



Power Platform

COMMUNITY CONFERENCE

SEPTEMBER 18–20, 2024 • Workshops: Sept 16, 17 & 21
MGM GRAND • Las Vegas, NV



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Crafting your conversational AI: A Hands-On Journey with Copilot Studio

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Code: PPCConf2024**

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COPILOT STUDIO

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What is Copilot Studio?

- Tool to build AI powered Copilots for specific business needs
 - Internal Facing: HR Copilot – answers HR questions
 - How much PTO do I get annually?
 - Is the business closed on January 1st?
 - What are the holidays in 2024?
 - External Facing
 - Chatbot for customers and prospects
- Low-Code interface
- Multi-channel deployment
- Extend Microsoft Copilots
 - M365 Copilot
 - Copilot in D365 Customer Service
 - Copilot for Sales



Extending Microsoft Copilots with Copilot Studio!



Microsoft Power Platform
CONFERENCE

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Microsoft & Power Platform Conf



Thursday September 19 @ 2PM-3PM

Copilot Building Blocks



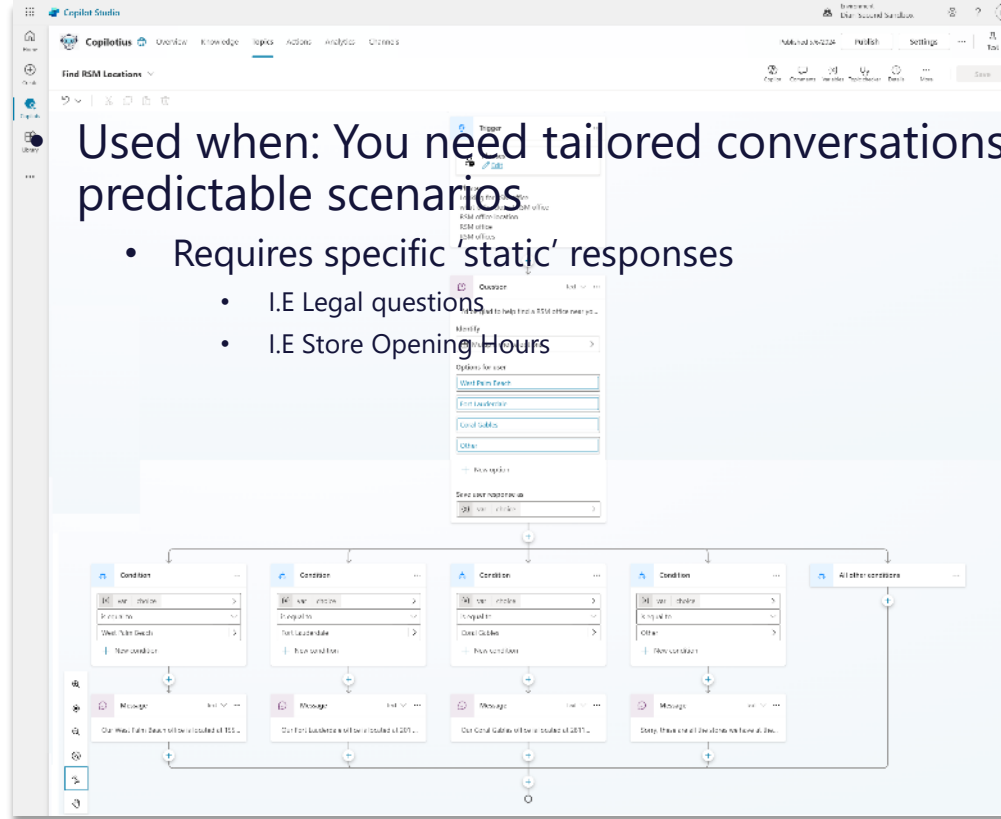
Topics	Entities	Knowledge	Actions
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Copilot Building Blocks

Used when: You need tailored conversations for predictable scenarios

- Requires specific 'static' responses
 - I.E Legal questions
 - I.E Store Opening Hours

Topics



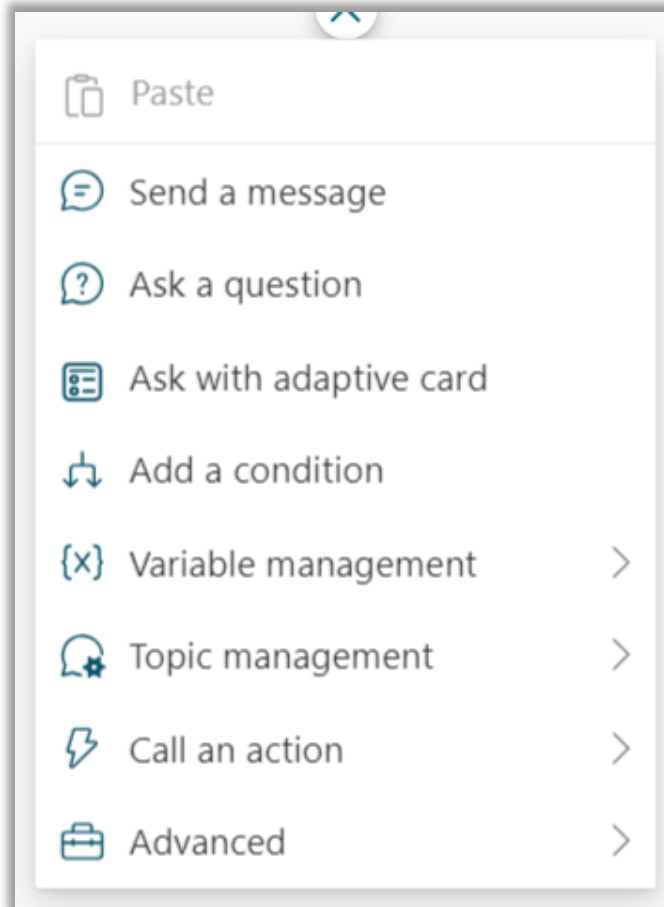
Triggers

- Used for Topic routing
- Trigger Phrases
 - Keywords/Questions/Phrases
 - Understand users' intent



Authoring Canvas

- Send a message
- Ask a question and capture response in a variable
- Ask question with adaptive card
- Add conditions
- Manage variables
- Topic Management
- Trigger Actions from Power Automate or Bot Skills



Copilot

End User

What is your
email
address?

Store answer in variable
Entity = Email Address

Variable
john@email.com

My email
address is
**john@email.
com**



Prebuilt Entities

Point of interest

Description

Points of interest, extracted as a string

Method

Prebuilt

Usage

User input	Entity	Saved value
I want to climb Mount Everest	Mount Everest	Mount Everest
The airport is 25 miles away	airport	airport
Eiffel Tower is in Paris	Eiffel Tower	Eiffel Tower

Temperature

Description

Temperature, extracted as a number

Method


Prebuilt

Usage

User input	Entity	Saved value
It's 32F outside	32F	32
It's 2° there	2°	2
It's 30 degrees	30 degrees	30

Custom Entities

Create an entity



Make your copilot smarter with entities.

An entity is a piece of information (person, place, thing, or concept) that the copilot might want to pick out from what your customer says.

[Close](#)

Choose a method

Closed list

Define a list. Use when you have an exact list of items that is a manageable size (small to medium).

Example: List of sizes

- Extra small
- Small
- Medium
- Large

Regular expression (Regex)

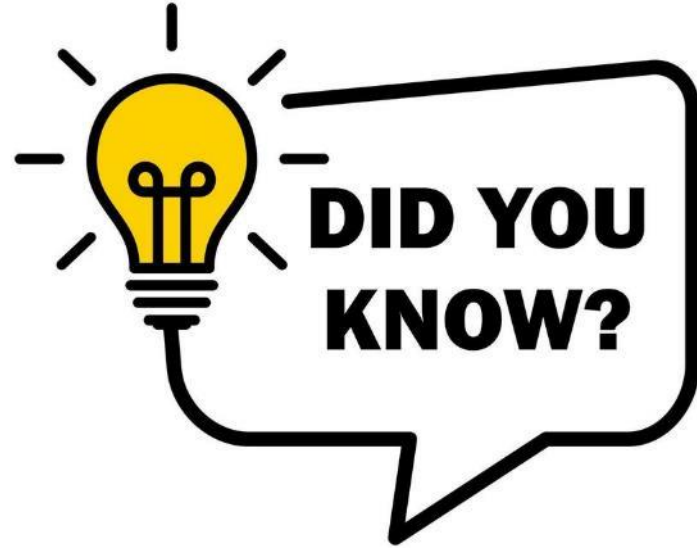
Define a specific logical pattern, such as an ID number, credit card number, IP address, and more.

Example: Article ID pattern that starts with "kb" and ends with 6 digits, such as 'kb123456'.

`kb[0-9]{6}`

Using Inputs & Outputs in Topics (Generative AI only)

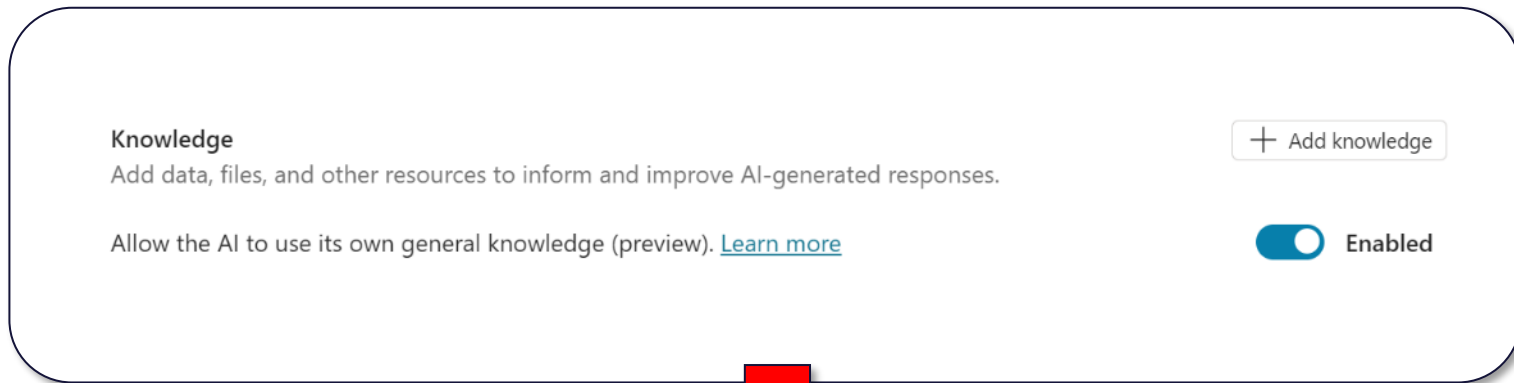
- Less nodes in the topic
- Dynamically creates questions
- Model Description
- Automatic Entity Extraction (LLM)
- Slot Filling
- Generative Copilots only



[illegible]

Knowledge

- Add knowledge sources to your Copilot
- AI Generated Responses, no need to create topics!



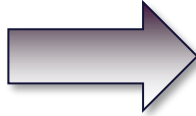
CONVERSATIONAL BOOSTING TOPIC*
(*Triggered on unknown intent)

Knowledge Sources



Public websites

Add public websites for real-time answers

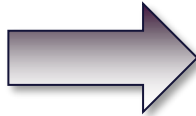


Publicly viewable content
Indexed by Bing
No authentication



Files

Upload documents from your local computer

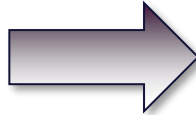


Up to 512 MB per file
No images, videos, audio or executable files
Dataverse Search Indexing



SharePoint and OneDrive

Securely integrate and manage internal data

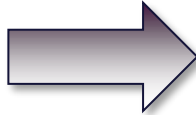


Only available for authenticated users
(Microsoft Entra ID authentication)



Dataverse (preview)

Customize and deploy structured data tables



Only available for authenticated users
(Microsoft Entra ID authentication)

Knowledge Sources

Connect to your enterprise data (preview)



Enterprise websites



Azure SQL



ADLS Gen2



MediaWiki



Salesforce



ServiceNow Knowledge



File share



SharePoint Server



SAP



Ado Git



CSV



Jira



Azure DevOps Wiki



Oracle SQL database



Microsoft SQL
server(New)



ServiceNow Catalog



Confluence



ServiceNow Tickets

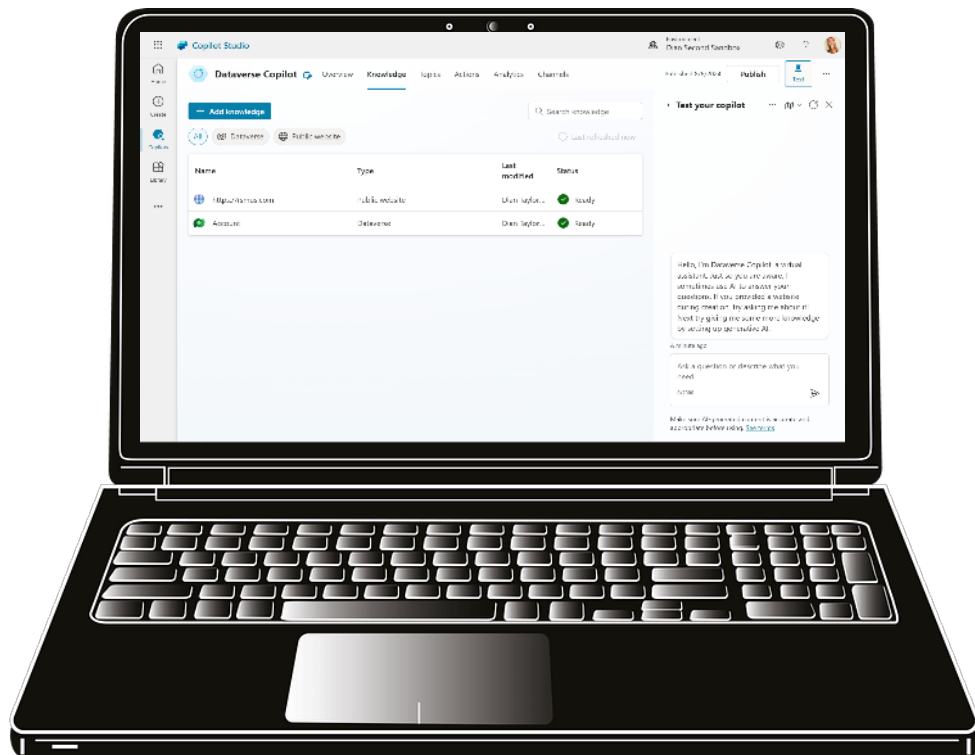


Custom Connector

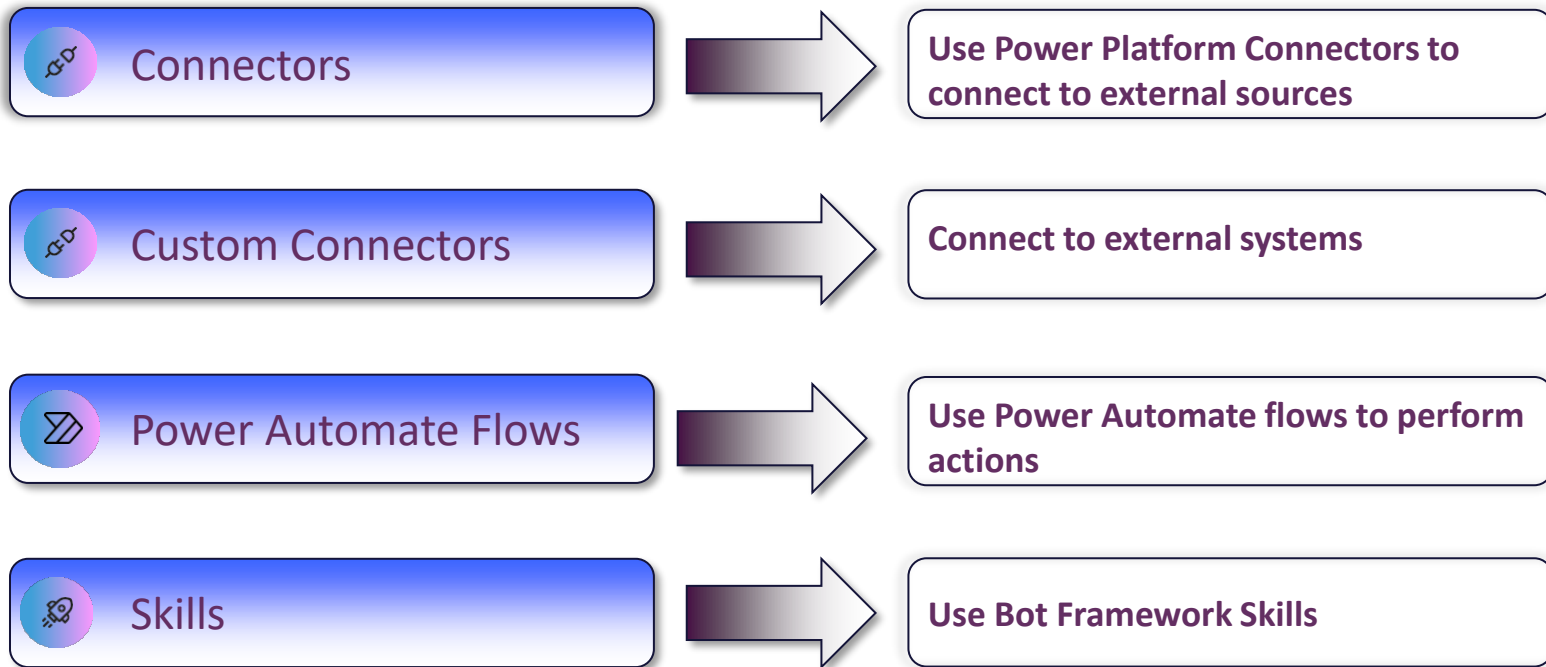


Power Platform
connector actions

Demonstration 2: Knowledge



Actions



Generative AI vs Classic

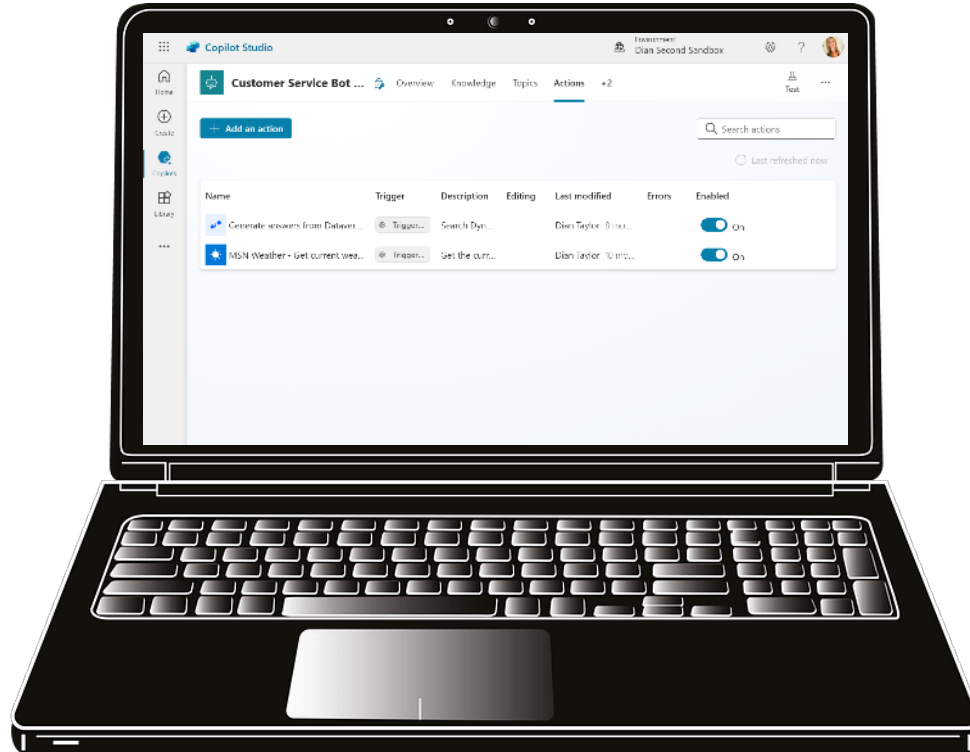
CLASSIC

- Uses trigger phrases and topics to respond
- Need to have many topics to account for all possible questions
- Actions can only be called from *within* a topic

GENERATIVE AI

- Copilots decides which topics/actions/knowledge to use in its response
- Less topic building
- Actions can be called outside of topics

Demonstration 3: Actions & Generative AI



Copilot Channels

Channels

Configure your copilot channels to meet your customers where they are.



Telephony



Microsoft Teams



Demo website



Custom website



Mobile app



Facebook



Skype



Slack



Telegram



Twilio



Line



GroupMe



Direct Line
Speech



Email

Security

- Who can access/engage this Copilot?



< Authentication

Verify a user's identity during a conversation. The copilot receives secure access to the user's data and is able to take actions on their behalf, resulting in a more personalized experience.[Learn more](#)

Choose an option

- ☒ No authentication
Publicly available in any channel
- ☐ Microsoft Entra ID authentication in Teams and Power Apps
When selecting this option, all other channels will be disabled.
- ☐ Authenticate manually
Set up authentication for any channel

Actions - Authentication

- Who can access this Action?*



Copilot Studio

MPPC 2024 Generative Copilot Overview Knowledge Topics **Actions** Analytics Channels Publish

MSN Weather - Get current weather

Details Inputs Outputs

Plugin action name *
MSN Weather - Get current weather

Display name *
Get current weather

Description for the copilot to know when to use this action *
Get the current weather for a location.

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

End user authentication
User authentication
✓ User authentication
Copilot author authentication

Describes the purpose of the connector action

Connector
MSN Weather

* Not all actions have authentication options

Website

- Iframe
- Customer facing or internal facing (I.E Sharepoint)
- Power Pages
- Custom Portal
- Teams

Custom website

This channel allows you to embed an HTML chatbot into your website. Learn about [embedding your bot in a web page](#).

Default embed code

Copy the following code snippet and paste it to your HTML website. If you do not have access to the website's code, share the code with the person responsible for your website.

```
<!DOCTYPE html> <html> <body> <iframe  
src="https://web.powerva.microsoft.com/environments/01ae3875-0e2e-4dbd-9d55-  
6a7450b870a2/bots/new_bot_a9ba6bb6d46e45c9b5298a49015fed5/webchat" frameborder="0"  
style="width: 100%; height: 100%;" > </iframe> </body> </html>
```

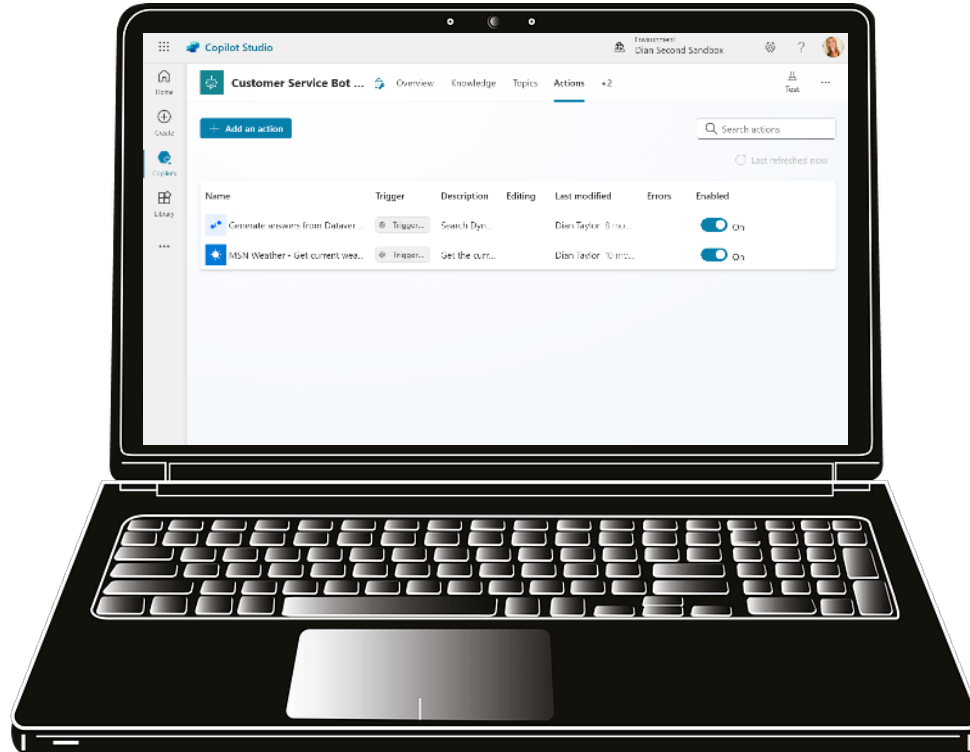
Copy

Share to email

Single sign-on embed code

Get a single sign-on enabled chat canvas to interact with your bot. [Learn about single sign-on](#)

Demonstration 4: Build a HR Copilot and publish on Teams



Connect Copilot to a Customer Engagement App

- Seamless Integration
- Handoff to live agents

Customer engagement hub

Connect to a customer engagement app to enable your copilot to hand off a chat session to a live agent or other copilot.



Dynamics 365
Customer
Service



Genesys



LivePerson



Salesforce



ServiceNow

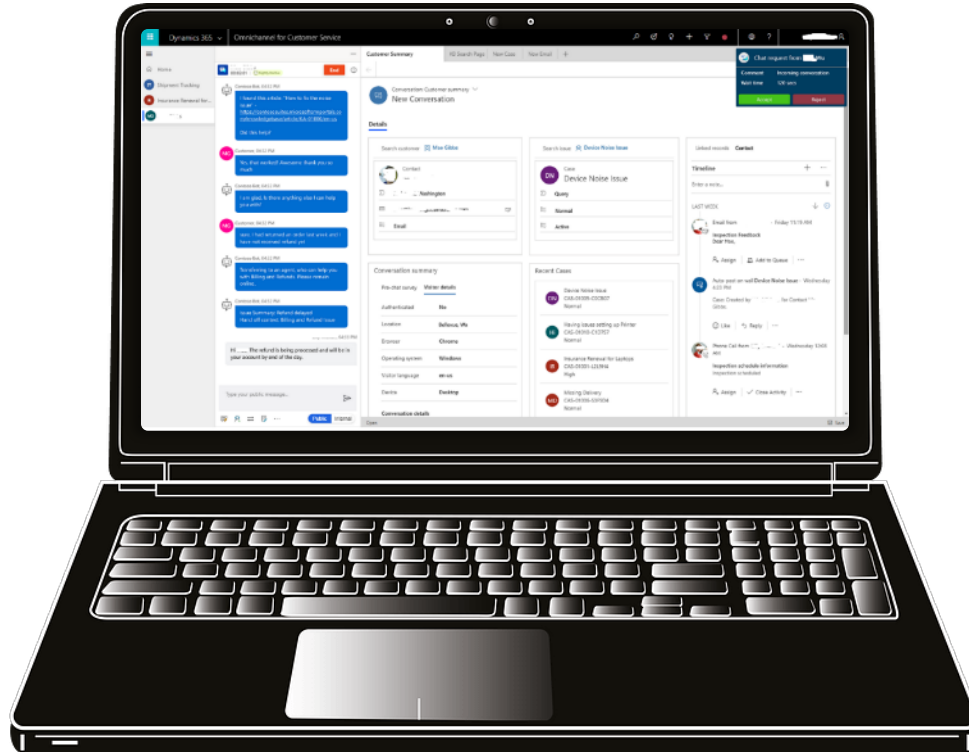


Zendesk



**Custom
engagement
hub**

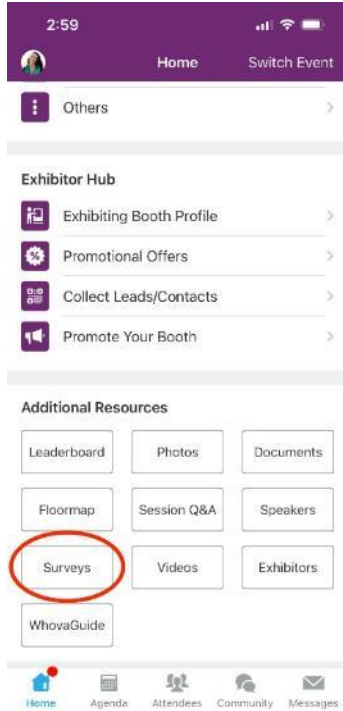
Demonstration 5: Handoff to live agent



Questions/Comments



Session Feedback Surveys



We really want to hear from YOU!

In the pursuit of making next year's Power Platform Community Conference even better, we want to hear your feedback about this session.

Here's How -

- *Simply go to the Whova App on your smartphone*
- *Scroll down on the Power Platform Community Conference Homepage to 'Additional Resources' to click "Surveys'.*
- *Click Session Feedback.*
- *Scroll down to find this session title.*
- *Complete the session feedback survey.*
- *Finally, click 'Submit'*

It's just that easy!

SELFIE TIME



THANK YOU!



 <https://D365Goddess.com>

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 <https://www.youtube.com/d365goddess>

 <https://www.linkedin.com/in/diantaylor/>



Questions? Contact us!

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