Customer Experience Workflow

**Solution 2: Grant Requests Summary**

**May 23, 2023**

This document catalogs the Microsoft Tech for Social Impact AI Solutions Project, delivered in collaboration with threshold.world. It includes detailed description of expected customer experience for accessing, downloading, installing, deploying, and utilizing the AI Solution.

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# Installation and Configuration

## Prerequisites

It's important to review the following prerequisites before you deploy or install the solution.

* Dynamics 365 Sales Enterprise must be installed
* Microsoft Cloud for Nonprofit – Fundraising and Engagement. (see [Deploy or upgrade Fundraising and Engagement](https://learn.microsoft.com/en-us/dynamics365/industry/nonprofit/fundraising-engagement-deploy-installer))
* Common Data Model for Nonprofits Sample Apps (solutions can be found [here](https://github.com/microsoft/Industry-Accelerator-Nonprofit/releases))
* You must be a Microsoft Power Platform admin, Dynamics 365 admin, or a tenant admin to deploy solutions

## Set up an OpenAI API Key

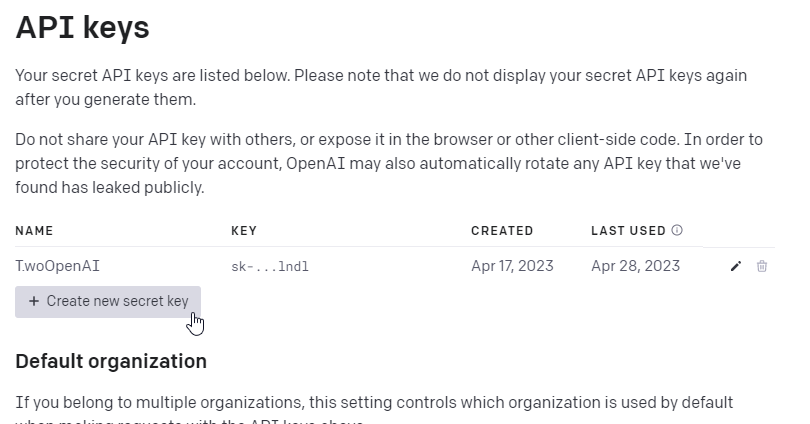
Before getting an API key, you need to go to [OpenAI’s official platform website](https://platform.openai.com/). If you haven’t already, create an account following the simple steps on the website. Once you have created an account or have logged in with an existing account, you’ll see your name and your profile icon at the top-right corner of OpenAI’s platform homepage.

To get an API key,

1. Log in to your OpenAI account.
2. Click on your name in the upper right corner and select **View API keys** from the drop-down menu**.**

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1. To get a new secret key, click the **Create new secret key** button near the center of the page. 
2. On the create new secret key dialog, enter a name for your API key and click **Create secret key**

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1. A new secret key will be generated. Make sure to save the secret key somewhere safe as soon as possible. Once the dialog closes, you won’t be able to view the secret key again.

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## Manual Solution Installation

1. Before installing the solution, make sure you have the solution file in your machine. (Filename: **TSI\_OpenAI\_FundraisingProposalDraft\_1\_0\_0\_0.zip**)
2. Go to the [Maker Portal](https://make.powerapps.com/)
3. On the top right, select the environment where you want to install the solution.

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1. On the left navigation pane, click **Solutions**

Graphical user interface, text, application

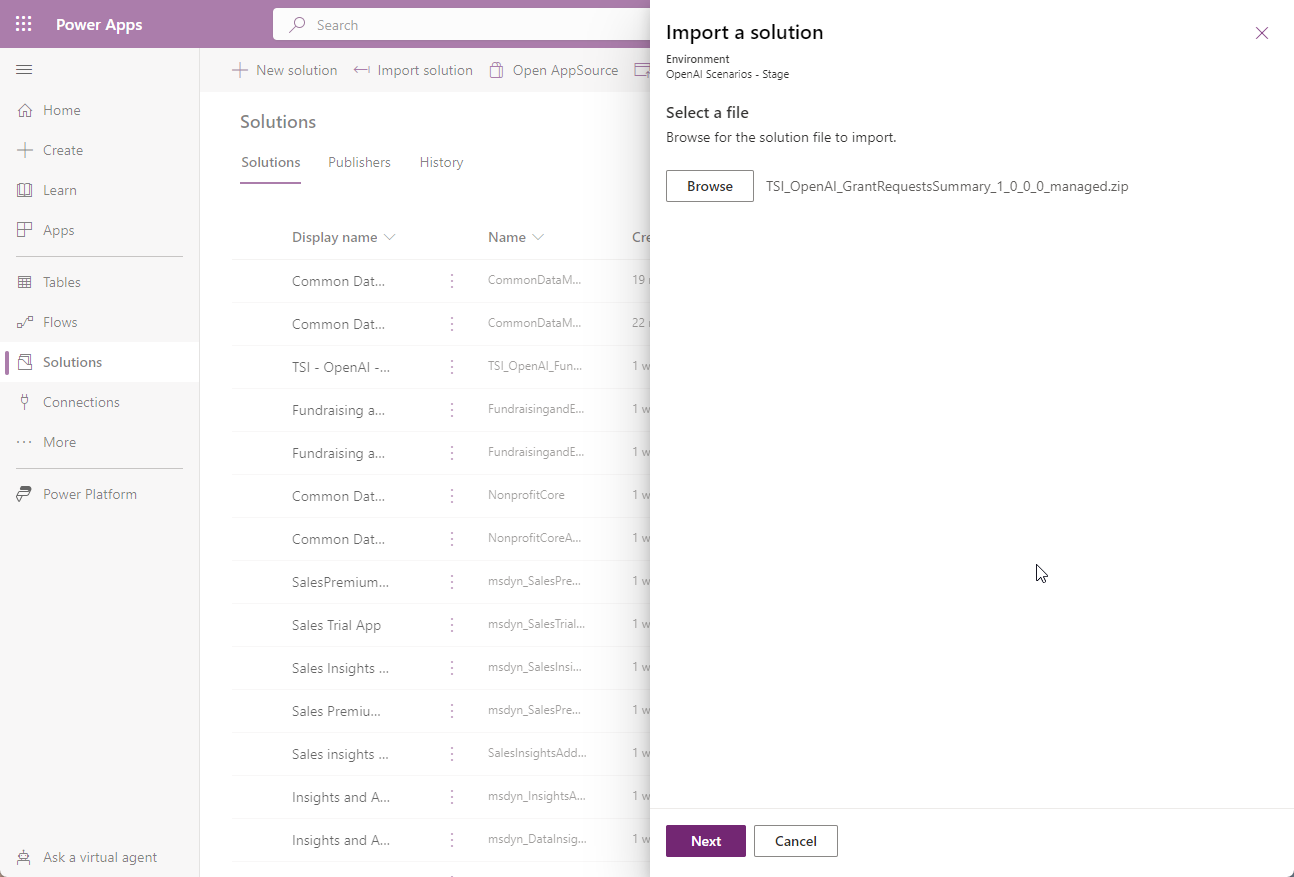
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1. Click **Import solution**

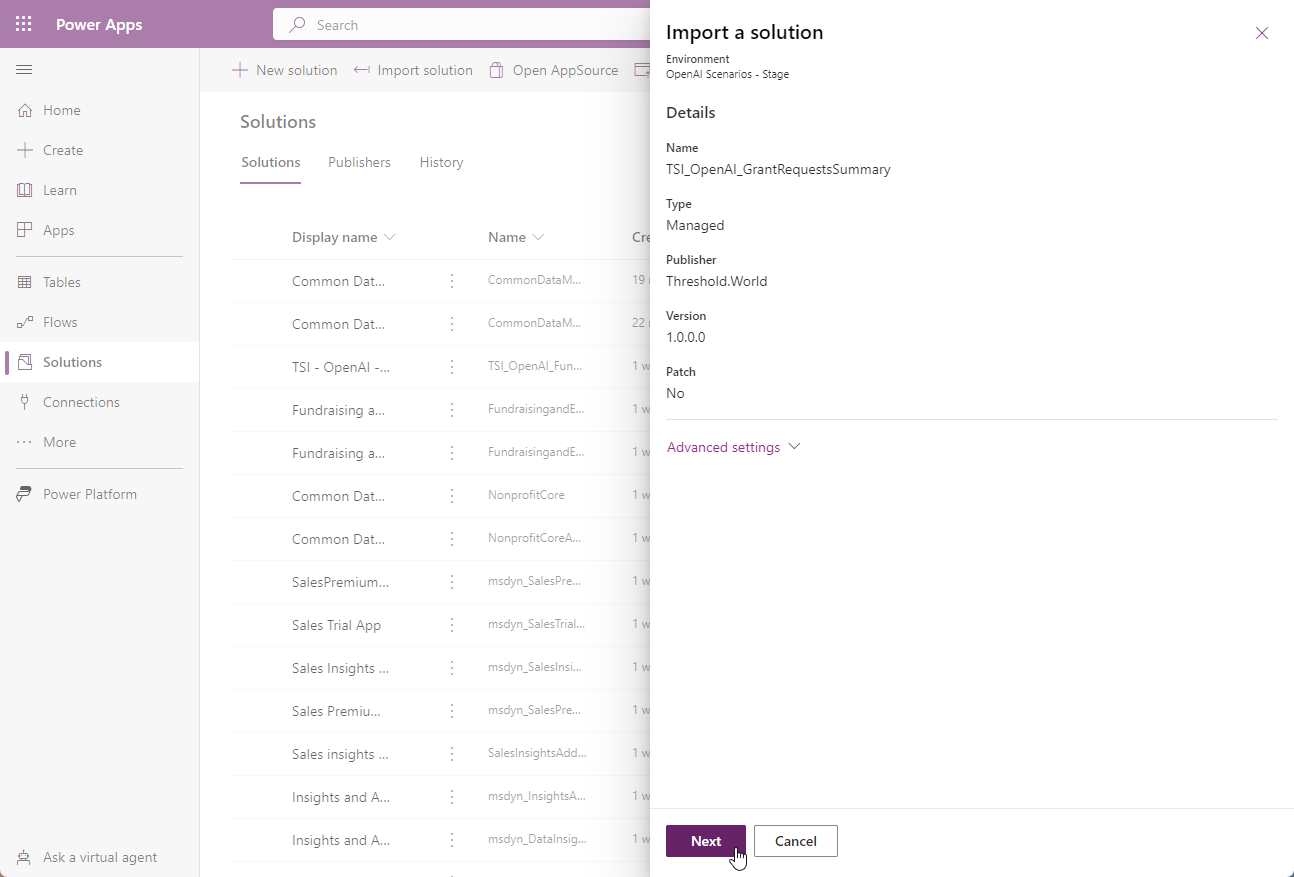
Graphical user interface

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1. Browse to the location of the solution file downloaded at step 1 and click **Next**



1. On the confirmation window click **Next**



1. The import process will ask you to reestablish a connection. A connection is needed for the Power Automate Flow that is part of the solution. This connection provides access to the org-based database on Microsoft Dataverse in current environment. If a connection already exists, you can select it from the dropdown and you can jump to step 12. In case there are no connections, Click the dropdown next to the connection reference and click **New Connection.**

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1. A new window will open to create the connection. On the dialog, click **Create**

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1. Pick an account or log in with an account that has access to the current Dataverse Environment

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1. After creating the connection, go back to the previous window and click **Refresh** on the dialog shown. That will refresh the connections dropdown.

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1. Select the newly created connection from the dropdown next to the connection reference and click **Next.**

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1. Wait until the import process completes.

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# Utilizing the AI Solution

## Grant Requests Summary​

Grant managers can accelerate grant review processes by quickly summarizing grant requests with OpenAI in the Microsoft Cloud for Nonprofit. ​

With the click of a button, grant managers can generate a summary of grant requests that can be edited and shared with grant reviewers. The request summary is generated by Open AI based on the context of each request, the requester’s profile, and request reviews in the Microsoft Cloud for Nonprofit.

The following guidelines will show how to use the predeveloped solution:

1. Go to your organization’s Dynamics 365 CRM portal (e.g.

<https://organizationid.crm.dynamics.com>).

1. From the list of apps, select the **Awards** model-driven app

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1. From the navigation pane, select **Requests**, and from any view, select one or more records from the list. When you do that, the button **Summarize Requests** appears in the Ribbon.

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1. To generate the Grant Requests Summary from the requests selected. After selecting the requests from the list, click the **Summarize Requests** button. A side panel dialog opens, which shows 3 sections:
   1. Docket & Selected Requests – this section shows the selected requests grouped by docket.
   2. Additional Guidance and Generation of requests summary – this section allows to add more guidance or context before sending the data to OpenAI.
   3. Generated Grant Request Summary – this section shows the response or AI generated summary of requests. Also, allows to edit the contents of that response before creating the email activity

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1. Once the additional context is added (is optional), click **Generate Grant Requests Summary.** When the process completes, the outcome or the grant requests summary will get displayed in the section below (Generated Grant Request Summary) where it can be reviews and edited before creating the email activity.

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1. After reviewing and or modifying the response with the use of the editor, to create the email activity with the contents, simply click **Create Docket Activity.**
2. After successfully creating the email activity, a notification banner will be shown on top and a link will be provided to navigate to the newly created email activity.

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