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DYNAMICS CON LIVE

MAY 2024



Build Intelligent Copilots with your

Microsoft Dynamics GP

data

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Agenda

- Introduction
- Learning objectives and expectations
- Introduction to Microsoft Copilot Studio
- Understanding the solution components
- Walkthrough Demo
- Q&A



Introduction

Mariano Gomez Bent

- 25 years in the MS channel
- CTO at Mekorma, Inc.
- 16x Microsoft Biz Apps MVP
 - Dynamics GP
 - Power Platform
- Microsoft Certified Trainer
- International speaker and blogger
- Father of 5



Learning objectives and expectations

Objectives

1. Combine the power of Microsoft Copilot Studio, Power Automate to create a Copilot-like experience for Dynamics GP
2. Understand how to use various Power Automate connectors to orchestrate workflow processes around Dynamics GP
3. Use Large Language Models (LLM) and Generative Pretrained Transformer (GPT) to create conversational experiences with Microsoft Dynamics GP



Learning objectives and expectations (continued)

Some assumptions:

1. Working knowledge or familiarity with Microsoft Dynamics GP and its architecture
2. Basic understanding of Power Platform
3. Have heard of or played with ChatGPT, Azure AI, or any other similar LLM



Learning objectives and expectations (continued)

In turn:

1. You don't have to see me coding or building anything
2. We will walk through an implemented Demo to spark ideas
3. The intent is not to show best practices, but to be practical so you can go back and try these things at home without fear



Introduction to Microsoft Copilot Studio

- Low-code tool to customize Copilot for M365 and build standalone copilots
- Capabilities of Power Virtual Agents are now part of Copilot Studio
- With Copilot Studio, you can easily design, test, and publish copilots that suit your specific needs for internal or external scenarios across your industry, department, or role
- Free trial
- <https://www.microsoft.com/en-us/microsoft-copilot/microsoft-copilot-studio>



DEMO WALKTHROUGH



Copilot Studio

Multiple choice options >

Options for user

Summary Balances

Address Information

Latest Transactions

+ New option

Save user response as

{x} RequestType choice >

+

Question Text ...

How would you like to query the vendor...

+ Add v

Identify

Multiple choice options >

Options for user

Power Automate

RequestVendorInformation

Enter key Enter value

Enter key Enter value

Body

```
{
  "model": "gpt-4-0613",
  "messages": [
    {
      "role": "user",
      "content": "varRequest X"
    }
  ],
  "temperature": 0.2
}
```

Enter HTTP cookie

Show advanced options v

varQuery

GetVendorInfo

GetResultSets

Address Info Scope

Summary Info Scope

Top 10 Trx

Return value(s) to Power Virtual Agents

SQL Server

Object Explorer

Connect - DESKTOP-150353D (SQL Server 15.0.2104 - sa)

- Databases
 - System Databases
 - Database Snapshots
 - DYN184
 - GPCONFIG184
 - GPCONFIGURATION
 - TW018
 - Database Diagrams
 - Tables
 - Views
 - System Views
 - dbo.Accounts
 - dbo.AccountSummary
 - dbo.AccountTransactions
 - dbo.ASIEXP06
 - dbo.ASIEXP07
 - dbo.ASIEXP08
 - dbo.ASIEXP09
 - dbo.ASIEXP12
 - dbo.ASIEXP22
 - dbo.ASIEXP13
 - dbo.ASIEXP19
 - dbo.ASIEXP20
 - dbo.ASIEXP21
 - dbo.ASIEXP22
 - dbo.ASIEXP27
 - dbo.ASIEXP28
 - dbo.ASIV0001
 - dbo.ASIV0002
 - dbo.ATP_BOM
 - dbo.ATP_BOMMHP
 - dbo.ATP_IVXFR_IN
 - dbo.ATP_IVXFR_VIA
 - dbo.ATP_POP
 - dbo.ATP_POP_REC
 - dbo.ATP_POP_RET
 - dbo.ATP_SOP
 - dbo.ATP_STK_IN
 - dbo.ATP_STK_OUT
 - dbo.BankTransactions
 - dbo.CAM10100V
 - dbo.CAM10110V
 - dbo.CFM_SOPAll
 - dbo.CFM10000
 - dbo.CFM10301
 - dbo.CFM10302
 - dbo.CFM20000
 - dbo.CFM20101
 - dbo.CFM20102
 - dbo.CFM30200
 - dbo.CFM30300
 - dbo.CFM30500
 - dbo.CFM40100
 - dbo.CFM40200



Some takeaways

- Prompt engineering is a thing.
- Microsoft Dynamics GP is more than just the UI. You can use Copilot Studio to provide rich interactions with the application
- GPT-4 is an awesome generative language engine





Q&A

Resources

- Download the Bot Building Handbook
<https://aka.ms/PVAPlaybook>
- Download the Implementation Guide
<https://aka.ms/copilotimplementationguide>
- Copilot Studio in a Day (self-paced)
<https://aka.ms/CSIADStudent>
- Copilot Studio Wave 1 features
<https://learn.microsoft.com/en-us/power-platform/release-plan/2024wave1/microsoft-copilot-studio/>
- GPT-4 API
<https://platform.openai.com/docs/models/gpt-4-and-gpt-4-turbo>

