

Empower Makers Session Workshop

Session Date: 10/6/23



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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
 A circular portrait of a young woman with short dark hair, smiling. She is wearing a black top and has small hoop earrings. <p>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</p>	 A circular portrait of a man with a beard and glasses, looking thoughtful. He is wearing a light-colored shirt. <p>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</p>

What do you need

Login & Environment

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

In incognito mode,

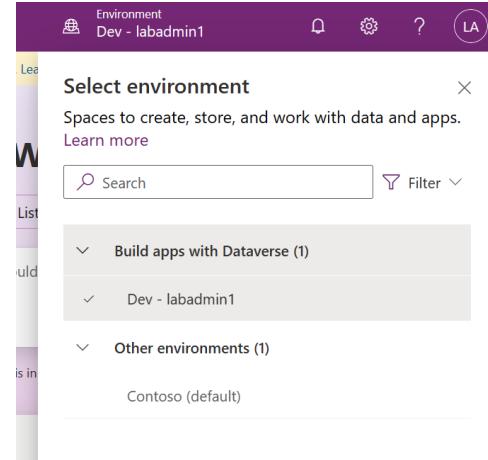
- Go to <https://make.preview.powerapps.com/>
 - Be sure to use make.Preview.powerapps.com
- **Login:** Use the “labadmin[#]” from your Post-It note and log in using this format and domain **labadminNNN@M365x14796634.onmicrosoft.com**
- **Password:** **test@word1**

- 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

	A	B	C	D	E	F	G	H	I	J	K	L
1	Request ID	Customer ID	Agent ID	Query Type	Subject	Description	Message	Status	Priorit	Created At	Response	Updated At
1							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.	Open	Medium	9/3/2023 12:29		9/4/2023 9:49
2		5	1460	Technical	Login Issues	Unable to log in	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				
2							I am writing to bring your attention to a billing discrepancy that I have encountered with my recent purchase. I would appreciate your assistance in resolving this matter as soon as possible.	Open				
3		5	1314	Billing	Payment Question	Billing discrepancy	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							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.	Open				
4		5	1611	General	Feature Request	Request for new feature	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.	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]**

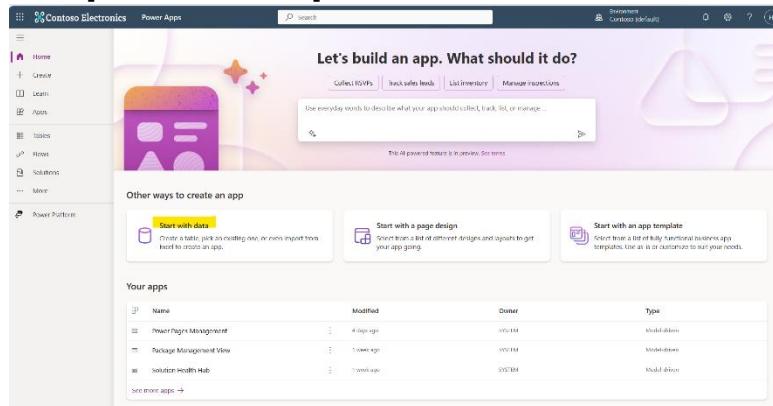




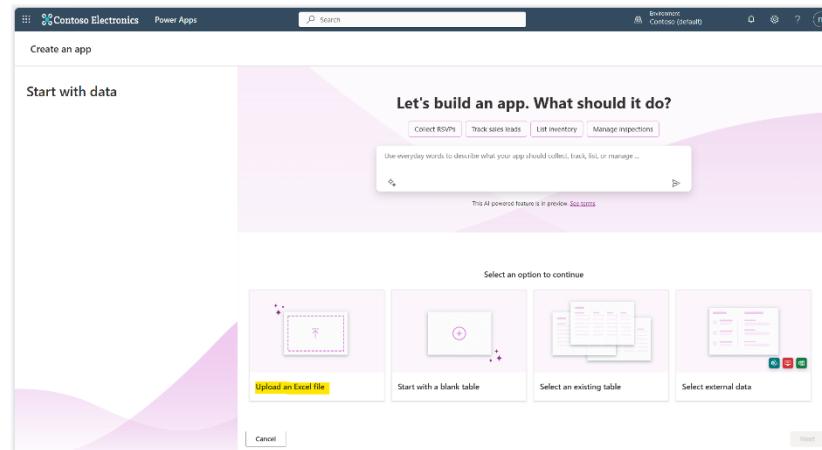
C.

3. Upload an Excel file

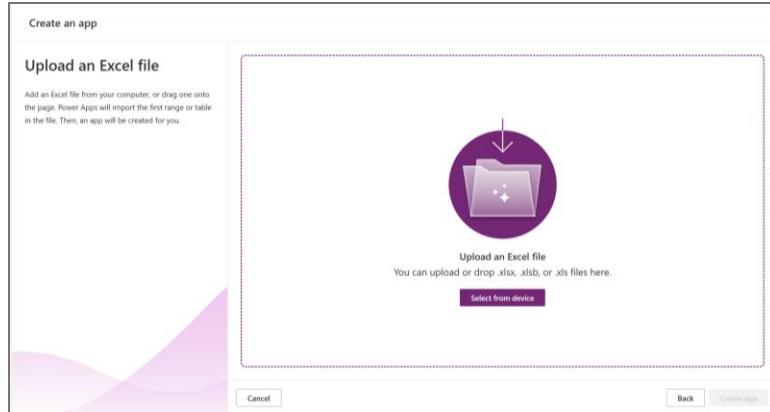
a. Click [Start with Data]



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.

Request_ID	Customer_ID	Agent_ID	Query_Type	Subject
1	5	1460	Technical	General Query
2	5	1314	Billing	Password Reset
3	5	1611	General	General Query
4	8	1839	Technical	Billing Issue
5	8	1710	General	General Query
6	3	1460	Billing	General Query
7	1	1314	Billing	General Query
8	10	1611	Technical	Password Reset
9	4	1839	Technical	General Query
10	2	1710	General	Billing issue
11	3	1460	Technical	Login Issues
12	8	1314	Billing	Payment Question
13	4	1611	Technical	Feature Request

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

Customer Request

Edit table

Display name *

Plural name *

Description

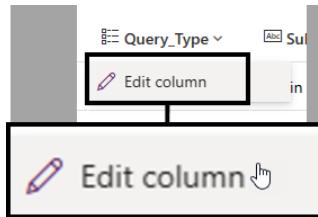
Primary column *

Advanced options

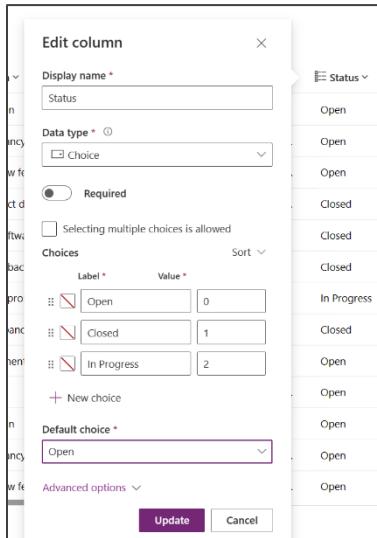
Save **Cancel**

f. Make changes to the following columns:

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

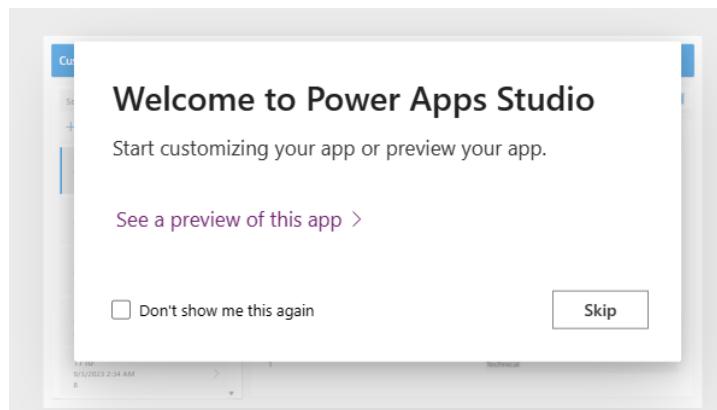


- ii. [Description] > Change type to **Text**>Multiple line of text-**Plain Text**.
- iii. [Subject] > Change type to **Text**>Single line of text-**Plain Text**.
- iv. [Response] > Change type to **Text**>Multiple line of text-**Plain Text**.
- v. [Status] > Change type to **Choice**> **Choice**. Set 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

The screenshot shows a "Customer Support Tickets" application. On the left, there's a sidebar with a "Search" field and a "New" button. Below it is a list of ticket items:

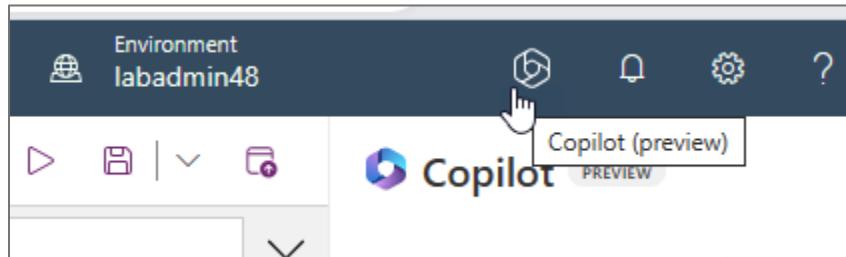
- General Query Open 1460
- Password Reset Open 1314
- General Query Open 1611
- Billing Issue Closed 1839
- General Query Closed 1710

On the right, a detailed view of the first ticket (Request_ID 1) is shown in a table:

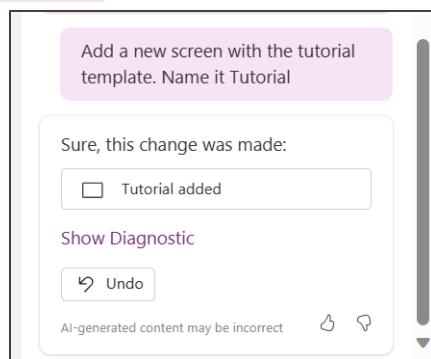
Request_ID	Subject
1	General Query
Customer_ID	Agent_ID
5	1460
Description	Query_Type
Unable to log in	Technical
Status	Priority
Open	Medium
Created_At	Updated_At
9/3/2023 12:29	9/4/2023 09:49

7. Next, let's customize the app and add a screen

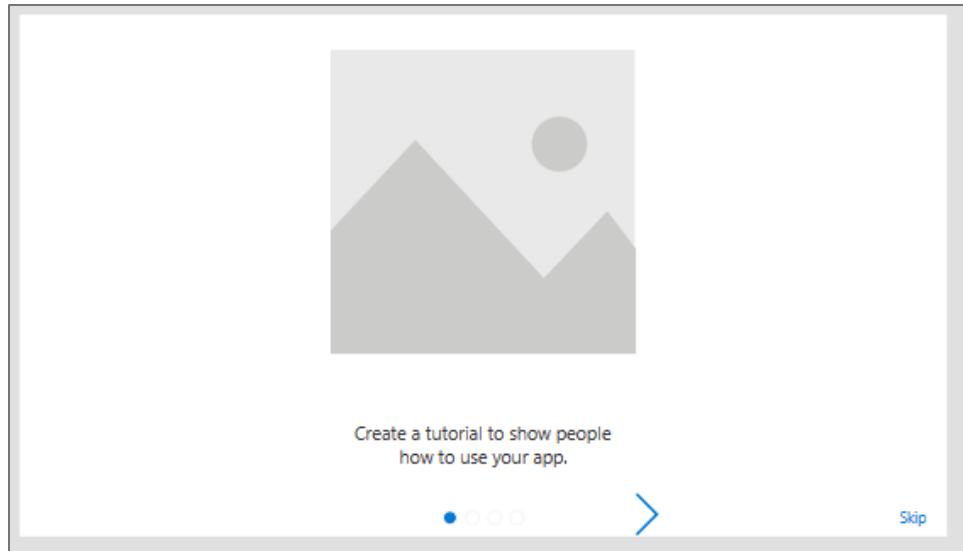
- The support agents may want to see a tutorial about the app
- Click the Copilot icon in the command bar



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

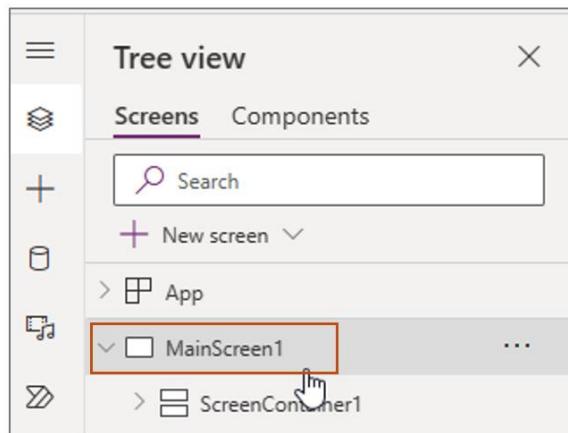


- Copilot will create a new template screen called [TutorialScreen1]



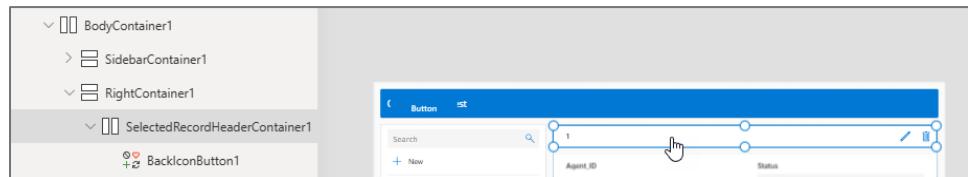
8. Let's add a button that helps users navigate to that screen

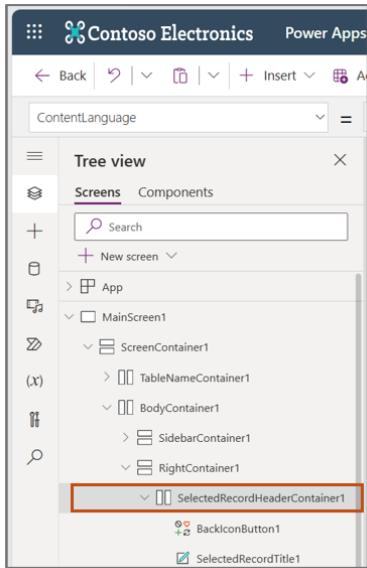
- Go back to the prior screen by selecting [**MainScreen1**] in the Tree View on the left navigation menu.



b. Add a button called **Tutorial** to the selected container by doing the following:

- In the Tree View, select [**SelectedRecordHeaderContainer1**]. This is the name of the container above the form control.





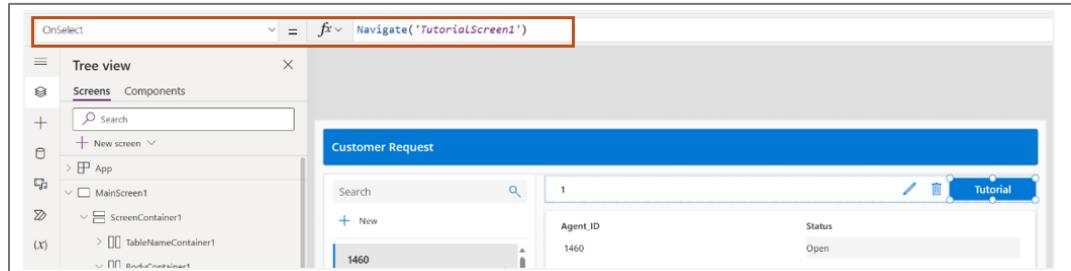
ii. Tell Copilot: “Add a button named Tutorial in the selected container”



c. Program the **Tutorial** button to navigate to **TutorialScreen1**

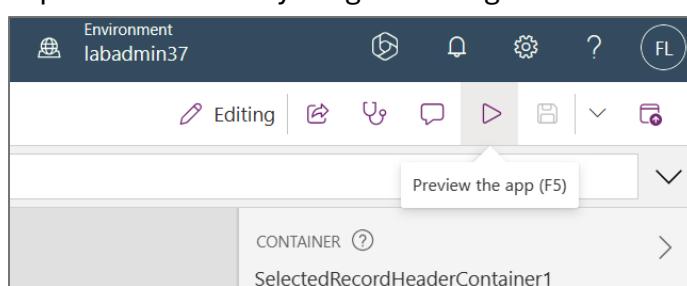
Tell Copilot: “When clicking on button Tutorial go to TutorialScreen1”

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.



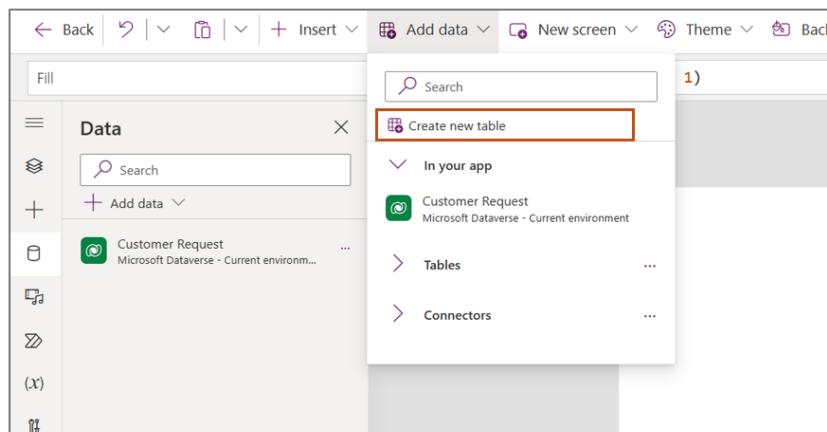
11. Use Copilot to learn more about **PowerFX** functions

a. The **Tutorial** button uses the function *Navigate*

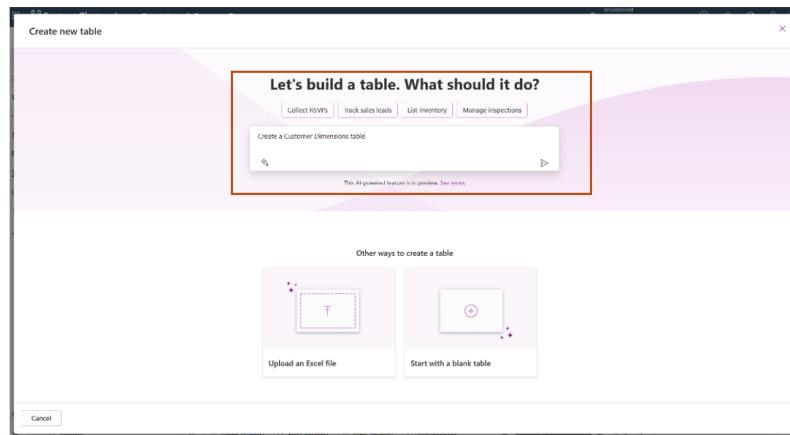
- b. Find out more about the PowerFX *Navigate* function by asking Copilot:
 “What does the Navigate function do?”
12. In the sections below we’ll explore how adding a Copilot control in the app will allow users to ask questions of the Support data. Stay tuned!
-

Bonus:

13. Can you add a button to the Tutorial screen that takes the user back to the Main screen?
- Try mentioning the button’s name in the Copilot request
14. Want to try using natural language to create a new table?
- Click [**Add Data**] in the top command bar and then [**Create new table**]
 - 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

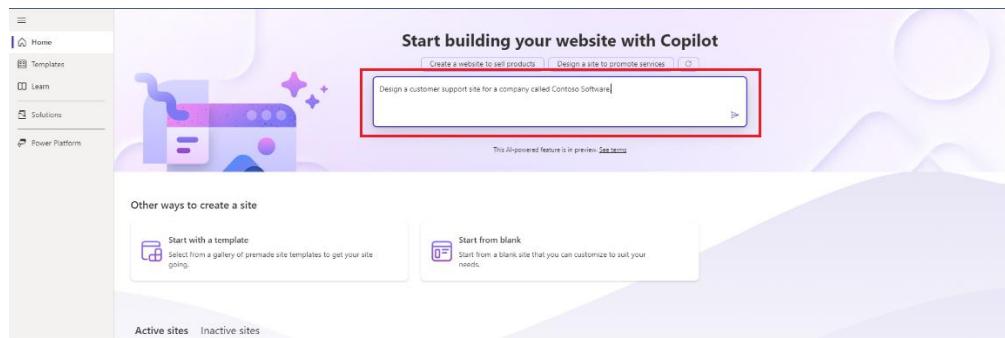
Scenario

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

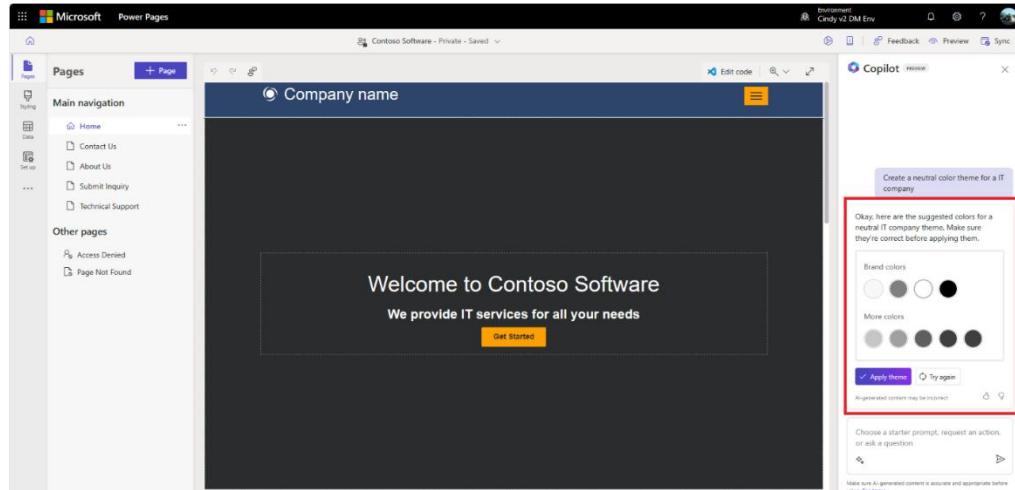
1. Create a site with Copilot
 - a. Navigate to **make.powerpages.microsoft.com** in a new browser tab in incognito window.
You should be signed into the same account and selected the same environment as the previous lab:
Login: Use the labadminNNNN@M365x14796634.onmicrosoft.com
Password: test@word1
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.**



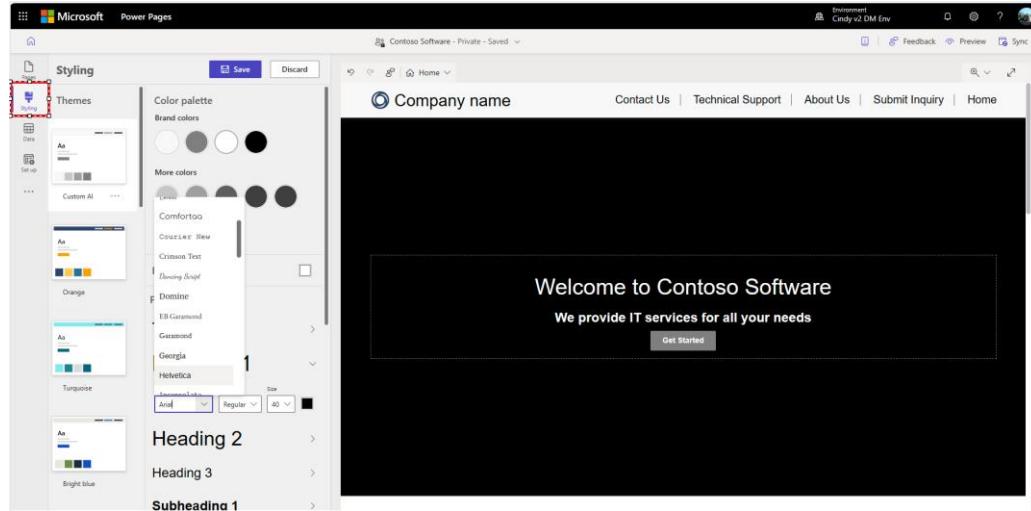
- c. Follow the 3 step site creation experience, where you can preview and revise (1) the site name and URL, (2) homepage design, and (3) create a sitemap. This kicks off site provisioning. Design Studio will open once the site is created.

2. Design your site theme

- 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>.
- Review the theme, and click on “Apply Theme” to apply the theme to all pages in the site.

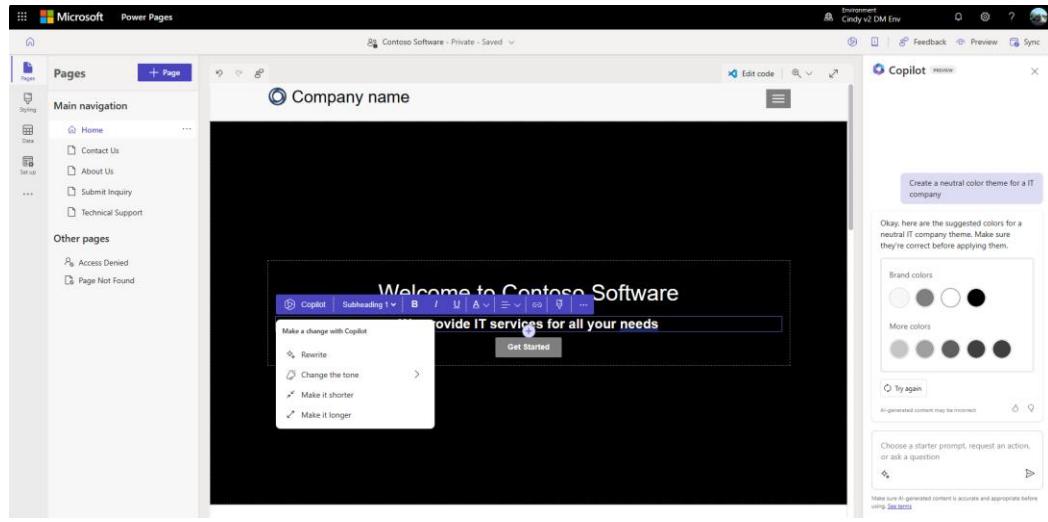


- Go to the Styling Workspace and edit the “Custom AI” theme. For example, change the Heading 1 font style from Arial to Helvetica. Hit “Save” to save the theme changes. The theme changes are applied to all pages in the site.

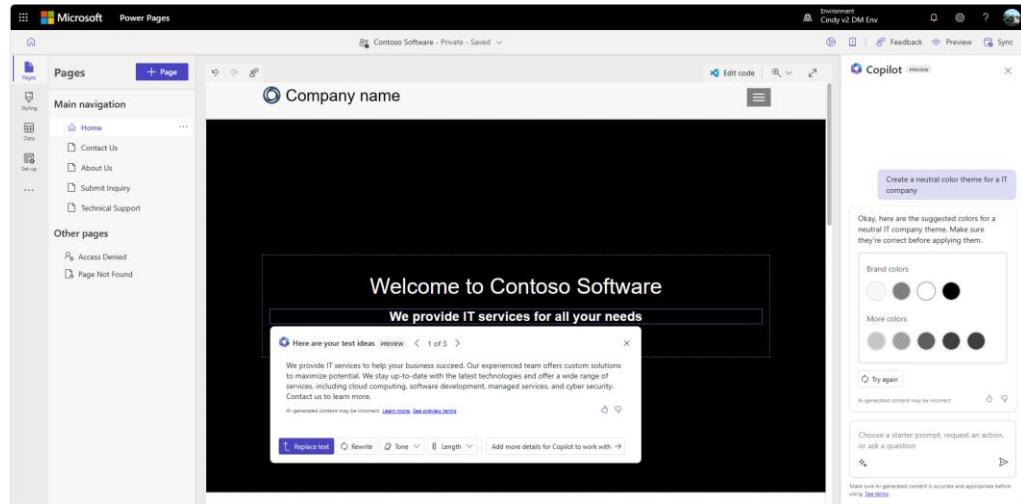


3. Edit pages with Copilot and WYSIWYG editor

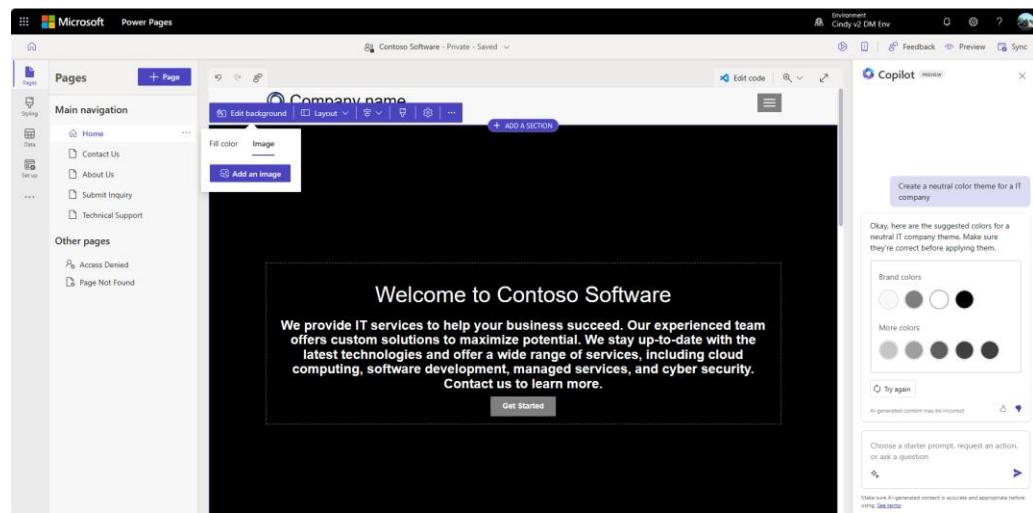
- Go to Pages Workspace, select a text component on the home page. In the toolbar, click on “Copilot” -> Make it longer.



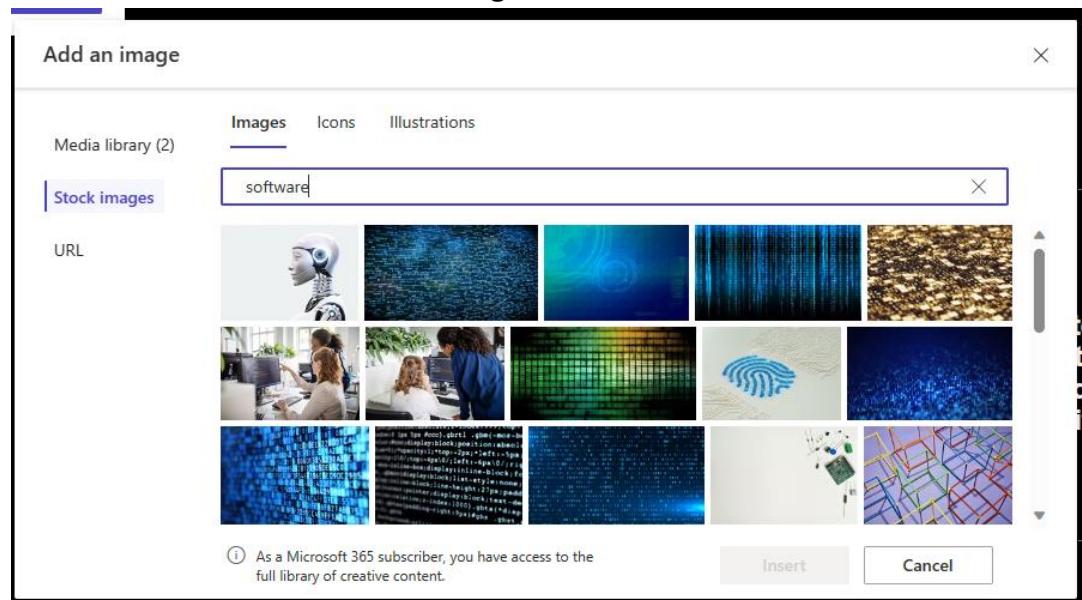
- b. Review and revise the text by adjusting the tone and/or length, review the multiple string suggestions, or provide more details. Click “Replace text” to update the text copy on the page.



- 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”.

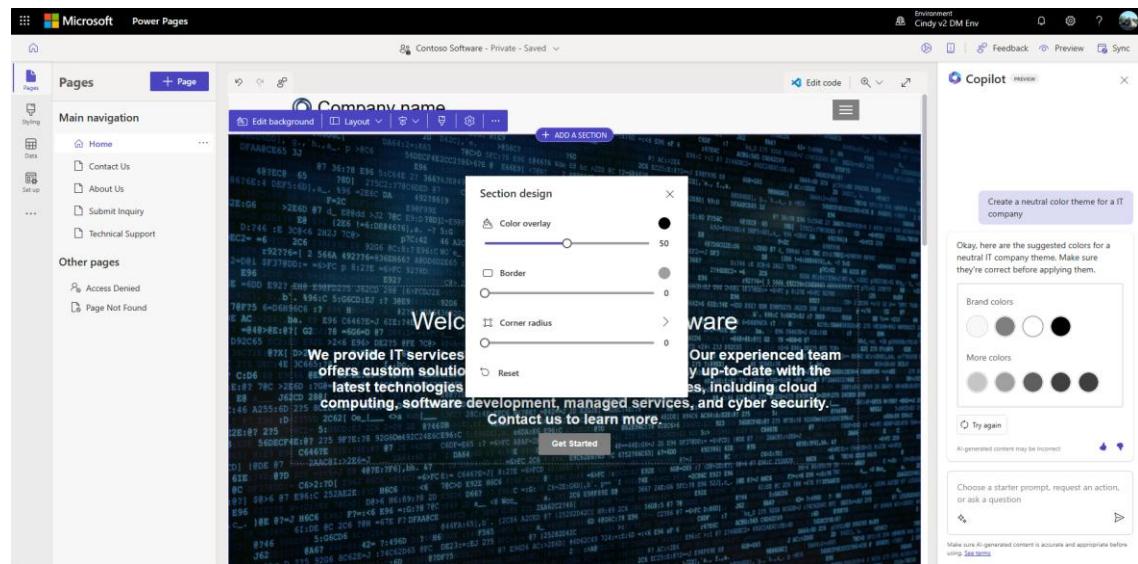


In the “Add an image” dialog, click on “Stock Images” tab. Type software and hit <enter> to find relevant images.



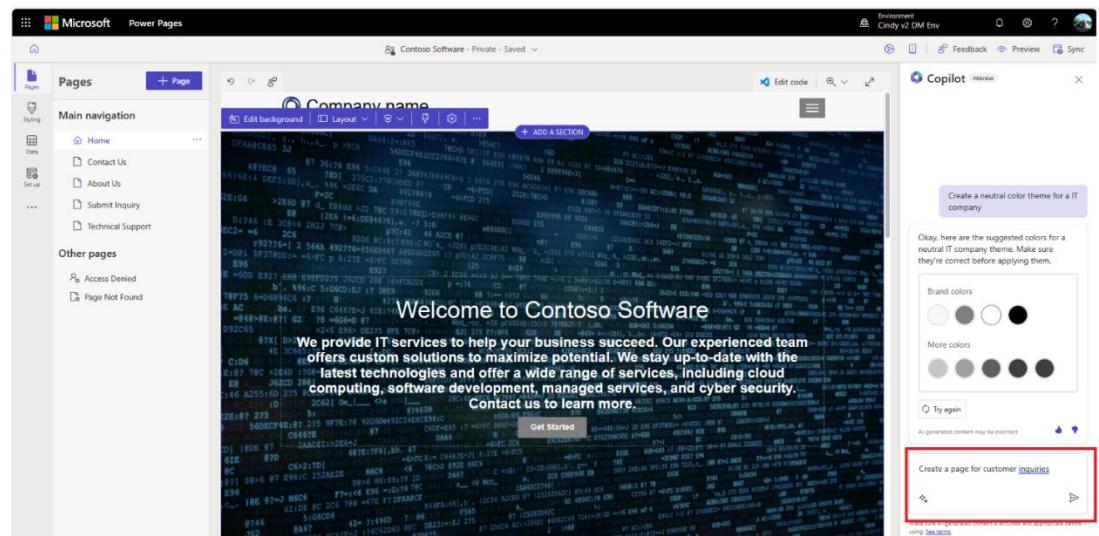
Select one of the images for the section background. Click “Insert” to add the image as section background.

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

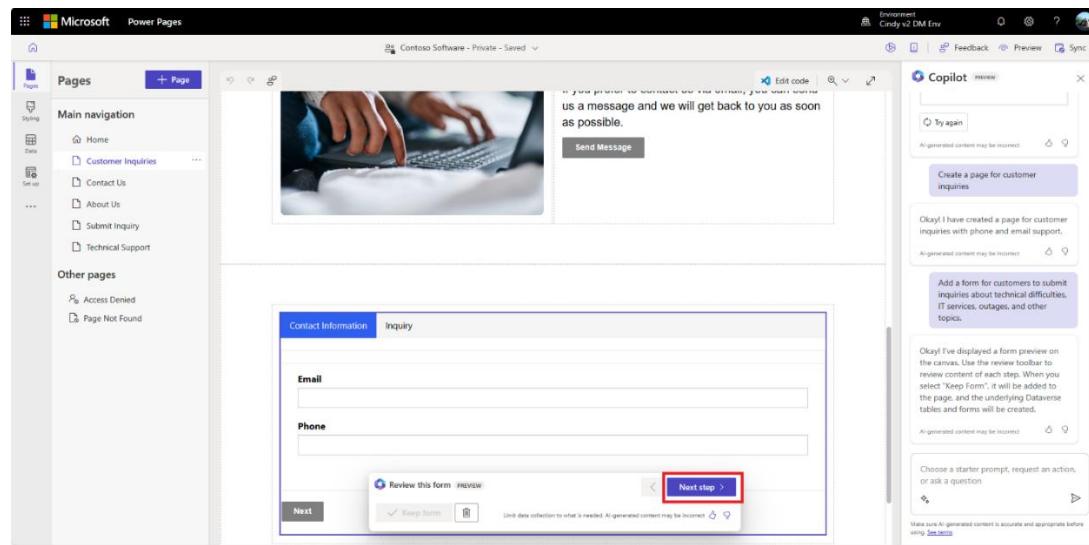
- In the Copilot side car input field, describe a page and hit <enter>. For example: **Create a page for customer inquiries.**



A new page is created and added to the site.

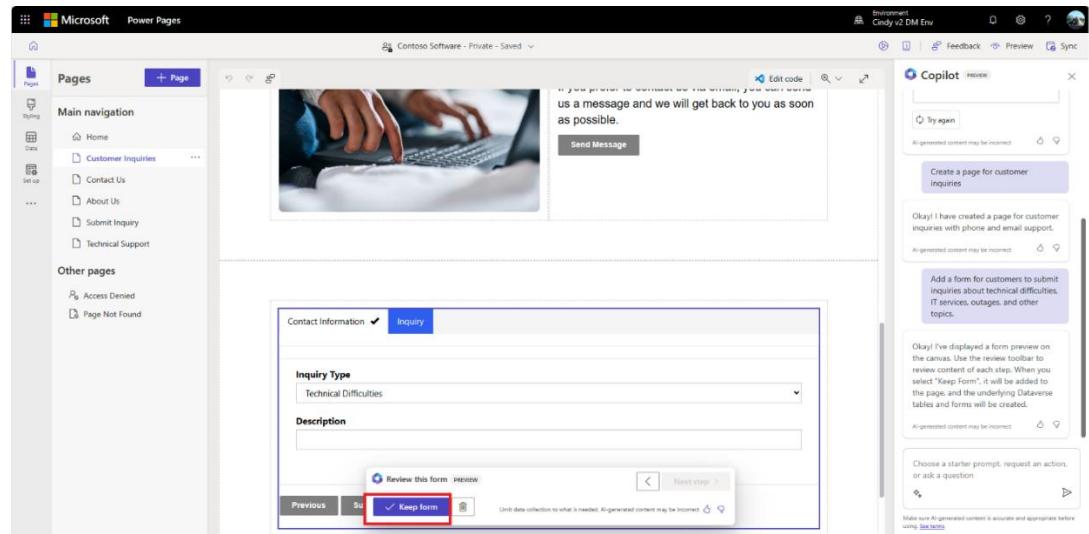
5. Use Copilot to design forms

- 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>.
- Copilot generates a multi-step form. Review each step of the form by clicking on “Next Step”.

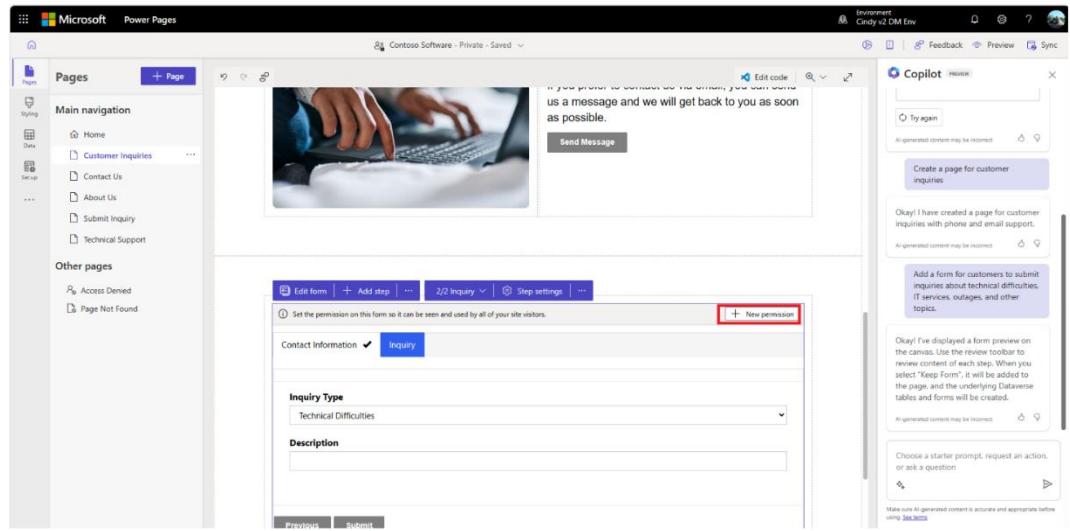


- c. After reviewing all the steps, click “Keep form” to add the form to the page.

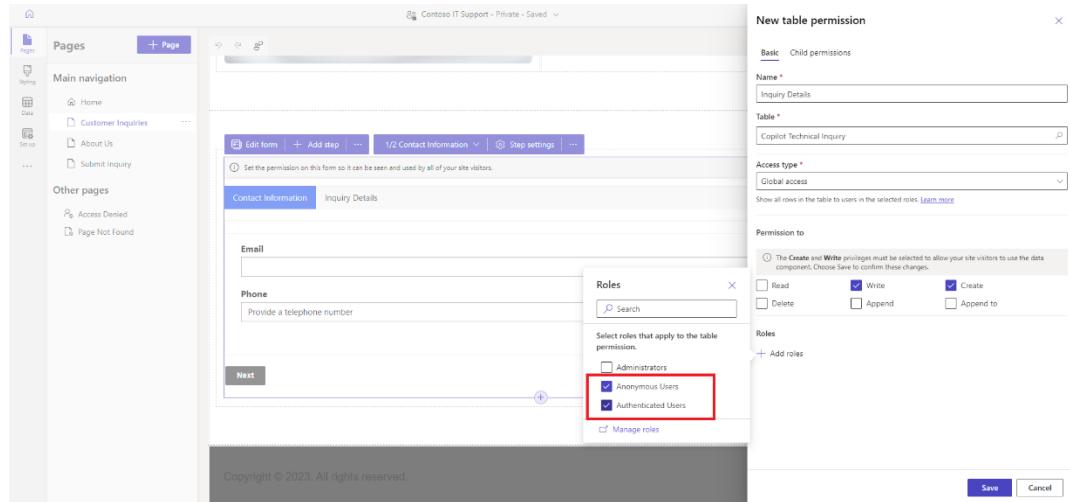
Note: Copilot creates the form with a new Dataverse table. Go to Data Workspace (in the left belt) to access and review the table.



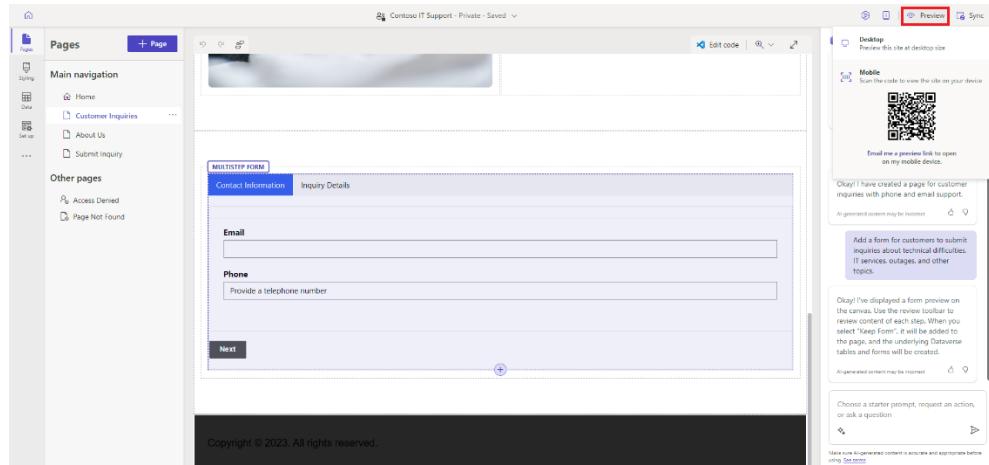
- d. When working with forms and business data, security is top of mind. Let's add permissions to this form, and allow anonymous users and authenticated users to submit this form. Click on “New permission”. This will open the “new table permission” panel with fields pre-selected based on the form context.



- 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.

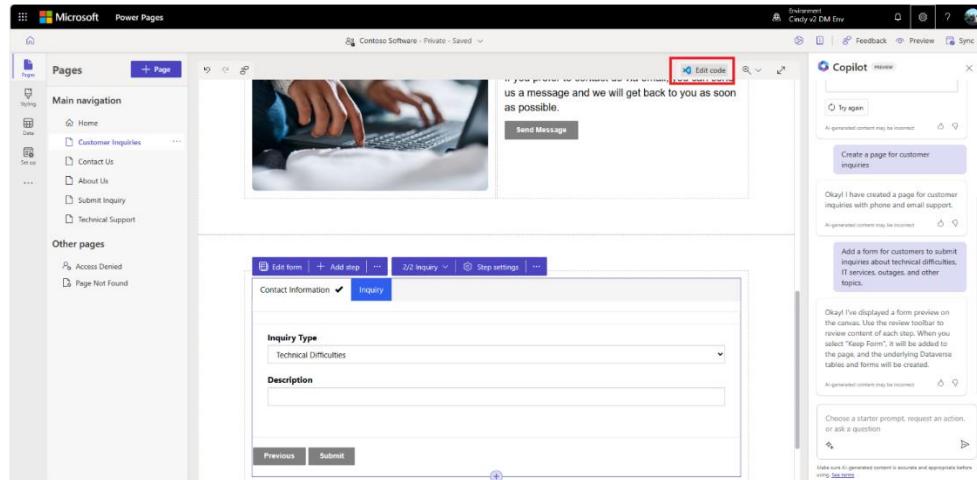


- f. Click “Preview” on Desktop to preview and test the form.
Note: New rows are created in the Dataverse table when the form is submitted. Go to Data workspace in Studio to see the data.



6. (BONUS) Add form validation with VSCode Web Copilot

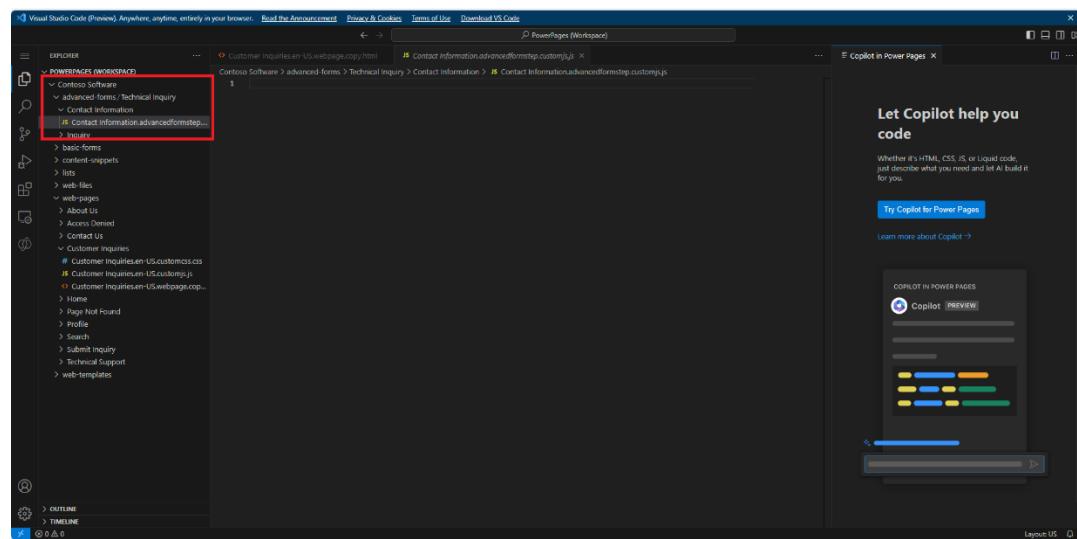
- Go back to Pages workspace, and click on “Edit code” in Studio-> Click “Open Visual Studio Code” in dialog.



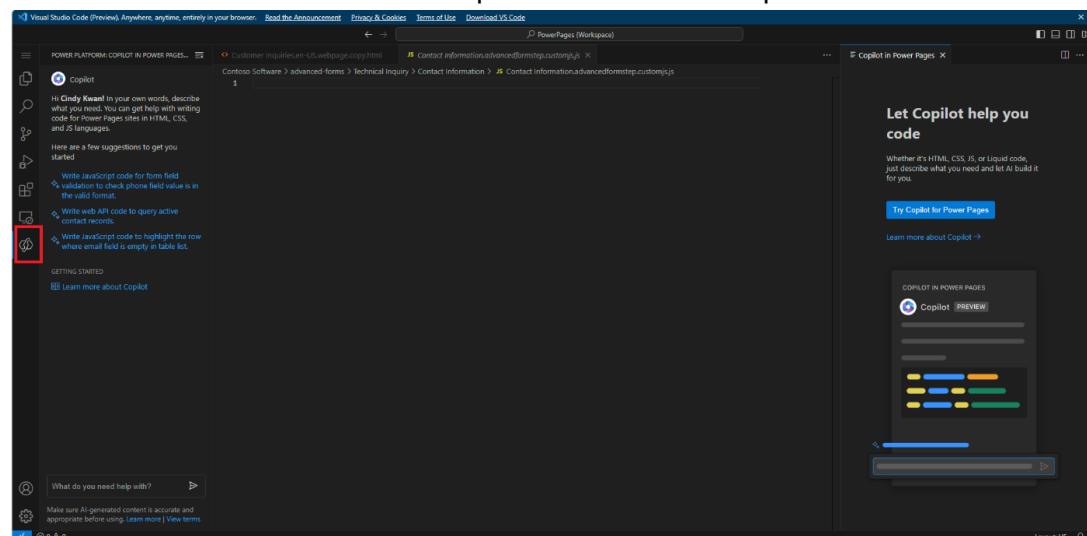
- This opens VSCode for web in a new browser tab.

Note: You may be asked to sign in. Click “Allow”.

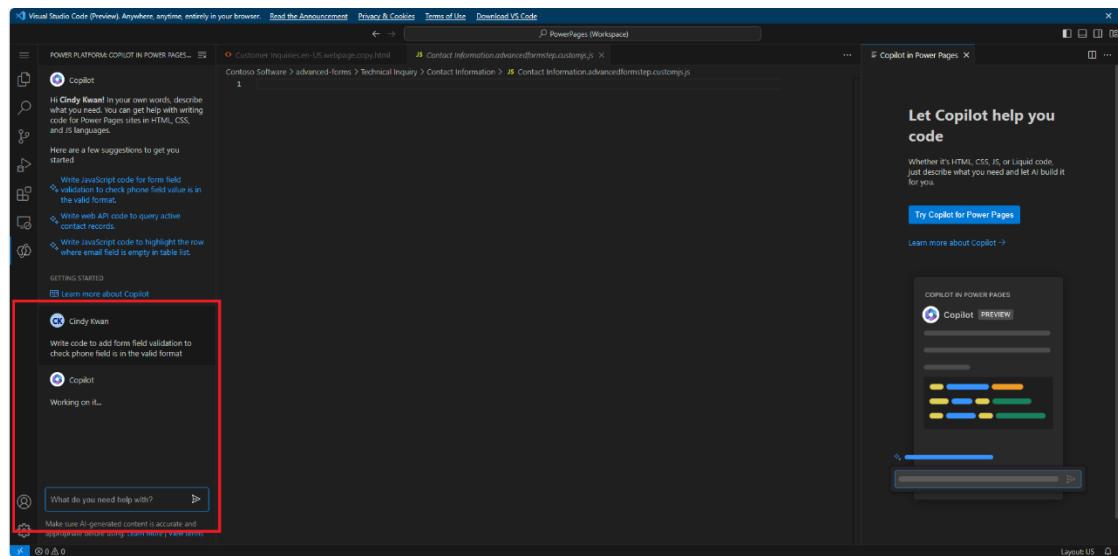
In the left navigation pane of VSCode for web, click “advanced-forms”-> select the step in your form that has the phone field -> click on the js file. In the example, this is the step 1: contact information.



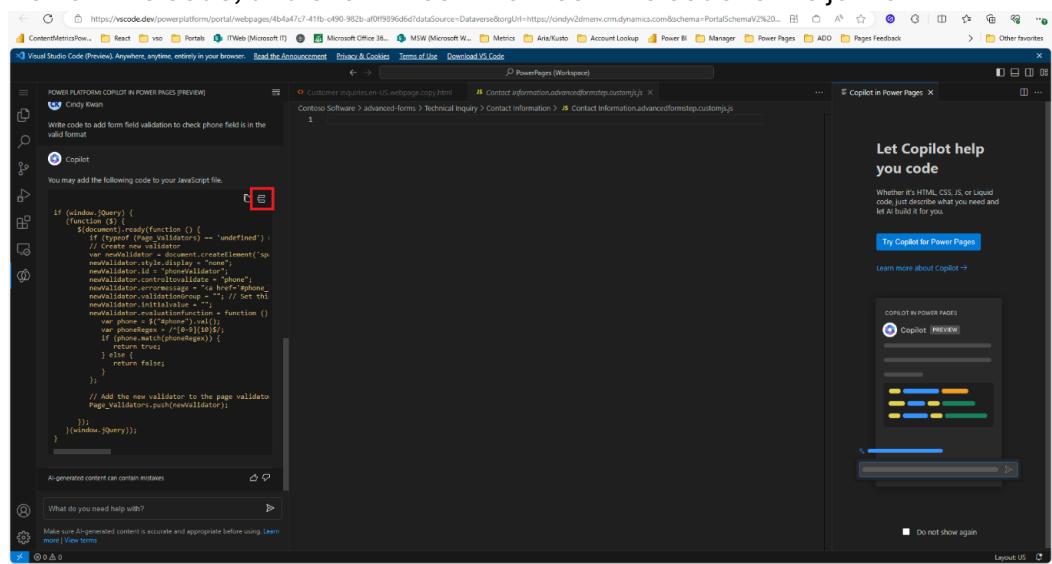
- c. Click on  in the left belt to open VSCode Web Copilot.



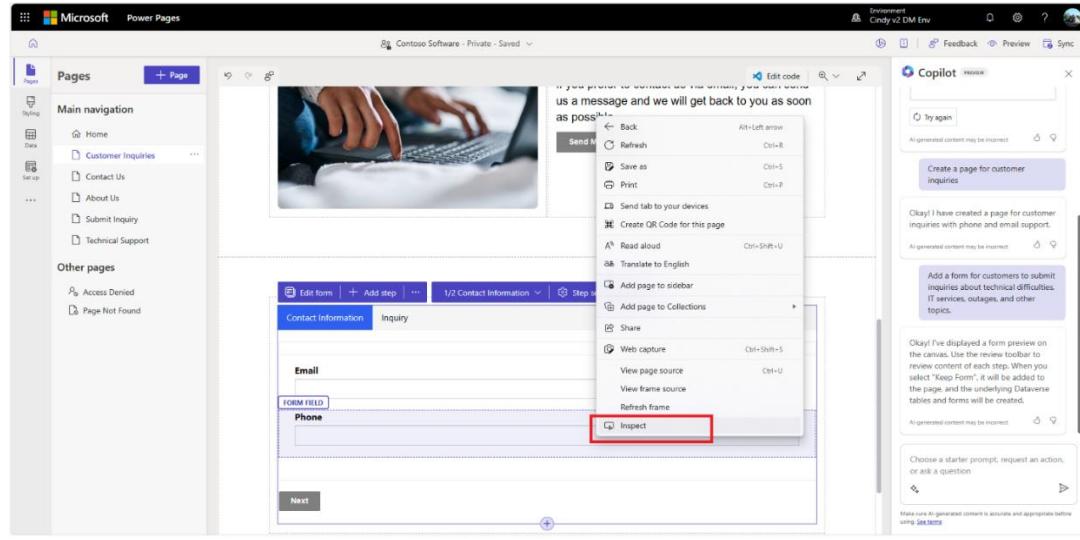
- d. Let's add phone number field validation to the form. Type **Write code to add form field validation to check phone field is in the valid format**. Hit <enter>.



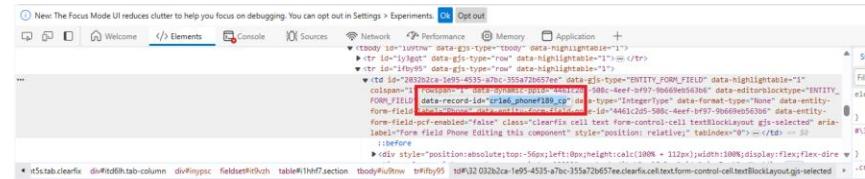
- Review the code, and click "Insert" to insert the code to the js file.



- Update the code to use 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.



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

```

1 if (window.jQuery) {
2   (function ($) {
3     $(document).ready(function () {
4       if (typeof (Page_Validators) == 'undefined') return;
5       // Create new validator
6       var newValidator = document.createElement('span');
7       newValidator.style.display = "none";
8       newValidator.id = "phoneValidator";
9       newValidator.controltovalidate = "cr1a6_phonef189_cp";
10      newValidator.errormessage = '<a href="#cr1a6_phonef189_cp_label" referencecontrolid="cr1a6_phonef189_cp" onclick="javascript:scrollToAndFocus';
11      newValidator.validationGroup = ""; // Set this if you have set ValidationGroup on the form
12      newValidator.initialvalue = "";
13      newValidator.evaluationfunction = function () {

```

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

```

1  if (window.jQuery) {
2      (function ($) {
3          $(document).ready(function () {
4              if (typeof (Page_Validators) == 'undefined') return;
5              // Create new validator
6              var newValidator = document.createElement('span');
7              newValidator.style.display = "none";
8              newValidator.id = "phoneValidator";
9              newValidator.controltovalidate = "cr1a6_phonef189_cp";
10             newValidator.errormessage = "<a href="#cr1a6_phonef189_cp_label' referencecontrolid='cr1a6_phonef189_cp' onclick='javascript:scrollToAndFocusControl(this, this.referencecontrolid);'>" + validationMessage + "</a>";
11             newValidator.validationgroup = "";
12             newValidator.initialvalue = "";
13             newValidator.evaluationfunction = function () {
14                 var phone = $('#phone').val();
15                 var phoneRegex = /^[0-9]{10}\$/;
16                 if (phone.match(phoneRegex)) {
17                     return true;
18                 } else {
19                     return false;
20                 }
21             };
22
23             // Add the new validator to the page validators array:
24             PageValidators.push(newValidator);
25
26         });
27     })(window.jQuery);
28 }

```

Replace the phone variable value with the phone field id:

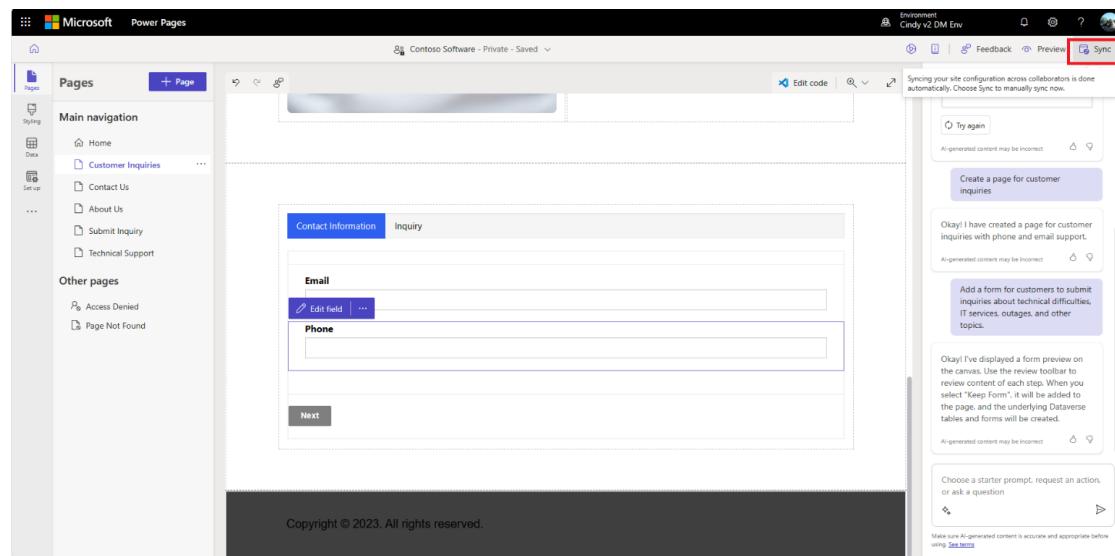
```

1  if (window.jQuery) {
2      (function ($) {
3          $(document).ready(function () {
4              if (typeof (Page_Validators) == 'undefined') return;
5              // Create new validator
6              var newValidator = document.createElement('span');
7              newValidator.style.display = "none";
8              newValidator.id = "phoneValidator";
9              newValidator.controltovalidate = "cr1a6_phonef189_cp";
10             newValidator.errormessage = "<a href="#cr1a6_phonef189_cp_label' referencecontrolid='cr1a6_phonef189_cp' onclick='javascript:scrollToAndFocusControl(this, this.referencecontrolid);'>" + validationMessage + "</a>";
11             newValidator.validationgroup = "";
12             newValidator.initialvalue = "";
13             newValidator.evaluationfunction = function () {
14                 var phone = $("#cr1a6_phonef189_cp").val();
15                 var phoneRegex = /^[0-9]{10}\$/;
16                 if (phone.match(phoneRegex)) {
17                     return true;
18                 } else {
19                     return false;
20                 }
21             };
22
23             // Add the new validator to the page validators array:
24             PageValidators.push(newValidator);
25

```

Save changes (Ctrl+s).

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



- 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:

- Create a flow using Natural Language
- Edit your flow using Copilot and the new designer
- 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:

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

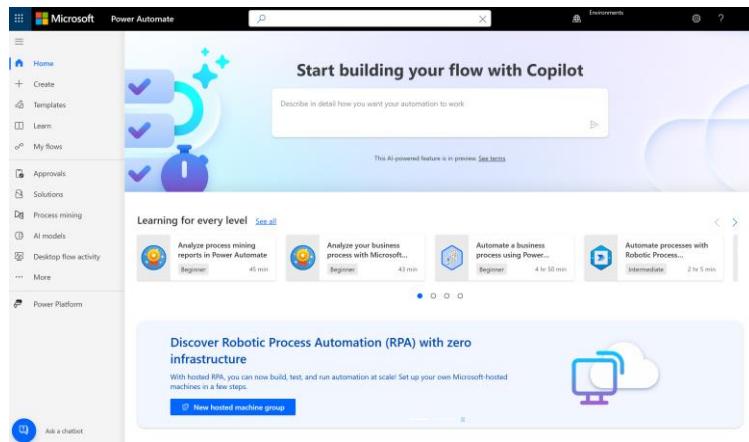
3. If prompted, keep your region set as **United States** in the dialog box.
4. Make sure you are using the **Developer** environment ("Dev - labadmin#"), and **NOT** the **Default** environment.
5. On the homepage, click [**Start with Data**]
6. Click [**Upload an Excel file**]
7. Download the Excel 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!



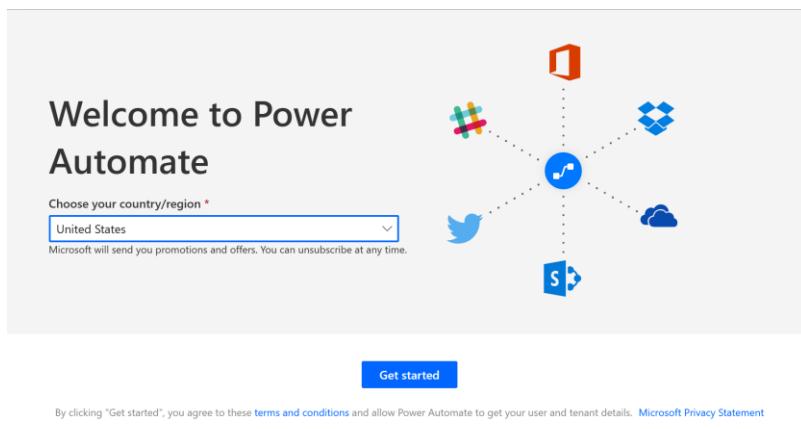
Steps

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.

Select environment

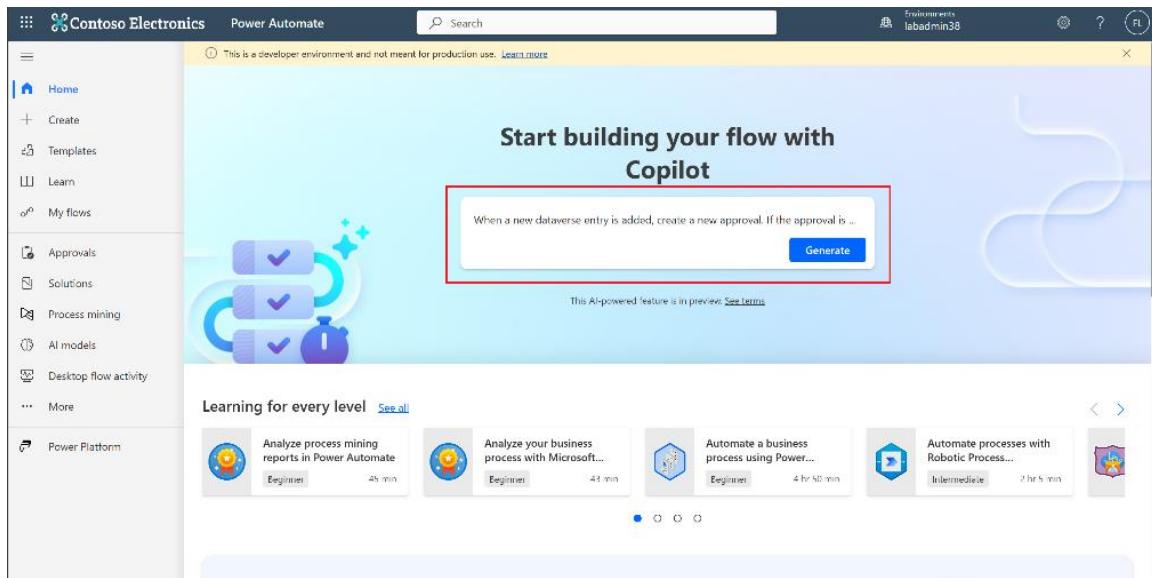
Spaces to create, store, and work with data and apps.
Learn more

Search Filter

- Build flows (2)
 - Contoso (default)
 - labadmin38
- Other environments (0)

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.*



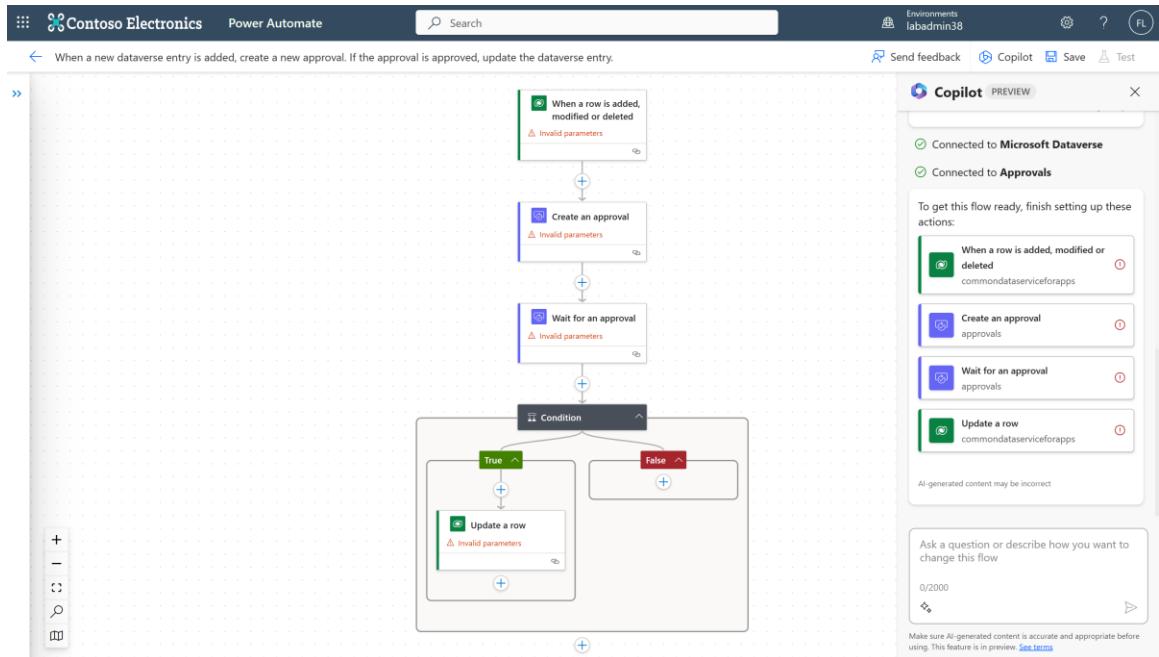
- b. Copilot converts your intent into an automated workflow. You can edit to make changes if you need. Click [Next] at the bottom of the page.
 - i. *If your flow doesn't match the screenshot below, make sure you've copied the prompt exactly (including punctuation!). Copilot is constantly evolving so 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.*

The screenshot shows the Power Automate AI-generated flow suggestion interface. It's titled "Describe it to design it" and "PREVIEW". The left sidebar says "Step 1 of 2" and "What will your flow do?". The main area has a prompt: "When a new dataverse entry is added, create a new approval. If the approval is approved, update the dataverse entry." Below this is a "Suggested flow" section with a "Trigger" step ("When a row is added, modified or deleted Microsoft Dataverse") and an "Actions" section containing "Create an approval" (under Approvals), "Wait for an approval" (under Approvals), a "Condition" step ("True"), and an "Update a row" (under Microsoft Dataverse) step. At the bottom are "Next" and "Cancel" buttons.

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

The screenshot shows the Power Automate review and creation interface. It's titled "Describe it to design it" and "PREVIEW". The left sidebar says "Step 2 of 2" and "Make sure everything's ready". The main area shows "Review your connected apps and services" with two entries: "Microsoft Dataverse" (connected) and "Approvals" (connected). To the right is the "Suggested flow" from the previous screen. At the bottom are "Back", "Create flow", and "Cancel" buttons.

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



5. Edit your flow

- Now you need to update your flow by filling in the parameters.
 - 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**)

- 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.)

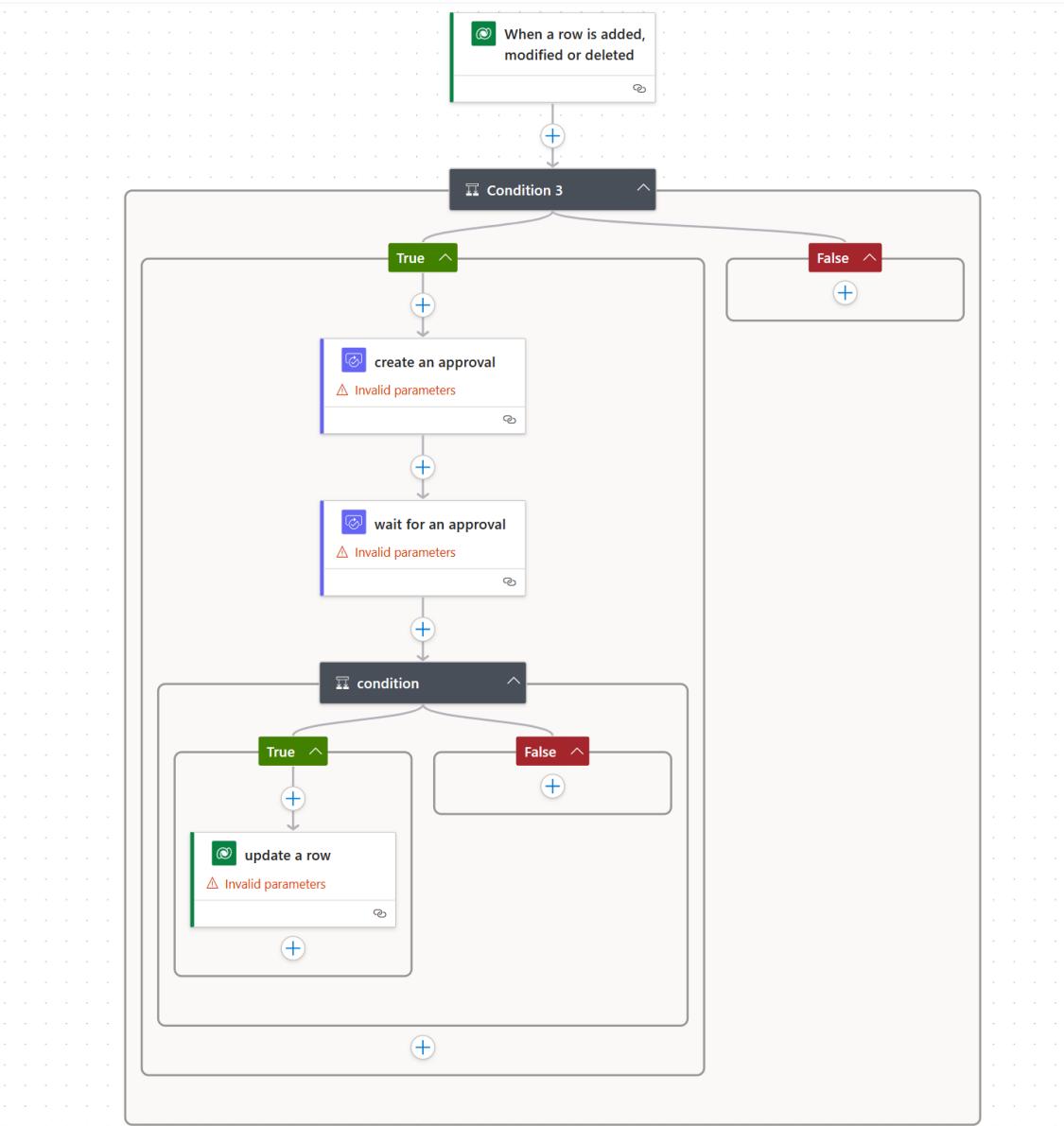
i. *Tip: You can search in the dropdown or type in “customer” and it will narrow down the results for you.*

The screenshot shows the 'When a row is added, modified or deleted' configuration screen. The 'Table Name' field is highlighted with a red border and contains the value 'customer'. A tooltip message 'Table name' is required.' is displayed below the input field. To the right, a Copilot pane is open, showing a list of suggestions under 'Customer Request'. One suggestion is highlighted with a red border and says 'Use "customer" as a custom value'. Another suggestion below it says 'Enter custom value'.

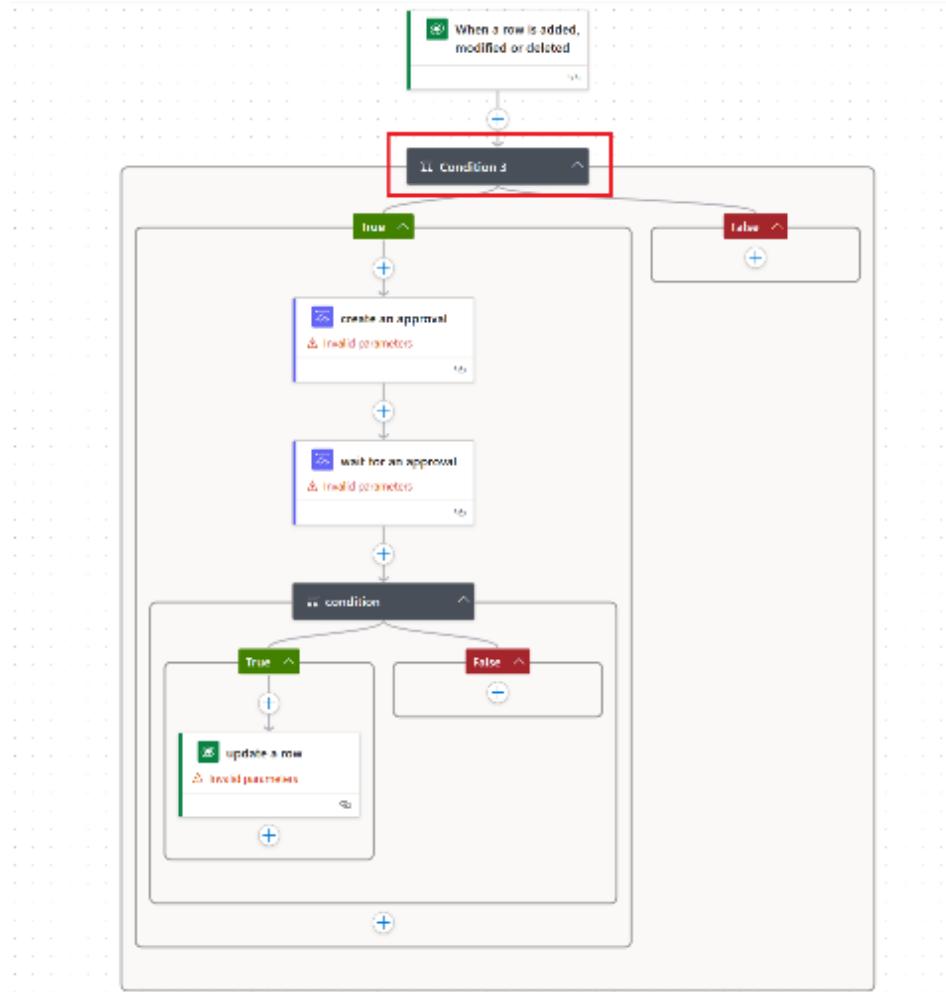
- d. You realize when you were creating your flow, you forgot to include the condition to check who the customer is. Don't worry, you can quickly edit your flow using Copilot! Only if the customer is Fabrikam, you want an approval sent.
- e. In the Copilot pane on the right side of the page, tell Copilot: **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.**

The screenshot shows the Power Automate flow editor. The flow consists of the following steps: 'When a row is added, modified or deleted' (trigger), 'Create an approval' (action), 'Wait for an approval' (action), and a 'Condition' block. The 'Condition' block has two branches: 'True' leading to 'Update a row' and 'False' (empty). A Copilot pane is open on the right, titled 'Copilot PREVIEW'. It displays a welcome message and a task card with the instruction: 'When a new dataverse entry is added, create a new approval. If the approval is approved, update the dataverse entry.' Below this, a callout box contains the specific AI-generated condition: '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.' A note at the bottom of the Copilot pane says: 'Make sure AI generated content is accurate and appropriate before using. This feature is in preview. See terms.'

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



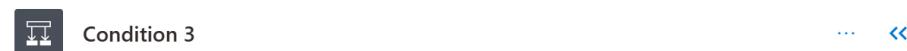
- g. Click the first **[Condition]** box at the top in the designer to open the side pane.



- 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!

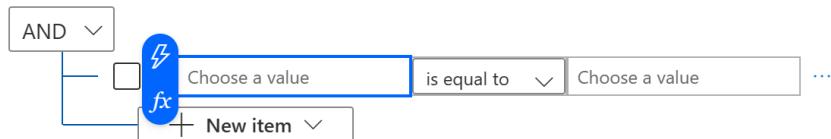


- j. In that same first field, click inside the textbox, click on the blue lightning bolt, next to **When a row is added, modified, or deleted**, click [See more]. Scroll down and select [**Customer_Email**].



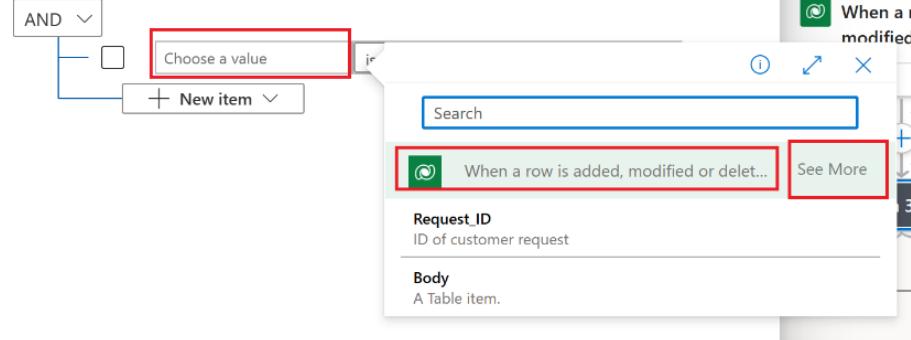
Parameters Settings Code View About

Condition Expression *



Parameters Settings Code View About

Condition Expression *

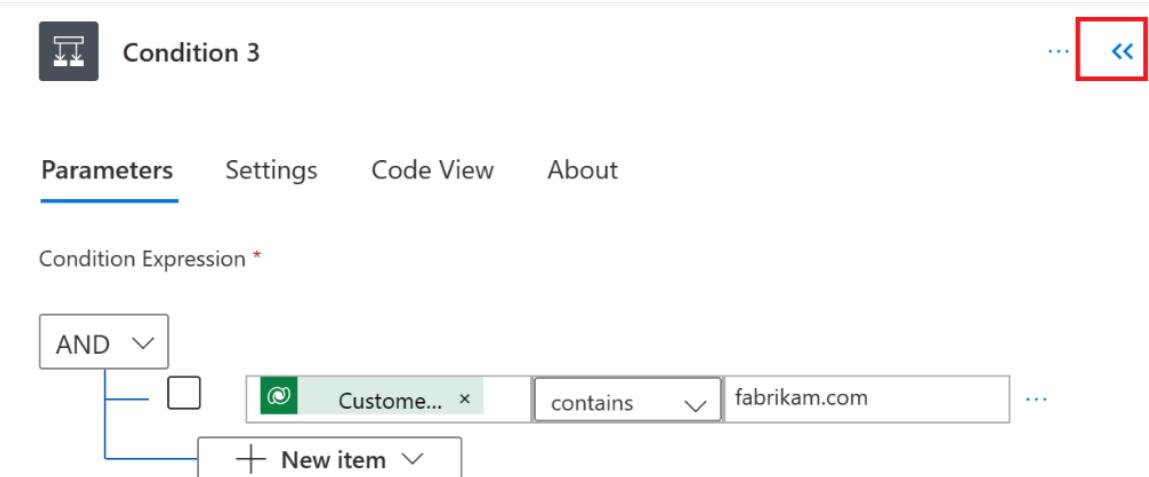


Customer_Email
Email of the customer

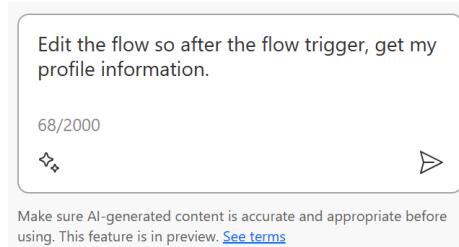
Condition Expression *



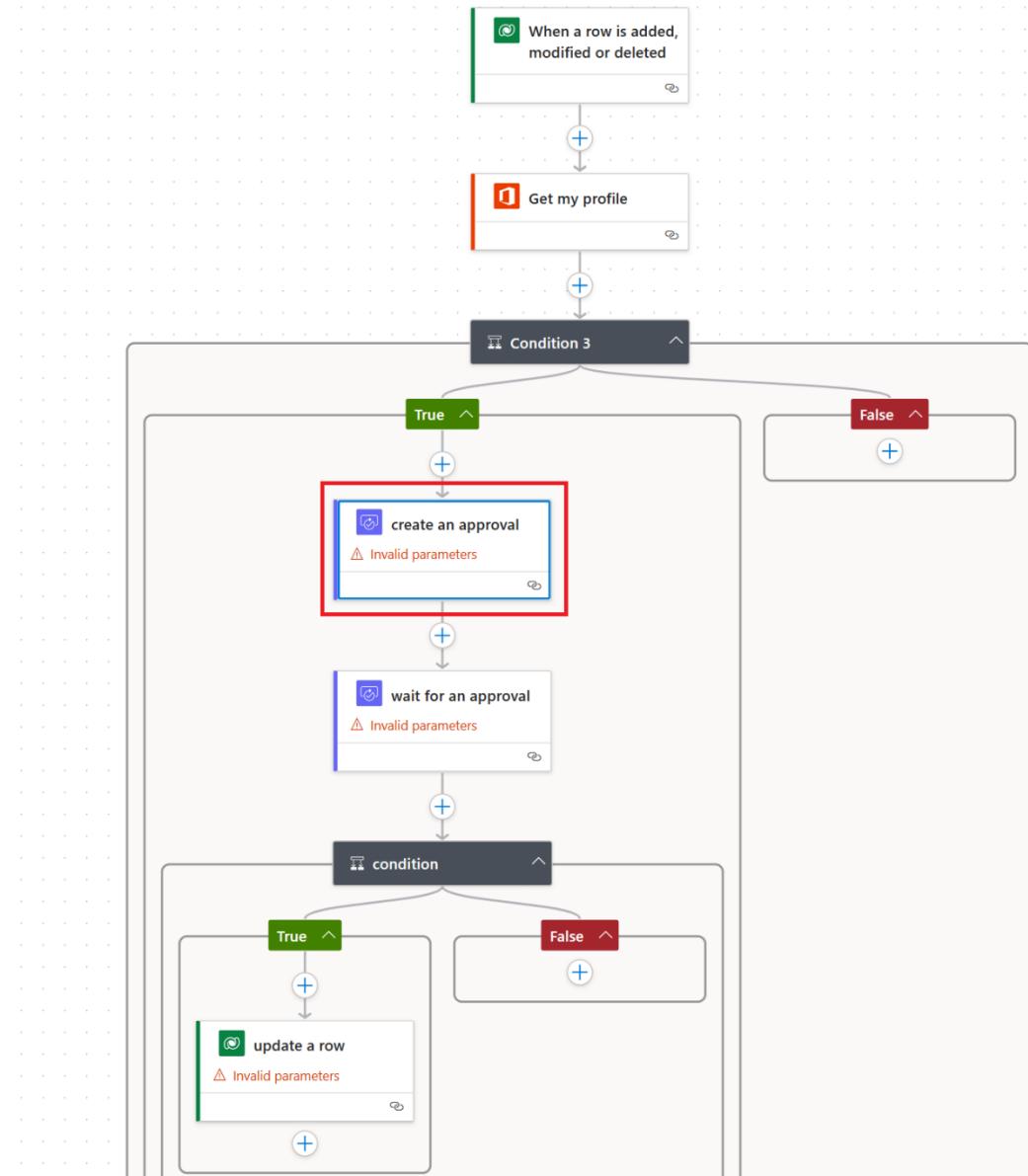
k. Click << to close the condition pane.



- 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]

create an approval
...
<<

Parameters ●
Settings
Code View
Testing
About

Approval Type *

Select an approval type.

'Approval type' is required.

Connected to Approvals. [Change connection](#)

- o. You will see more fields appear.

The screenshot shows the 'create an approval' interface. At the top, there's a blue icon with a circular arrow and the text 'create an approval'. To the right are three small icons: three dots, a double left arrow, and a double right arrow. Below this is a navigation bar with tabs: 'Parameters' (underlined in blue), 'Settings', 'Code View', 'Testing', and 'About'. The main area contains several input fields:

- Approval Type ***: A dropdown menu showing 'Approve/Reject - First to respond'.
- Title ***: An input field containing 'Create a title for the approval'.
- Assigned To ***: An input field containing 'Email addresses, separated by a semicolon (;)'.
- Details**: An input field containing 'Markdown supported (see <https://aka.ms/approvaldetails>)'.
- Item Link**: An input field containing 'Add a link to the item to approve'.
- Item Link Description**: An input field containing 'Describe the link to the item'.

Advanced parameters

Showing 0 of 4 ▼ [Show all](#) [Clear all](#)

Connected to Approvals. [Change connection](#)

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

 create an approval

... <<

Parameters ● Settings Code View Testing About

Approval Type *

Approve/Reject - First to respond

Title *

New support case created for customer Fabrikam

Assigned To *

Email addresses, separated by a semicolon (;)

'Assigned to' is required.

Details

Markdown supported (see <https://aka.ms/approvaldetails>)

Item Link

Add a link to the item to approve

Item Link Description

Describe the link to the item

Advanced parameters

Showing 0 of 4

Show all Clear all

Connected to Approvals. [Change connection](#)

- 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.

 create an approval

Parameters ● Settings Code View Testing About

Approval Type *

Approve/Reject - First to respond

Title *

New support case created for customer Fabrikam

Assigned To *

Email addresses, separated by a semicolon (;)

'Assigned to' is required.

Details

Markdown supported (see <https://aka.ms/approvaldetails>)

Item Link

Add a link to the item to approve

Item Link Description

Describe the link to the item

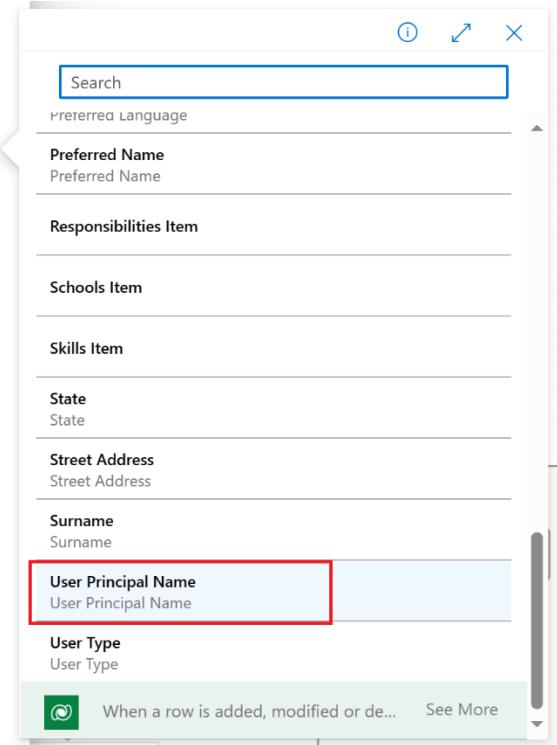
Advanced parameters

Showing 0 of 4

Show all Clear all

Connected to Approvals. [Change connection](#)

- 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**].

The screenshot shows the 'create an approval' screen in the Power Platform canvas editor. The left side of the screen displays the approval configuration, including:

- Parameters** tab selected.
- Approval type**: Set to 'Approve/Reject - First to respond'.
- Title**: 'New support case created for customer Fabrikam'.
- Assigned to**: 'User Prin... x' (highlighted with a red box).
- Details** section: Contains a field labeled 'Customer Email:' which is also highlighted with a red box.
- Item Link**: 'Add a link to the item to approve'.
- Item Link Description**: 'Describe the link to the item'.
- Advanced parameters**: Shows 0 of 4.

The right side of the screen shows the 'Customer Request' data view with the following fields:

- Created By (Table Name)**: Unique identifier of the user who created the record.
- Created By (Type)**: Unique identifier of the user who created the record.
- Created On**: Date and time when the record was created.
- Created At**: Date and Time of the inquiry.
- Customer Request**: Unique identifier for entity instances.
- Customer_Email**: Email of the customer (highlighted with a red box).
- Customer ID**: ID of the customer.
- Description**: Description of the inquiry.
- Import Sequence Number**: Sequence number of the import that created this record.



- 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].

The screenshot shows the 'Details' pane of a Microsoft Power Automate flow. On the left, there is a 'Customer Email' field and a 'Description:' field. The 'Description:' field has a red box around it. On the right, a 'Customer Request' Dataverse connector pane is open, displaying a list of fields. One of these fields, 'Description', is also highlighted with a red box.

- u. Click << to close the pane.

 create an approval

... 

Parameters Settings Code View Testing About

Approval Type *

Approve/Reject - First to respond

Title *

New support case created for customer Fabrikam

Assigned To *

User Prin... ×

Details

Customer Email:  Customer... × . Description:  Descripti... ×

Item Link

Add a link to the item to approve

Item Link Description

Describe the link to the item

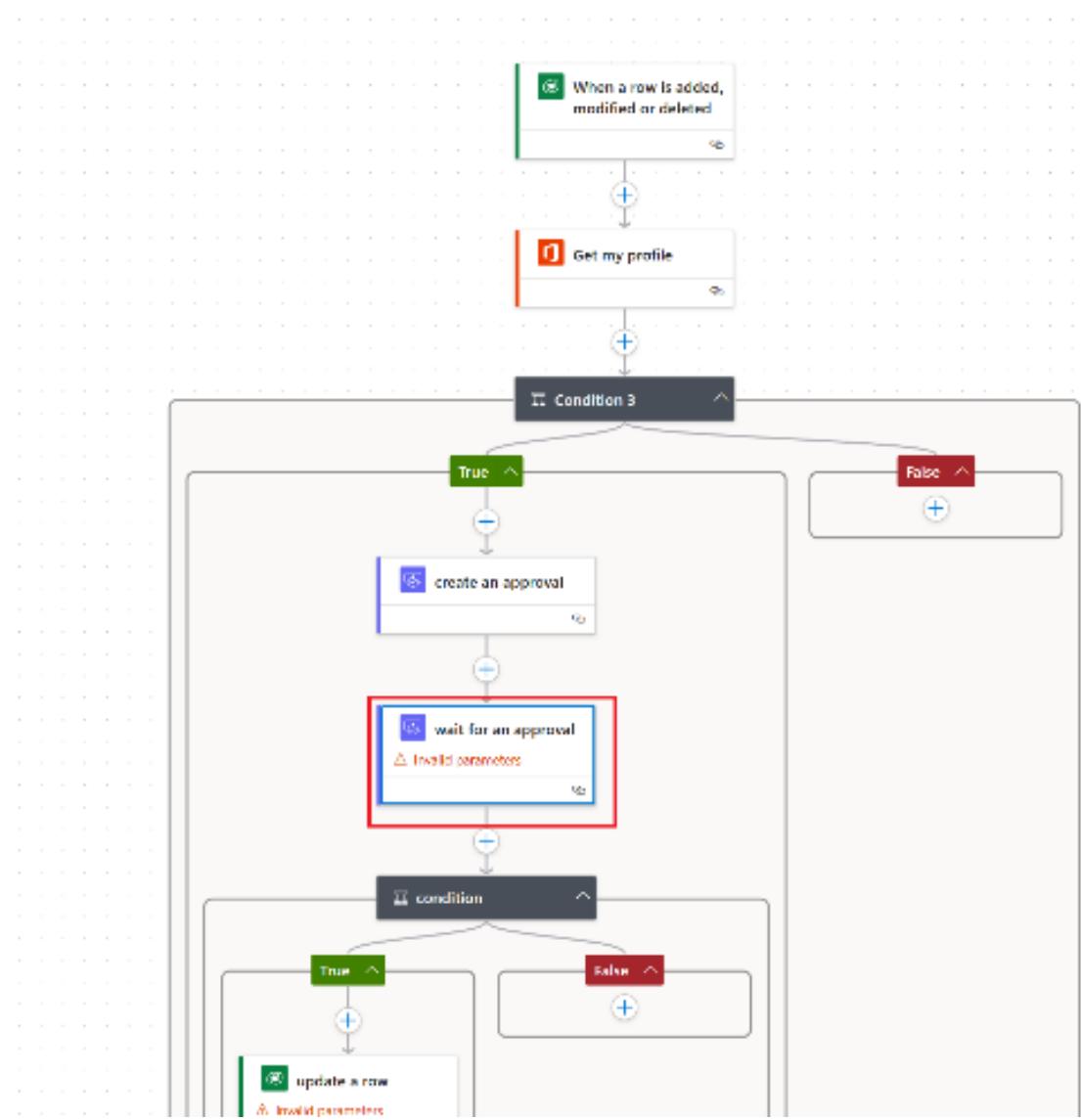
Advanced parameters

Showing 0 of 4

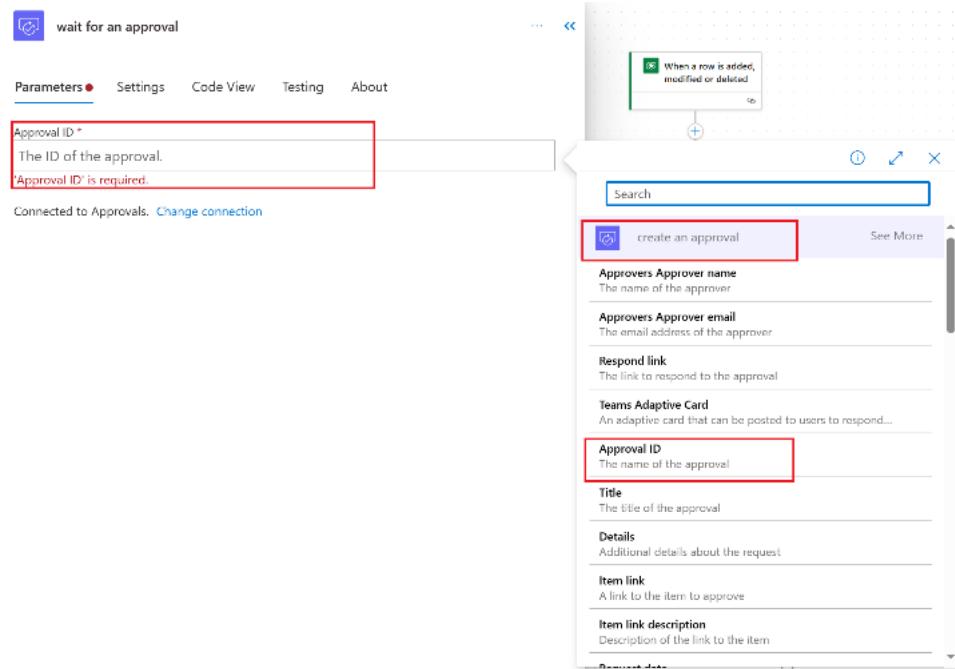
Show all  Clear all 

Connected to Approvals. [Change connection](#)

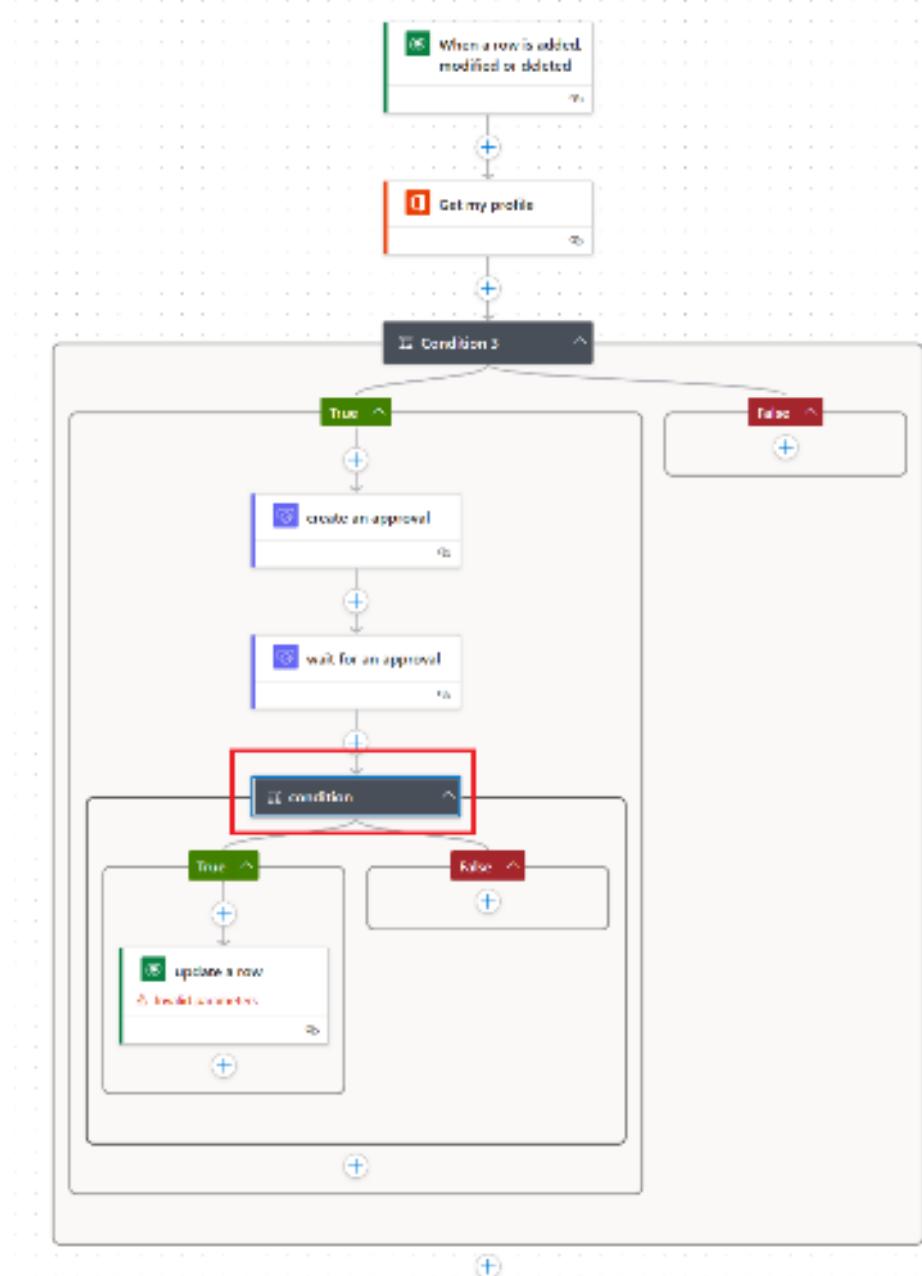
- v. Next, click into the box called **Wait for an approval** to open the pane.



- 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!



condition

Parameters Settings Code View About

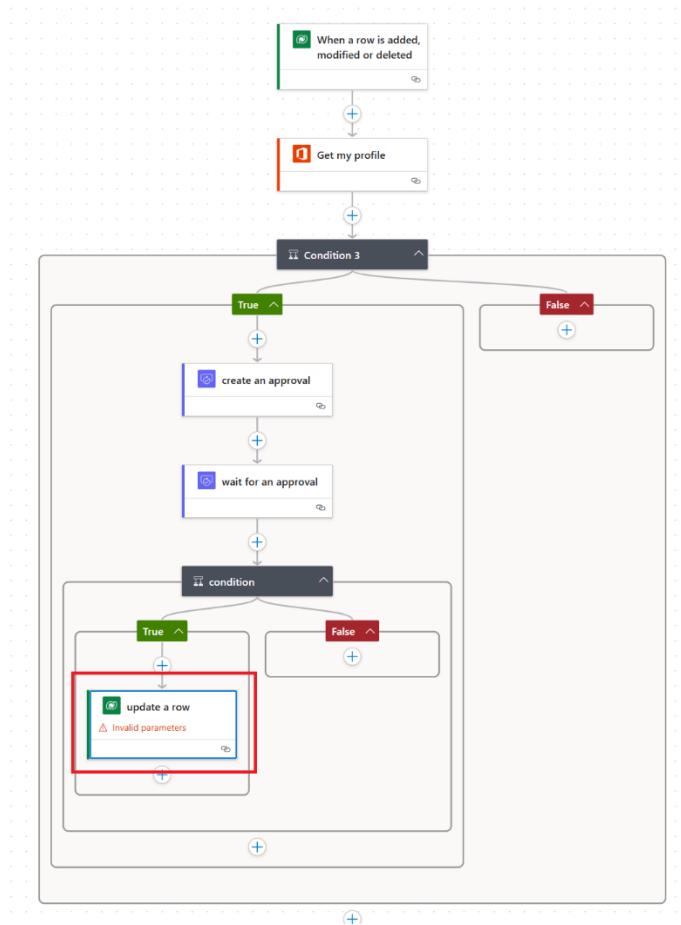
Condition Expression *

AND

body/ou... is equal to Approve

+ New item

- 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.)

update a row

Parameters Settings Code View Testing About

Table Name *
Customer Request

Row ID *
Enter the row's globally unique identifier (GUID)

Request_ID
ID of the request

Advanced parameters
Showing 0 of 17 Show all Clear all

Connected to labadmin38@M365x14796634.onmicrosoft.com. [Change connection](#)

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

update a row

Parameters Settings Code View Testing About

Table Name *
Customer Request

Row ID *
Enter the row's globally unique identifier (GUID)
'Row ID' is required.

Request_ID
ID of the request

Advanced parameters
Showing 0 of 17 Show all Clear all

Connected to labadmin38@M365x14796634.onmicrosoft.com. [Change connection](#)

create an approval

wait for an approval

Search

Unique identifier of the delegate user who created the r...

Created By (Table Name)
Unique identifier of the user who created the record.

Created By (Type)
Unique identifier of the user who created the record.

Created By (Value)
Unique identifier of the user who created the record.

Created On
Date and time when the record was created.

Created At
Date and Time of the request

Customer Request
Unique identifier for entity instances

Customer_Email
Email of the customer

Customer_ID
ID of the customer

Description
Description of the query

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

 update a row

... <<

Parameters Settings Code View Testing About

Table Name *

Customer Request

Row ID *

 Custome... x

Request_ID

ID of the request

Advanced parameters

Showing 0 of 17

Show all Clear all

Connected to labadmin38@M365x14796634.onmicrosoft.com. [Change connection](#)

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.

 update a row

Parameters Settings Code View Testing About

Table Name *

Customer Support Cases

Row ID *

 Custome... x

Advanced parameters

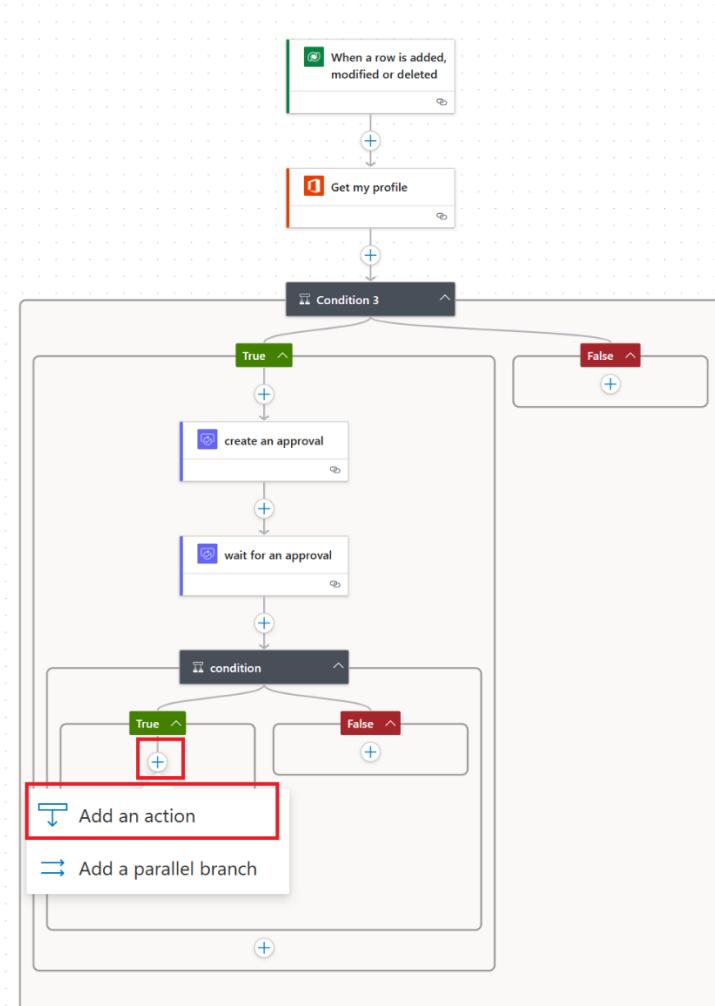
Showing 16 of 16

Show all

Agent_ID

9999

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.

Add an action

X

X

Action Type

Actions

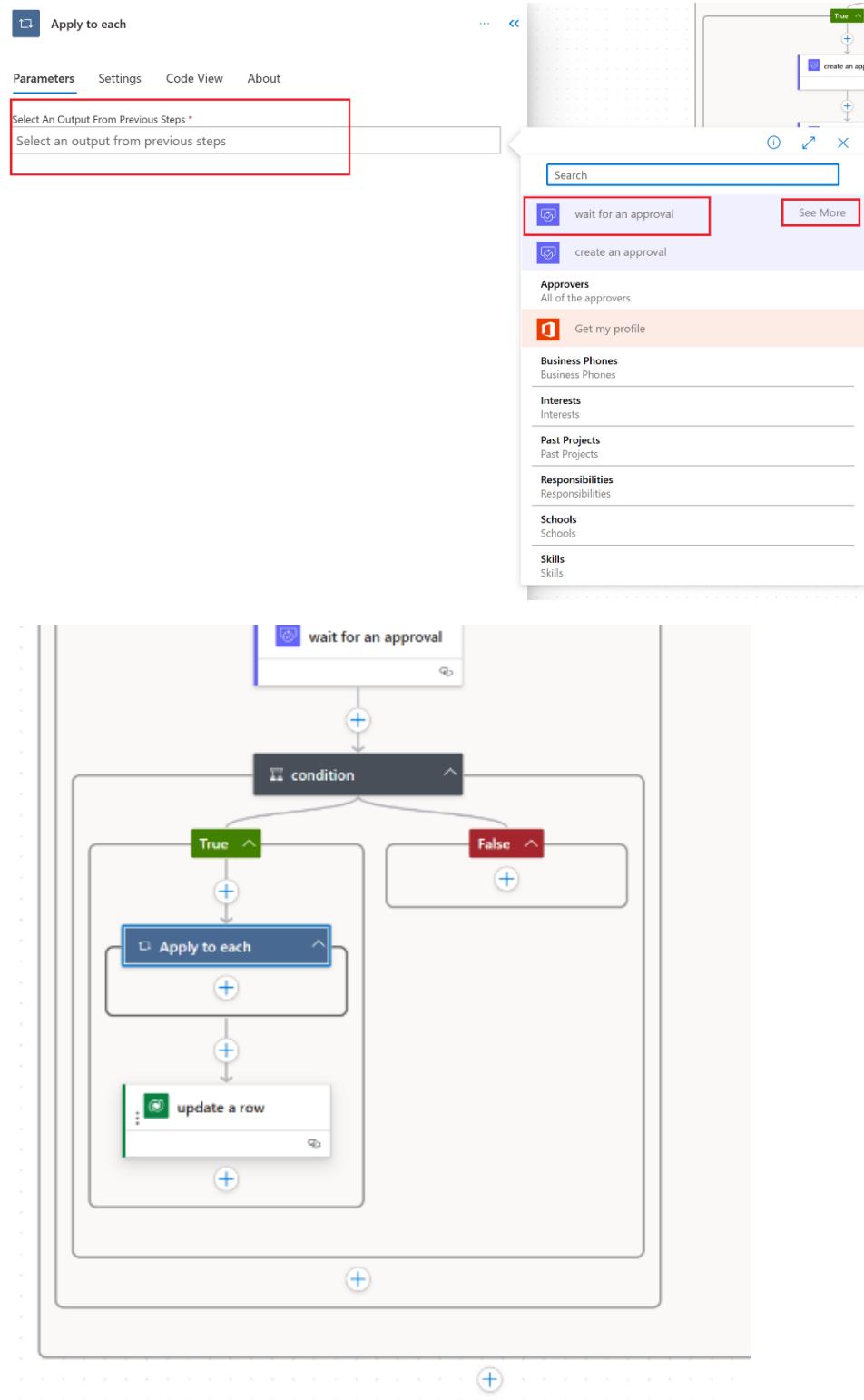
Group by Connector

Control

See more

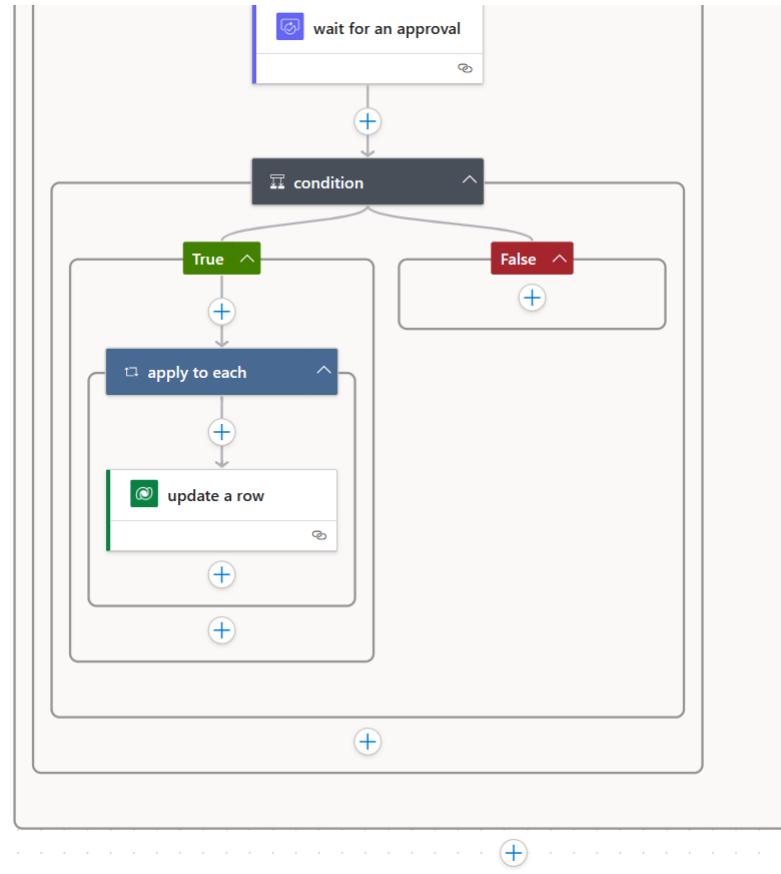
Apply to each

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**.

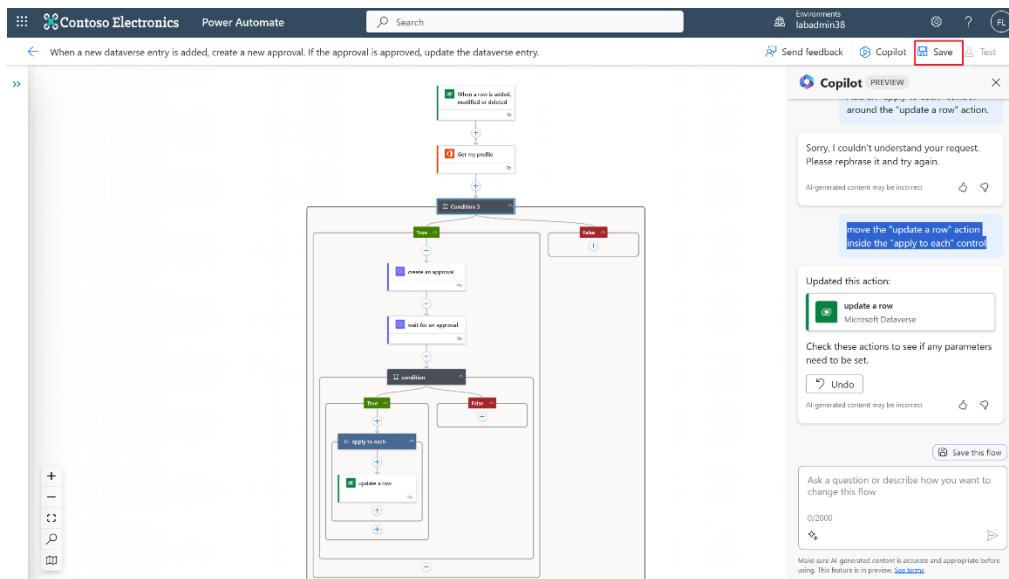


hh. We need the **Update a row** action to be inside the **Apply to Each** control. Tell copilot: **Move the “update a row” action inside the “apply to each” control.** You should now see the action inside!

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

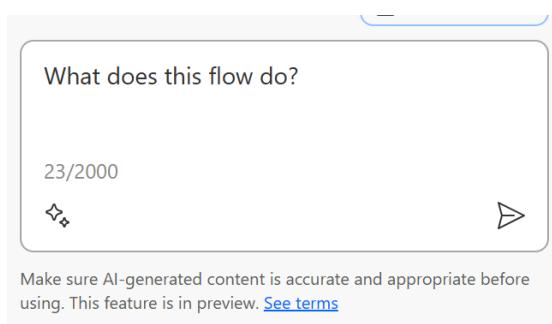


- ii. Save your flow at the top right of the page.



6. Use Copilot to learn about your flow

- In addition to creating and editing a flow, you can use Copilot to learn about your flows!
- 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.)



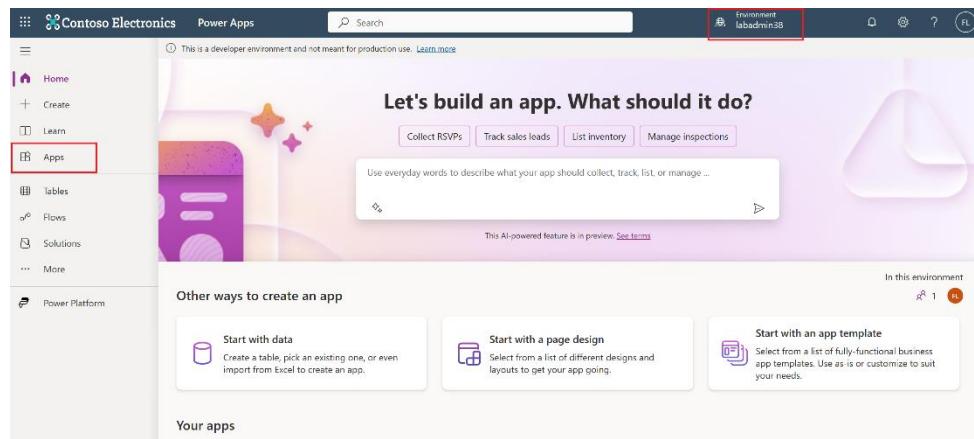
What does this flow do?

This flow subscribes to a webhook trigger for a specific entity in Common Data Service for Apps. If the customer email contains "Fabrikam.com", it creates an approval request for a new support case and waits for the approval outcome. If the outcome is "approve", it updates a record in Common Data Service for Apps by setting the "cr0b0_agentid" field to "9999".

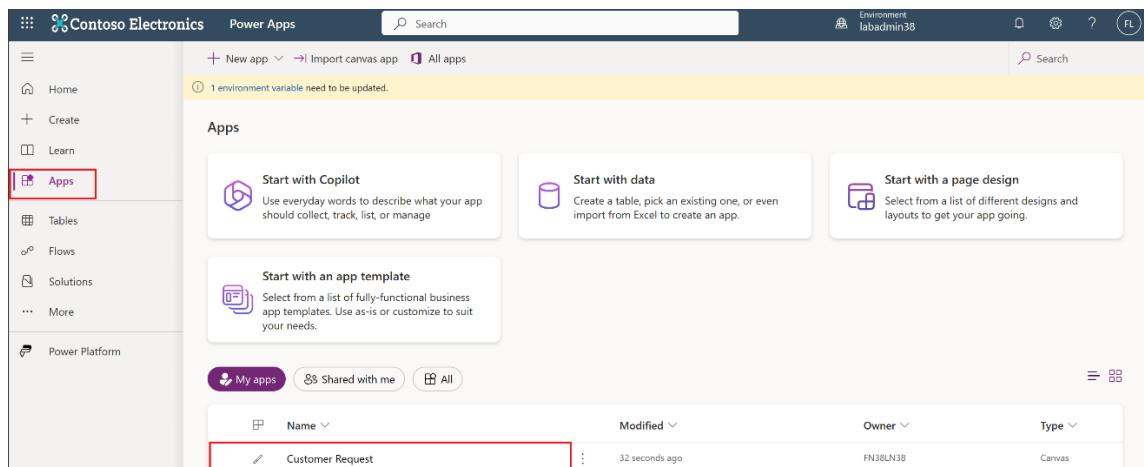
AI-generated content may be incorrect

7. Test your flow

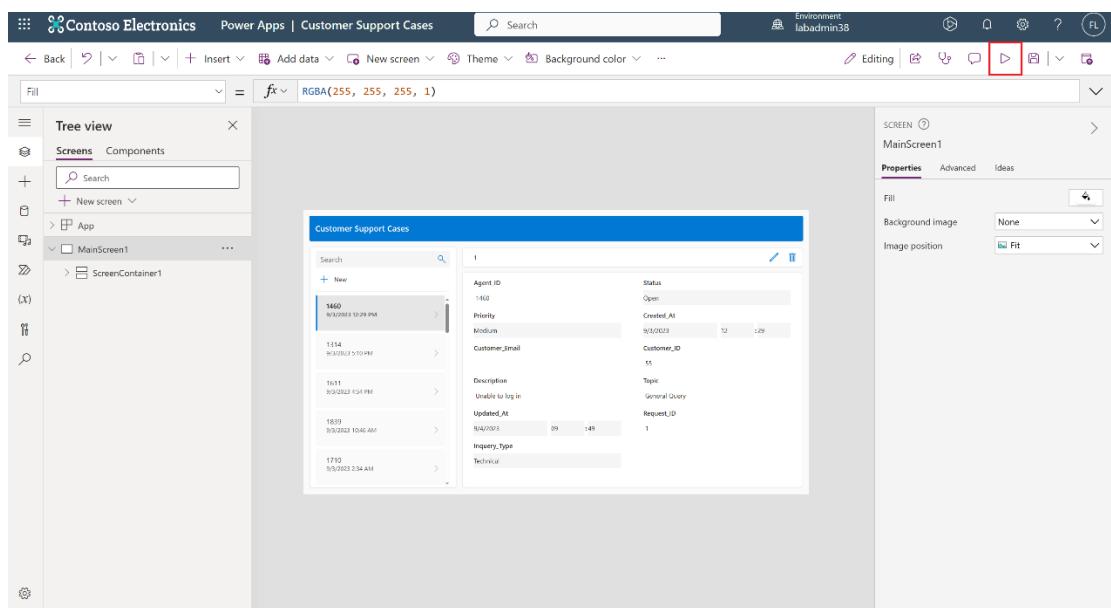
- Now let's run your flow! First, you'll need to open the Power Apps app that you already created. In a new browser, go to <https://make.preview.powerapps.com> and login with your demo credentials (if you aren't logged in already).
- Make sure you are using the **Developer** environment (**Dev - labadmin#**),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



- 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.

Agent_ID	Status
1460	Open

Priority	Created_At
Medium	9/3/2023 12:29 PM

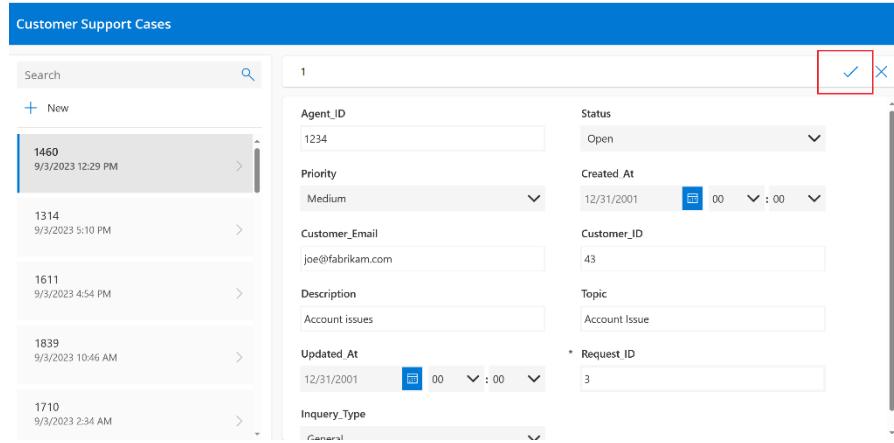
Customer_Email	Customer_ID
joe@fabrikam.com	55

Description	Topic
Unable to log in	General Query

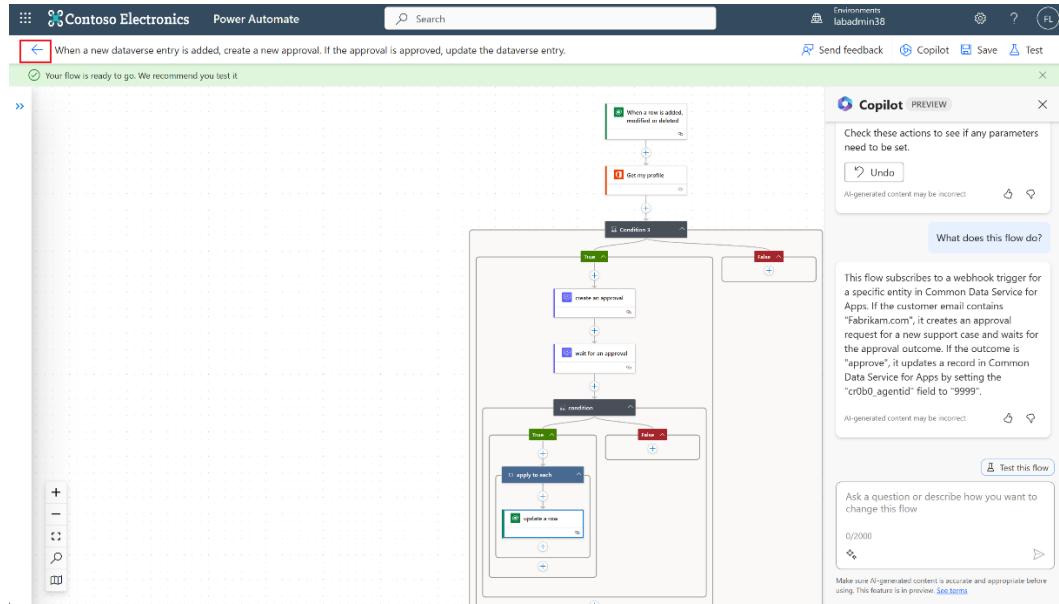
Updated_At	Request_ID
9/4/2023 09:49	1

Inquiry_Type
Technical

- g. Fill in the fields in the form with:
- Agent ID: **1234**
 - Priority: **Medium**
 - Customer Email: **joe@fabrikam.com**
 - Description: **Account Issues**
 - Status: **Open**
 - Customer ID: **43**
 - Message: **I need help with my account**
 - Subject: **Account Issue**
 - 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.



- 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!)



- You can see under **Run History**, your flow is running! It won't finish until you respond to the approval.
 - If you don't see your flow run status under Run History, you may need to refresh. Click the spinning arrow icon to refresh.

28-day run history			Edit columns	All runs
Start	Duration	Status		

- 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.

Respond X

Overview

Approval
New support case created for customer
Fabrikam

Requester
 FN38LN38

Received
Sep 29, 03:42 PM (2 min ago)

Details

Customer email: joe@fabrikam.com.
Description: Account issues

Choose your response *

Select an option ▼

Add a comment

(optional)

Confirm Cancel

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

Choose your response *

Select an option ▼

Approve

Reject

Reassign

- 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.

Name	Modified	Type
When a new dataverse entry is added, create a new approval.	5 min ago	Automated
When a new dataverse entry is added, send me an approval. i...	4 h ago	Automated

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

28-day run history i		
Start	Duration	Status
Sep 29, 03:42 PM (4 min ago)	00:03:25	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!**

Agent_ID

1234

The screenshot shows a Microsoft Copilot interface for managing customer support cases. On the left, a sidebar lists several cases with their IDs and customer emails. A specific case, '9999' with email 'joe@fabrikam.com', is selected and highlighted with a blue border. On the right, a detailed view of this case is displayed in a card format. The card includes fields such as Agent_ID (9999), Status (Open), Priority (Medium), Created_At (12/31/2001 00:00:00), Customer_Email (joe@fabrikam.com), Customer_ID (44), Description (I need help), Topic (account issue), Updated_At (12/31/2001 00:00:00), Request_ID (5675), and Inquiry_Type (Technical). The Agent_ID field is currently selected, indicated by a red border around its input box.

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

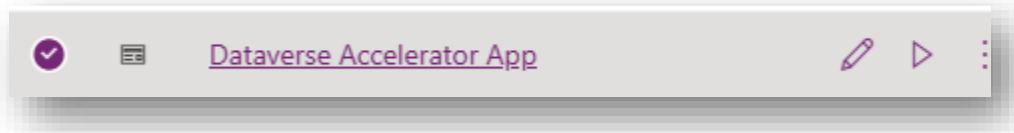
Requirement: Complete Exercise 1

Scenario: Classify automatically upcoming cases

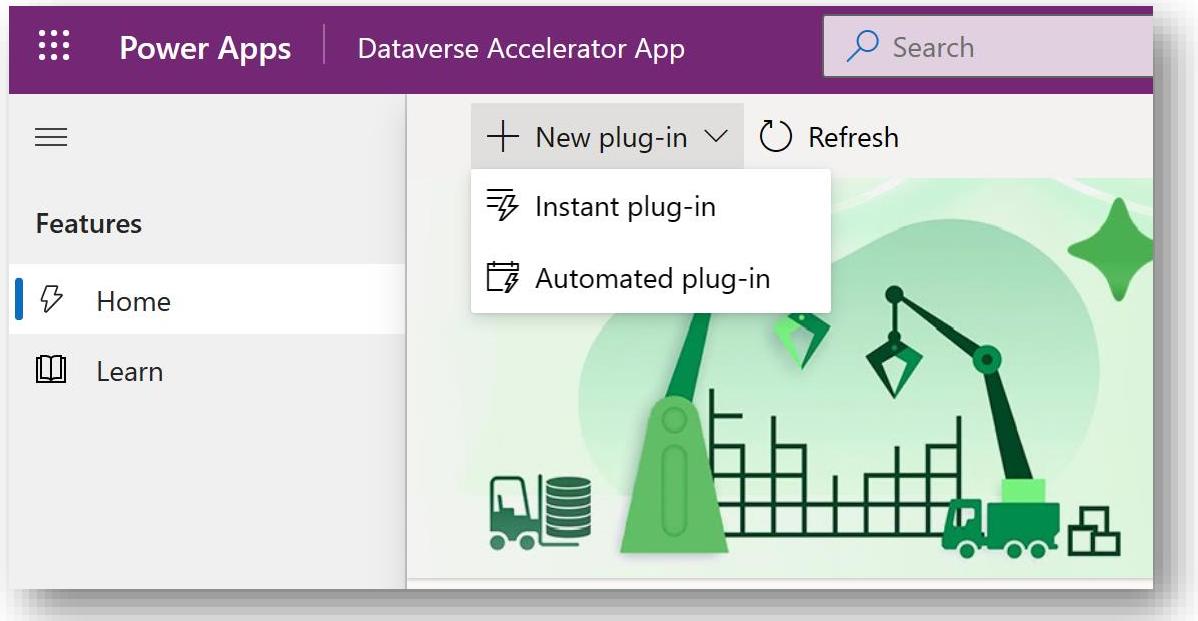
During this exercise, we will see how you can leverage AI Builder default Prompts and the Dataverse Accelerator to perform some AI automations when records are created in a table.

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)  
);
```

Automated plug-in > New

Display name *

Classify case



Table *

crd4a_CustomerRequest



Run this plug-in when the row is *

Created

Updated

Deleted

Expression

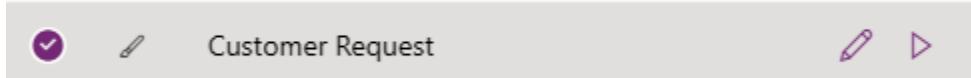
Define the behavior of the plug-in when invoked. [Learn more](#)

```
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)  
);
```

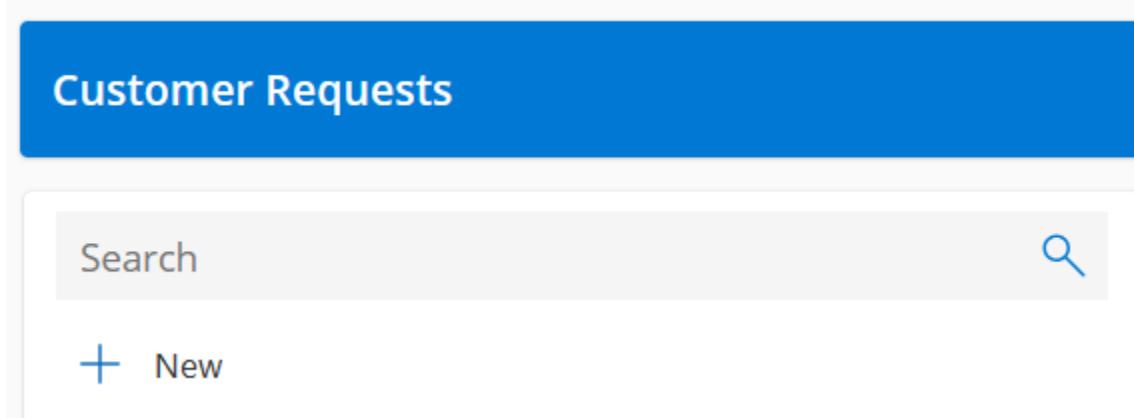
6. Select **Save** and close the application.

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.

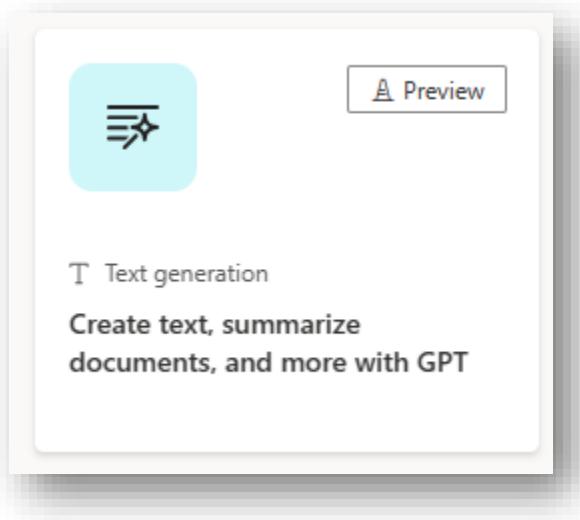
Exercise 5: Create and use AI Builder dynamic prompts as PowerFx in Power Apps

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**

Create text, summarize documents, and more with GPT

This model runs on Azure OpenAI Service and can be used for many tasks that involve creating text. Try a template to see how to use generative AI in a variety of scenarios. You can also try writing a prompt from scratch. When you're done, you can use the model in an app or a flow.

Prebuilt model Preview Dynamic prompt

Prompt
Create a custom prompt using the data sources and inputs you want. You can also add the prompt to the Dataverse plugin registry to use it across Power Platform.

Summarize the **Last message** taking in account the **Attached file content** and the **Conversation history**

Inputs and sample data
Last message

Dear John, I hope this email finds you well. I would like to take this opportunity to communicate some important updates and reminders regarding our team's goals and expectations for the quarter. Provide a brief overview of the current projects and their progress. Remind your reports of any imminent deadlines and ask for updates on their progress. Share any recent learnings or best practices in the field of ITX. Action that you...

Response
AI-generated content can have mistakes. Make sure it's accurate and appropriate before using it. [Read terms.](#)

Your boss emailed you some updates and reminders about the team's goals and expectations. They want to know how the projects are going and what you have learned. They also want your feedback on their leadership and how to improve it. They thanked you for your hard work and achievements.

[View documentation](#) [Use prebuilt model](#) **Create dynamic prompt**

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

Write or paste your prompt here or [start from existing template](#)

Classify text
Assign a set of predetermined categories to open-ended text.

Summarize text
Create concise summaries of any text, such as paragraphs, articles, or documents. **(This option is highlighted with a red box)**

Extract action points from text
Extract relevant tasks or goals from documents or online resources.

Extract information from text
Identify and extract relevant information from documents or online resources.

Respond to a complaint
Handle customer complaints more effectively and efficiently.

Reminder email message about a task
Write effective and polite emails to remind someone of a task they need to complete.

Sentiment analysis of text
Understand the emotions and opinions expressed in a given text.

+ Add dynamic value

Test your prompt

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

Prompt

Summarize  TextToSummarize   in fewer than two paragraphs without adding new information. Write the summary in an eighth-grade level.
When the text seems too short to make at least one paragraph of summary, answer that you can't summarize a text that is too short.

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

 TextToSummarize  

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

 Text  

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

 **Add dynamic value**

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

Prompt

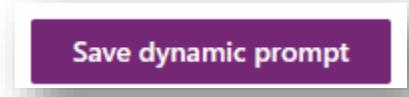
Summarize  Text   adding  Date   and  Priority   in fewer than two paragraphs without adding new information. Write the summary in a formal tone.
When the text seems too short to make at least one paragraph of summary, answer that you can't summarize a text that is too short.

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

GptPowerPrompt 10/3/2023, 8:19:55 PM 

Prompt

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 **Test prompt**

15. Check that the generated summary

The screenshot shows a user interface for testing AI prompts. At the top, there's a header "Test your prompt" with a collapse arrow. Below it, a note says "Use sample values to see how well your prompt works." There are three input fields: "Text" containing "Upon using the product, I noticed a significant defect that is affecting its functionality. When opening the entry form and selecting the ..."; "Date" containing "10/1/2023 08:45"; and "Priority" containing "Medium". A "Test prompt" button is below these fields. Underneath, a section titled "AI Response" displays the generated summary: "On 10/1/2023 at 08:45, a significant defect was observed in the product's functionality. Specifically, when attempting to edit the description in the "New account" category of the entry form, it was found to be non-editable. This defect is hindering the full utilization of the product as intended, leading to inconvenience and frustration. Given the impact it has on usability, the issue has been assigned a medium priority level."

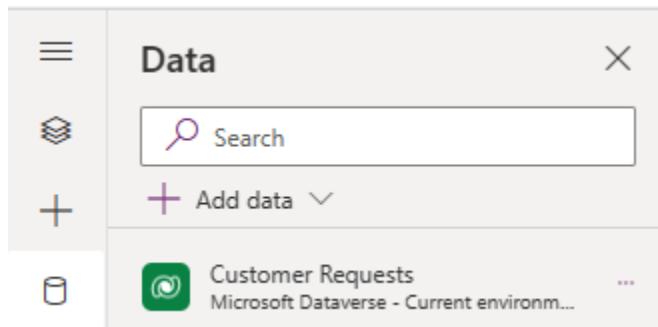
16. Close the windows with the top right X or **Cancel** button

Using AI Builder dynamic prompts in Power Apps :

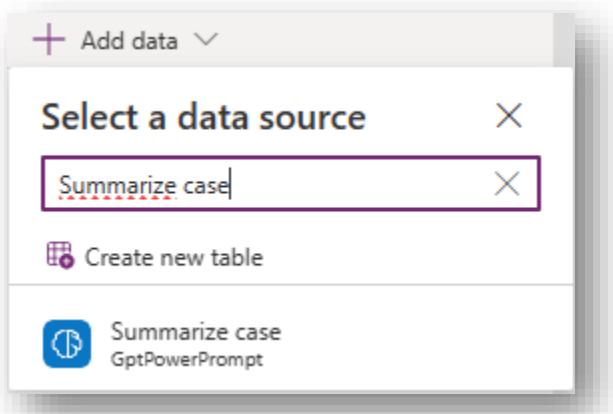
1. Go to <https://make.powerapps.com/apps>
2. Select **Customer Request** application and select the **pen** button.



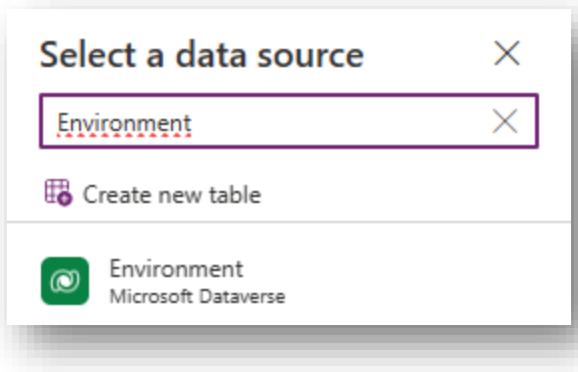
3. When the designer is ready, select **Data** in the left navigation pane



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



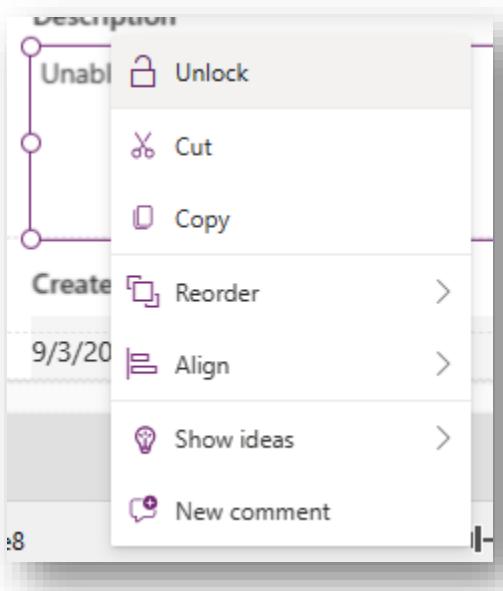
5. We will also use a default AI Builder prompt and need to add the **Environment** data source, select **+Add data** and search for and select the **Environment** data source.



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**

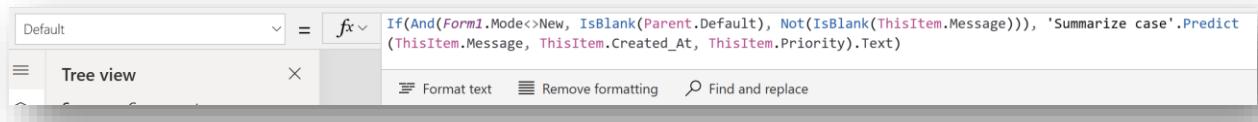
Enable spell check	Off
Maximum length	100
Mode	Multiline
Display mode	View
Visible	On
Position	30 48
Size	398 120
Padding	5 5

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)
```

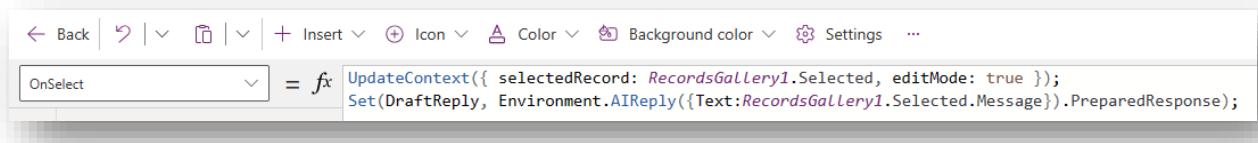


9. Finally, we want to propose a draft response for this case to accelerate the work of the support agent went they edit the case. Select the **Pen** icon in the form.

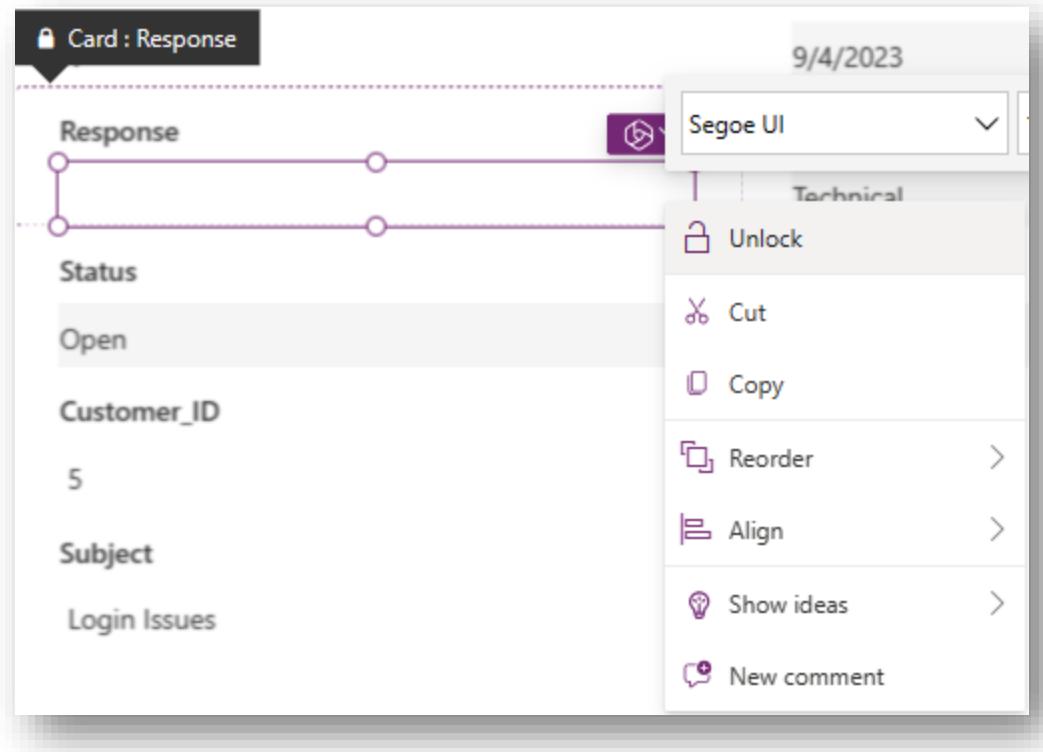


10. In the formula bar, replace the current formula with this

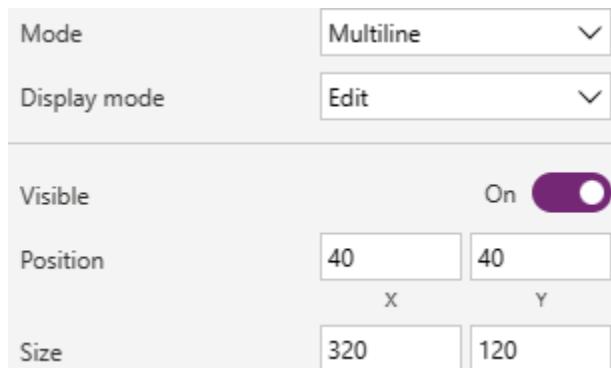
```
UpdateContext({ selectedRecord: RecordsGallery1.Selected, editMode: true });  
Set(DraftReply,  
Environment.AIReply({Text:RecordsGallery1.Selected.Message}).PreparedResponse)  
;
```



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**

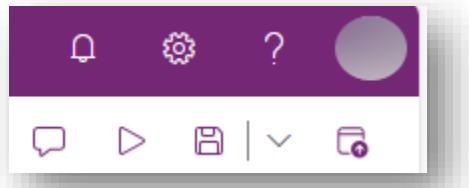


13. In the formula bar for the **Default** property, replace the existing formula by :

`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.