



**Dynamics 365 &
Power Platform**
UK User Groups

WELCOME TO NATIONAL USER GROUP

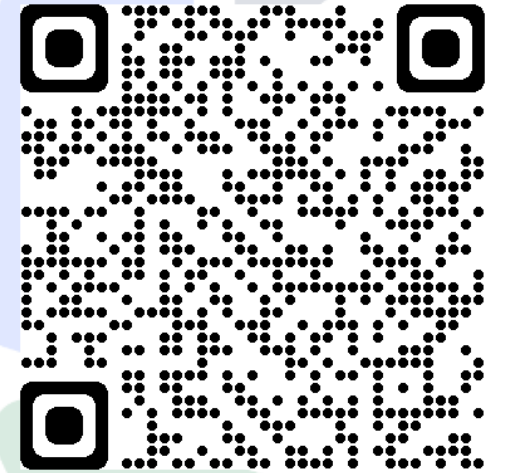
Based in the London this user group is set up for all to benefit from shared knowledge and experience. All levels of skill and experience are welcome, we hope to provide content for all.

Presented by | Sumit Kumar
10 December 2024



Upcoming Events

- Bristol – 28th November 2024
- Reading – 4th December 2024
- **National (London) In Person Meeting – 10th December 2024 (All Day)**
- Birmingham – 30th January 2025
- Manchester – 22nd January 2025
- **Bristol – 13th February 2025**
- Cambridge – 25th February 2025
- Reading – 26th February 2025
- National (Manchester) In Person Meeting – 5th March 2025 (All Day)
- Birmingham – 13th March 2025
- Manchester – 19th March 2025
- Reading – 14th May 2025
- Cambridge – 15th May 2025
- Birmingham – 15h May 2025
- Manchester 21st May 2025
- **Bristol – 22nd May 2025**
- National (London) In Person Meeting – 8th July 2025 (All Day)
- Birmingham – 17th July 2025
- Manchester – 23rd July 2025
- **Bristol – 11th September 2025**
- Reading – 17th September 2025
- Manchester – 24th September 2025
- Birmingham – 25th September 2025
- Cambridge – 21st October 2025
- National (London) In Person Meeting – 18th November 2025 (All Day)
- Manchester – 19th November 2025
- Birmingham – 20th November 2025
- Reading – 26th November 2025



TODAY'S AGENDA

1. Agents Overview
2. What is Copilot studio?
3. What is Approval kit?
4. Better together -Power platform approval Kit + Copilot Studio
5. Demo : Approval Agent

THANK YOU TO OUR SPONSORS

— Please join us in thanking the user group sponsors who make these meetings possible —



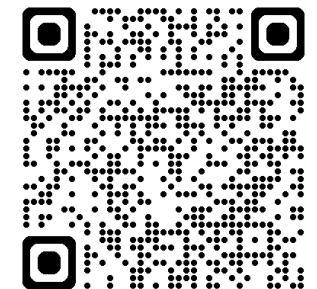
SPEAKER



SUMIT KUMAR

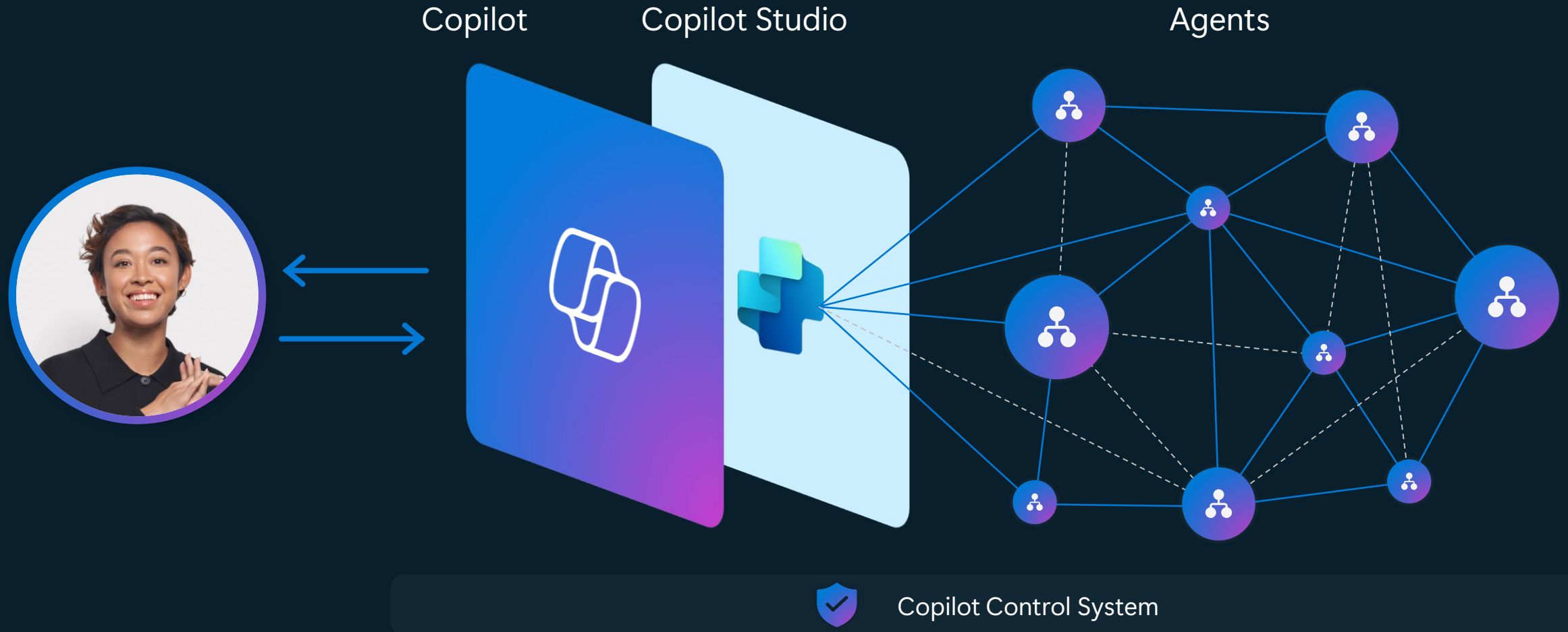
Engagement Director ,HCLTECH

2x Fast track Architect-2023-2024 , Southwest User group leader
18+ Years working with Dynamics and the Power Platform



Better Together : Exploring the integration between Approval kit and Copilot studio

Copilot is the UI for AI





Copilot

**Every employee will
have a Copilot**

Works as your personal assistant

Grounded in work content like email,
meetings and documents

The UI for AI



Agents

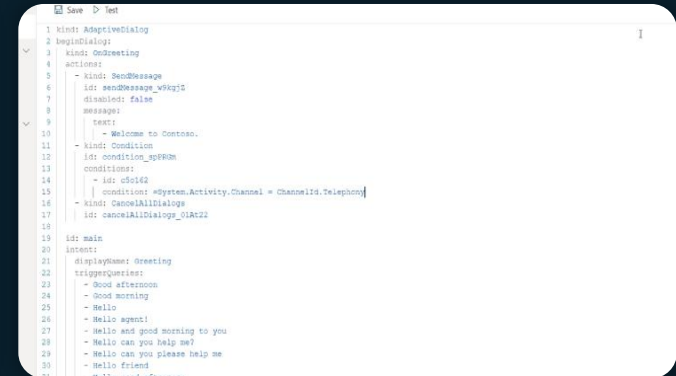
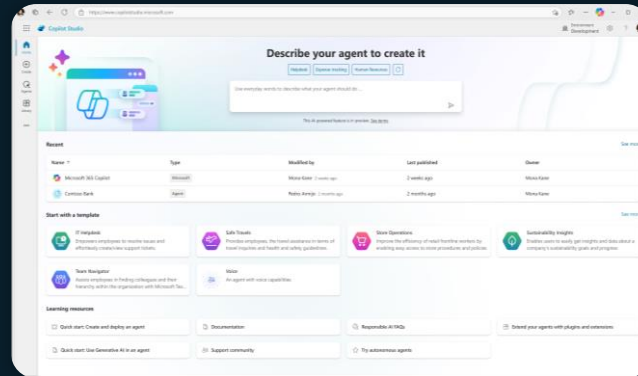
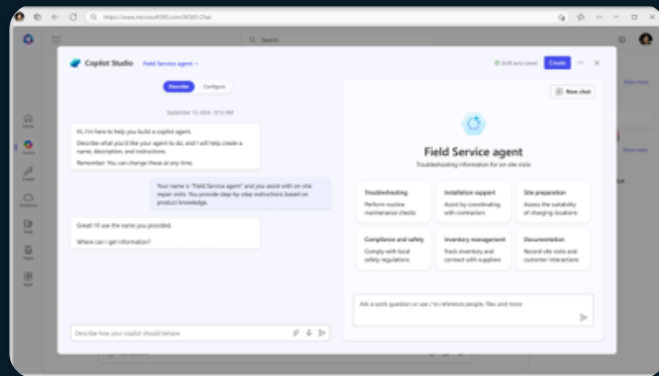
**Every business process will
have an agent**

AI-powered system with actions,
triggers and knowledge

Works on behalf of employees, teams
and functions

Connected to Copilot or autonomous

Meeting you where you are in your agent building journey



Natural language



Agent builder

For End Users



Copilot Studio

For Makers



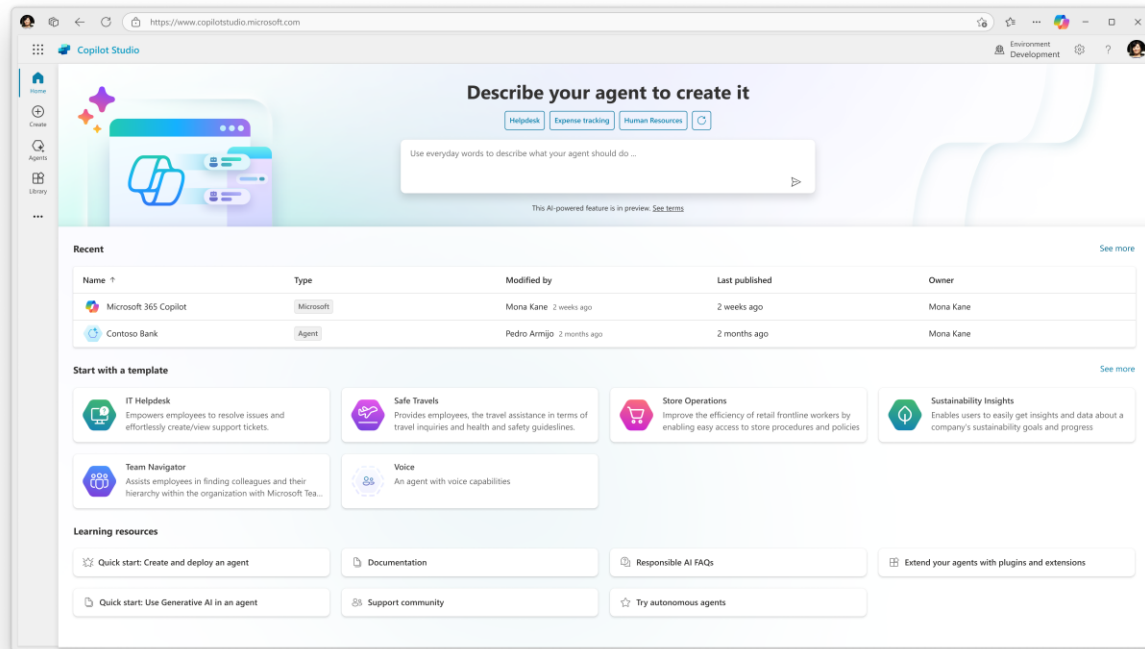
Code-first

Copilot Studio + Visual Studio / GitHub

For Developers



Your agent, your way



Copilot Studio is an end-to-end conversational AI product for both **building your own agents** and **extending Microsoft Copilot** with **your own enterprise data, APIs, and knowledge sources.**



Meet your users where they already are



Access everything in one place



Automate your workflows



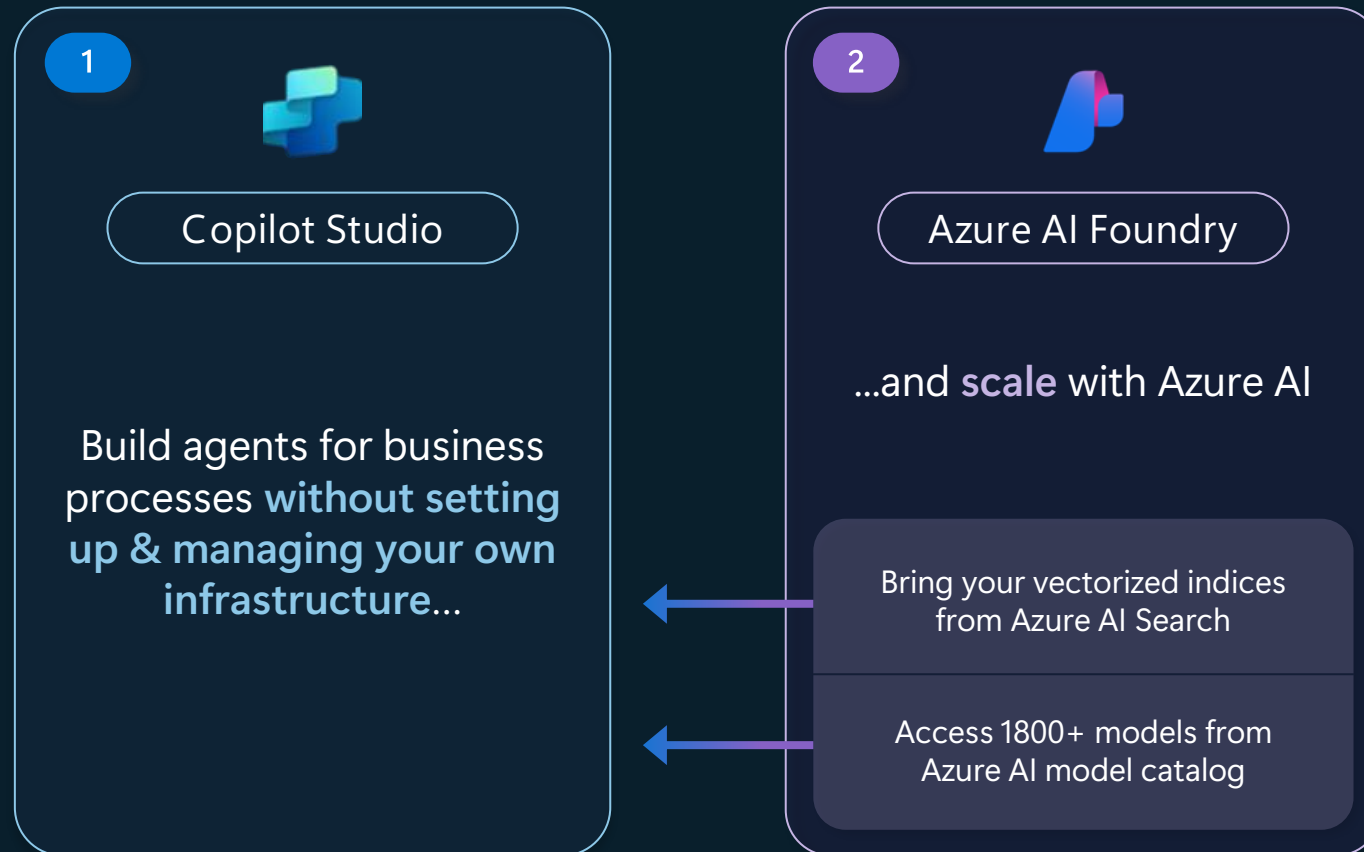
Integrate with your external apps



Connect to your data in Microsoft 365

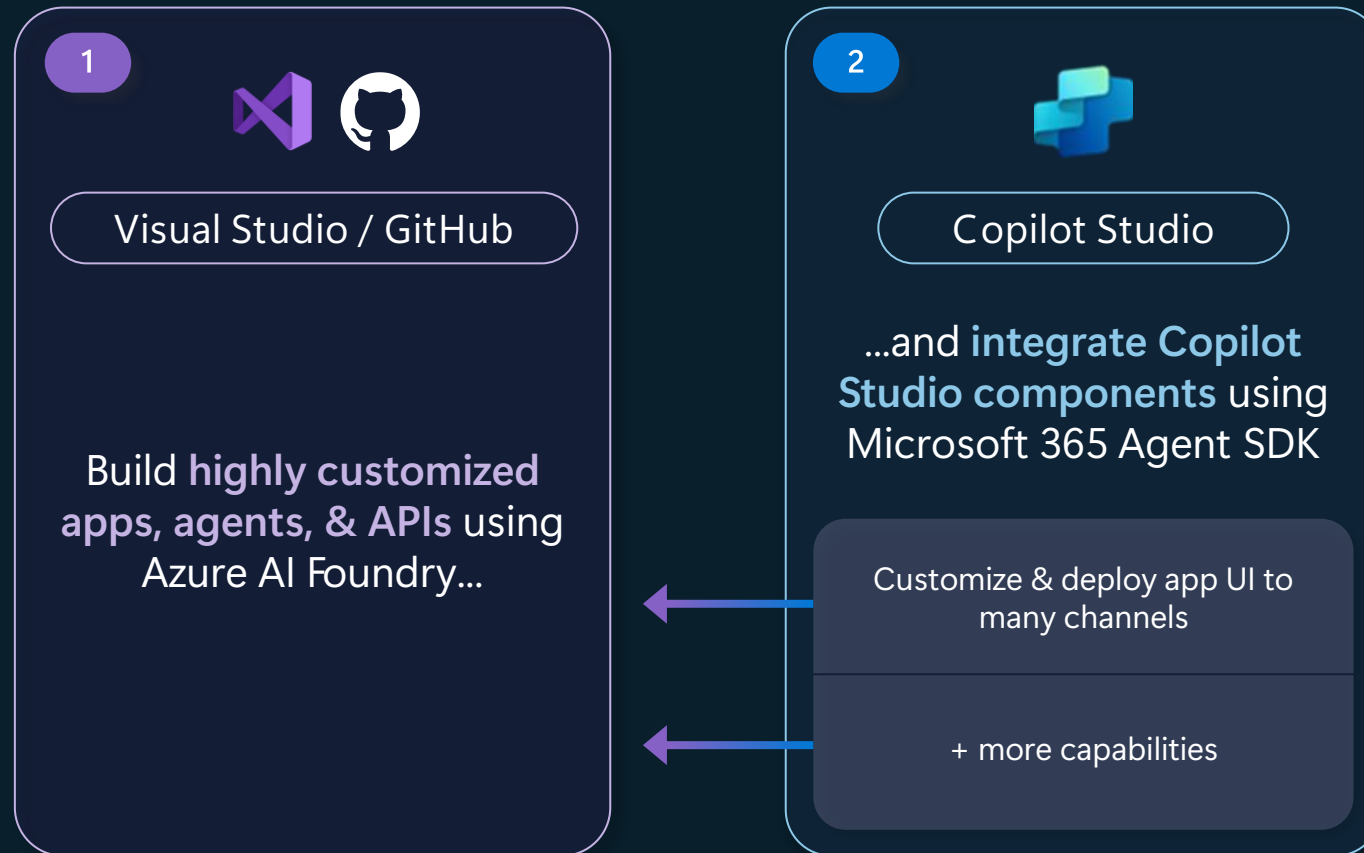
Start building agents with Copilot Studio

Build, deploy, realize value and prototype faster for simple scenarios



Or start with code-first solutions

Control and customize with options to manage your own infrastructure

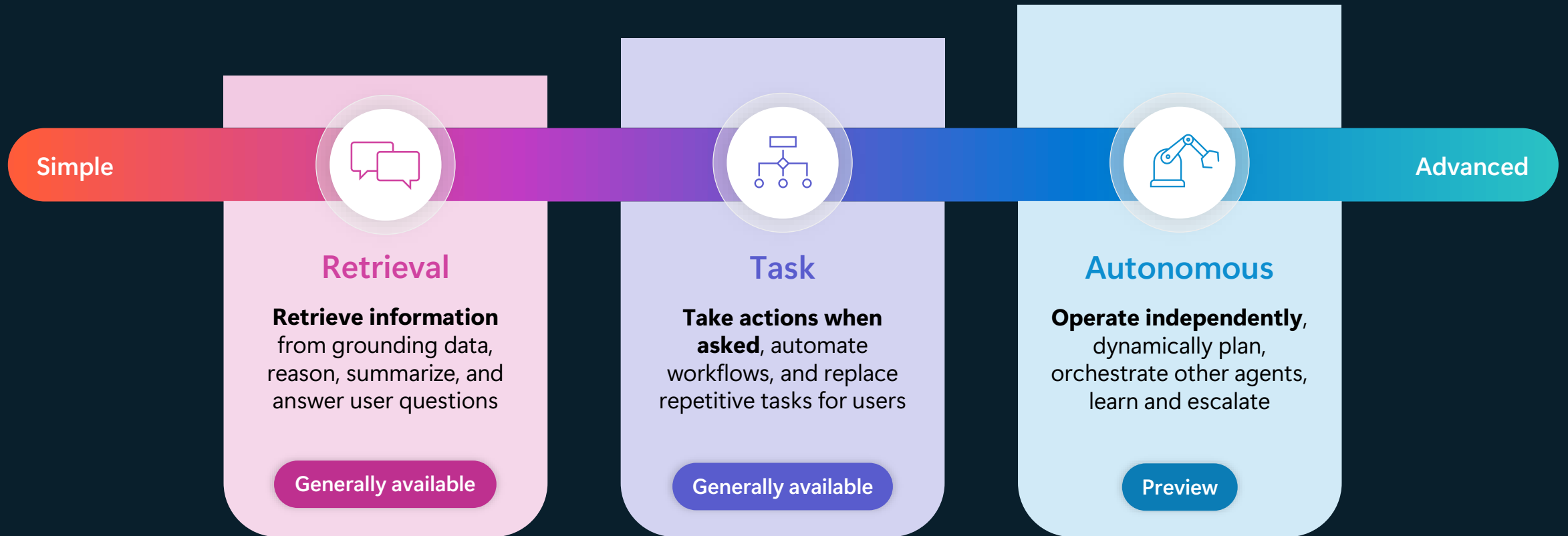


Copilot Studio

Components of an agent

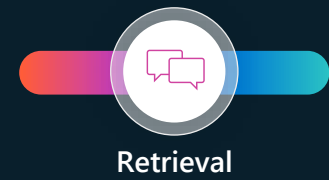


A spectrum of agents



←..... Agents vary in levels of complexity and capabilities depending on your need→

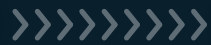
Retrieval agent



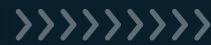
Create agent instruction

Assist with onsite repair visits providing step-by-step instructions based on product information.

1) Trigger



2) Prompt



3) Plan



4) Outcome

The agent automatically reacts to triggers



When a request comes from Copilot

The agent follows your prompt

I received an error code E-1023 on one of the chargers. Can you help me find the right documentation and provide a step-by-step guide to solve the issue?



The agent completes the ask using your data and knowledge



Product Information



The agent generates a response

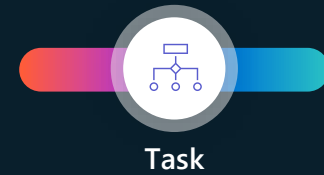


Agent

Check out step-by-step step guide for the error code you shared



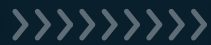
Task agent



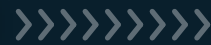
Create agent instruction

An agent to assist the team with the product information by utilizing SharePoint files and providing support for ordering products

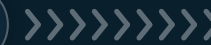
1) Trigger



2) Prompt



3) Plan



4) Outcome

The agent automatically reacts to triggers



When a request comes from Microsoft Teams

The agent follows your prompt

"I have an issue with the insulation on the cables. What could be causing this?"

"Place an order for 200 units of the part you recommended"

The agent completes the ask using your data and knowledge



Product Information

Supply chain



The agent generates a response

Agent

No problem. I will place an order for 200 units of the DX100.



Autonomous agent



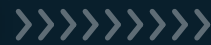
Create agent instruction

Help customers with product questions, refunds and replacements on products from Pets at Home.

1) Trigger



2) Prompt

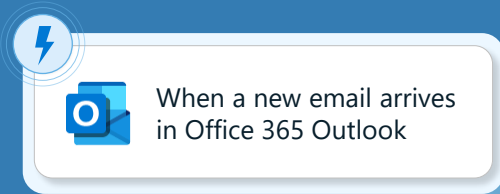


3) Plan



4) Outcome

The agent automatically reacts to triggers



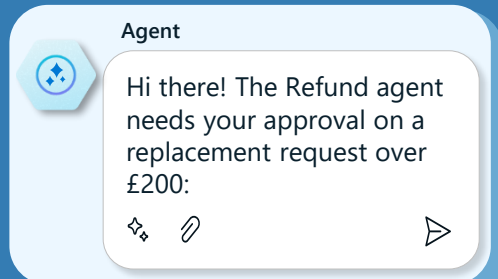
The agent follows your prompt

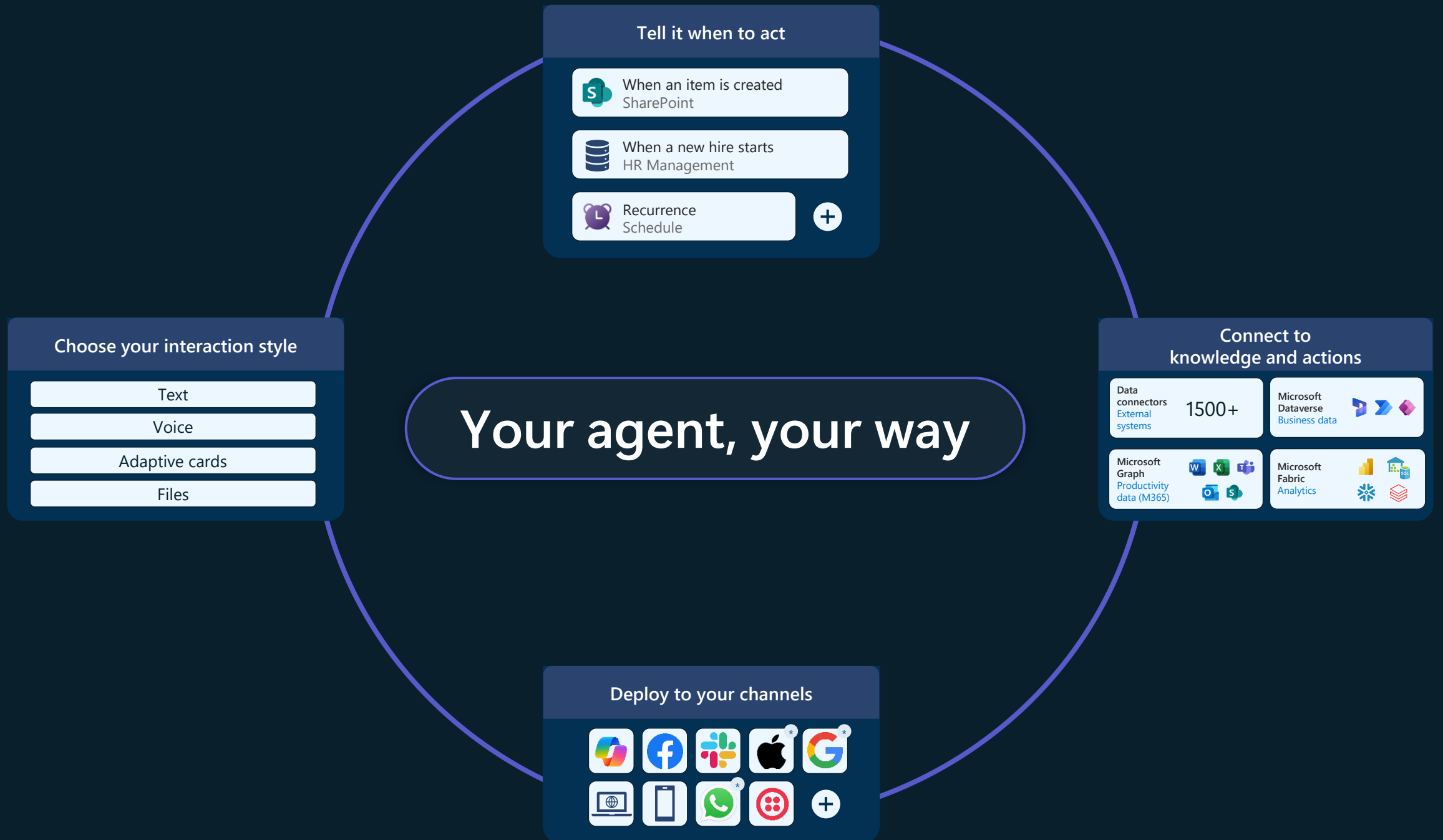
I recently purchased a product from your company, but unfortunately, it arrived broken. I would like to request a replacement. Could you please assist me with this?

The agent completes the ask using your data and knowledge

- Refunds, replacements
- Pets at home website
- Send an email
- Analyze image
- Message in Copilot

The agent generates a response





* Access this channel by connecting to an ISV

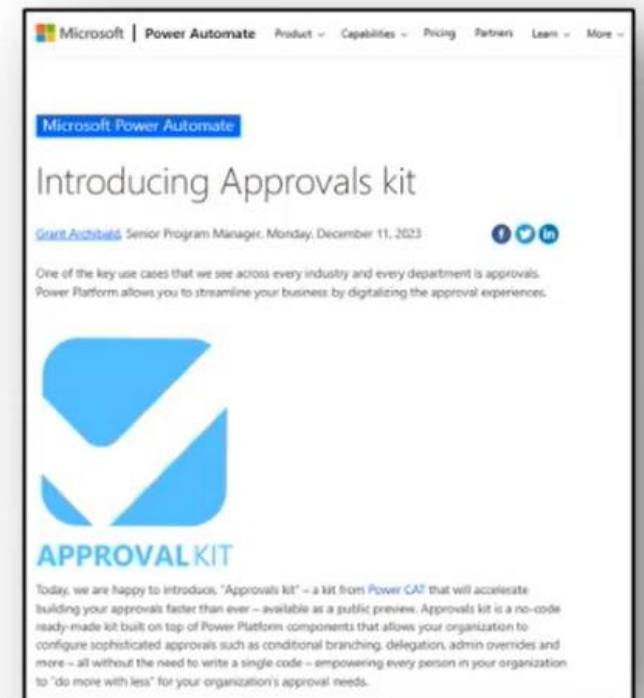
What is Approval Kit?

- Built on Approval connector Developed by Power CAT
 - + Creator Kit
 - + Managed Solution(Power App,Power Automate and Dataverse) to add low cc
 - + Custom connector
- No Code Creation

Citizen developers can easily create and customize approval using this kit – with code

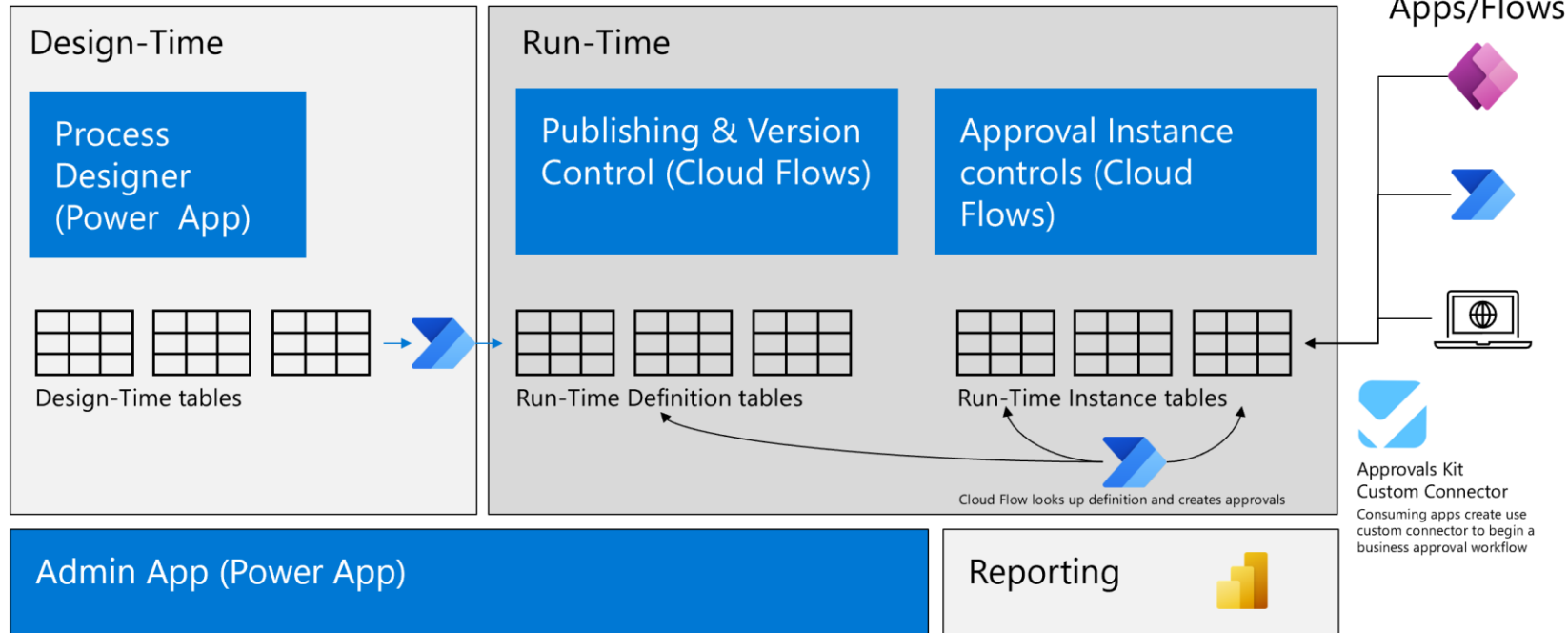
- Accelerate building Sophisticated approvals
 - Multi – stage
 - Conditional branching
 - Delegation
 - Out of office
 - Organizational Calendar
 - Workdays based timeout

Public Preview – Dec 2023



High Level Architecture

Approvals Kit: High Level Architecture



Why Approval Kit?

| | Approval Connector | Approval Kit |
|-----------------------|--------------------|--------------|
| Approval History | Custom | Yes |
| Multistage Approval | Custom | Yes |
| Delegated approvals | Custom | Yes |
| Out of Office | Custom | Yes |
| Workdays and Holidays | Custom | Yes |
| Standard Connector | Yes | Premium |

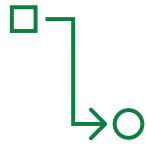
[Business approvals templates approvals kit comparison - Power Automate | Microsoft Learn](#)

Automated Approval Examples



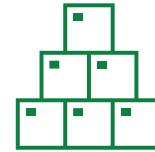
Document Approval

Invoices. Work
Orders, Sales,
Quotes



Process Approval

Vacation Request.
Expenses, Travel



Approval Component

Add as subcomponent of larger
end to end power platform
solution

[Business approvals templates approvals kit comparison -
Power Automate | Microsoft Learn](#)

How to Start with Approval Kit? - Personas



Gibson
Power Platform Admin
(Environment/DLP/Solution)

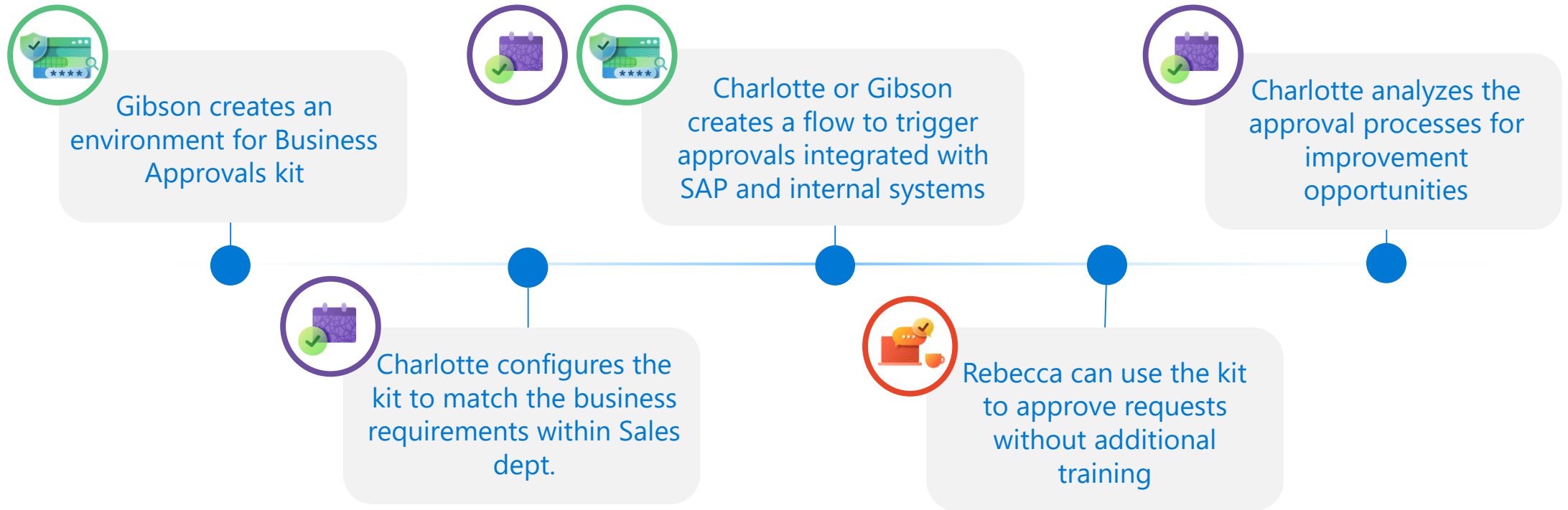


Charlotte
Approval Administrator
(Approval Kit Power App)

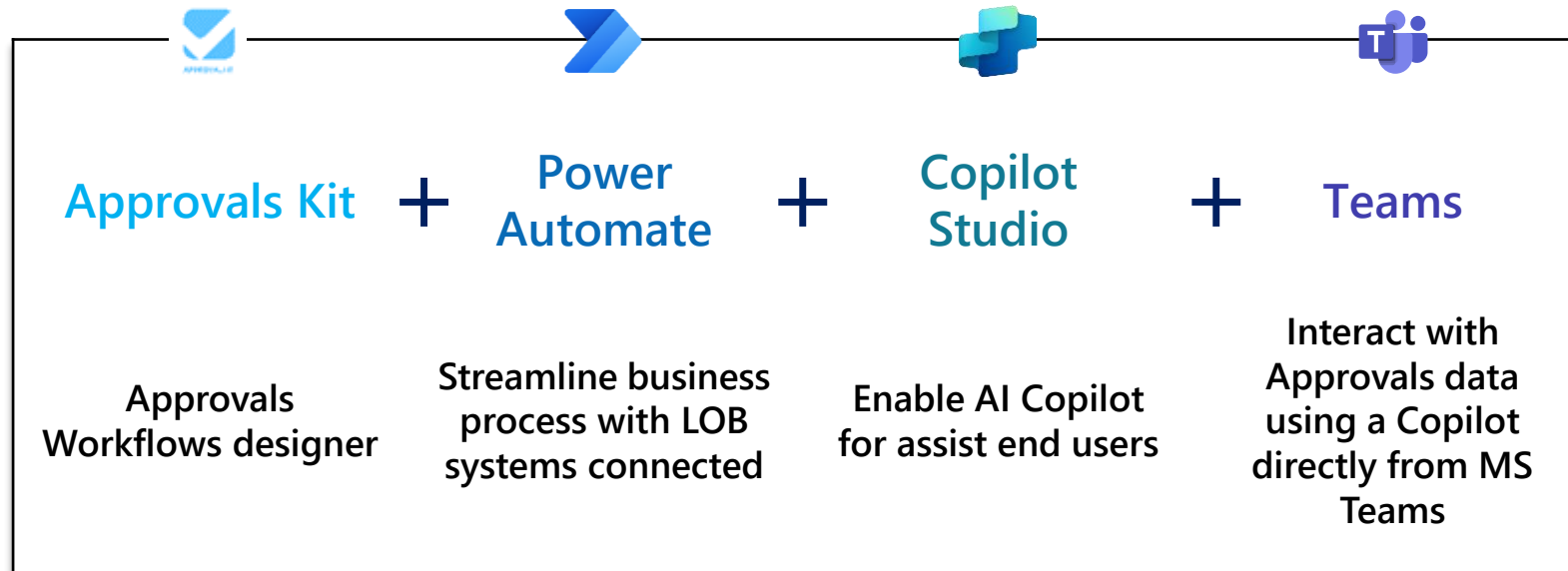
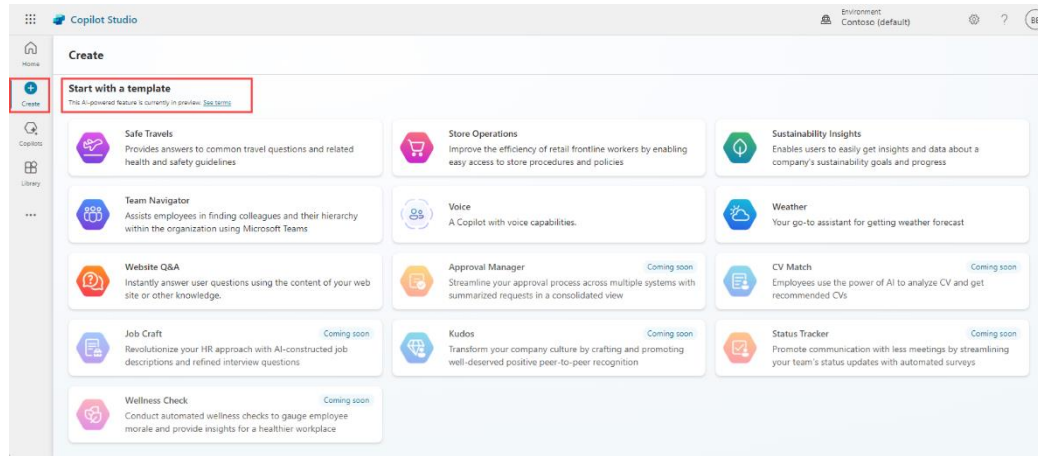


Rebecca
Approver
(Teams, Outlook, Power
automate portal)

User Journey



AI Copilot in Business Approvals



Approval Agent

Product:

"Copilot and Approval Templates for Business Approvals Kit"

A comprehensive toolkit designed to extend the existing Business Approvals Kit, adding Salesforce and ServiceNow templates and Copilot Studio capabilities.

Purpose:

- Streamline Business Processes: Integrate seamlessly with enterprise systems like Salesforce or ServiceNow to enhance the approvals experience.
- Accelerate Approvals: Speed up raising and resolving approvals, ensuring swift business operations.

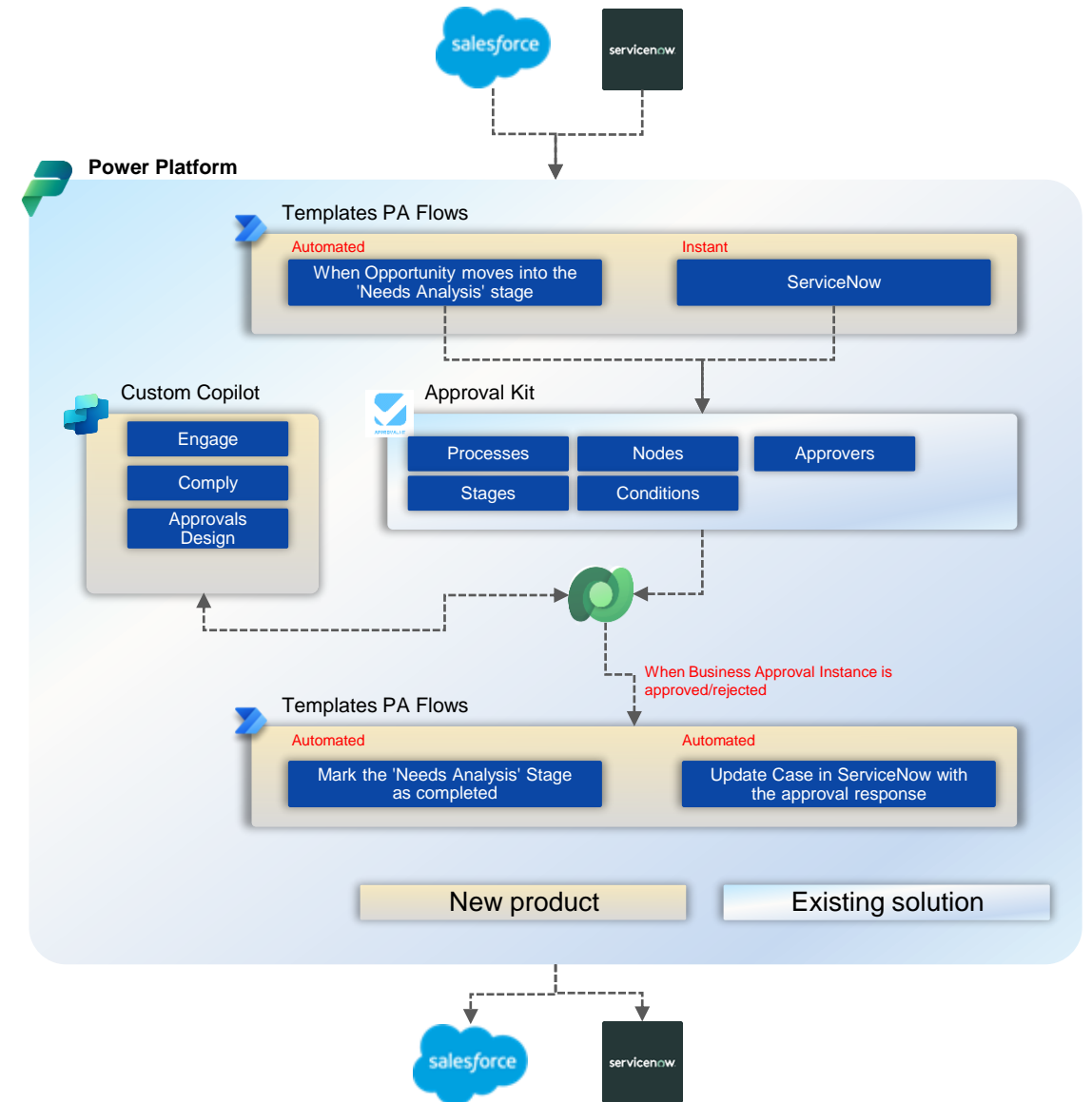
Features:

- Custom Copilot: Elevate your business communication channels with an interactive Copilot (AI assistant) that empowers users to:
 - **Engage:** Users directly interact with an AI-driven assistant for real-time approval inquiries.
 - **Pending Approvals instances**
 - **Raise Approval instance**
 - **Approve/Reject a given Approval instance**

-Salesforce & ServiceNow Templates: Customizable flow templates tailored for business approvals within Salesforce and ServiceNow ecosystems

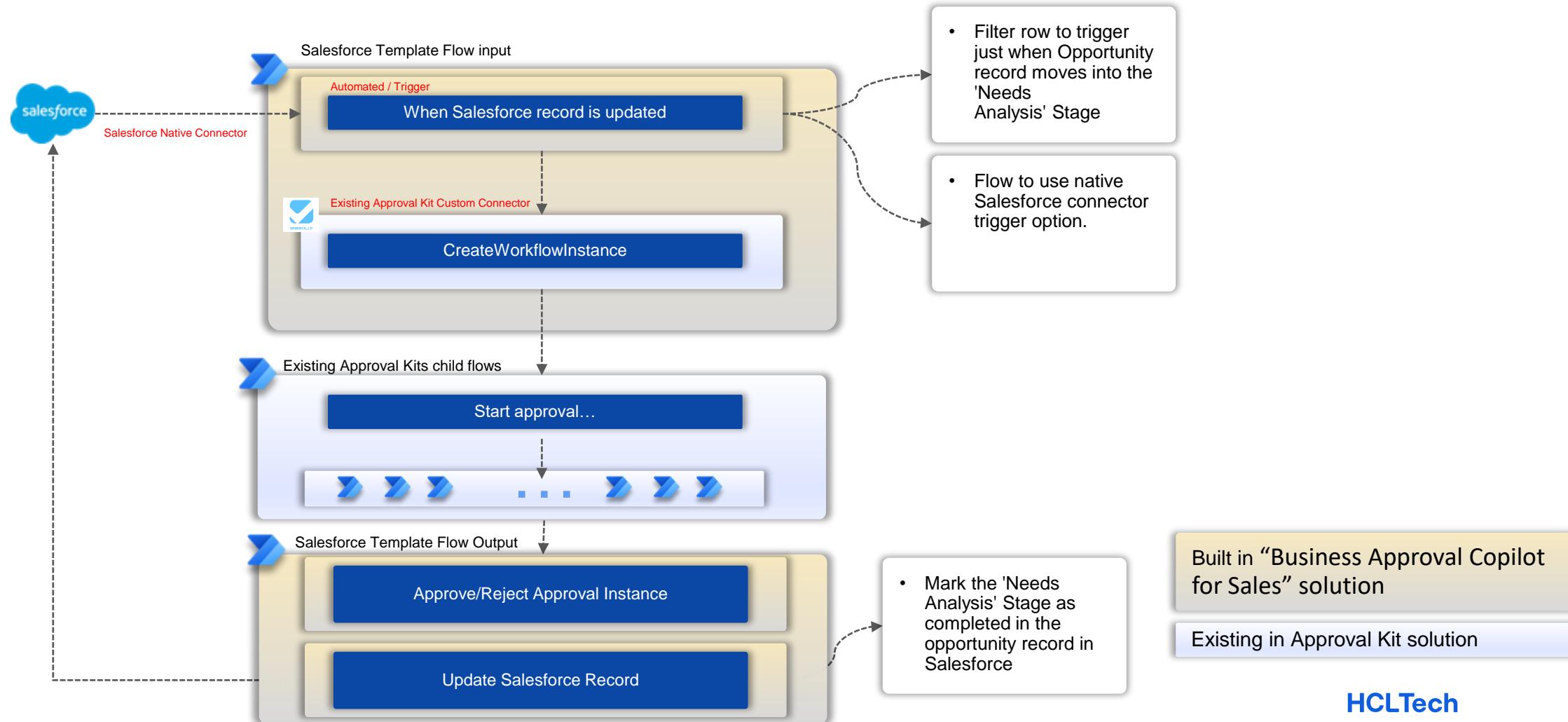
Prerequisites:

- Installation of the Base Business Approvals Kit solution is required to utilize this toolkit.



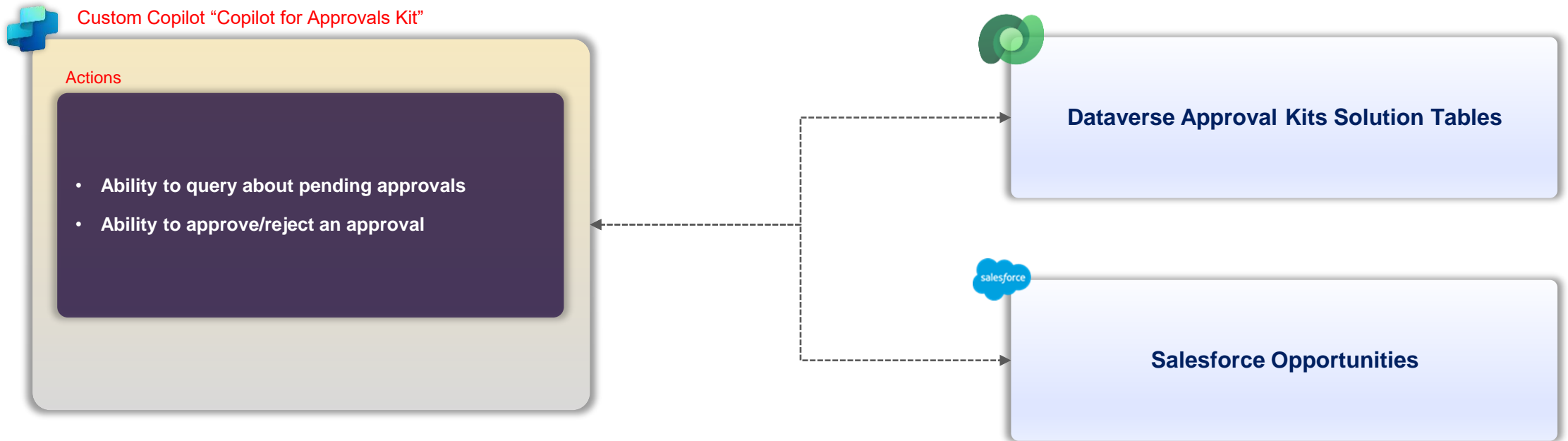
Business Approval Copilot for Sales

Data Journey



Business Approval Copilot for Sales

Custom copilot – solution capabilities

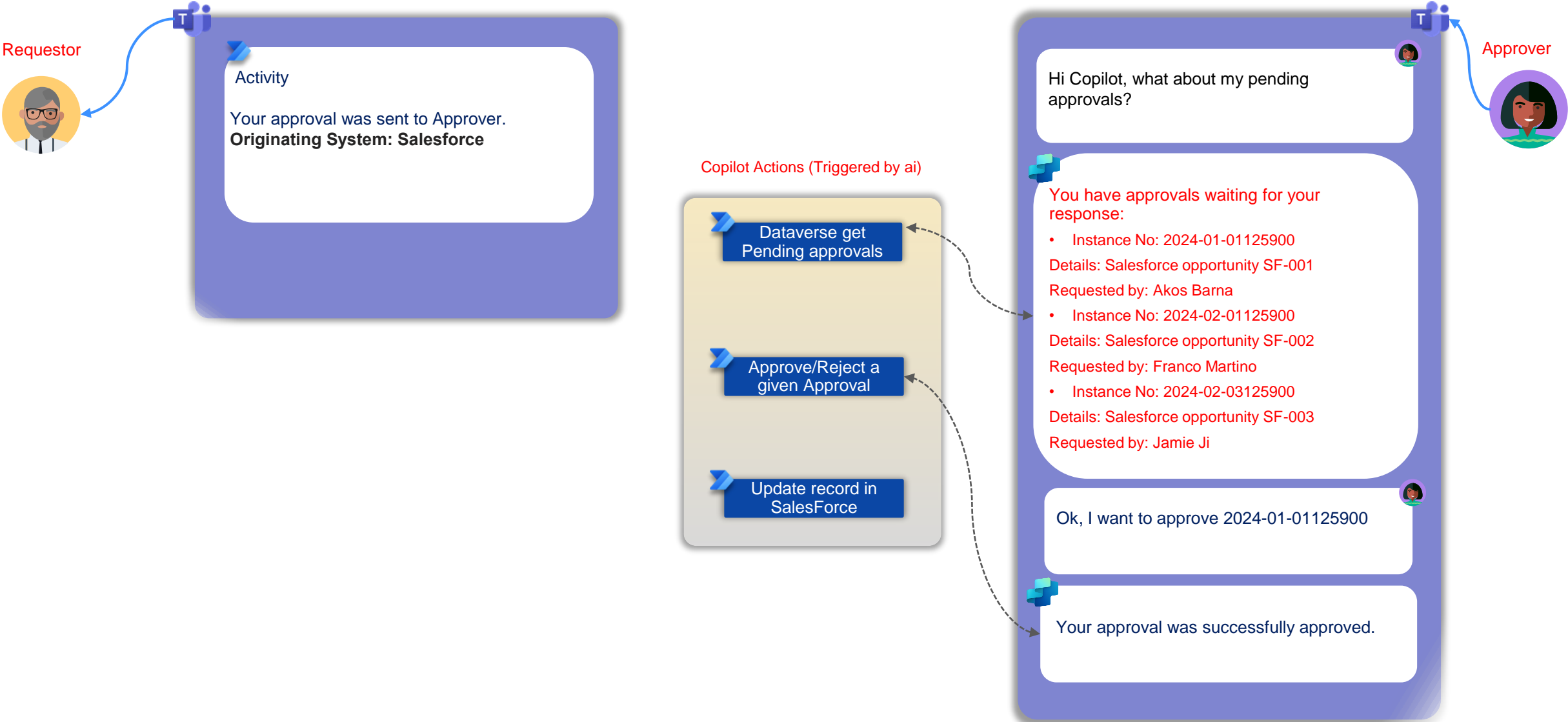


Existing in Approval Kit solution

built in "Business Approval Copilot for Sales " solution

Business Approval Copilot for Sales

User journey example



Resources



Copilot Studio trial

aka.ms/TryCopilotStudio

Copilot Studio website

aka.ms/CopilotStudio

Approval Kit

aka.ms/ApprovalsKit

Official Blog

aka.ms/CopilotStudioBlog

Copilot Studio Demo

aka.ms/CopilotStudioDemo

Product documentation

aka.ms/CopilotStudioDocs

Product guidance

aka.ms/CopilotStudioGuidance

Implementation guide

aka.ms/CopilotStudioImplementationGuide

Community

aka.ms/CopilotStudioCommunity

THANK YOU

Looking forward to connecting!

QR Codes



Feedback Form

[https://www.d365ppug.com/uk/
feedback](https://www.d365ppug.com/uk/feedback)



Agenda

[https://www.d365ppug.com/uk/
schedule](https://www.d365ppug.com/uk/schedule)