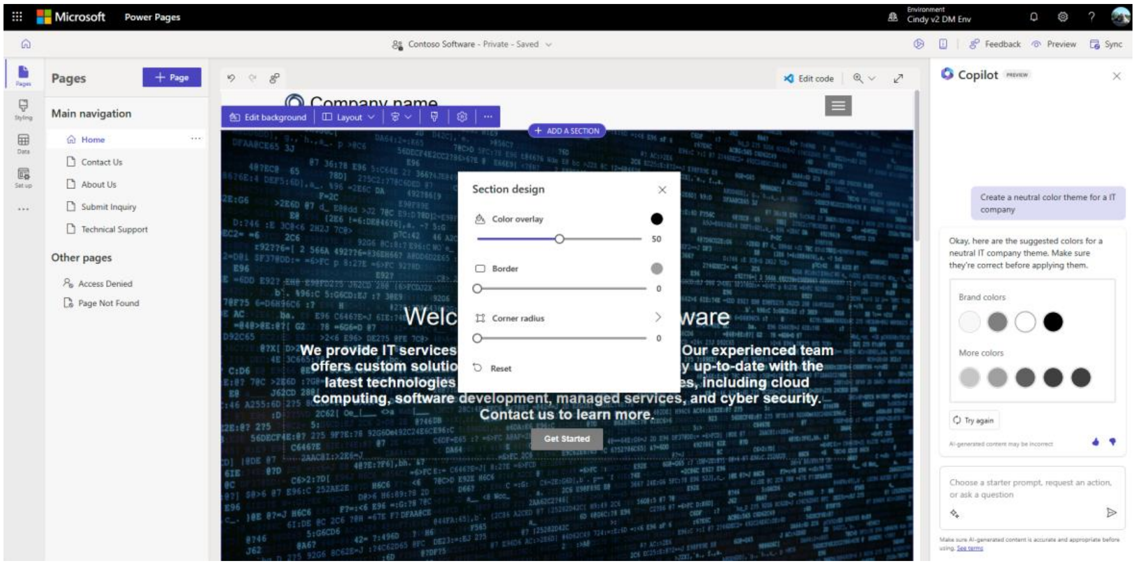


In the “Add an image” dialog, click on “Stock Images” tab. Type software and hit <enter> to find relevant images.

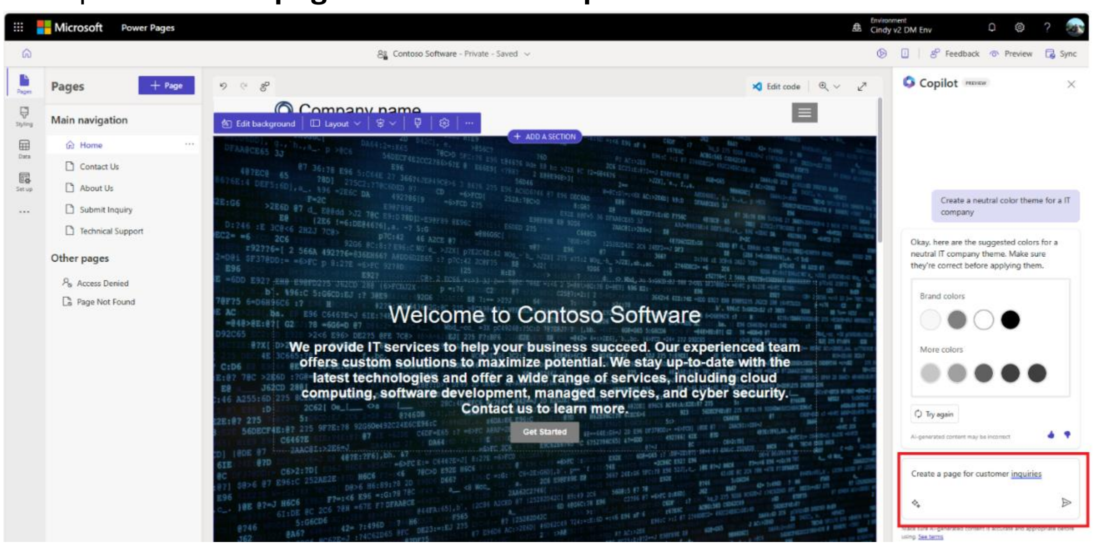


Select one of the images for the section background. Click “Insert” to add the image as section background.

Next, add image styling to improve readability of text. Click  on the section toolbar. In the “Section design” dialog, change the color overlay. Pick a color and change the color overlay opacity. Click ‘x’ in the top right corner to close the dialog.

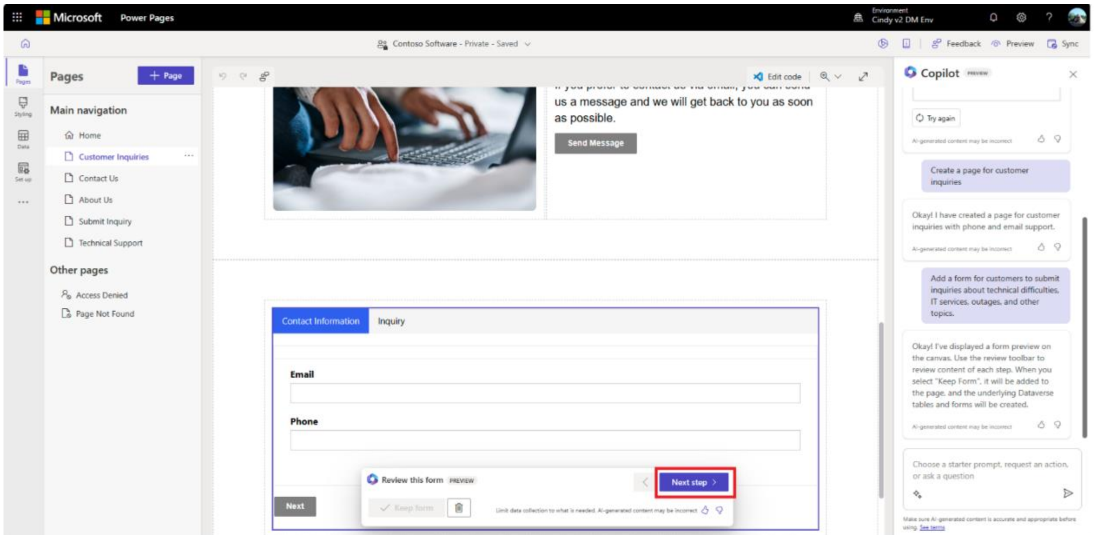


4. Create a webpage with Copilot
    a. In the Copilot side car input field, describe a page and hit <enter>. For example: **Create a page for customer inquiries.**

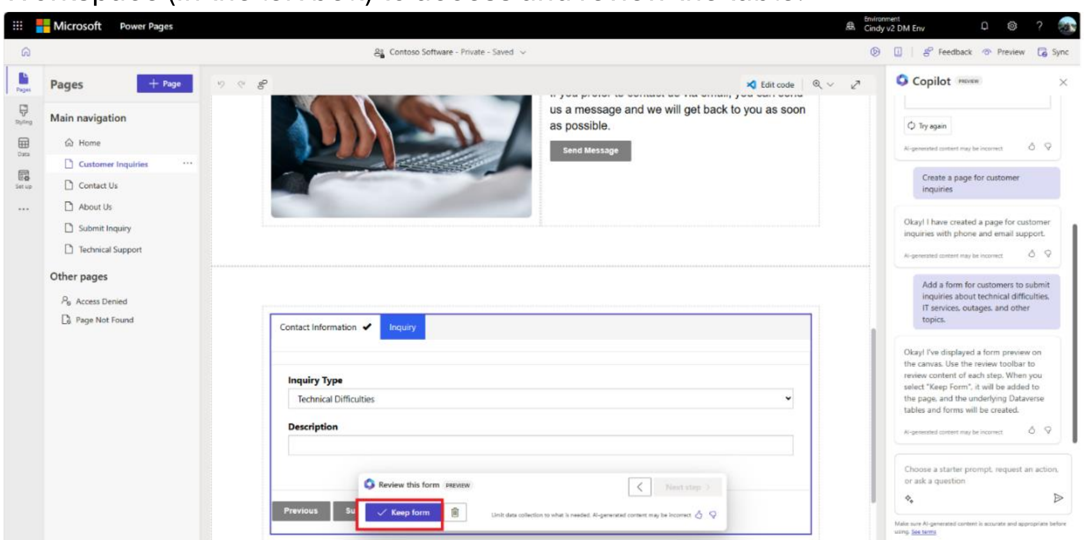


A new page is created and added to the site.

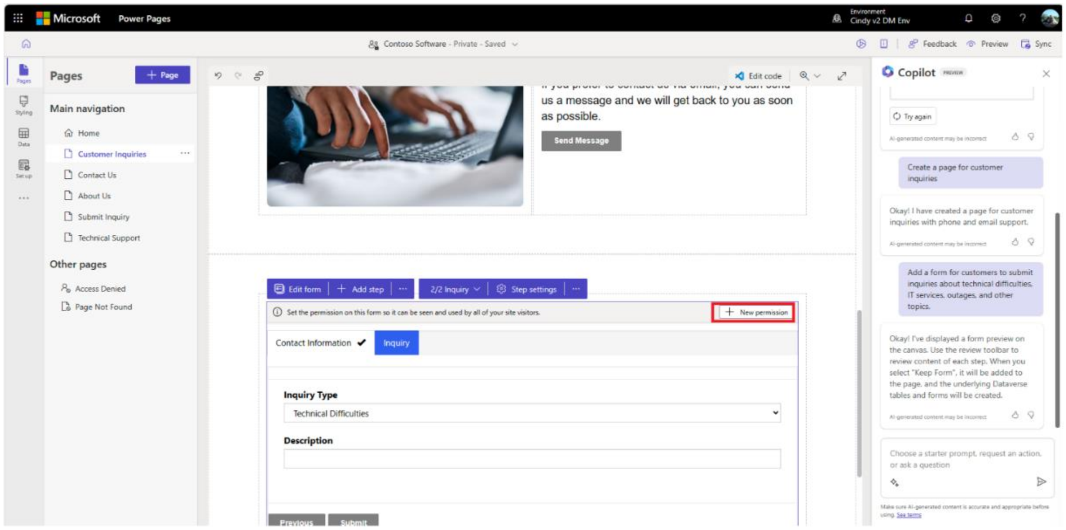
5. Use Copilot to design forms
    a. Add a form to the page for customers to submit inquiries. In the Copilot side car input field, type **Add a form for customers to submit inquiries about technical difficulties, IT services, outages, and other topics**. Hit <enter>.
    b. Copilot generates a multi-step form. Review each step of the form by clicking on "Next Step".



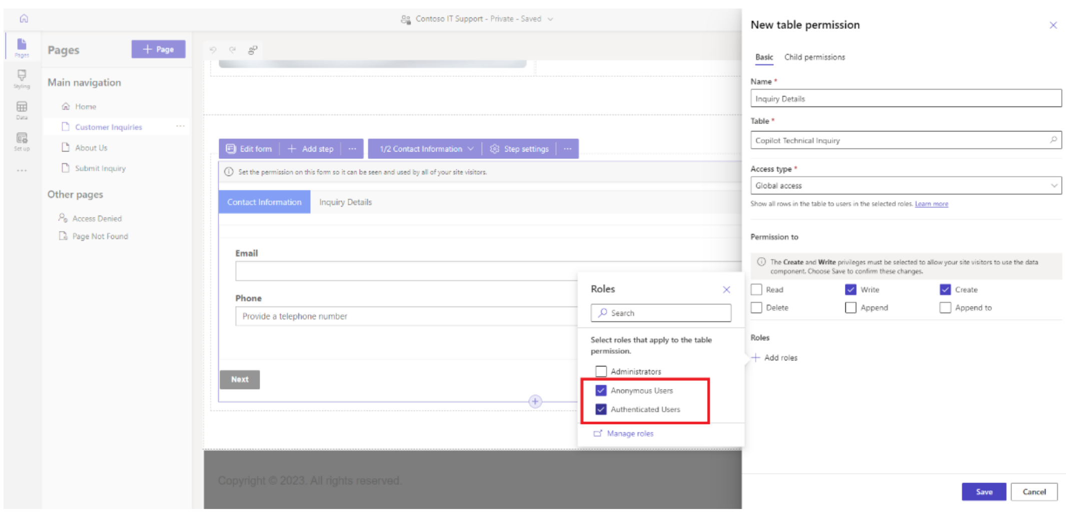
c. After reviewing all the steps, click "Keep form" to add the form to the page.
Note: Copilot creates the form with a new Dataverse table. Go to Data Workspace (in the left belt) to access and review the table.



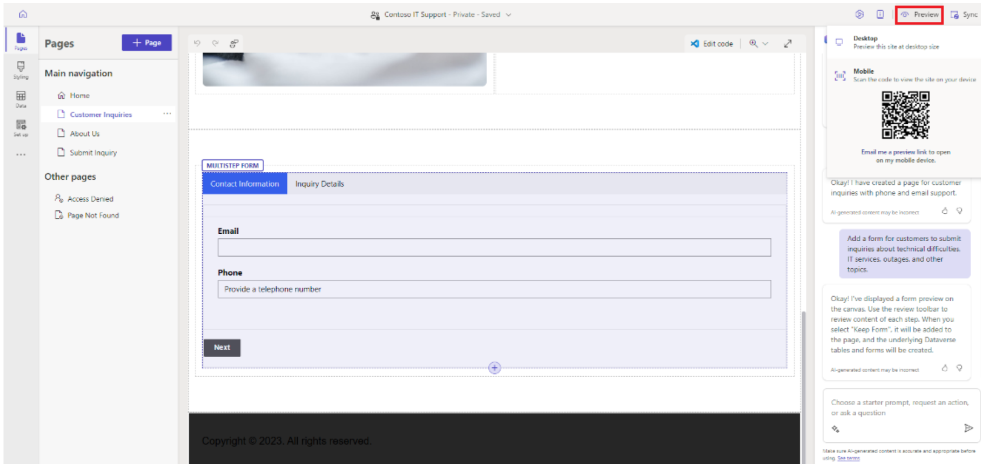
d. When working with forms and business data, security is top of mind. Let's add permissions to this form, and allow anonymous users and authenticated users to submit this form. Click on "New permission".
This will open the "new table permission" panel with fields pre-selected based on the form context.



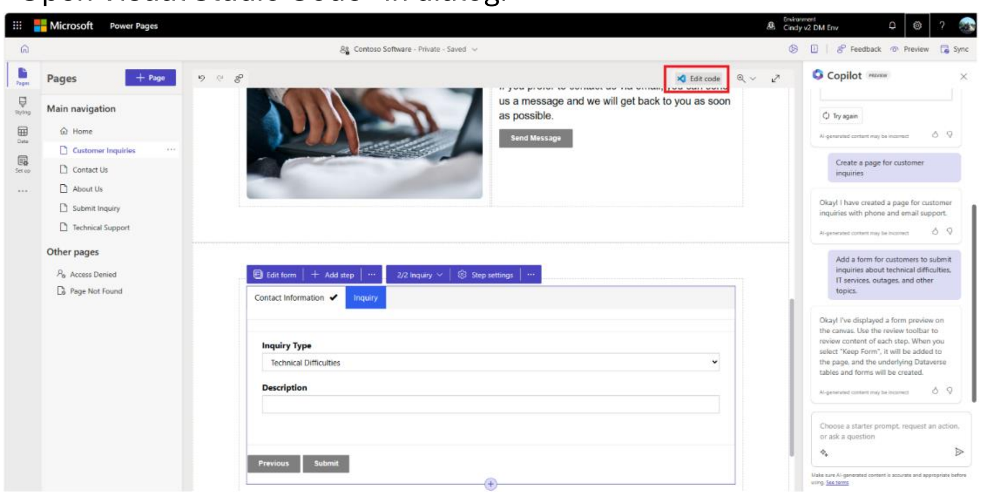
e. Click on “Add roles” and select “Anonymous Users” and “Authenticated Users”. Click “Save”. This table permission will give all visitors to the site permissions to submit the form. This data will get written to the Dataverse table that Copilot created.



f. Click “Preview” on Desktop to preview and test the form.
Note: New rows are created in the Dataverse table when the form is submitted. Go to Data workspace in Studio to see the data.

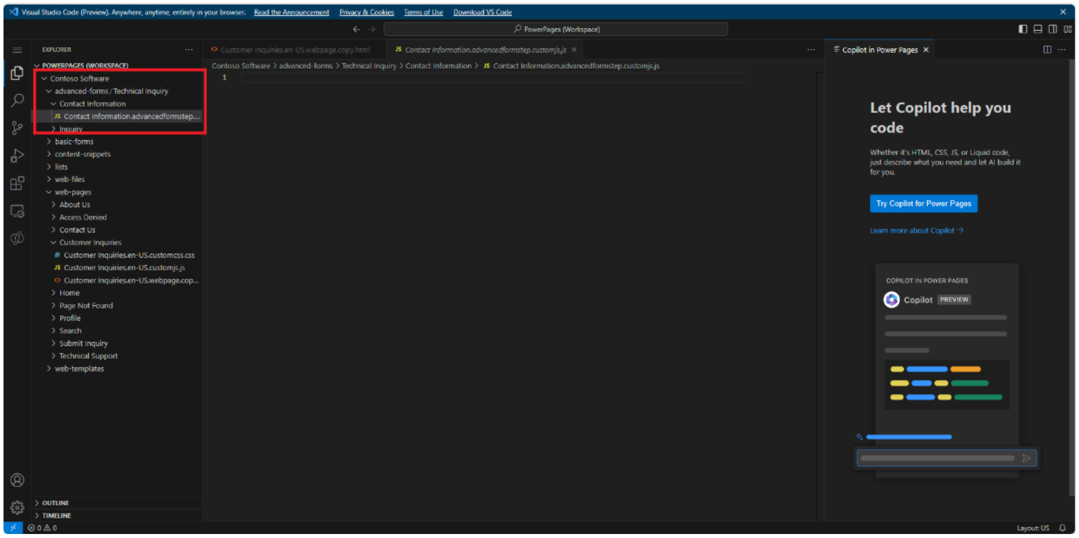


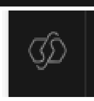
6. (BONUS) Add form validation with VSCode Web Copilot
   a. Go back to Pages workspace, and click on "Edit code" in Studio-> Click "Open Visual Studio Code" in dialog.

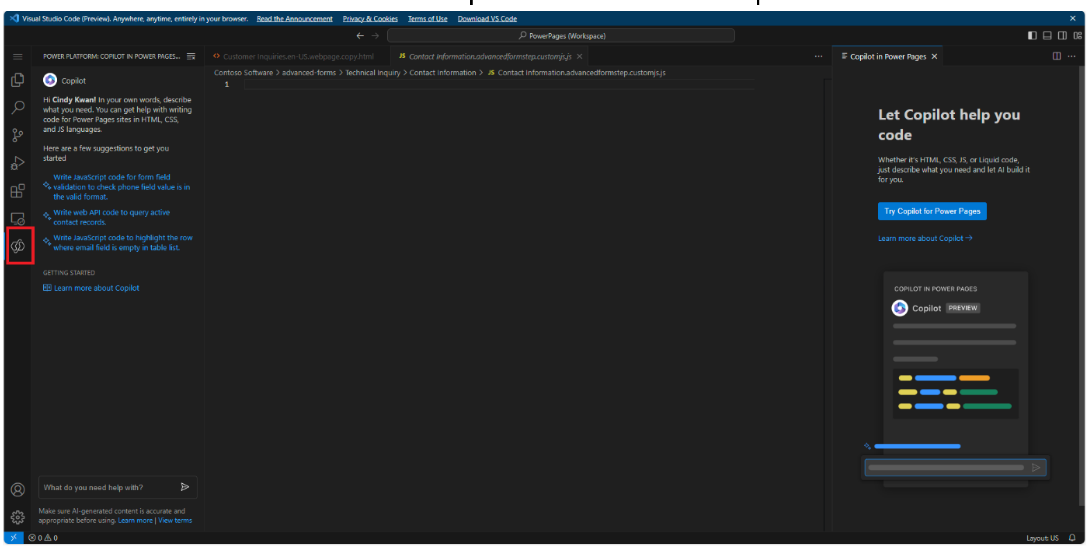


   b. This opens VSCode for web in a new browser tab.
      Note: You may be asked to sign in. Click "Allow".

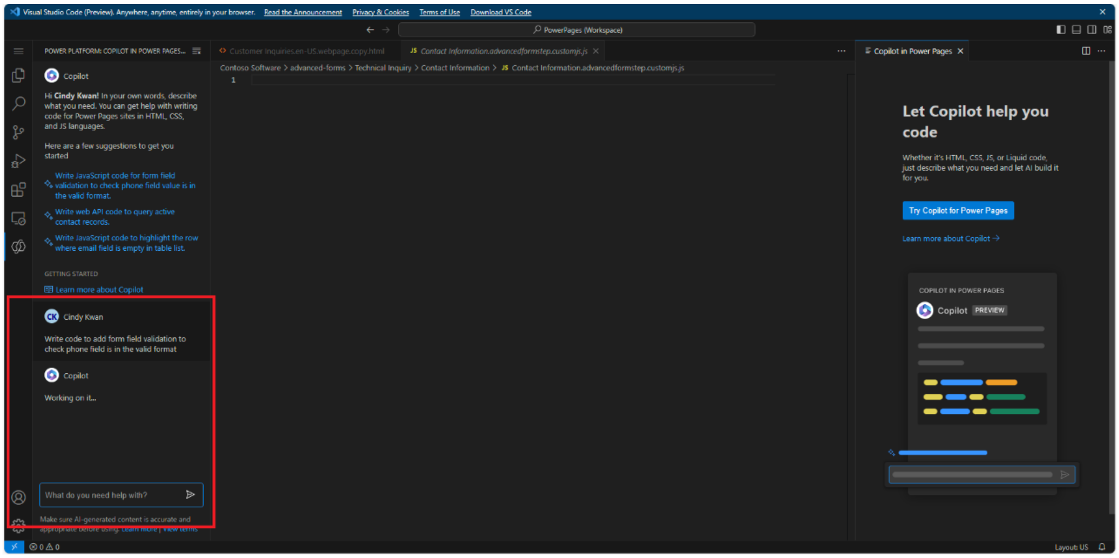
      In the left navigation pane of VSCode for web, click "advanced-forms"-> select the step in your form that has the phone field -> click on the js file. In the example, this is the step 1: contact information.



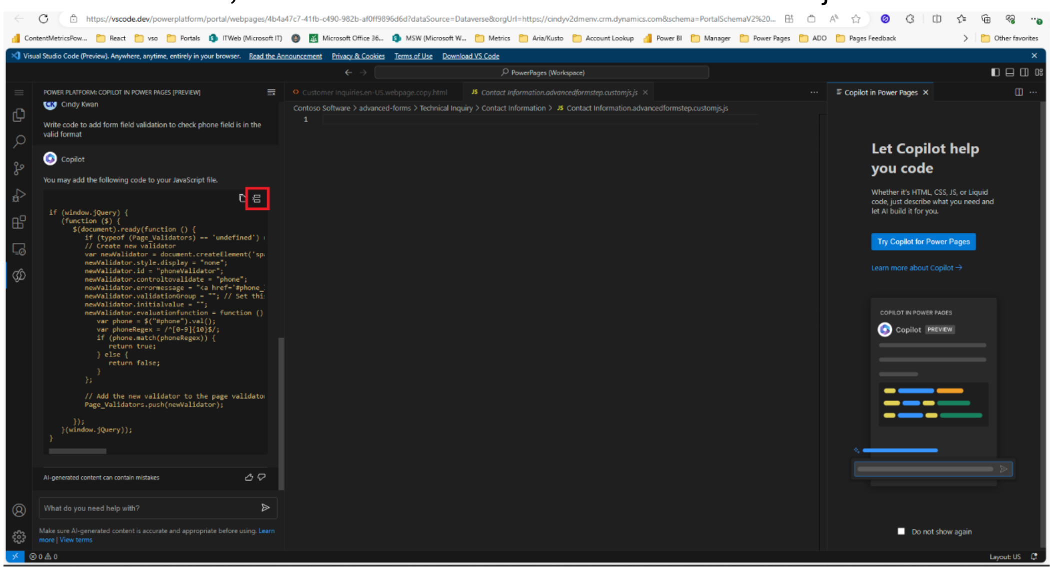
c. Click on  in the left belt to open VSCode Web Copilot.



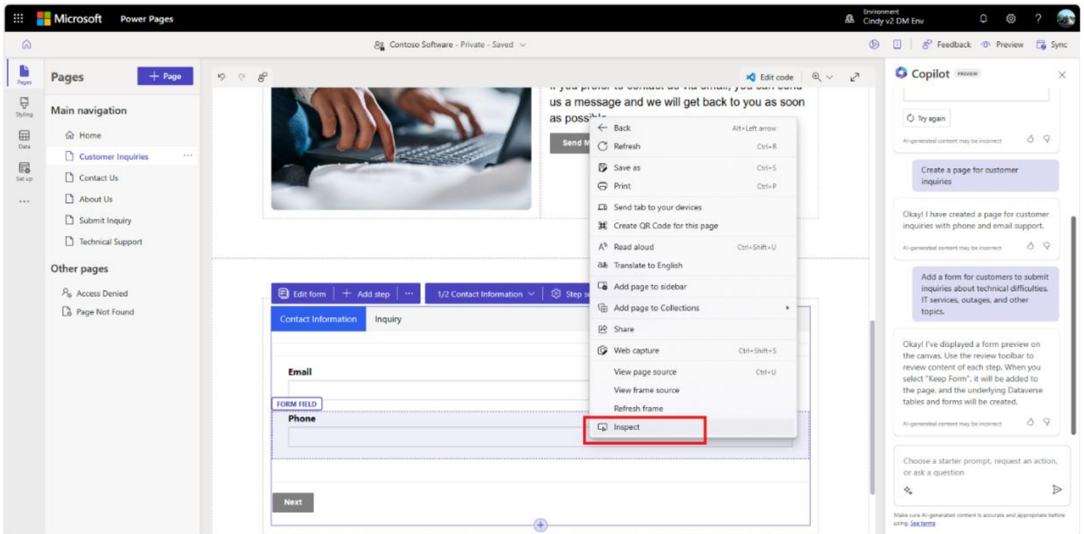
d. Let's add phone number field validation to the form. Type **Write code to add form field validation to check phone field is in the valid format**. Hit <enter>.



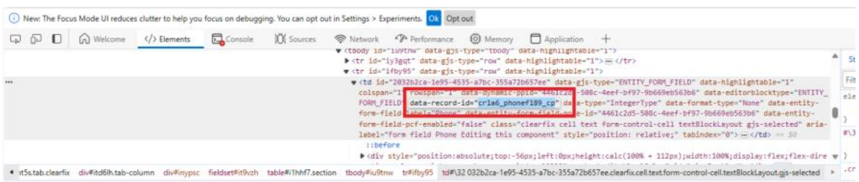
e. Review the code, and click “Insert” to insert the code to the js file.



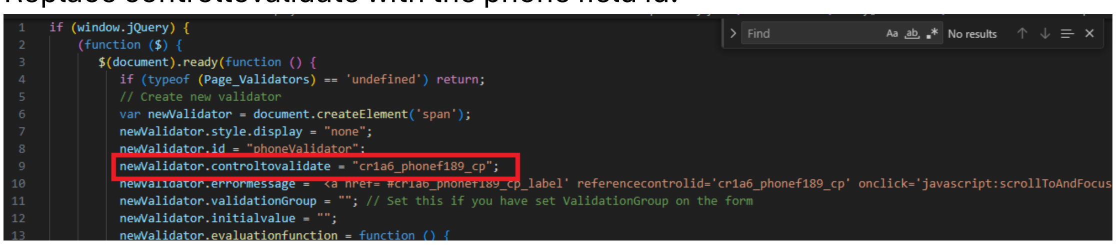
f. Update the code to use to the phone field ID in the form. Go to Design Studio, right click on the phone field and select “Inspect”.
Note: when you return to Design Studio, there is a dialog to “sync” changes. Click “Cancel” on the dialog to return to the Studio canvas.



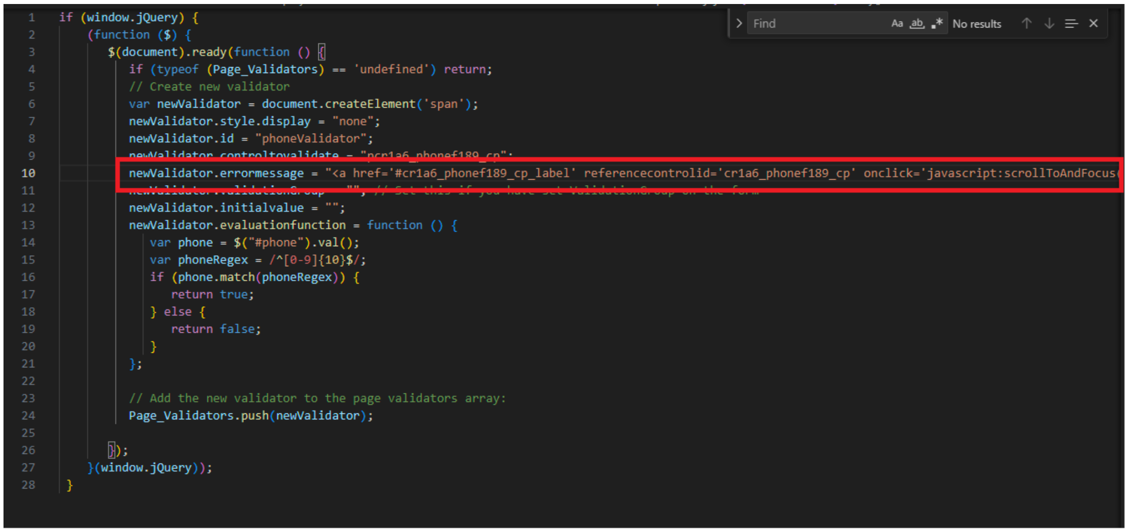
After dev tools open, click on the phone field in the Studio canvas. Look up and copy (ctrl+c) the phone field id.



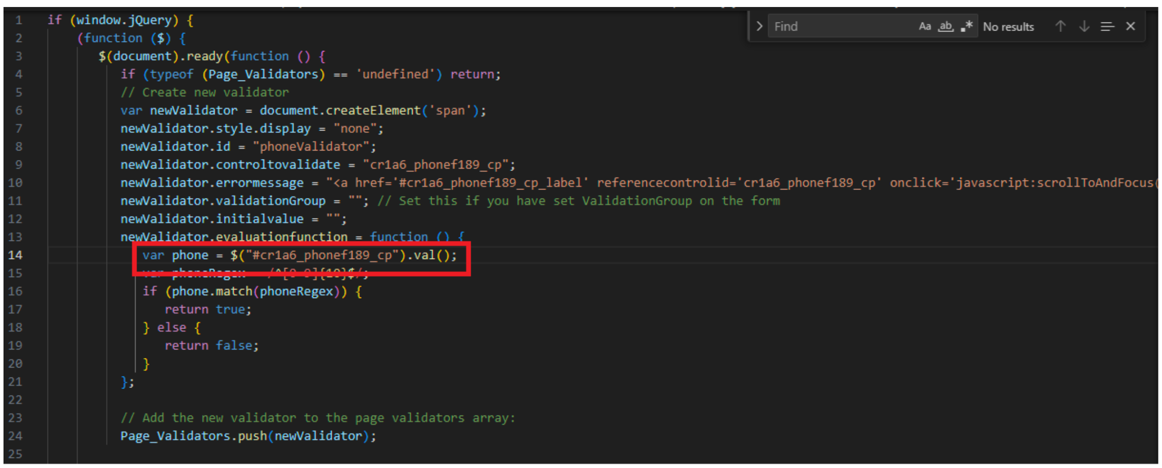
g. Go back to the VSCode for web browser tab.
Replace controltovalidate with the phone field id.



Replace all phone variables in the errormessage with the phone field id:

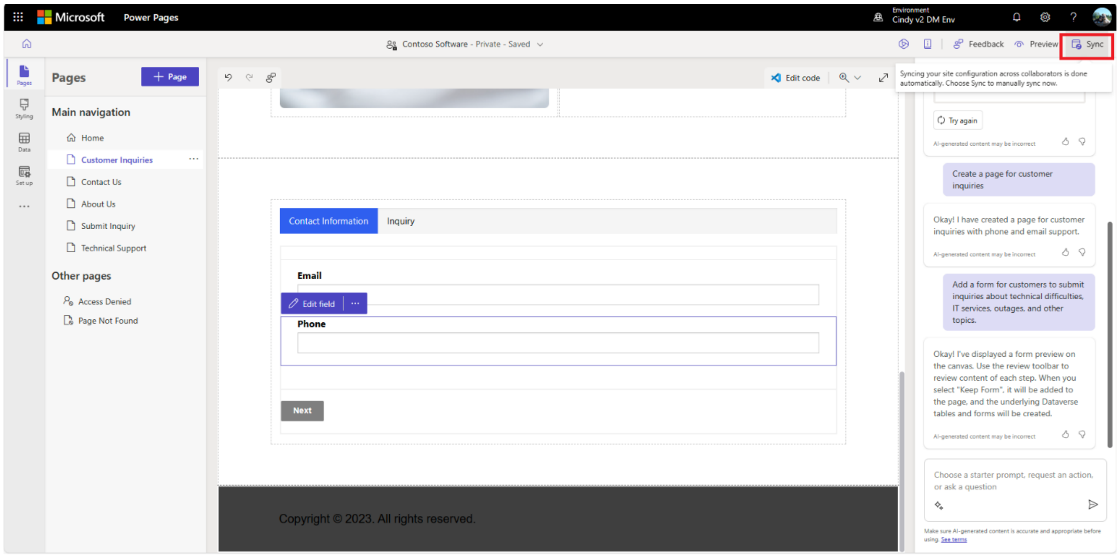


Replace the phone variable value with the phone field id:



Save changes (Ctrl+s).

h. Go to the Design Studio browser tab. Click on “Sync”.



i. Click “Preview” to preview and test the field validation.

Exercise 3: Create a flow using Power Automate Copilot

Scenario

When a new support case is created, if it’s created by a specific customer (Fabrikam), you want to assign the case to a particular agent (Agent ID 9999) who handles that account. Create a flow to send an approval for the account manager (you) to review before transferring the case. In this exercise you will:

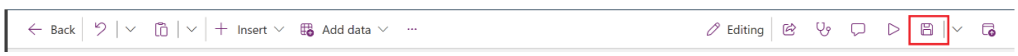
1. Create a flow using Natural Language
2. Edit your flow using Copilot and the new designer
3. Use Copilot to learn about your flow

Note before you begin: The steps below assume you have already completed the Power Apps section of the workshop and have created your Customer Support Cases app. If you have already done this, you can skip ahead to start in Power Automate. If you have not yet done this, please complete the following 10 steps before starting (it should just take a few minutes):

Build your Customer Support Cases app in Power Apps:

1. *In incognito mode, go to https://make.preview.powerapps.com/*
2. *Login:*
   a. *Username: Use the “labadmin[#]” from your Post-It note and log in using this format and domain: labadminNNNN@M365x14796634.onmicrosoft.com*
   b. *Password: test@word1*

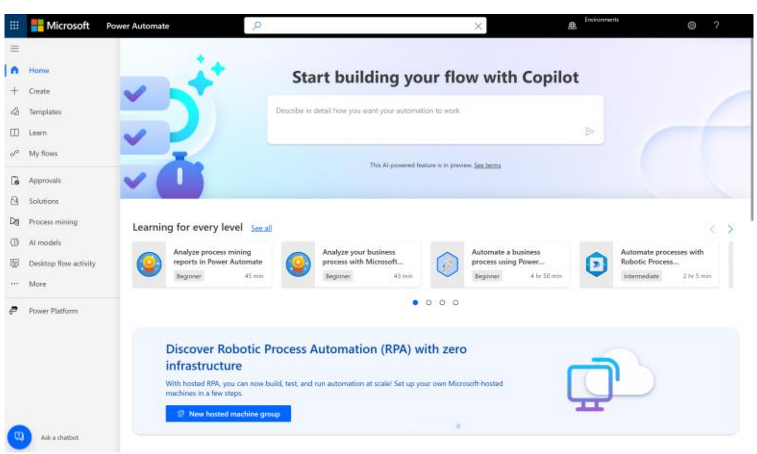
3. *If prompted, keep your region set as **United States** in the dialog box.*
4. *Make sure you are using the **Developer** environment (**“Dev - labadmin#”**), and **NOT** the **Default** environment.*
5. *On the homepage, click [**Start with Data**]*
6. *Click [**Upload an Excel file**]*
7. *Download the Excel file here: https://aka.ms/csexcel.mppc23*
8. *Then upload the Excel file to Power Apps*
9. *Once uploaded (don’t make any changes), click [**Create app**] at the bottom right.*
    a. *Note: Please leave the Table name as Customer Request (we will refer to it later)*
10. *Click the **Save** button at the top right of the page. Now follow the steps below to create your flow in Power Automate!*



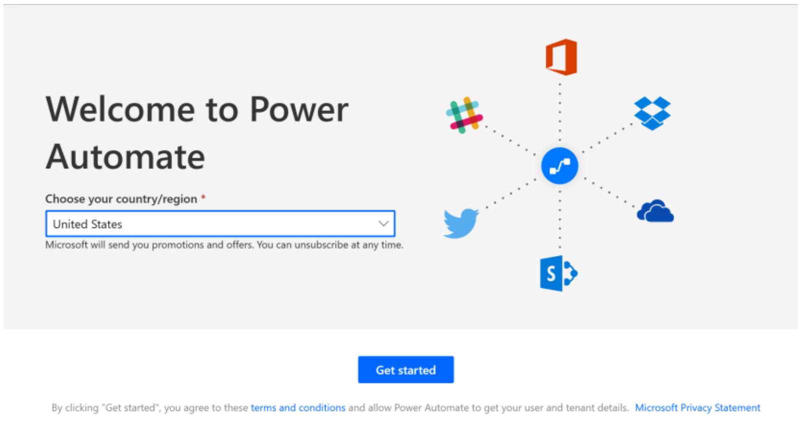
Steps

Friendly reminder that Copilot is constantly evolving! Prompt results may vary slightly as it learns more as it’s used. Please be mindful as you are completing this exercise. You may need to go off script slightly to get the results you are looking for or update the flow manually in the designer for some steps. Thank you for understanding!

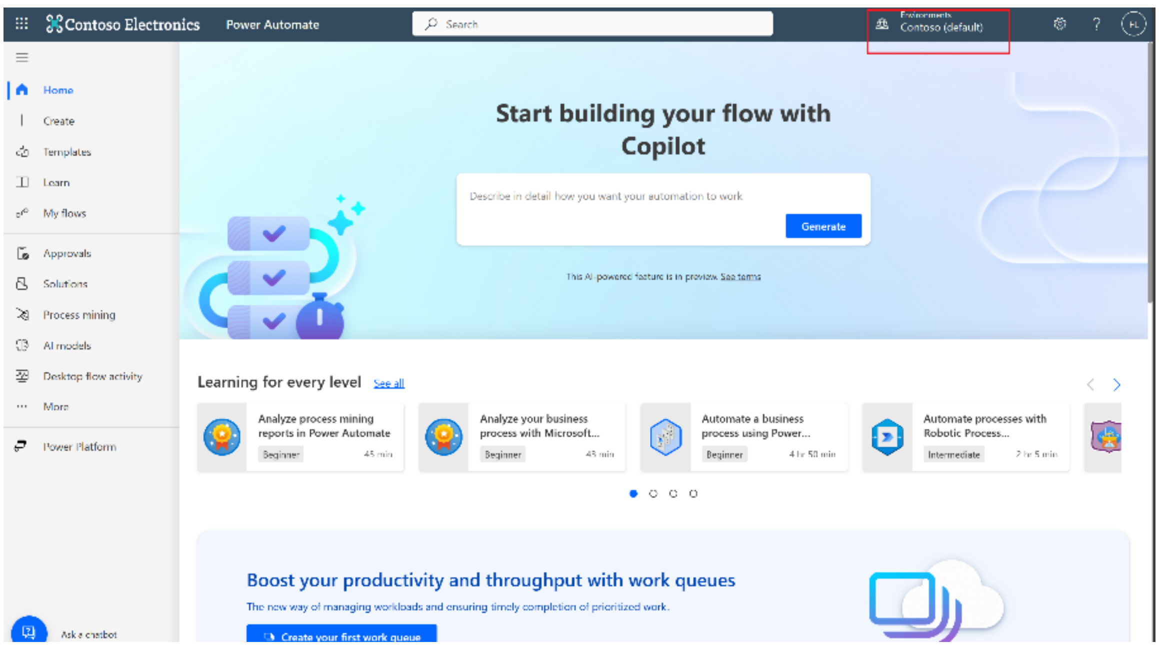
1. In incognito mode, go to https://make.preview.powerautomate.com in a new browser tab

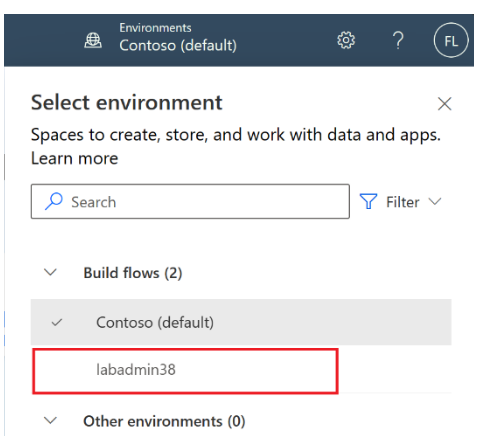


2. Keep your region set as **United States** in the dialog box. Click [**Get Started**]

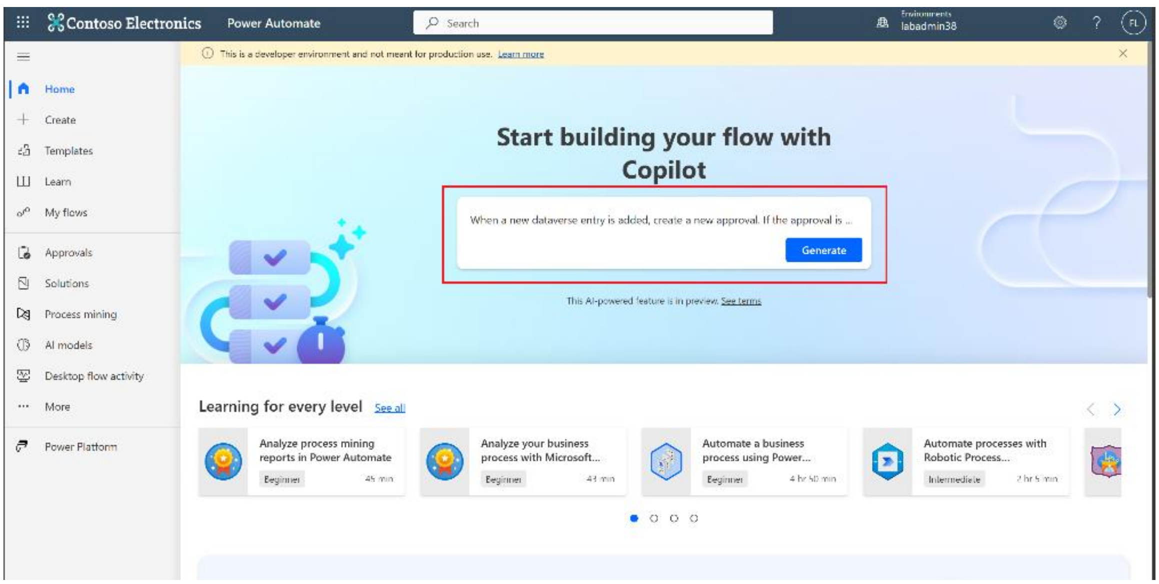


3. Make sure you are using the **Developer** environment (“**Dev - labadmin#**”), and **NOT** the **Default** environment.

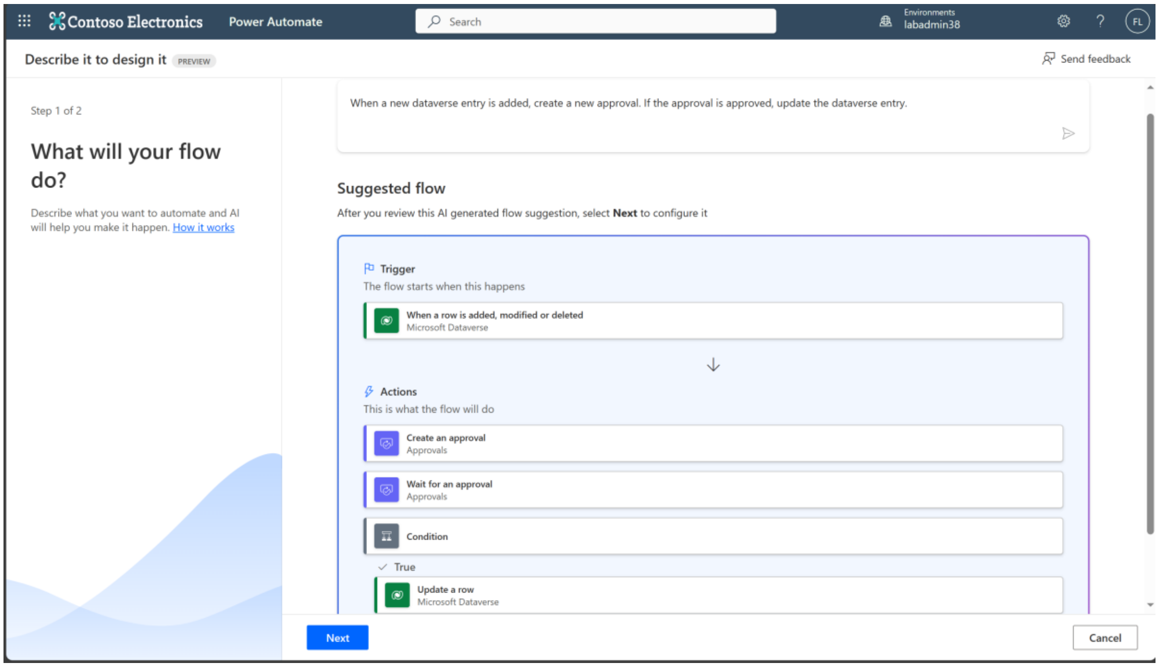




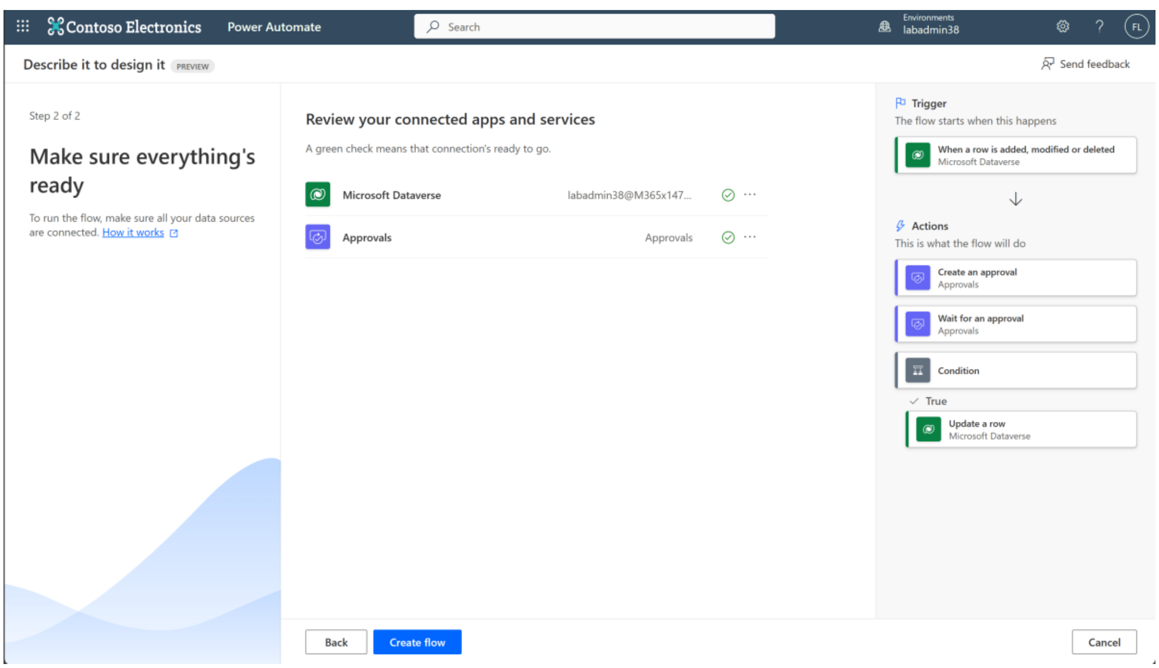
4. Create your flow
    a. In the textbox at the top of the home page, tell Copilot: **When a new dataverse entry is added, create a new approval. If the approval is approved, update the dataverse entry.** Click [**Generate**] or **press Enter**.
        i. *If the "Start building your flow with Copilot" textbox does not show up for you on this page, you may need to navigate to another page (e.g., click on the "Create" page in the left navigation pane, and then click back to "Home" again in the left pane. It should appear. If not, try refreshing the browser. This is a known issue.)*
        ii. *The "Generate" button may be called something different or just be an arrow depending on your environment.*



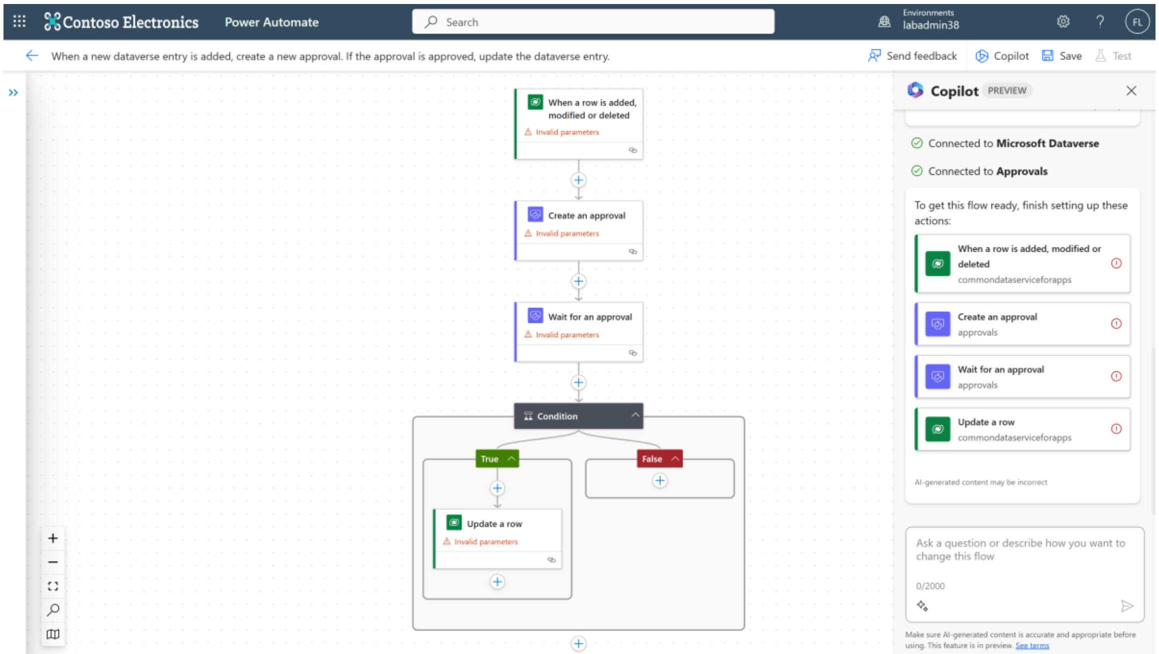
    b. Copilot converts your intent into an automated workflow. You can edit to make changes if you need. Click [**Next**] at the bottom of the page.
        i. *If your flow doesn't match the screenshot below, make sure you've copied the prompt <u>exactly</u> (including punctuation!). Copilot is constantly evolving so there's a chance it might return differently for you. Don't worry, you can always start over and ask in a different way or edit manually later in the designer.*



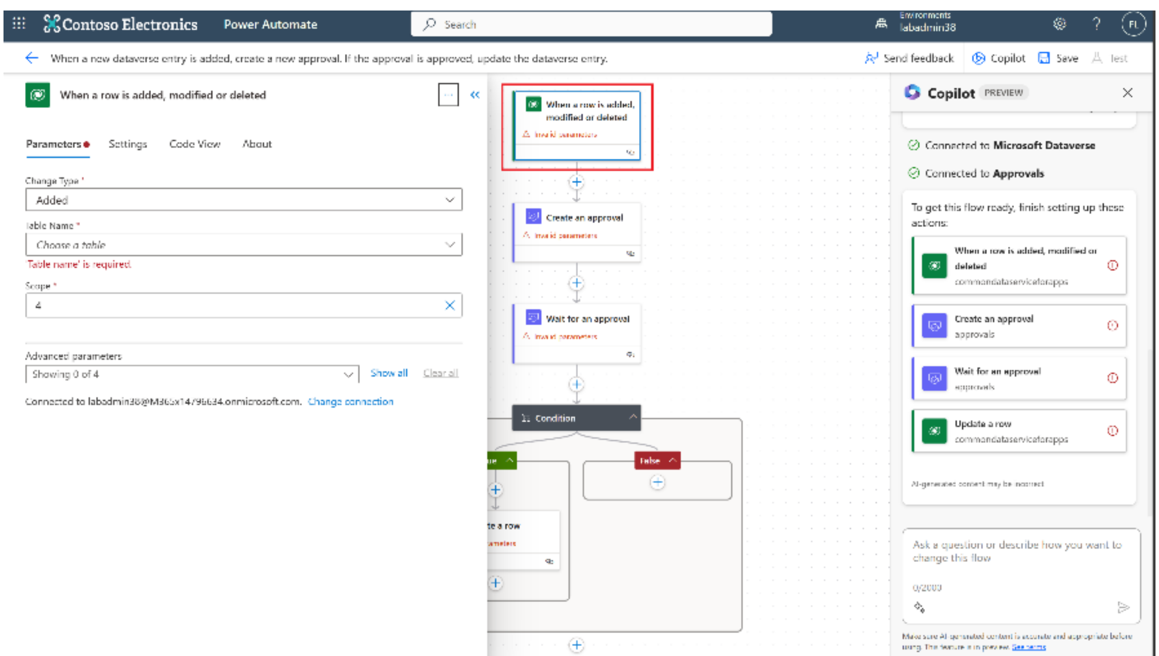
c. Review what services your flow connects to and your connections then click [**Create flow**] at the bottom of the page.



d. Here is the flow Copilot built for you based on your prompt:

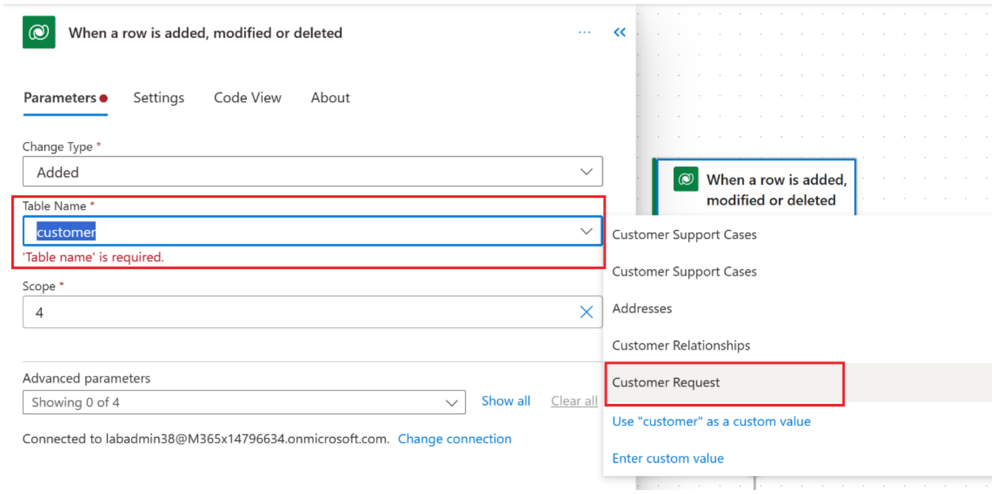


5. Edit your flow
    a. Now you need to update your flow by filling in the parameters.
    b. Click on the trigger to open the side pane so you can add your parameters. (Click on the box labeled ***When a row is added, modified or deleted***)



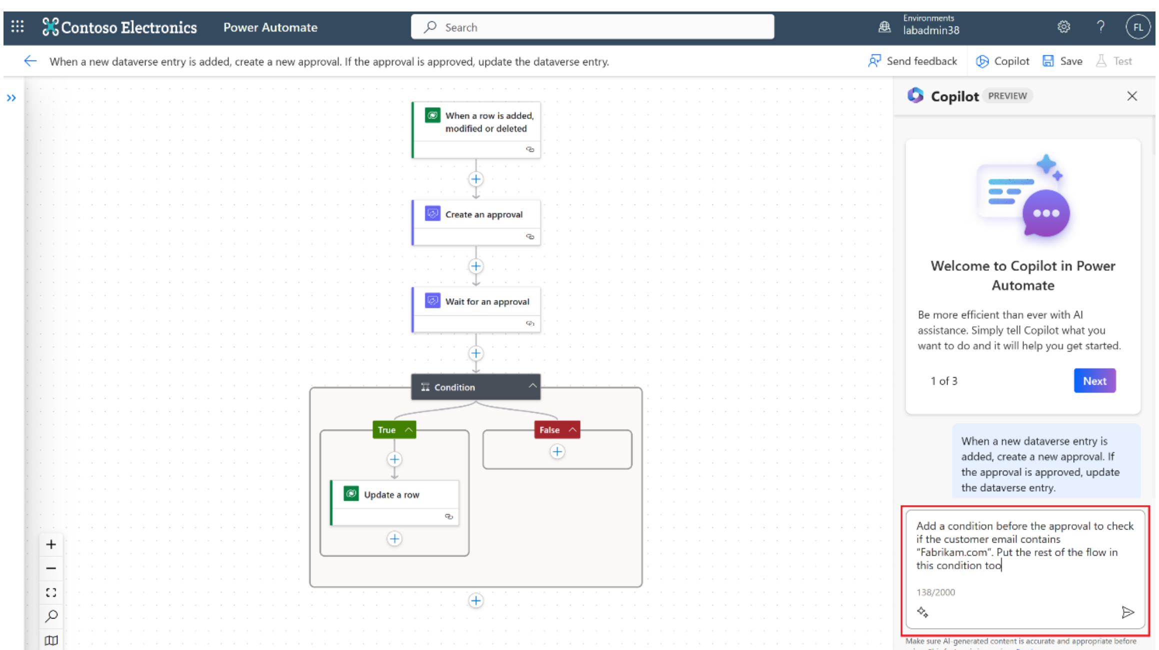
    c. In the [**Table Name**] dropdown, select [**Customer Request**]. This is the name of the table you already created in Power Apps. (If you accidentally renamed this table in your app, select your table name here instead.)

i. *Tip: You can search in the dropdown or type in "customer" and it will narrow down the results for you.*

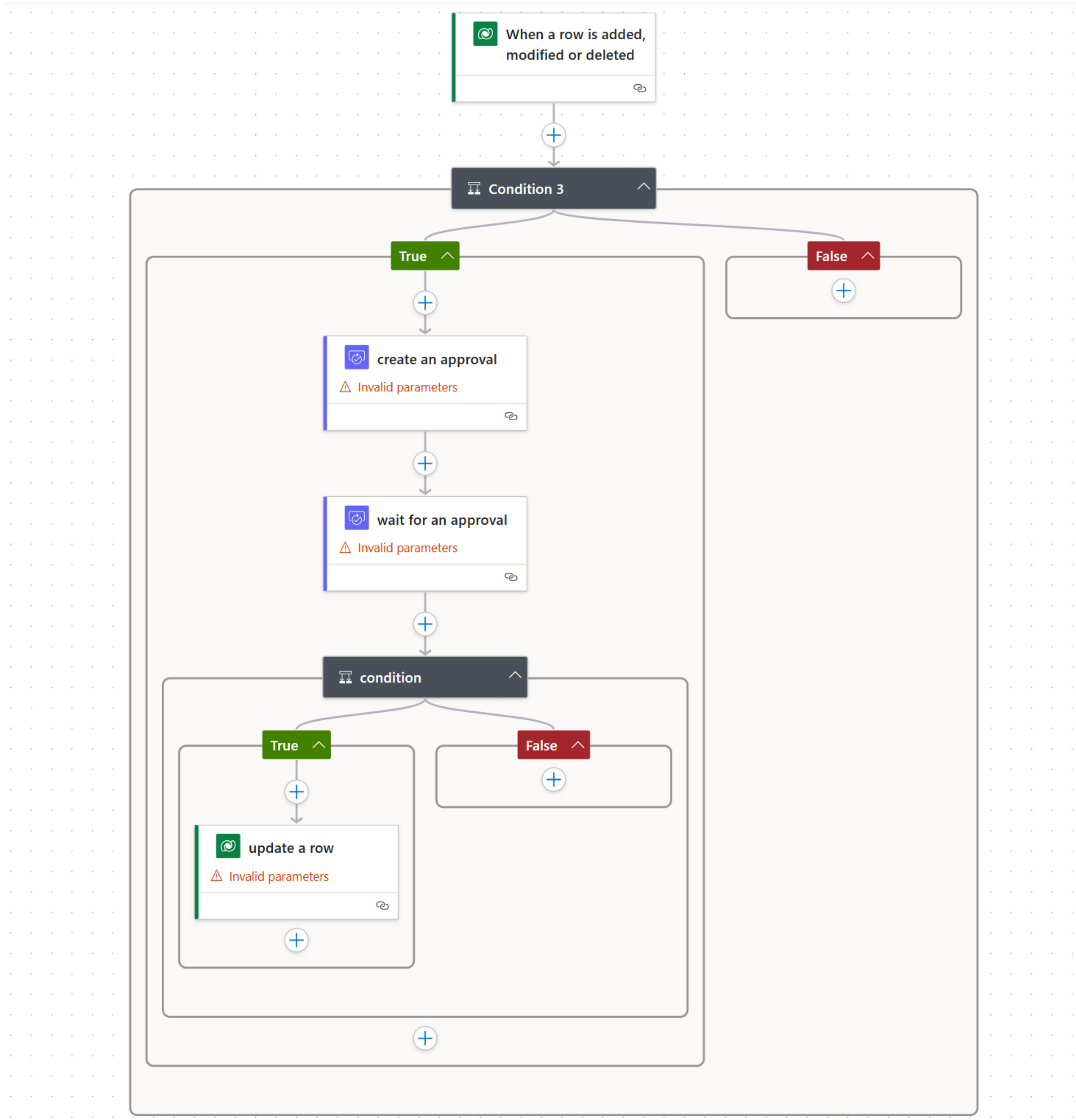


d. You realize when you were creating your flow, you forgot to include the condition to check who the customer is. Don't worry, you can quickly edit your flow using Copilot! Only if the customer is Fabrikam, you want an approval sent.

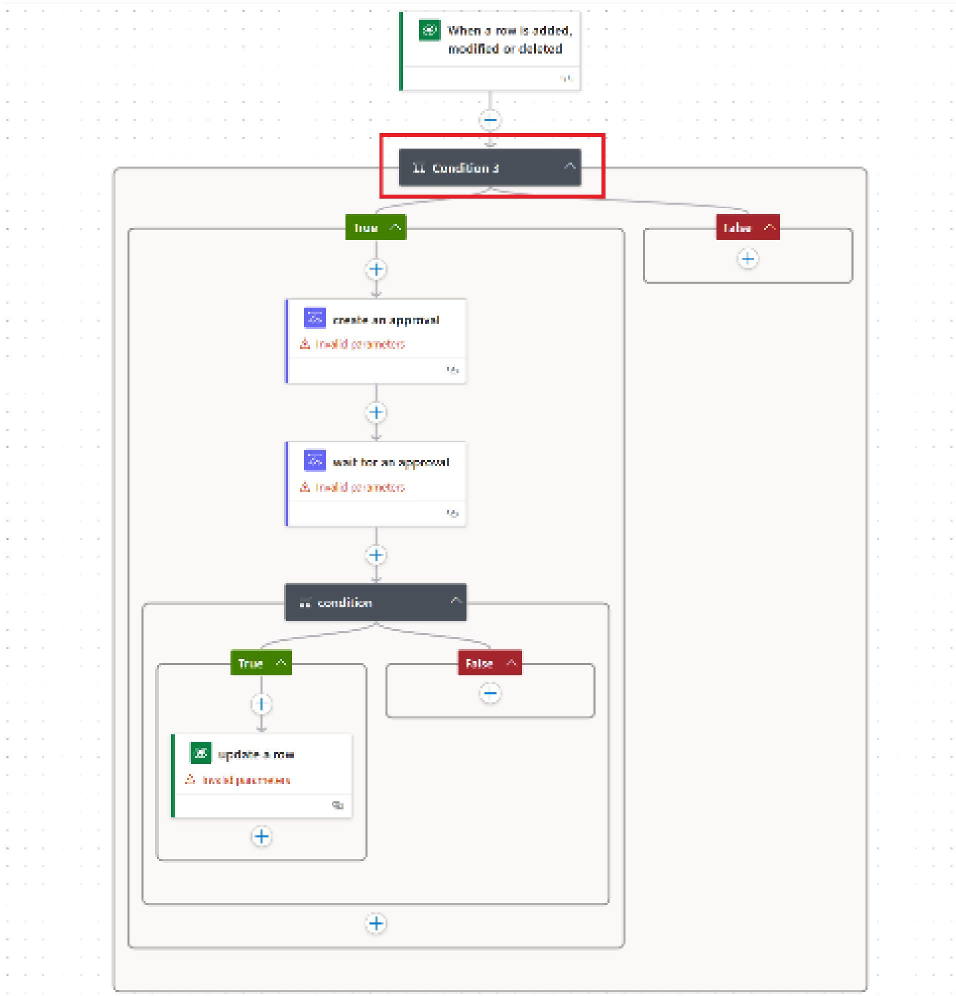
e. In the Copilot pane on the right side of the page, tell Copilot: **Add a condition before the approval to check if the customer email contains "fabrikam.com". Put the rest of the flow in this condition too.**



f. You can see your updated flow now includes another condition.



g. Click the first [**Condition**] box at the top in the designer to open the side pane.

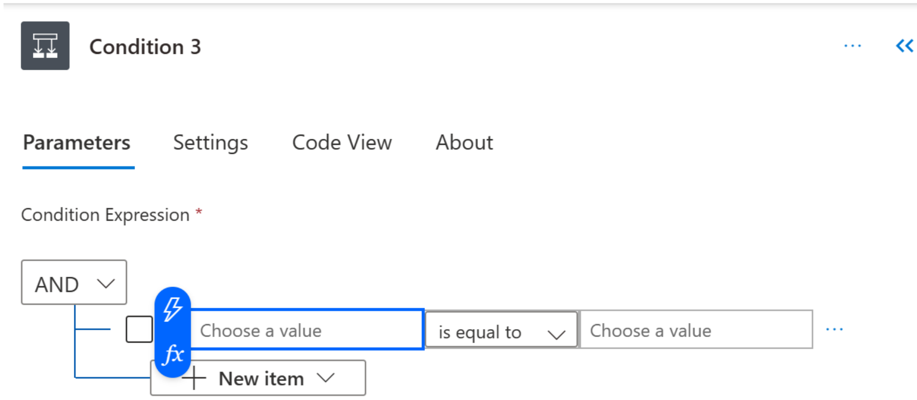


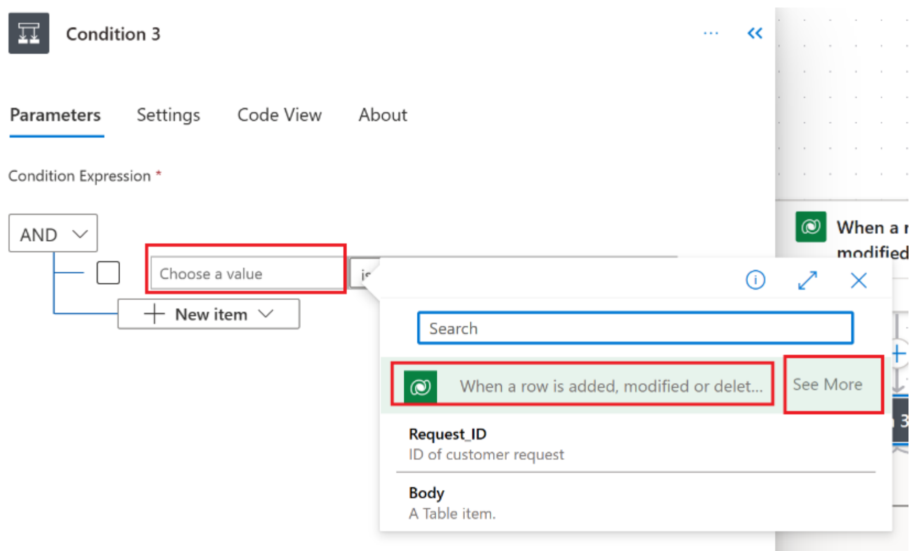
h. You can see Copilot filled in your parameters for you! If you hover over the green dataverse parameter, you can see you are getting the *Customer Email* from the *Customer Request* table using dynamic content (data from your previous step). Copilot also filled in the rest of the expression, so it is set to true when *Customer Email contains "fabrikam.com"*.

i. Unfortunately, we're currently experiencing a little issue when Copilot fills in the dynamic content for us so for now, let's click the [x] on the green Customer Email parameter and we'll input it ourselves.

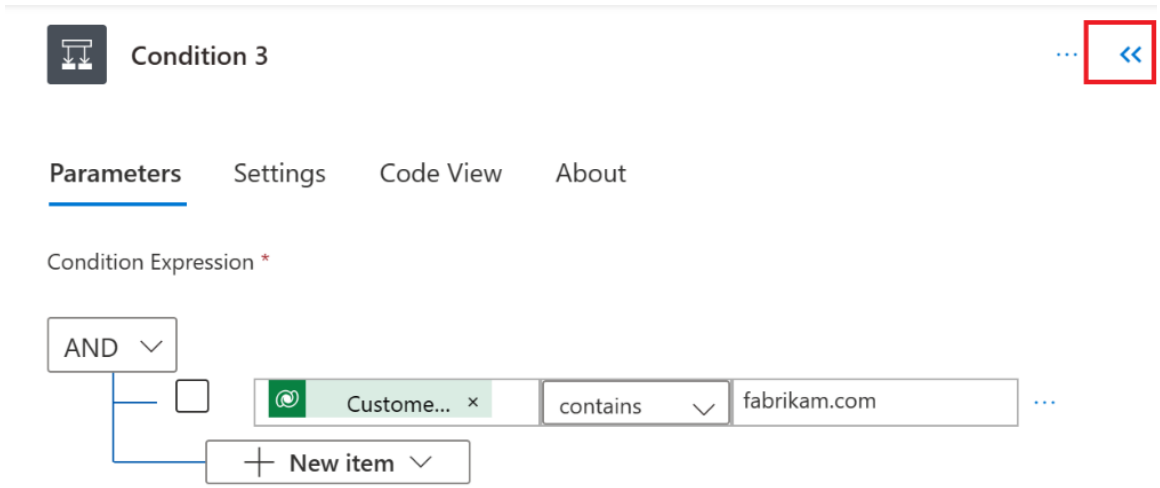
   i. *Note: We are looking into a fix for this bug so please stay tuned!*

j. In that same first field, click inside the textbox, click on the blue lightning bolt, next to ***When a row is added, modified, or deleted***, click [**See more**]. Scroll down and select [**Customer_Email**].

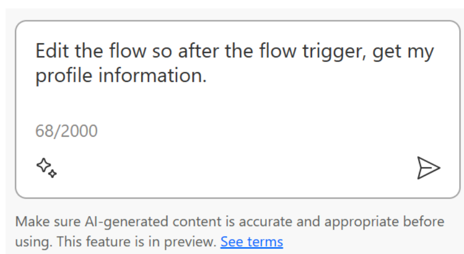




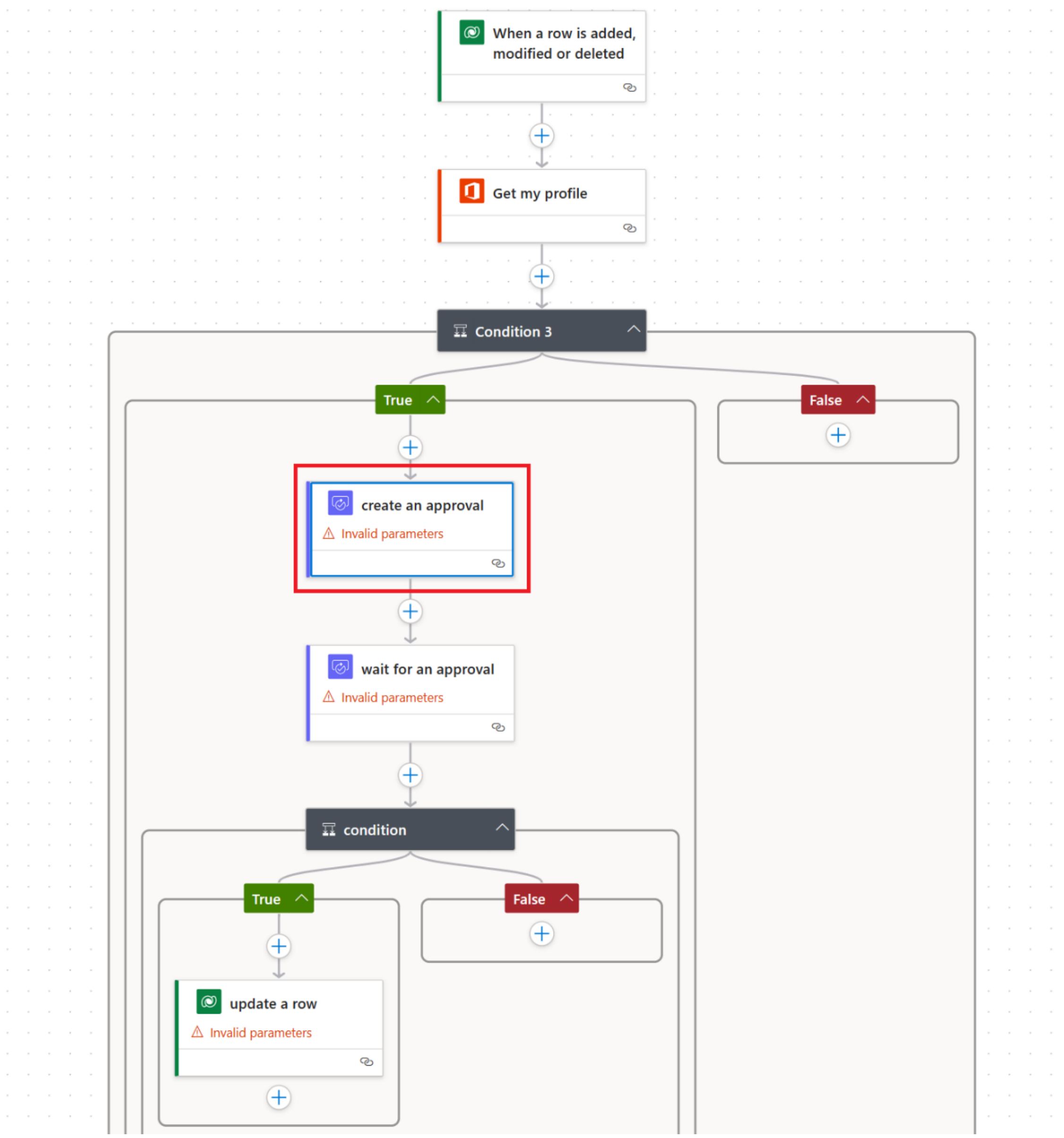
k. Click << to close the condition pane.



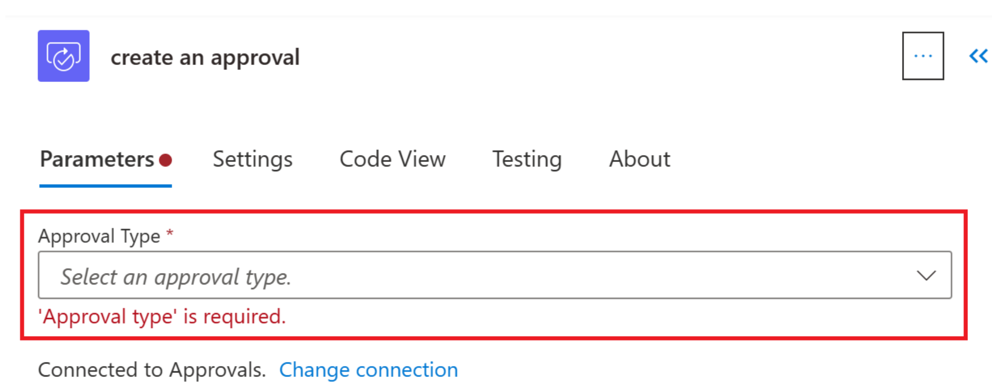
l. Before we can assign the approval to ourselves, we need to get our profile information. Tell Copilot: **Edit the flow so after the flow trigger, get my profile information.**



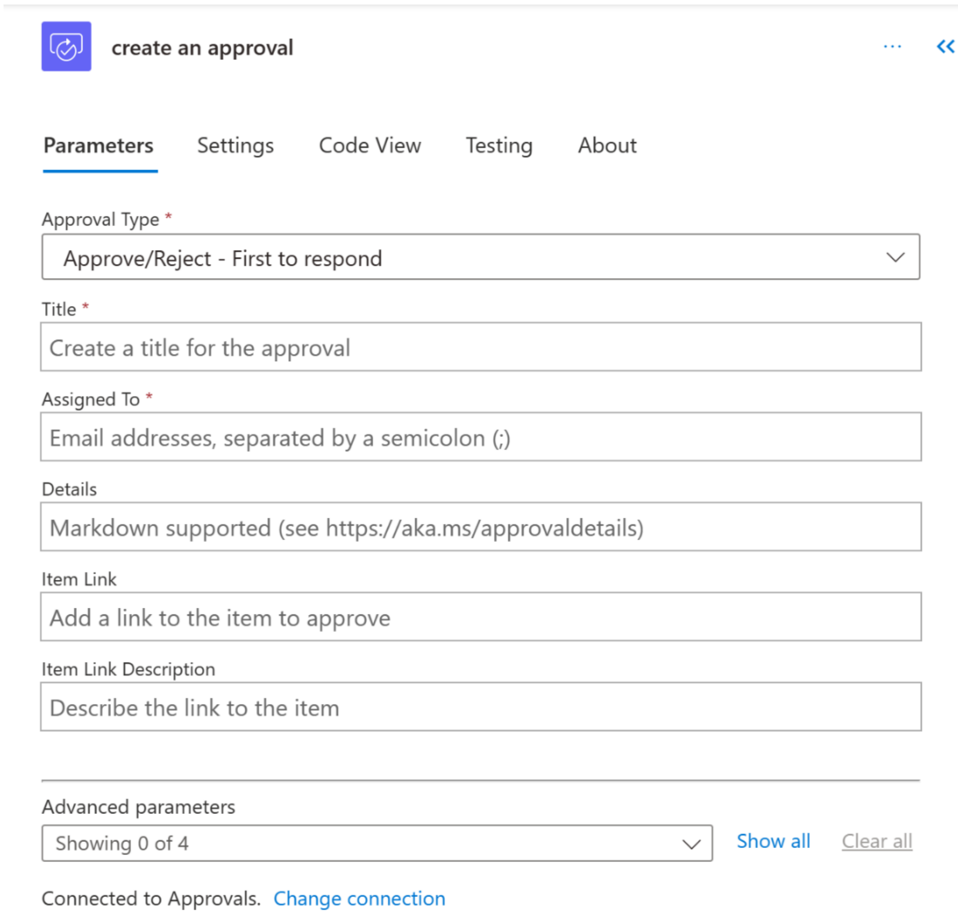
m. Click on the ***Create an approval*** box to open the pane.



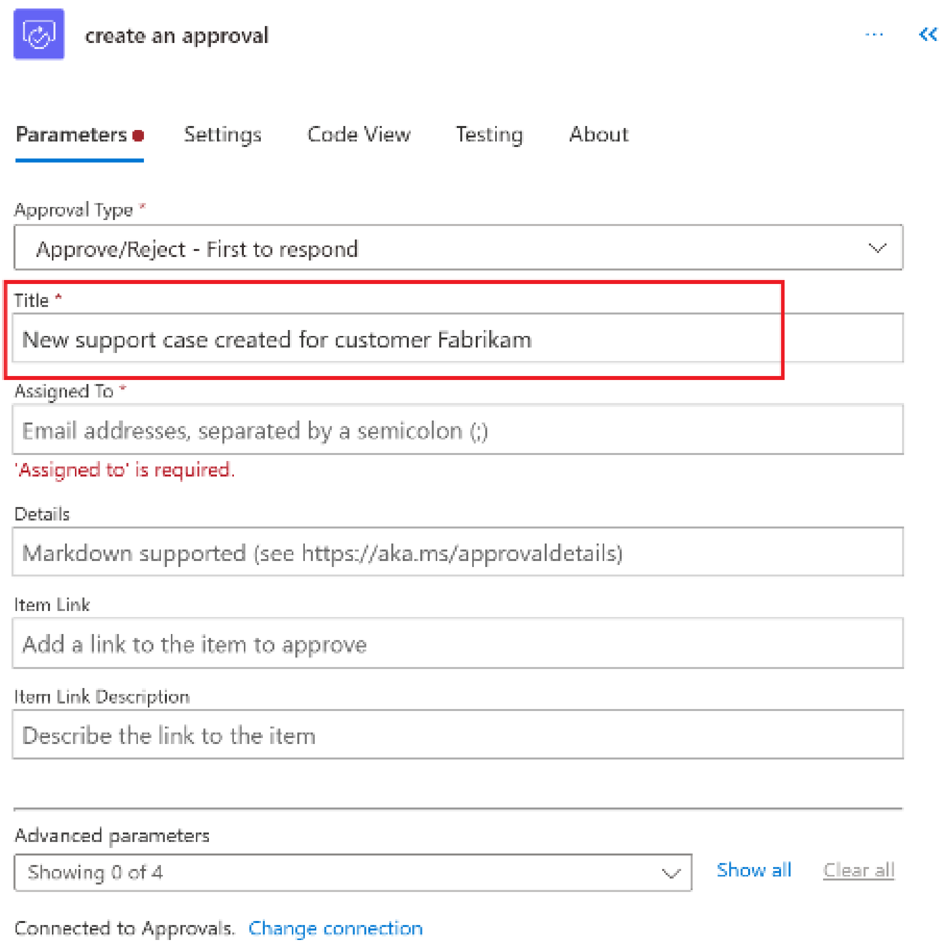
n. In the ***Approval Type*** dropdown, select [**Approve/Reject - First to respond**]



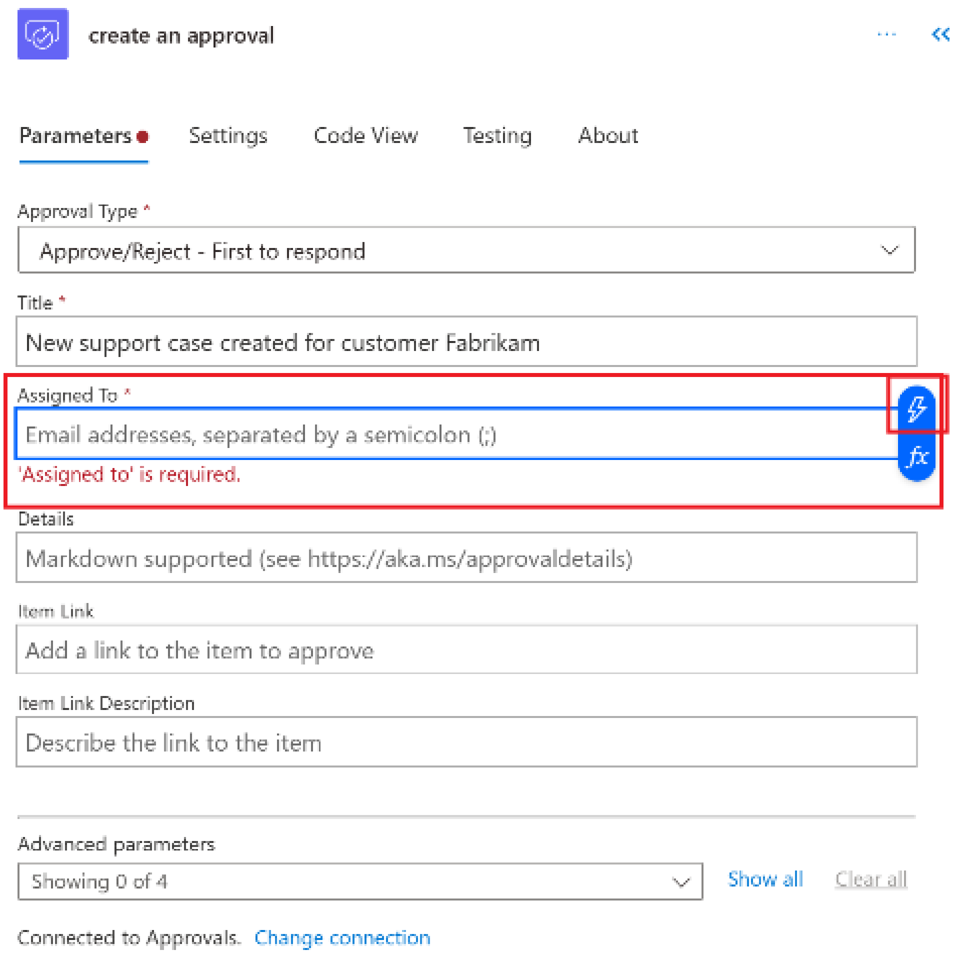
o. You will see more fields appear.



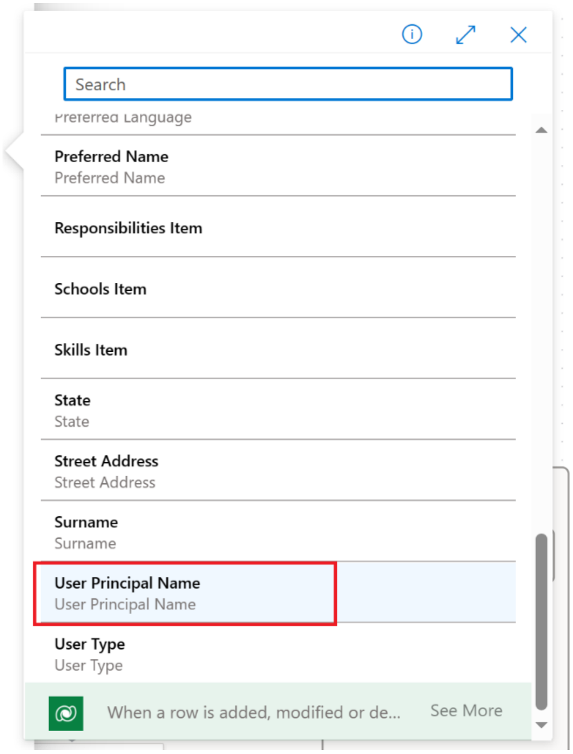
p. Tell Copilot: **Add a title to the approval that a new support case was created for customer Fabrikam.**



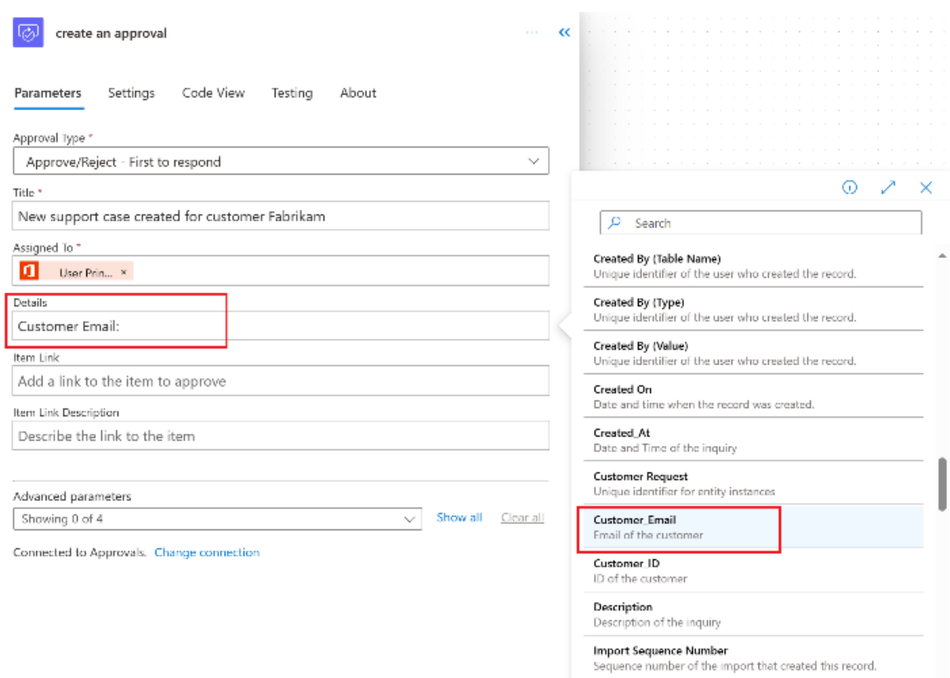
q. You can still update your flow without Copilot if you want to. Let's fill in the rest of the fields using dynamic content (data from previous steps). Under the ***Assigned To*** field, click inside the textbox and you'll see a blue lightning bolt.

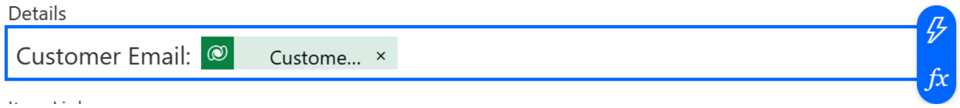


r. Under ***Get my Profile***, scroll down and select [**User Principal Name**].

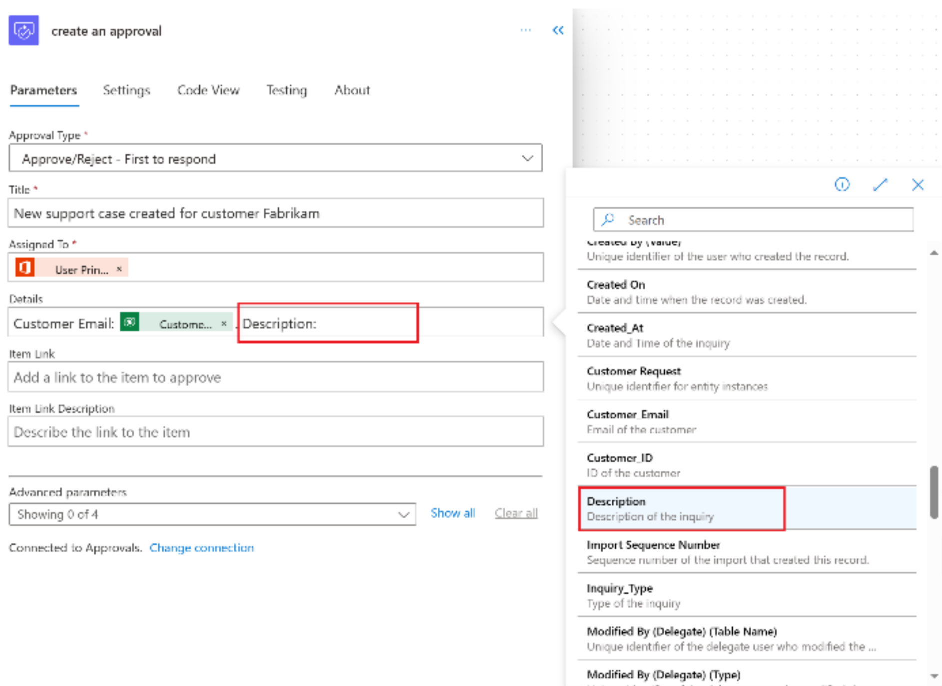


s. Now click inside the ***Details*** box, type in [**Customer email:**] then click on the blue lightning bolt, scroll down to the green dataverse connector called ***When a row is added, modified, or deleted*** and click [**See More**] to view the fields from this connector. Select [**Customer_Email**].

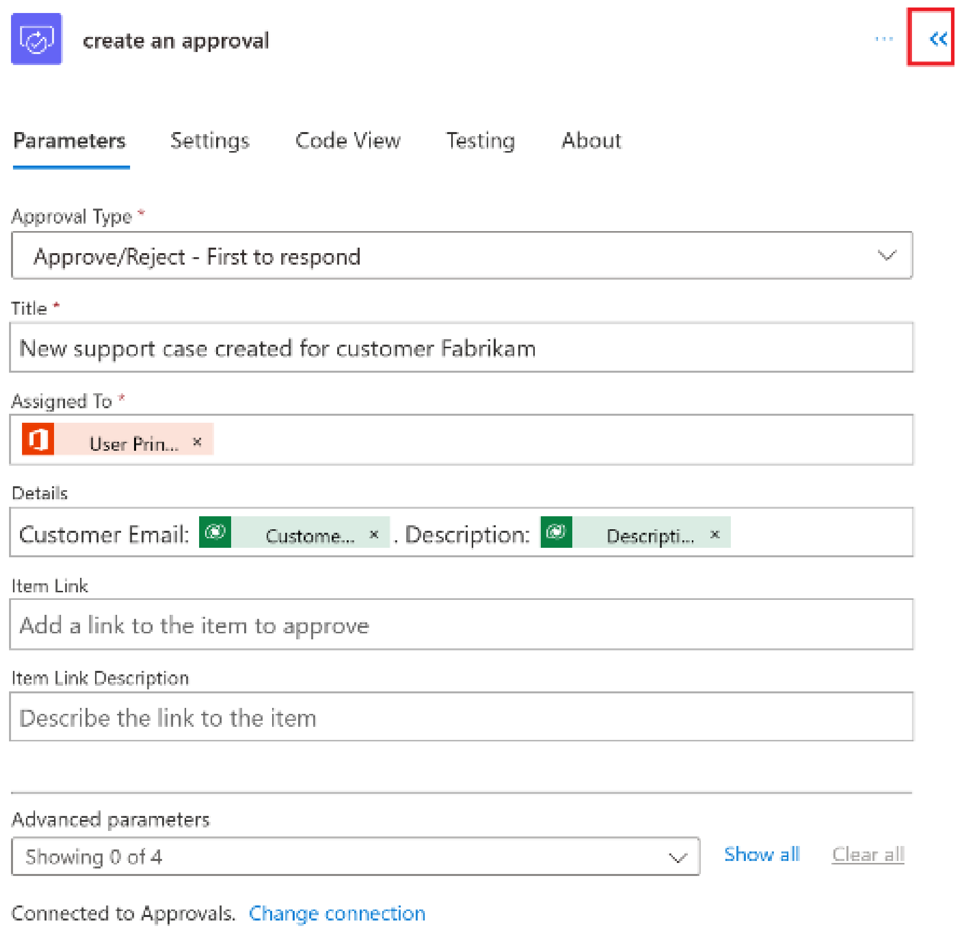




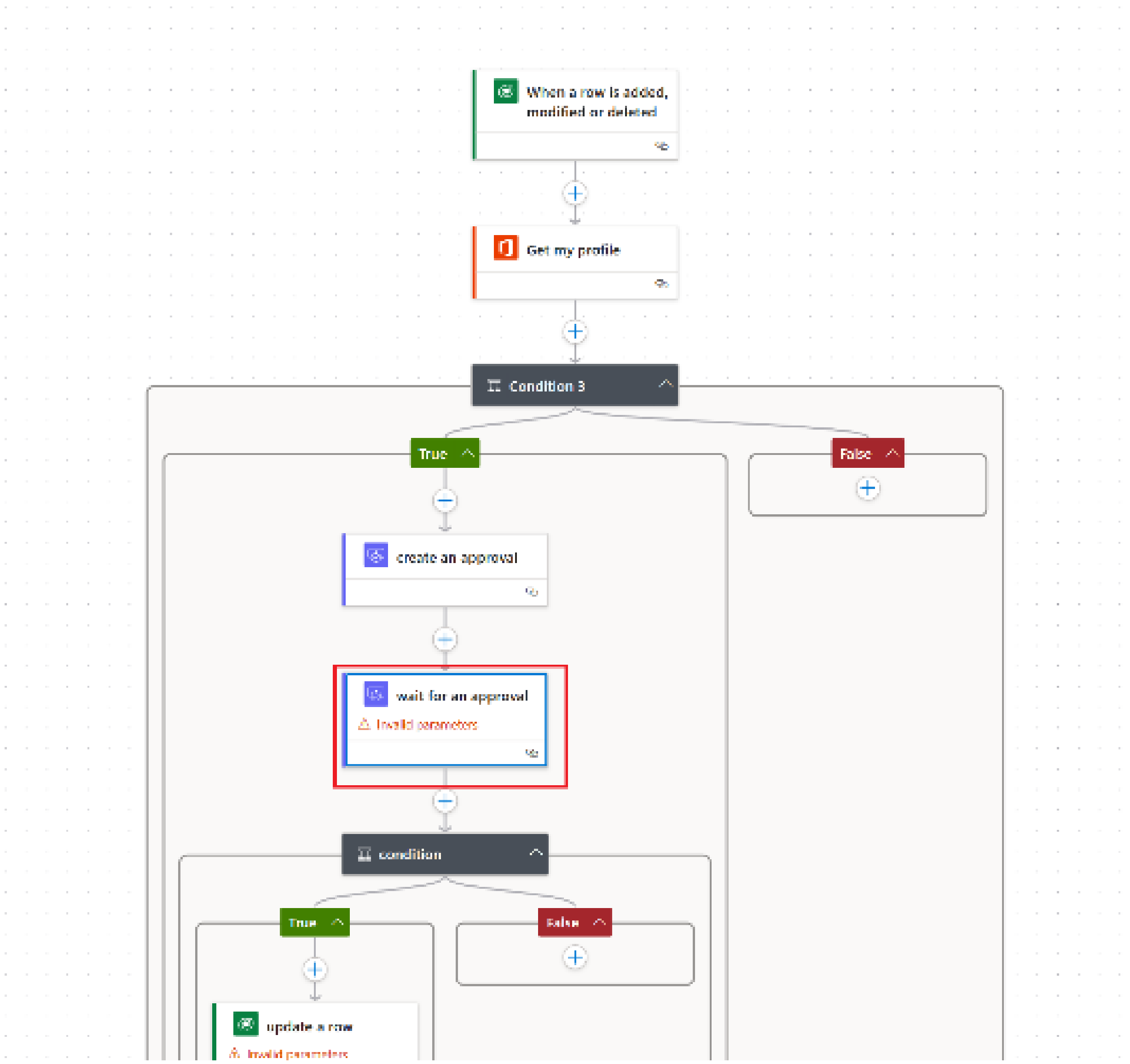
t. Now after the Customer Email, you want to also add the description from the support case. In the same ***Details*** textbox, type in [**Description:**] and then click on the blue lightning bolt, scroll down to the green dataverse connector called ***When a row is added, modified, or deleted*** and click [**See More**] to view the fields from this connector. Select [**Description**].



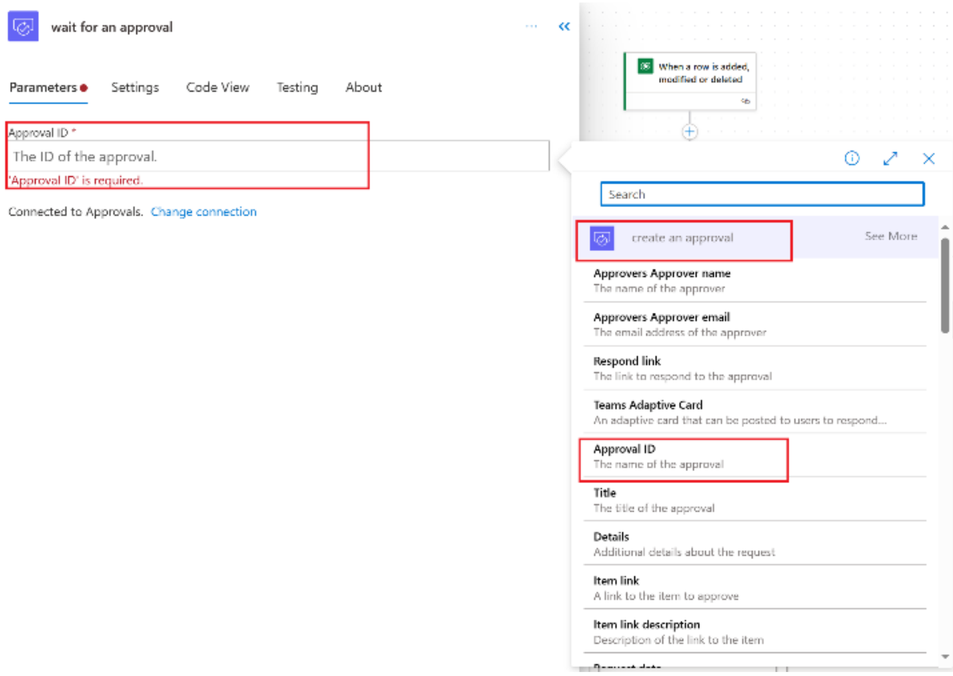
u. Click **<<** to close the pane.



v. Next, click into the box called ***Wait for an approval*** to open the pane.

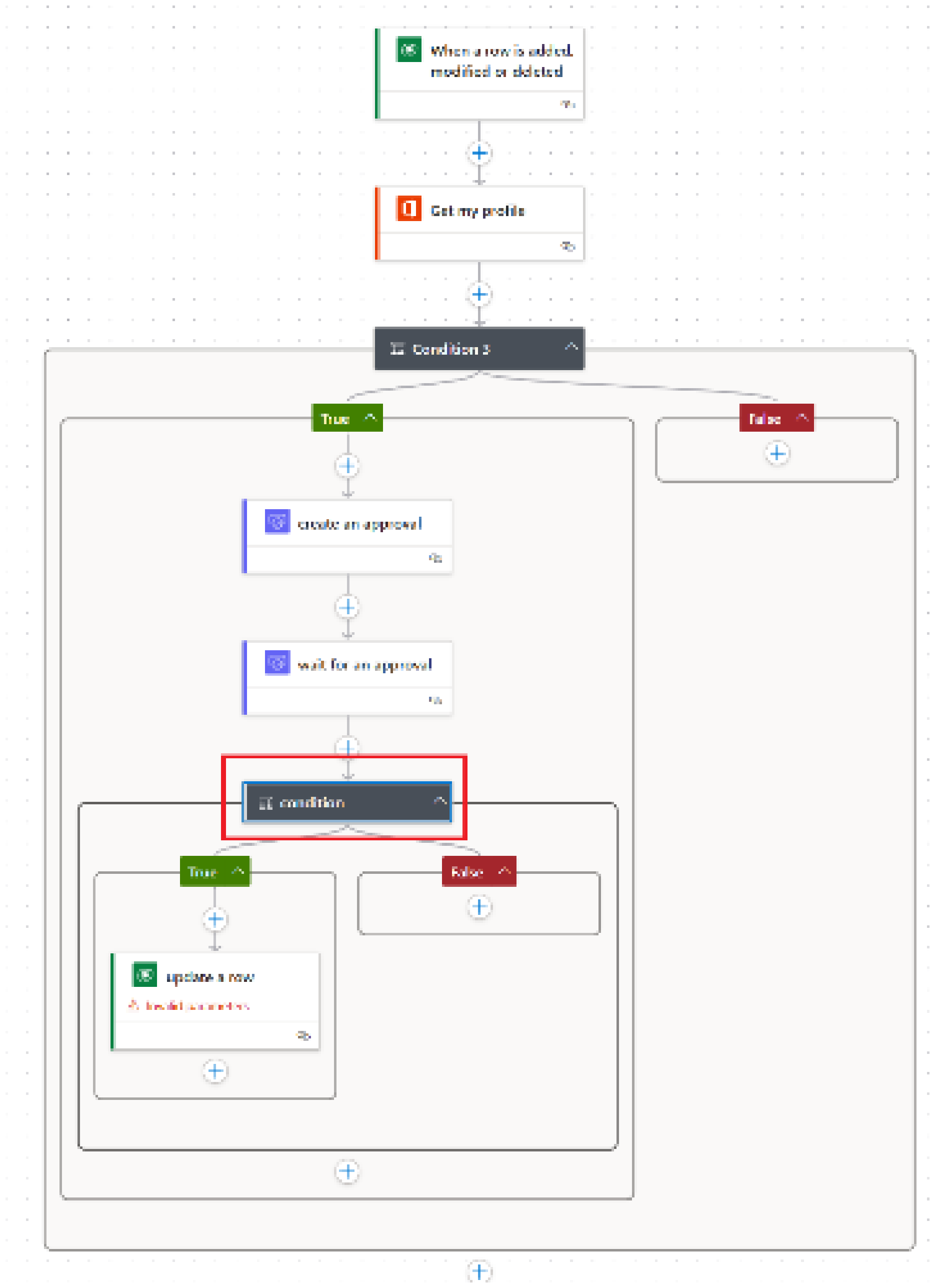


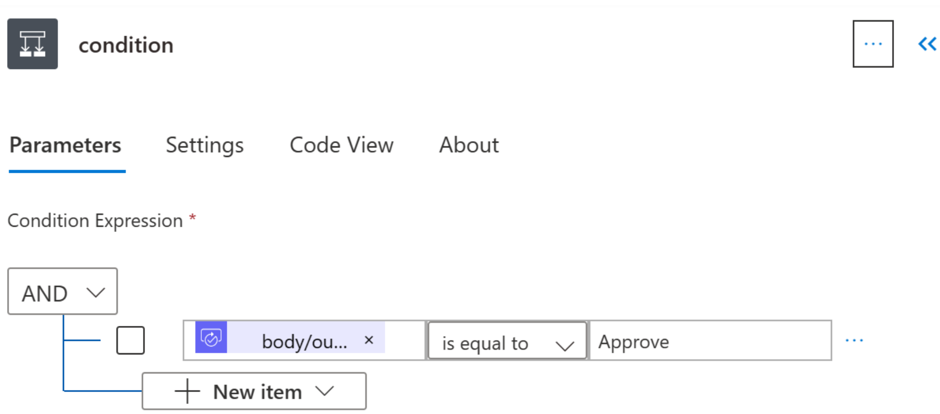
w. Click inside the ***Approval ID*** field, click on the blue lightning bolt, and select [**Approval ID**]



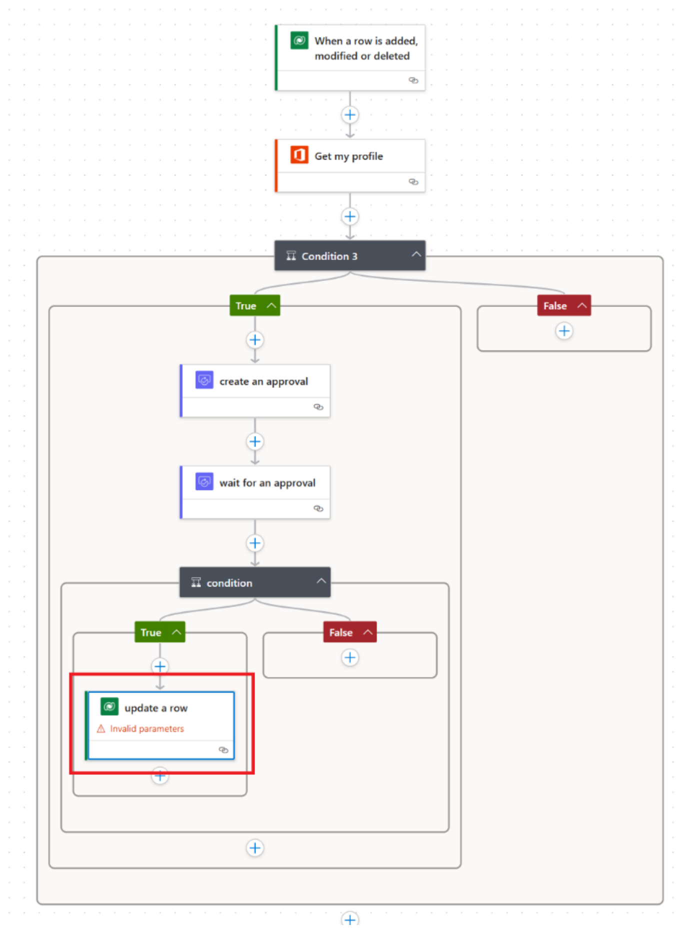
x. Now we need to fill in the next condition. Once the approval is created, only if it was approved do we want to update the Agent who that support ticket is assigned to. Tell Copilot: **Update the condition after the approval to "outcome is equal to Approve"**

y. Click on the 2nd condition box in your flow to open the pane. You see Copilot filled in these fields for us!


When a row is added, modified or deleted
Get my profile
Condition 3
True
False
create an approval
wait for an approval
condition
True
False
update a row

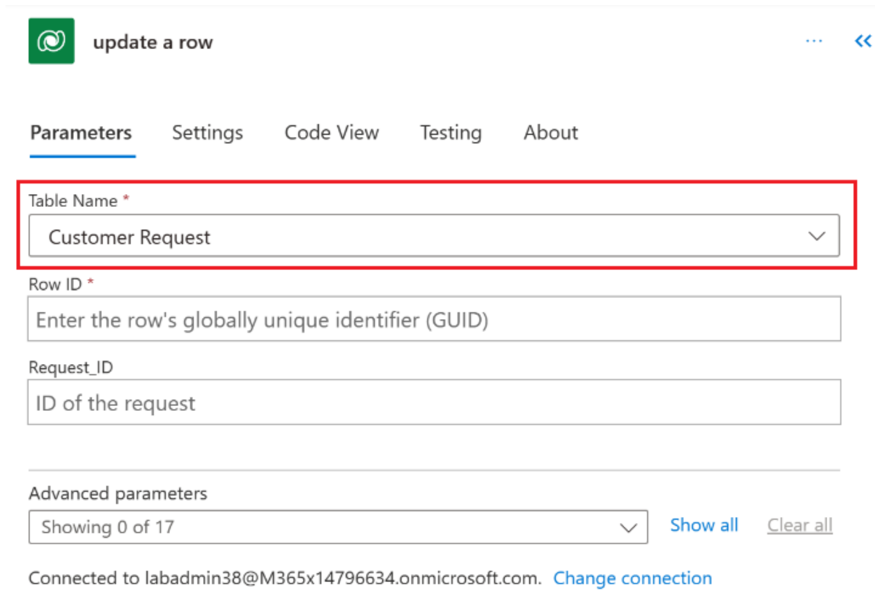


z. If the approval is approved, we want to assign it to Agent 9999 since they handle the Fabrikam account. In your flow, click on the ***Update a row*** box to open the pane.



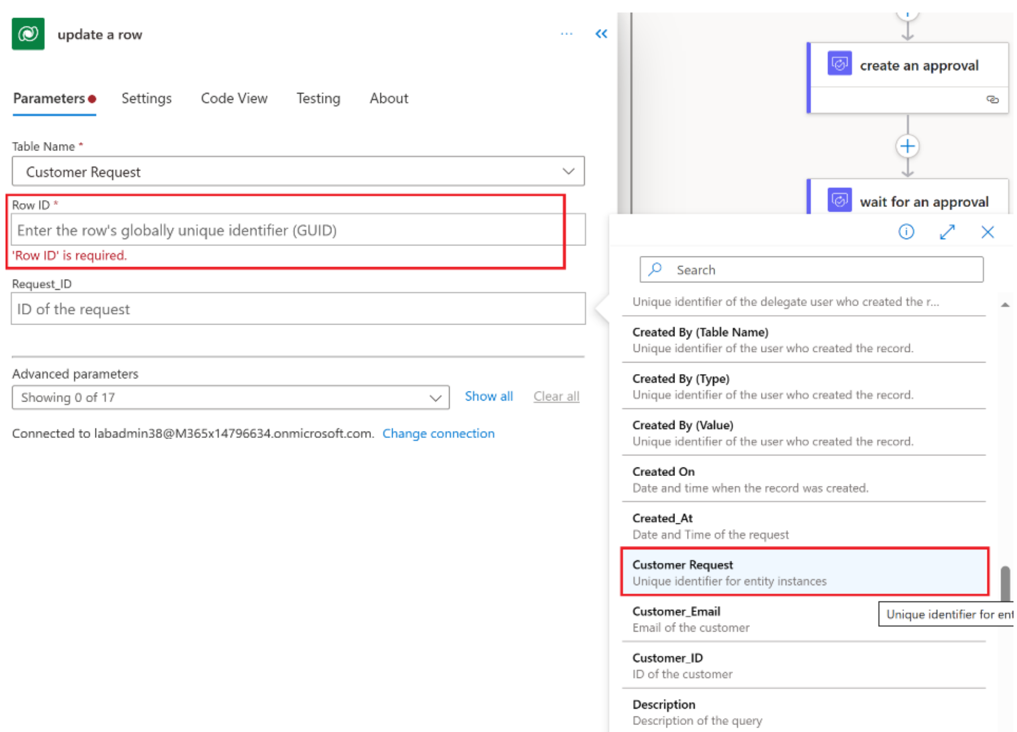
aa. In the **Table Name** field, select [**Customer Request**] from the dropdown.

i. (Or if you accidentally renamed your table in your Power App, choose that table name here instead.)

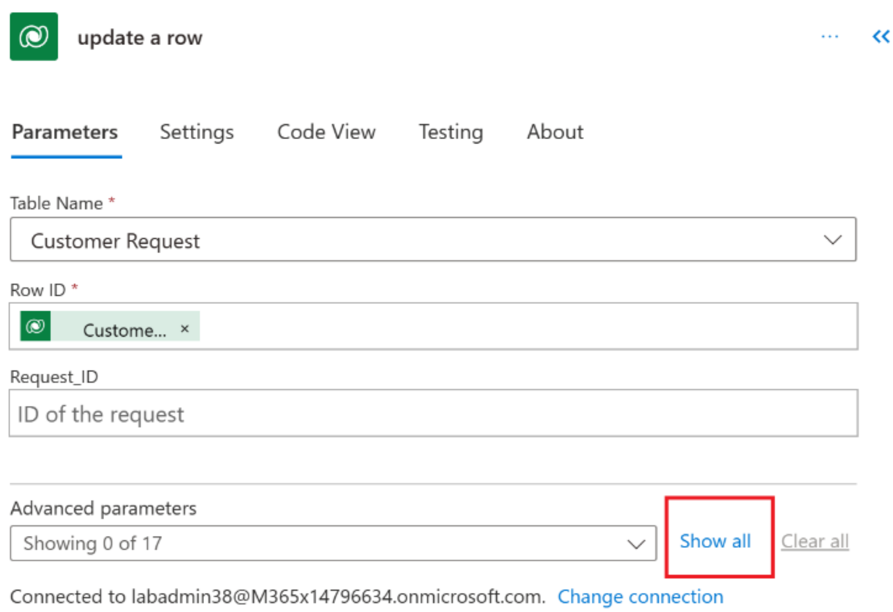


bb. Click inside the **Row ID** field to show the blue lightning bolt, click and scroll down to the green dataverse connector called ***When a row is added, modified, or deleted,*** click [**See more**] then select [**Customer Request**]

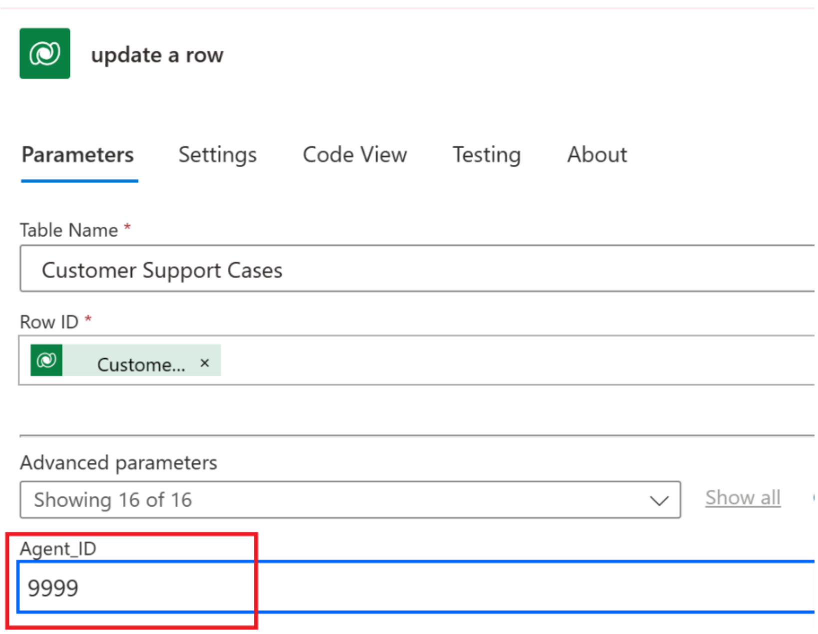
   i. (If you accidentally renamed your table in your Power App, choose that name/unique identifier here instead.)



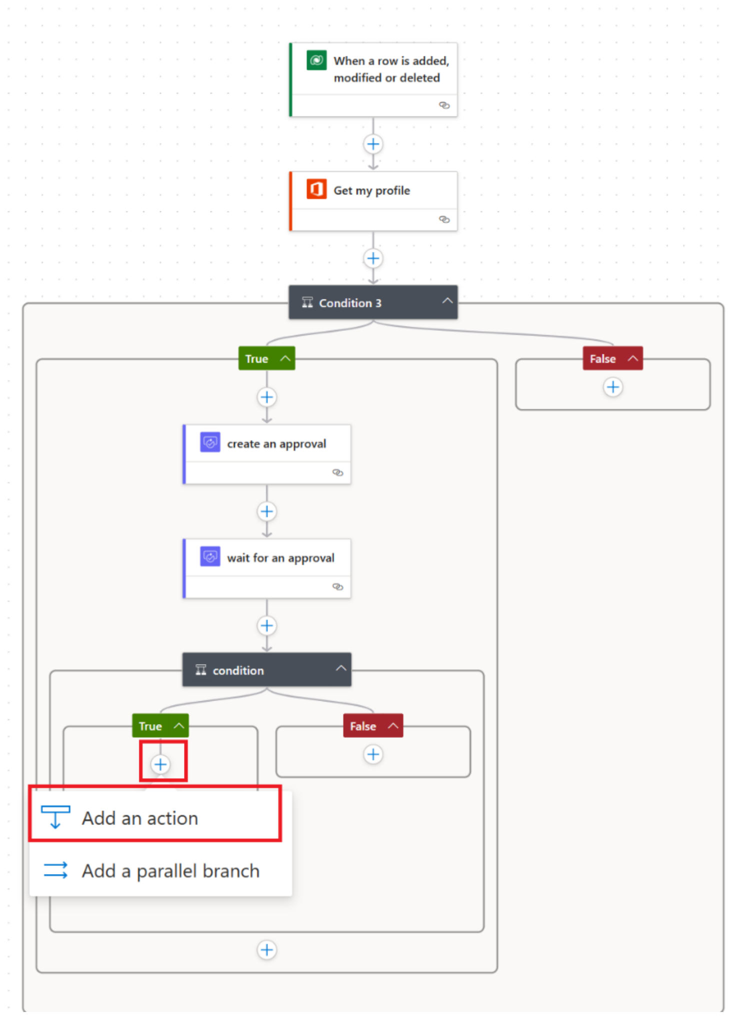
cc. Next click on [**Show all**] under ***Advanced parameters***.



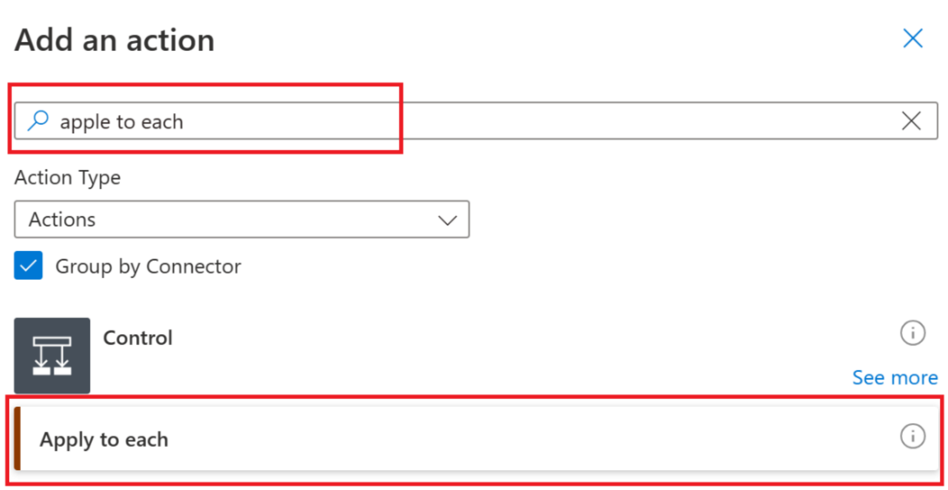
dd. We need to add the Agent ID for the agent who handles the Fabrikam account. Their ID is 9999 so type in [**9999**] into the **Agent_ID** field.



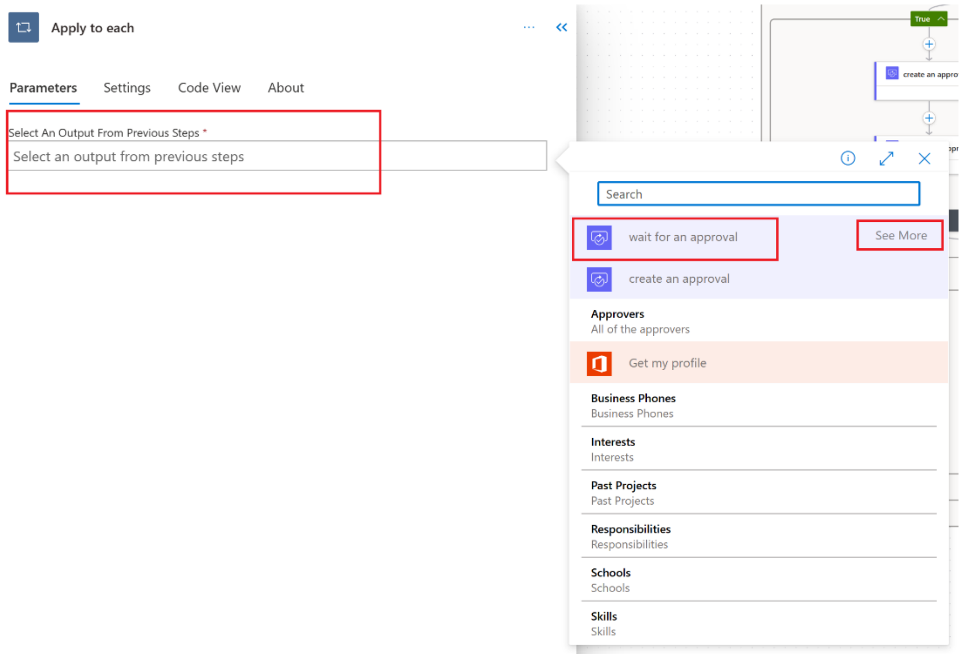
ee. Your flow is looking great! One last edit, let's add an "Apply to each" control around the *Update a row* action. Click the [**+**] right before the ***Update a row*** action.

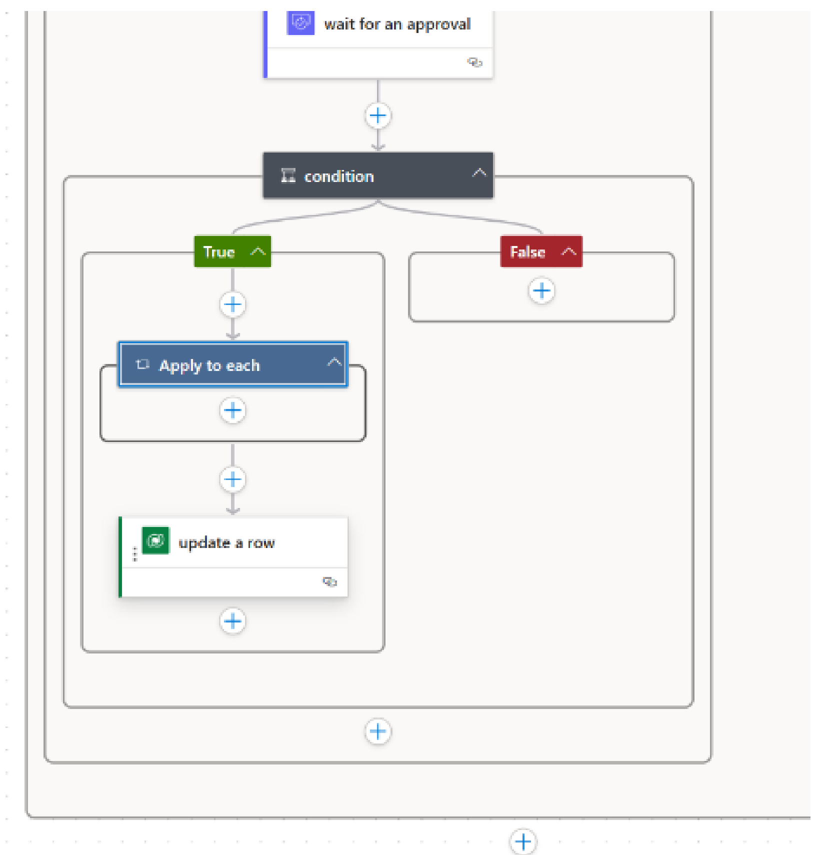


ff. Search **Apply to each** and select it in the search results.



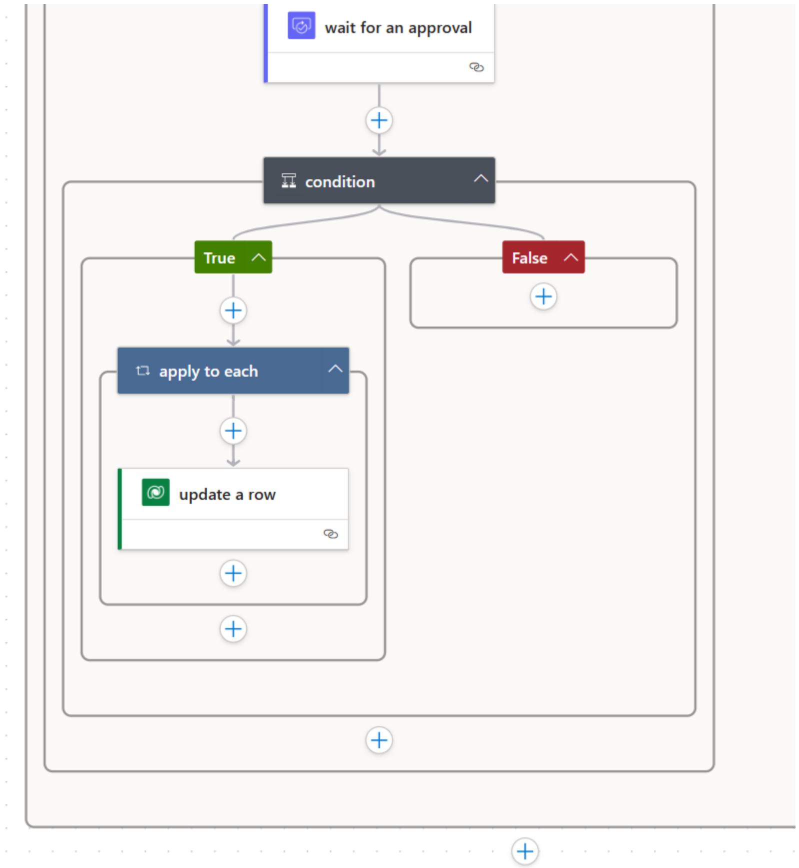
gg. Click inside the **Select An Output From Previous Steps** box, click on the blue lightning bolt, next to the purple ***Wait for an approval***, click [**See More**]. Select **Responses.**



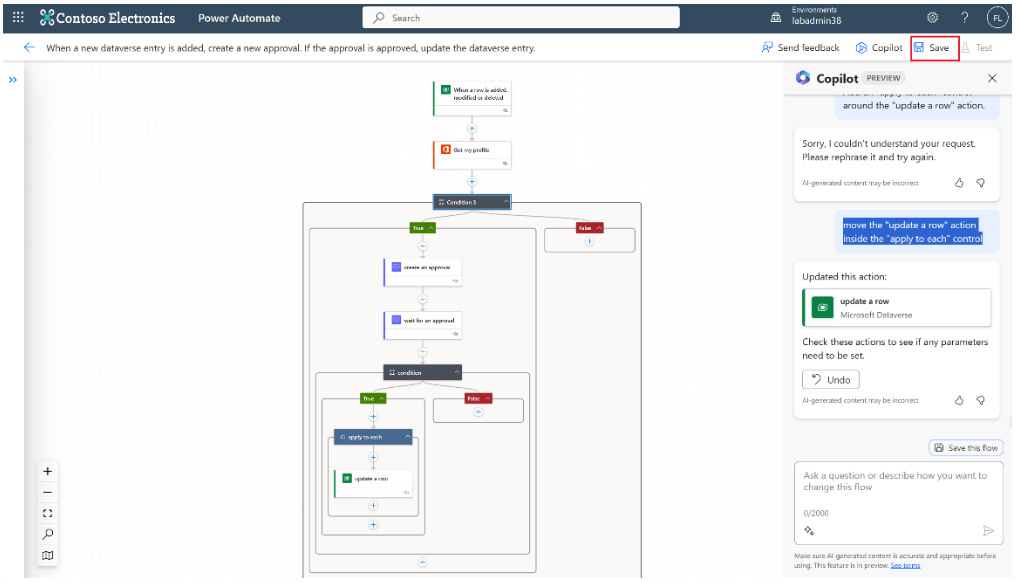


hh. We need the ***Update a row*** action to be <u>inside</u> the ***Apply to Each*** control. Tell copilot: **Move the "update a row" action inside the "apply to each" control.** You should now see the action inside!

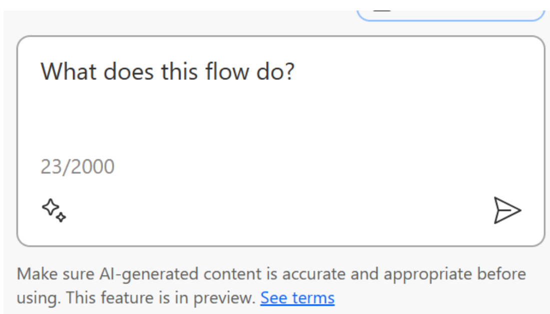
i. *If the action doesn't move, you can always drag and drop it over the [+] right below the* Apply to Each

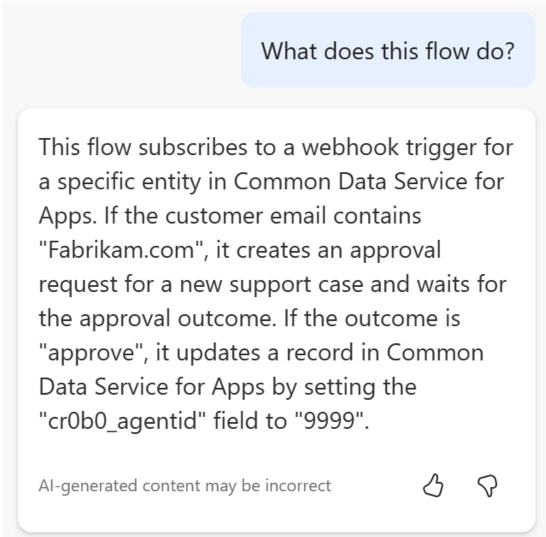


ii. Save your flow at the top right of the page.

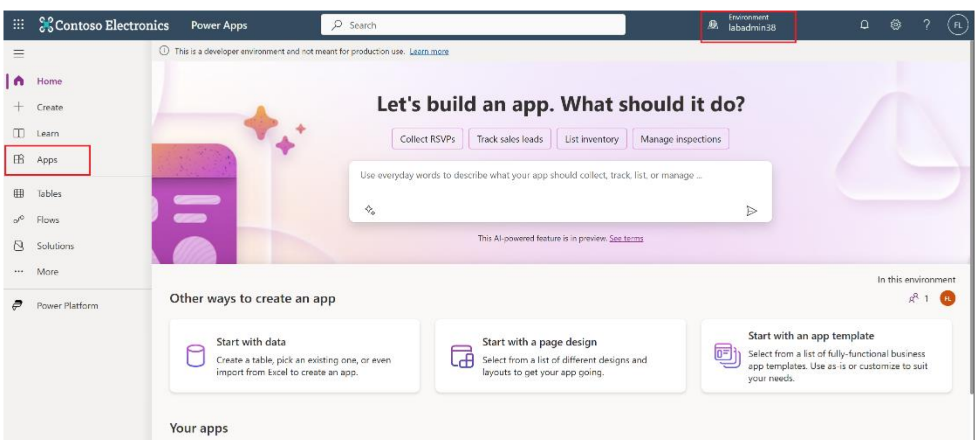


6. Use Copilot to learn about your flow
    a. In addition to creating and editing a flow, you can use Copilot to learn about your flows!
    b. In the Copilot pane, ask Copilot: **What does this flow do?** (Note: The response to this question may vary slightly and not match the screenshot below exactly.)

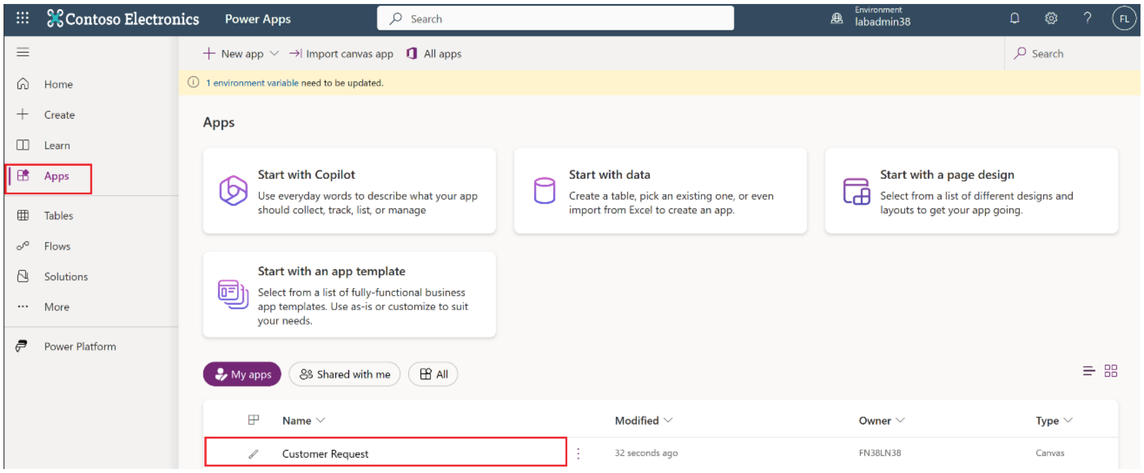




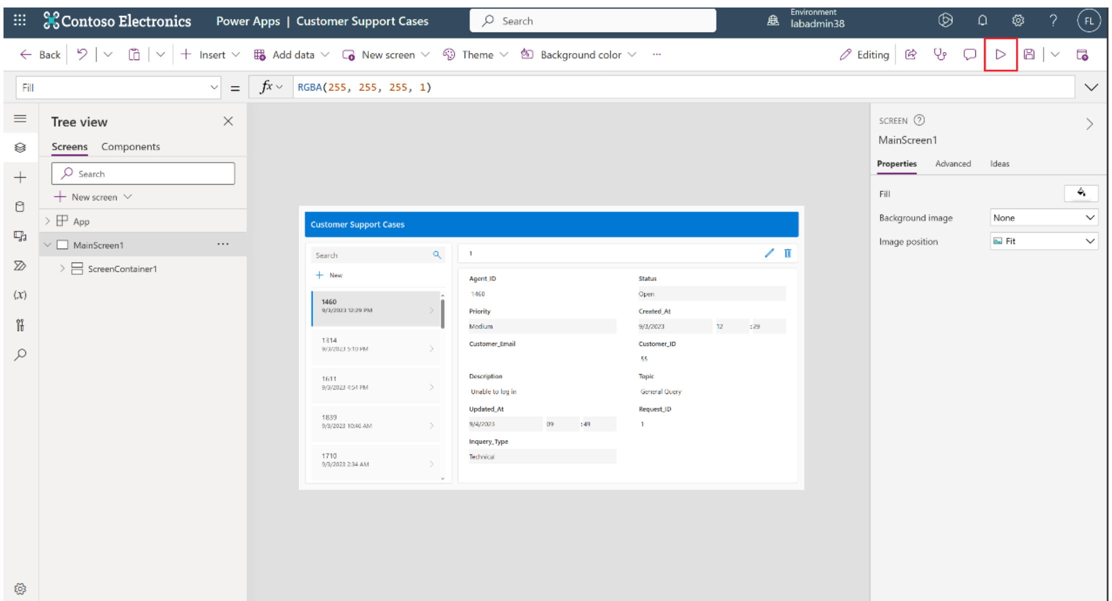
7. Test your flow
   a. Now let's run your flow! First, you'll need to open the Power Apps app that you already created. In a new browser, go to **https://make.preview.powerapps.com** and login with your demo credentials (if you aren't logged in already).
   b. Make sure you are using the **Developer** environment (**Dev - labadmin#**), and **NOT** the **Default** environment.
   c. Click on [**Apps**] in the left navigation bar.



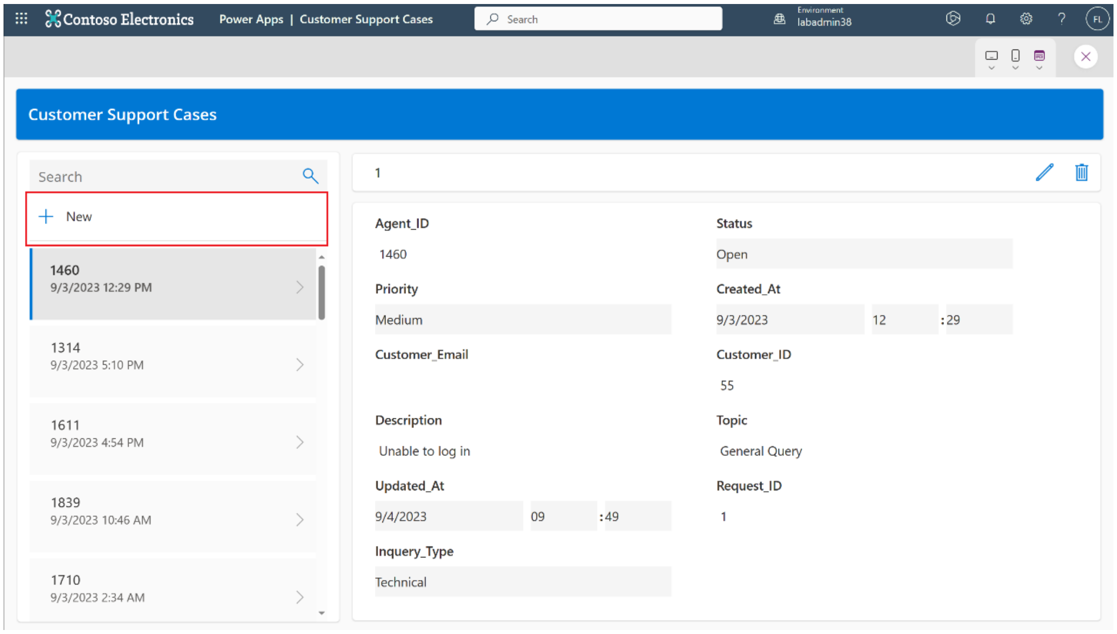
   d. Click on the app titled [**Customer Request**] to open it. (If you accidentally renamed the app when you created it, open your app.)



e. In the top right of the page, click the **Play** button. ▷

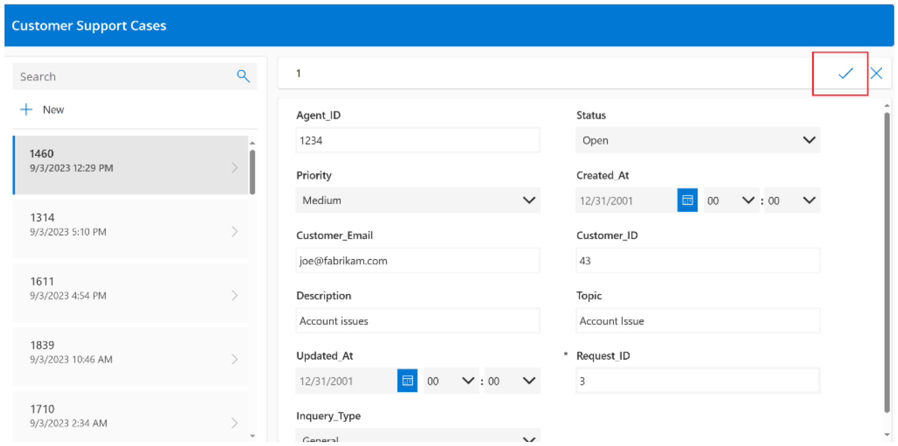


f. Click on [**+ New**] to create a new support ticket.

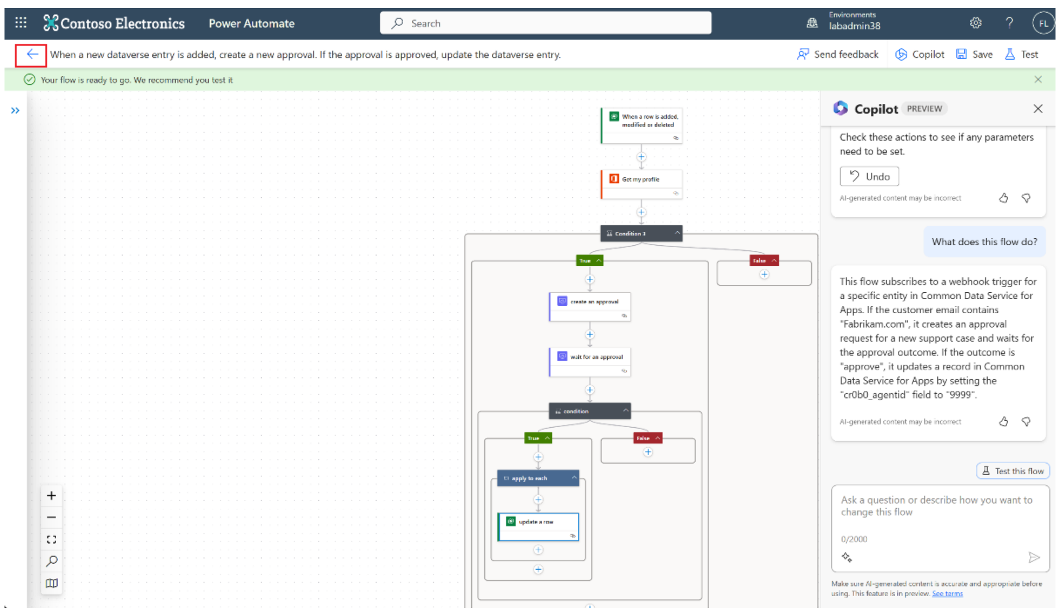


g. Fill in the fields in the form with:
   i. Agent ID: **1234**
   ii. Priority: **Medium**
   iii. Customer Email: **joe@fabrikam.com**
   iv. Description: **Account Issues**
   v. Status: **Open**
   vi. Customer ID: **43**
   vii. Message: **I need help with my account**
   viii. Subject: **Account Issue**
   ix. Request ID: **67876**

h. Once you have filled in the fields (some of the fields are optional so we'll leave them blank), click the **check box** at the top right. This will create a new support ticket which creates an entry into the dataverse table which will kick off your flow.

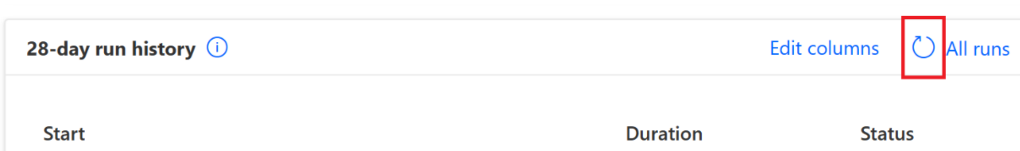


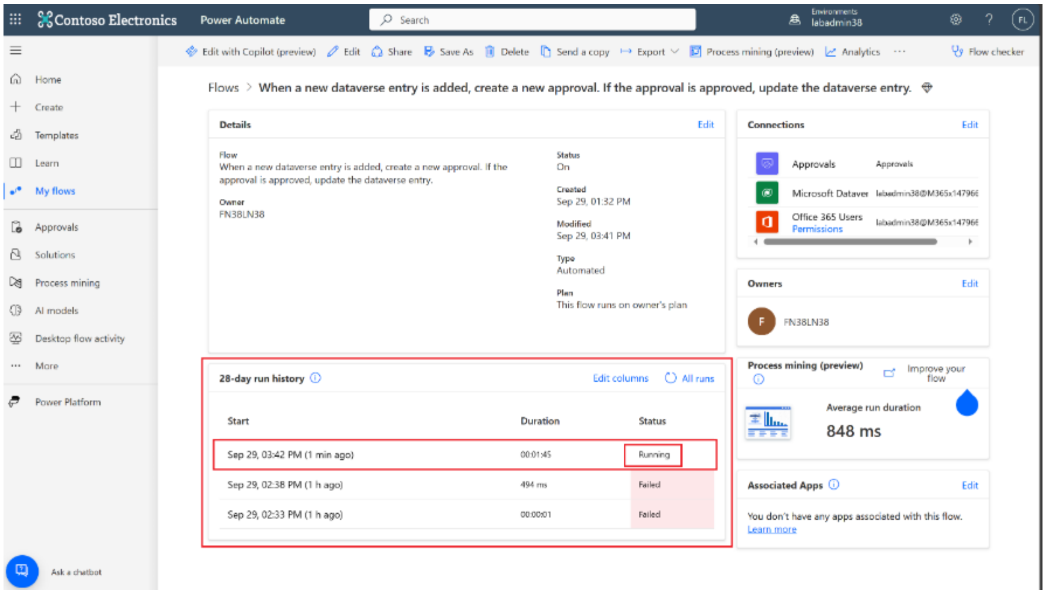
i. Go back to your Power Automate browser tab. In the top left of the page, click the **left arrow** to go to your flow details page. (Make sure you have saved your flow first!)



j. You can see under **Run History**, your flow is running! It won't finish until you respond to the approval.

   i. If you don't see your flow run status under Run History, you may need to refresh. Click the spinning arrow icon to refresh.

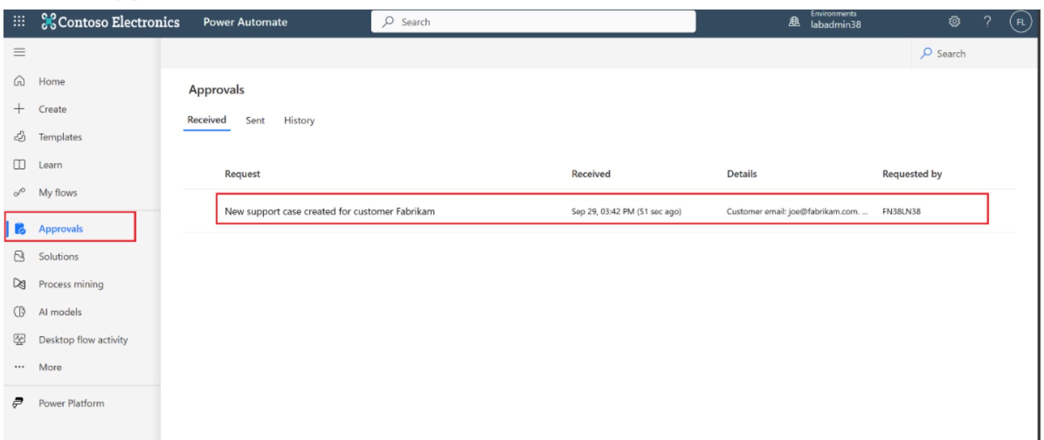




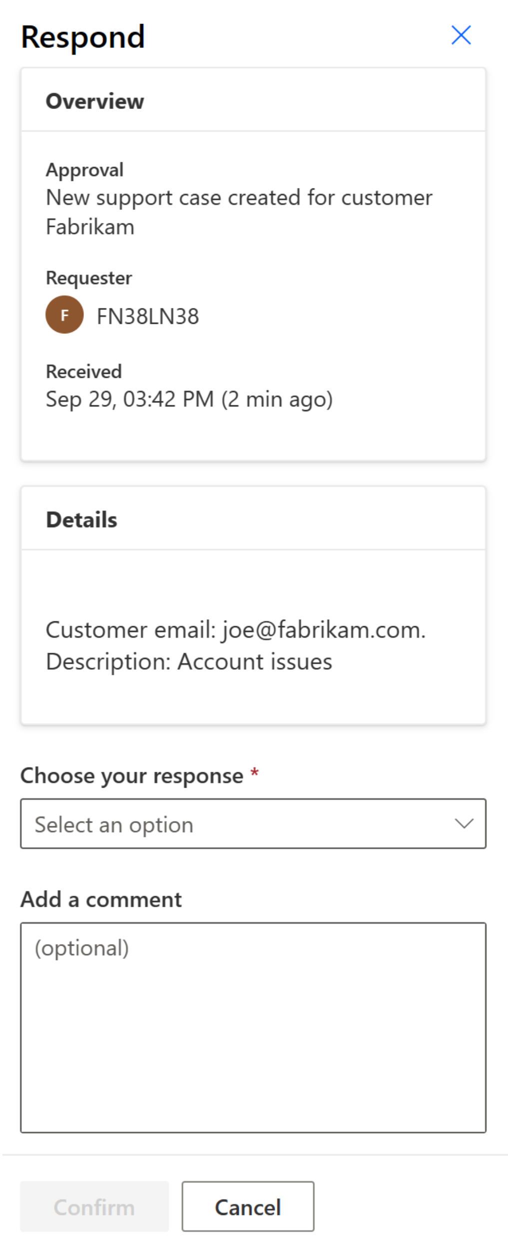
k. Click [**Approvals**] on the left navigation bar.

l. You should see your new request. Click on the request to open it.

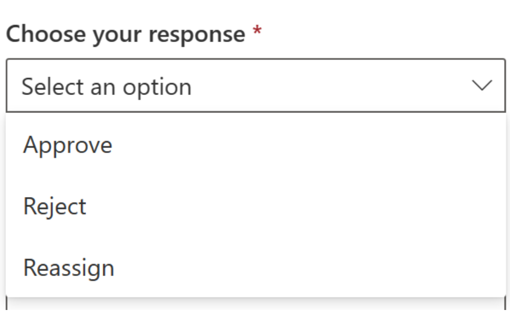
Error! Hyperlink reference not valid.



m. You'll see the approval you created titled "New support case created for customer Fabrikam" with the email and description of the support case.

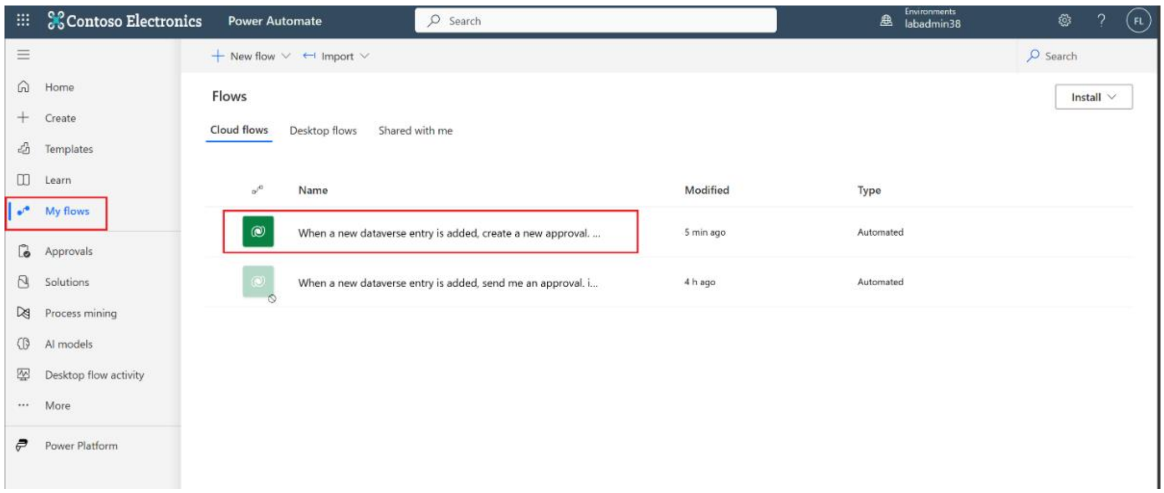


n. Click the **Choose your response** dropdown and select [**Approve**].

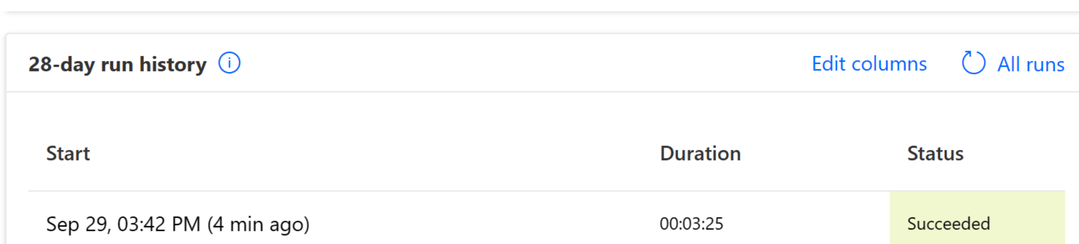


o. Click [**Confirm**] at the bottom to approve the request.

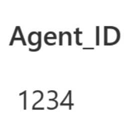
p. Click on **My flows** in the left navigation bar then click on your flow to open it.

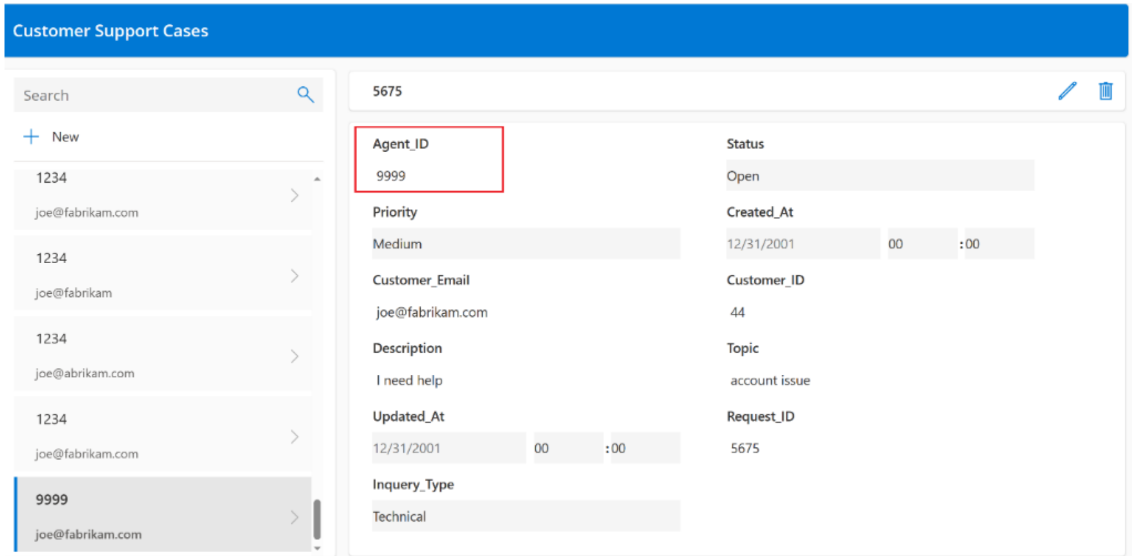


q. You should see under **Run History** that your flow run succeeded!



r. If you want to confirm the **Agent ID** field was updated on the case, go back to Power Apps and refresh (reload) the page.
s. Once it loads, click the **Play** button at the top right.
t. Scroll through the list of cases on the left side of your app to the very bottom. You should see the newest case (the case you created). Click on it to open the details.
u. You should see the **Agent ID** (which was originally 1234) was updated to **9999**!





8. Resources

Power Automate Copilot is continuously improving! Here are a few resources to help get you started:

a. Create a flow using the cloud flows designer with Copilot
b. How to write a good prompt
c. Edit a flow using the designer with Copilot capabilities

Exercise 4: Use an AI Builder prebuilt prompt in Dataverse Accelerator

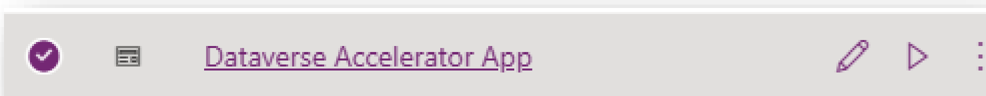
Requirement: Complete Exercise 1

Scenario: Classify automatically upcoming cases

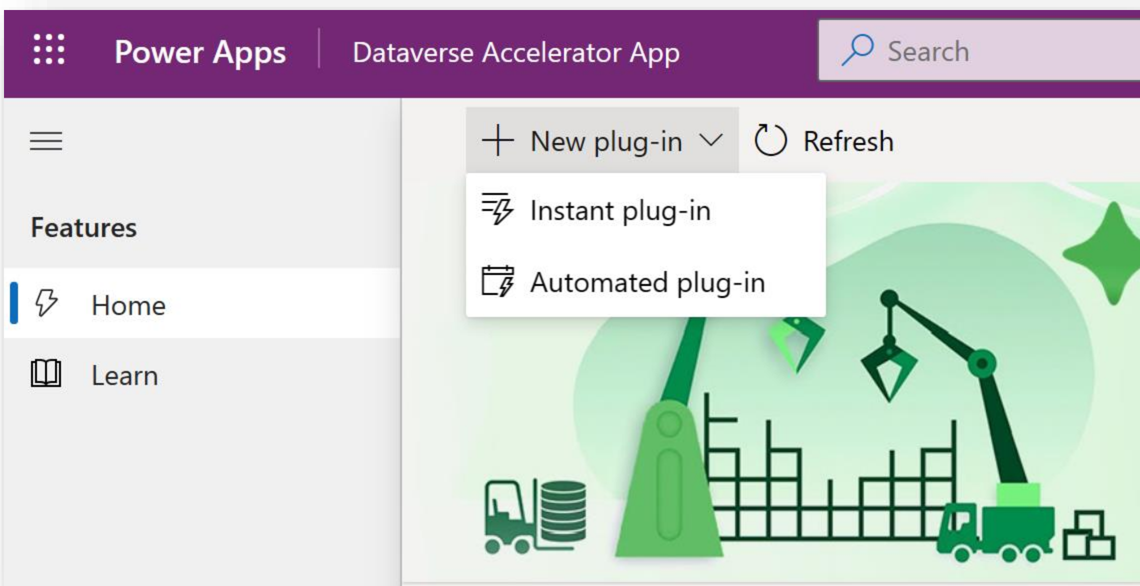
During this exercise, we will see how you can leverage AI Builder default Prompts and the Dataverse Accelerator to perform some AI automations when records are created in a table.

Creating a Dataverse plugin

1. Go to https://make.powerapps.com/apps
2. Select the **Dataverse Accelerator App** and select the **play** button.



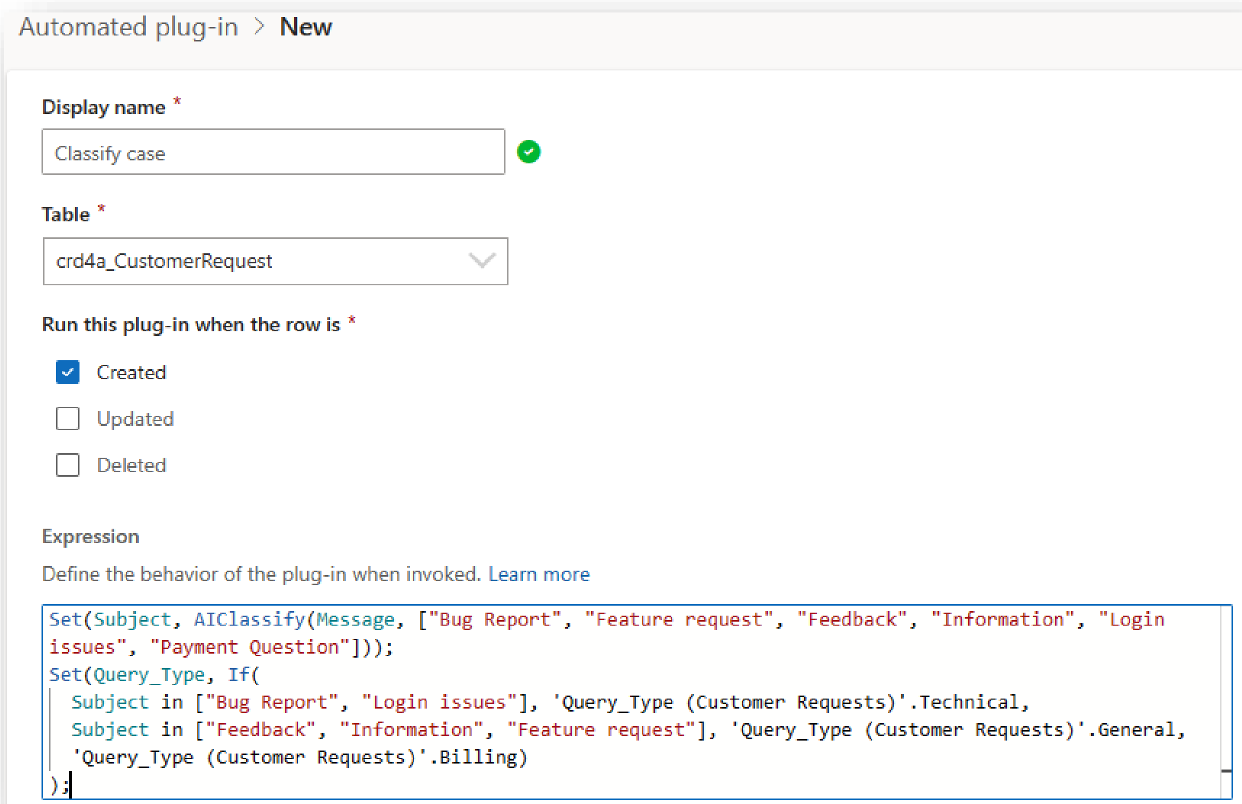
3. Once the application has been loaded, select **+New plug-in** and **Automated plug-in.**



4. In Display Name enter “Classify case”, in Table select the **%ENVCODE%_CustomerRequest** table.

5. In the Expression enter the following:

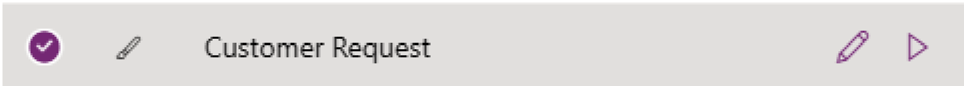
```
Set(Subject, AIClassify(Message, ["Bug Report", "Feature request", "Feedback",
"Information", "Login issues", "Payment Question"]));
Set(Query_Type, If(
 Subject in ["Bug Report", "Login issues"], 'Query_Type (Customer Requests)'.Technical,
 Subject in ["Feedback", "Information", "Feature request"], 'Query_Type (Customer
Requests)'.General,
 'Query_Type (Customer Requests)'.Billing)
);
```



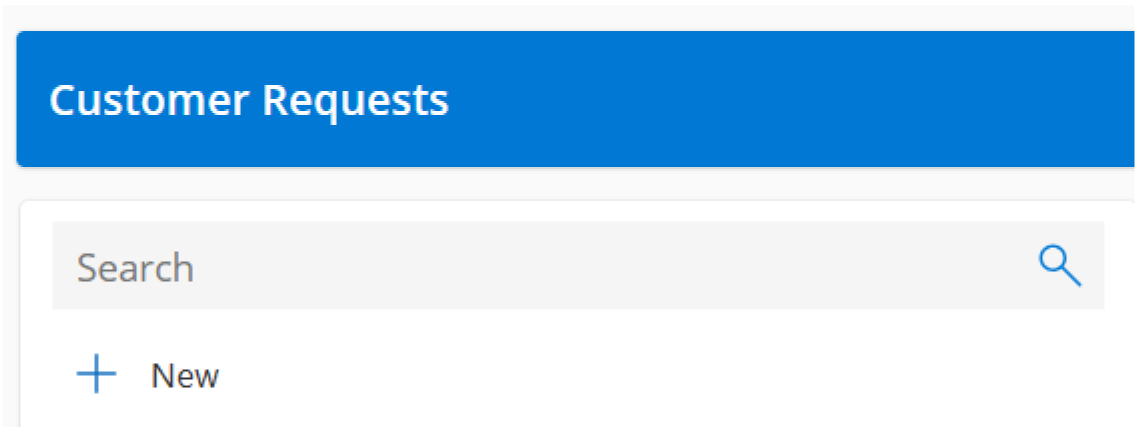
6. Select **Save** and close the application.

Testing the plugin

1. Go to https://make.powerapps.com/apps.
2. Select **Customer Request** application and select the **play** button.



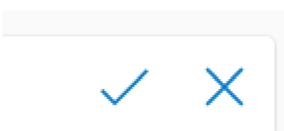
3. Once the application has been loaded, select **+ New.**



4. Enter 100 in the **Request_ID** field and the following text in the **Message** field.

```
When opening the entry form and selecting the category new account, I
can’t edit the description. This defect is preventing me from fully
utilizing the product as intended, and it is causing inconvenience and
frustration.
```

5. Select the **checkmark** on the top right.



6. See how the Subject and Query-type fields have been automatically populated, which will help routing the message to the proper support agent.

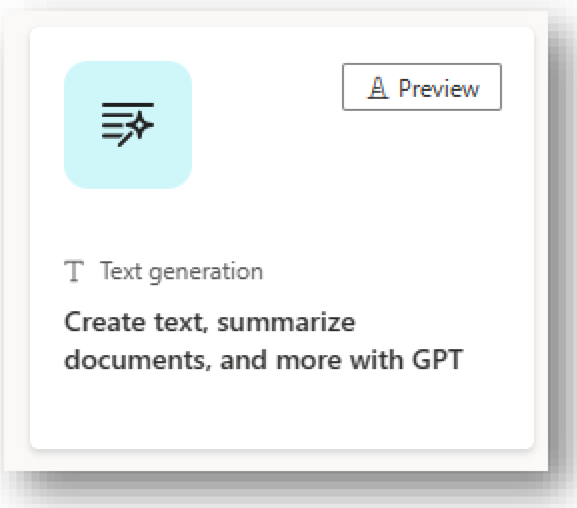
Exercise 5: Create and use AI Builder dynamic prompts as PowerFx in Power Apps

Scenario: Provide an executive summary of a case in a Power Apps control to accelerate processing.

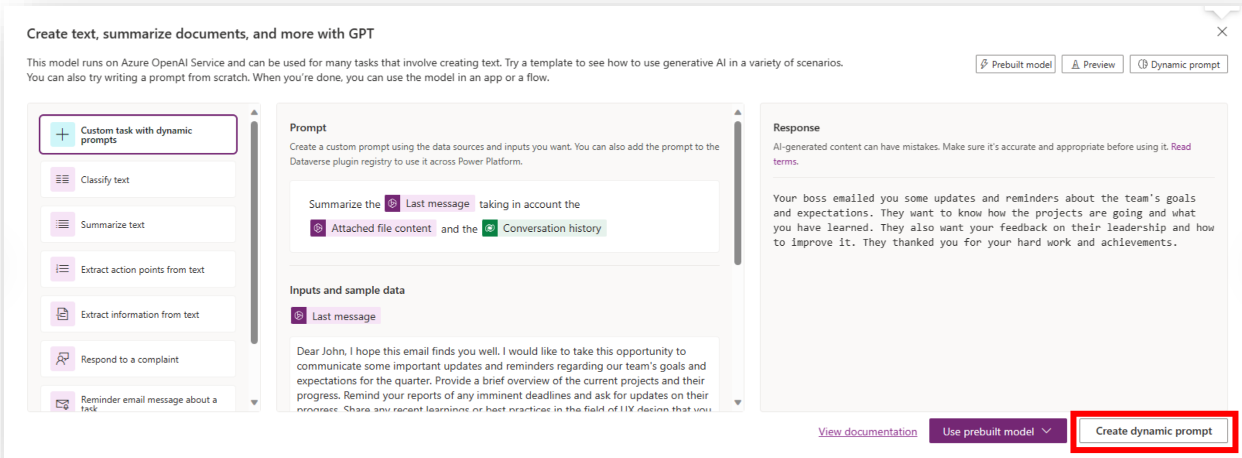
During this exercise, we will see how AI Builder Prompt Builder enables to create powerful prompts leveraging Open AI GPT capabilities to summarize incoming cases and how to use prebuilt prompts to draft responses.

Creating an AI Builder dynamic prompt :

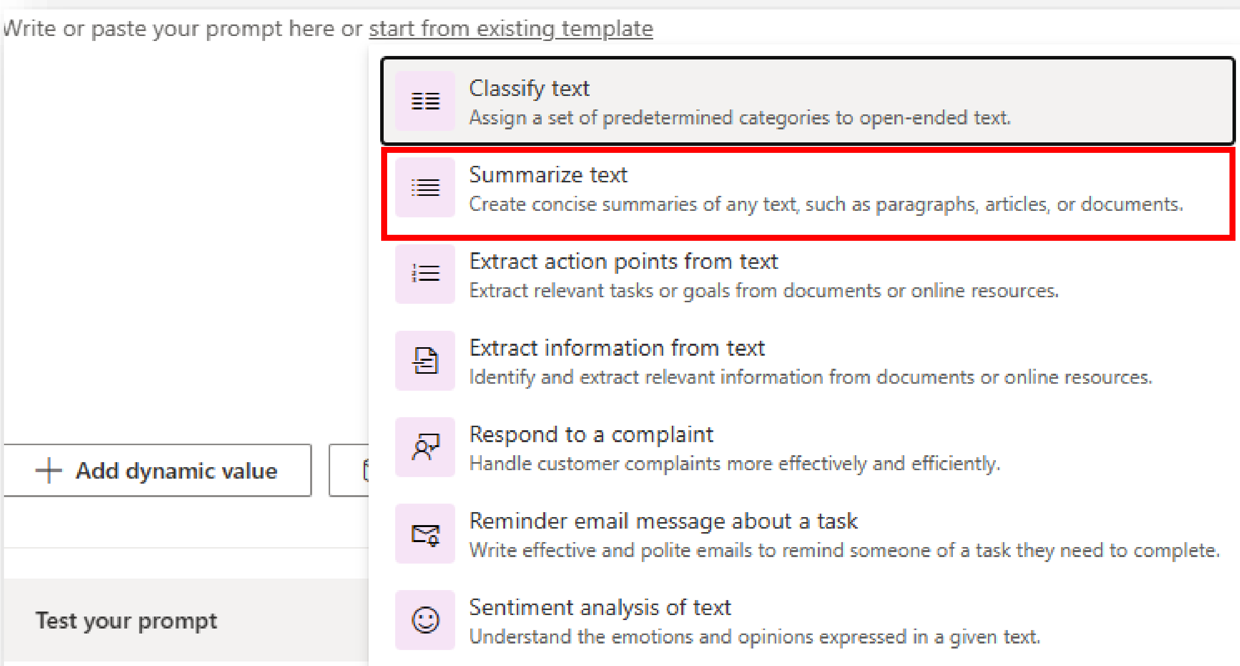
1. Go to https://make.preview.powerapps.com/aibuilder?&aiBuilder.smartActions=true
2. Select the **Text Generation** tile



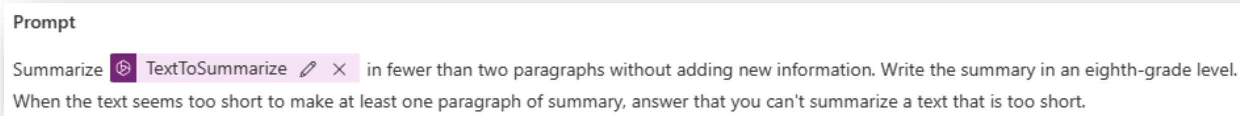
3. You can view the various samples to get inspiration on applicable scenarios. Select **Create dynamic prompt**



4. In the **Prompt** text area, select start from existing template and **Summarize text.**

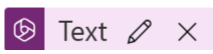


5. You can see that a default instruction taking a text as input has been created for you.

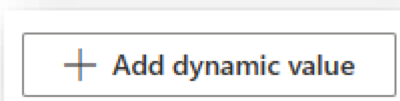


6. Edit **TextToSummarize** by selecting the pen to rename it just `Text`.

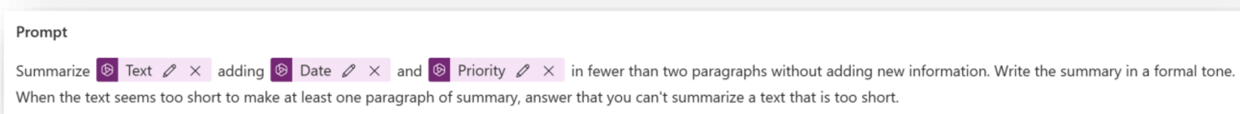
7. We want this summary to be more formal. So let's change
`Write the summary in an eighth-grade level`
By
`Write the summary with a formal tone.`
We want to add the creation date and priority in the summary, so let's enter `adding` after



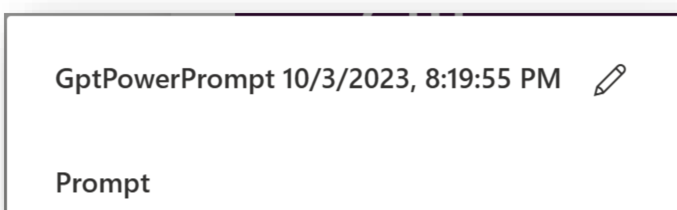
8. Then select **+ Add dynamic value**



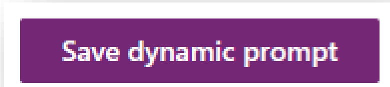
9. Enter `Date`, type the **return** key and enter `and` then insert `Priority`



10. Select the **pen** icon on the top and edit the name to **Summarize case**



11. Select **Save dynamic prompt**



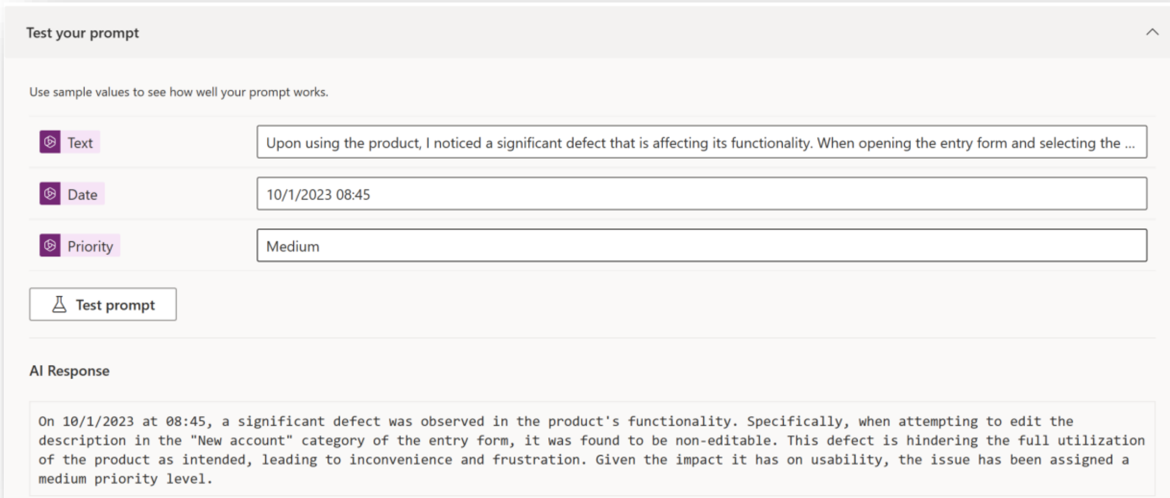
12. We can now test it by selecting "**Test your prompt"**

13. Enter the following text for **TextToSummarize**

```
Upon using the product, I noticed a significant defect that is
affecting its functionality. When opening the entry form and selecting
the category "New account", I can't edit the description. This defect
is preventing me from fully utilizing the product as intended, and it
is causing inconvenience and frustration.
```

14. Enter the `10/1/2023` for CreationDate and `Medium` for Priority, then select select **Test prompt**

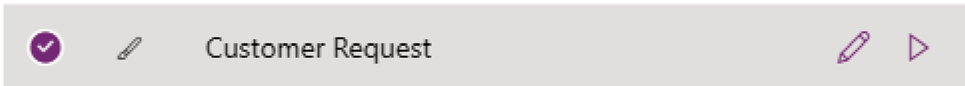
15. Check that the generated summary



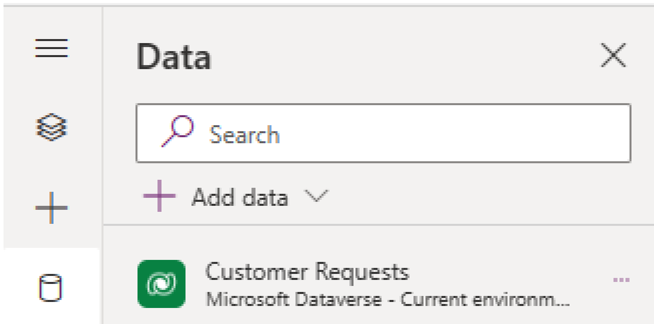
16. Close the windows with the top right **X** or **Cancel** button

Using AI Builder dynamic prompts in Power Apps :

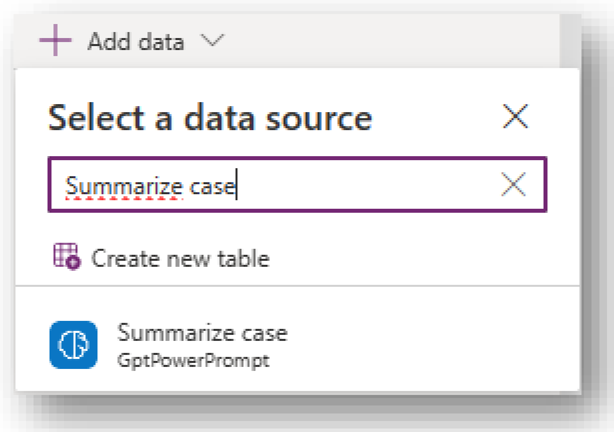
1. Go to https://make.powerapps.com/apps
2. Select **Customer Request** application and select the **pen** button.



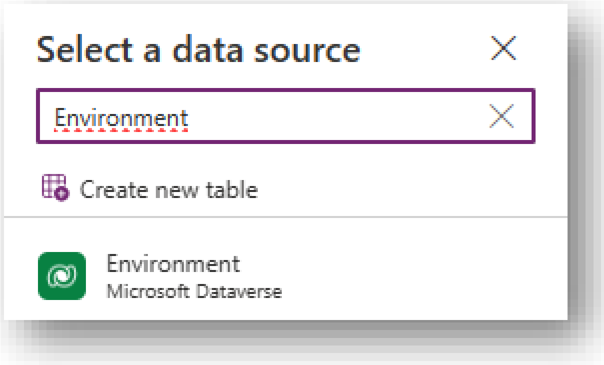
3. When the designer is ready, select **Data** in the left navigation pane



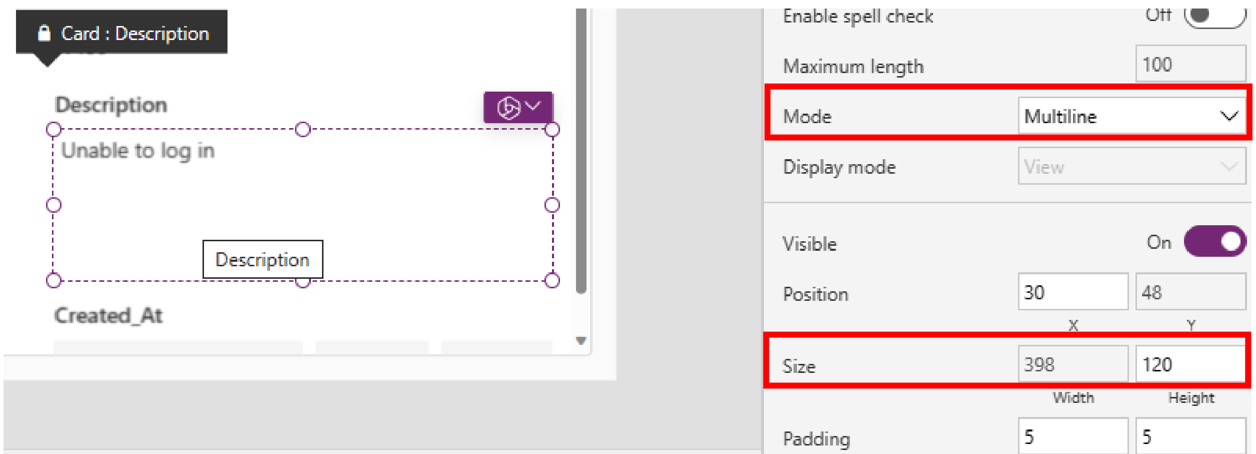
4. To use our custom prompt, select **+Add data** and search for and select the **Summarize case** data source**.**



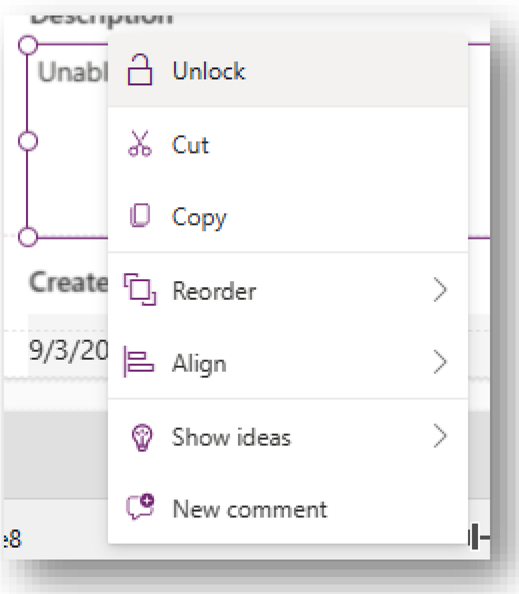
5. We will also use a default AI Builder prompt and need to add the **Environment** data source, select **+Add data** and search for and select the **Environment** data source.



6. Select the text field below the **Description** in the visual designer. In the right pane, change **Mode** to **Multiline** and **Size \ Height** to **120**

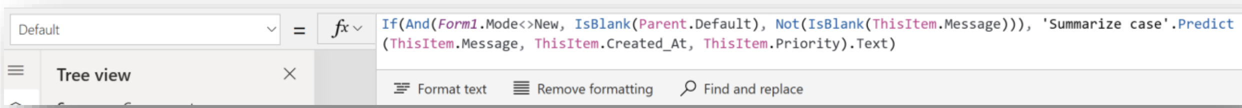


7. We now want to display the summary when there is no description. Right click on the **Description** input text and select **Unlock**



8. In the formula bar for the **Default** property, enter the following:

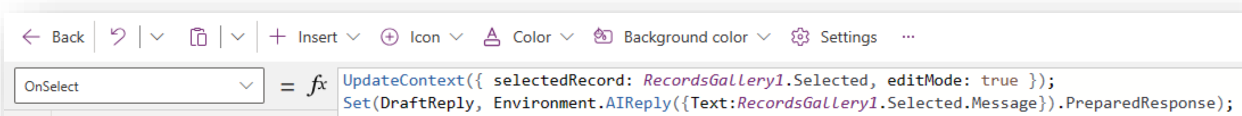
```
If(And(Form1.Mode<>FormMode.New, IsBlank(Parent.Default),
Not(IsBlank(ThisItem.Message))), 'Summarize
case'.Predict(ThisItem.Message, ThisItem.Created_At,
ThisItem.Priority).Text)
```



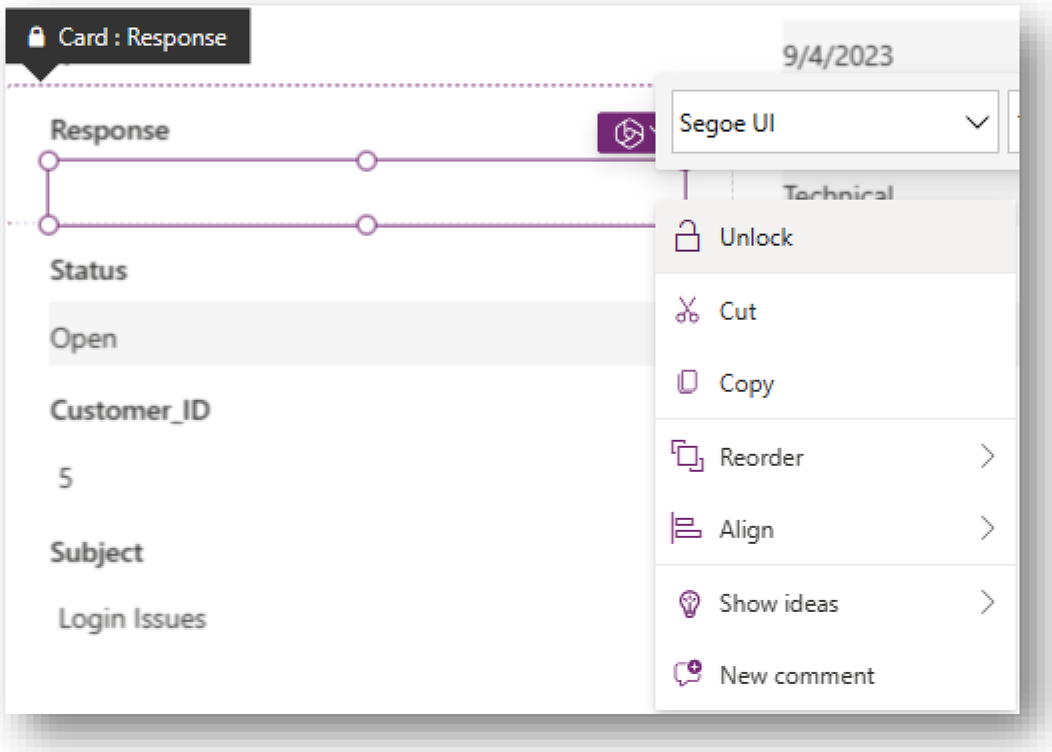
9. Finally, we want to propose a draft response for this case to accelerate the work of the support agent went they edit the case. Select the **Pen** icon in the form.

10. In the formula bar, replace the current formula with this

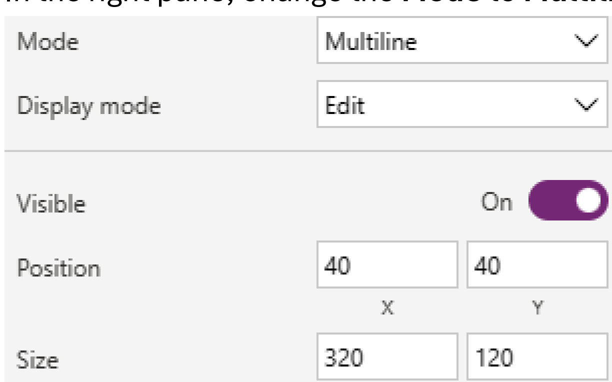
```
UpdateContext({ selectedRecord: RecordsGallery1.Selected, editMode: true });
Set(DraftReply,
Environment.AIReply({Text:RecordsGallery1.Selected.Message}).PreparedResponse)
;
```



11. We want to display this draft when there is no existing response sent. Right click on the **Response** input text and select **Unlock.**



12. In the right pane, change the **Mode** to **Multiline** and **Size \ Height** to **120**

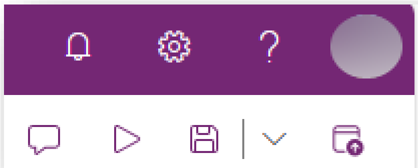


13. In the formula bar for the **Default** property, replace the existing formula by :

`Coalesce(Parent.Default, DraftReply)`

Testing the new behaviors

1. Select the **play** button on the top.



2. Open the case created in previous exercise, select the **pen** and see to see the **description** displayed as well as the draft **response** proposed that you can edit at your convenience.