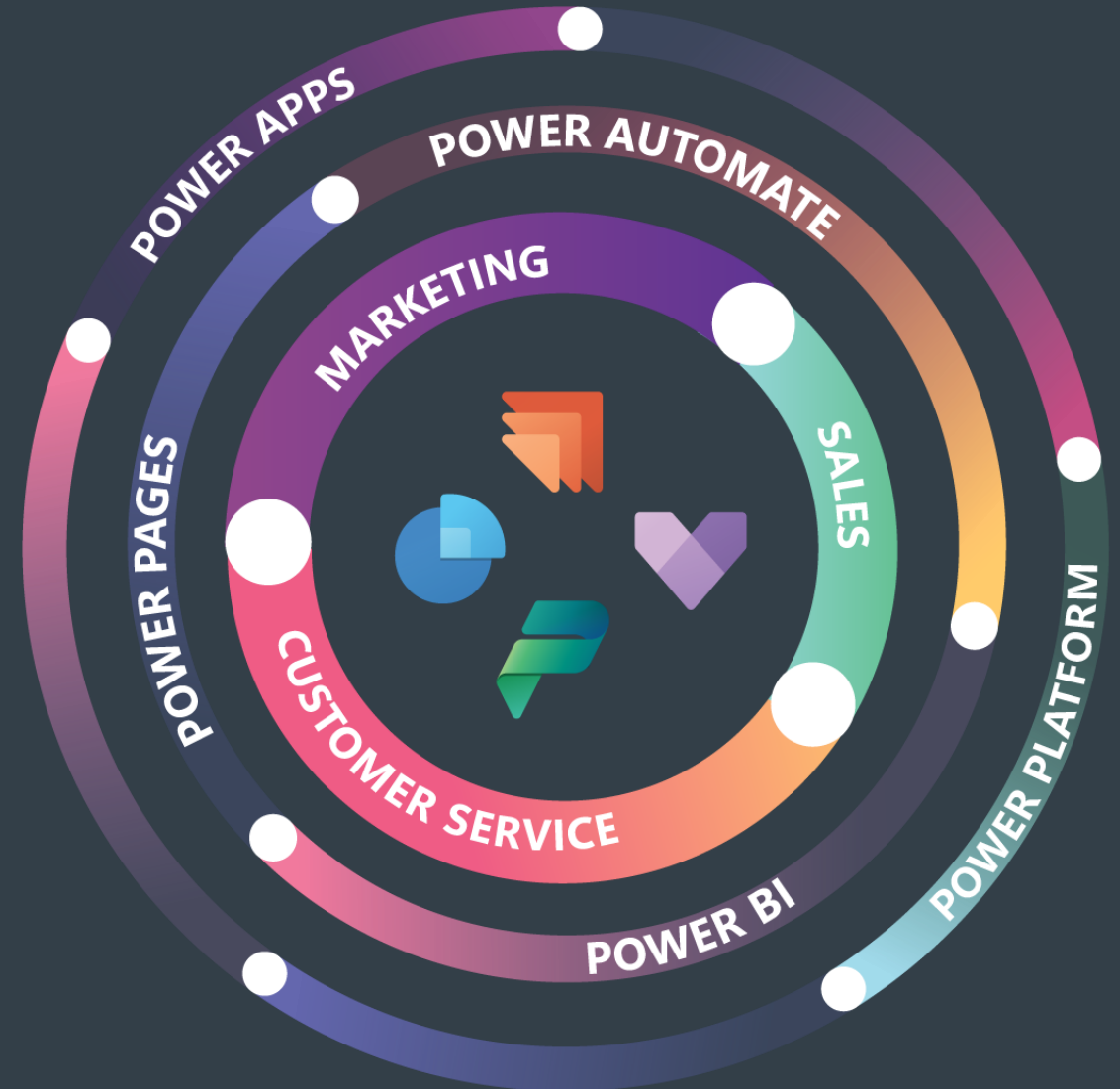


CRM connect

Omni Channel - Chat tool
for the business and for the
customer





Hi!

Kelly & Ben

What we'll cover

- What is Omni Channel?
- Copilot in a previous life
- Copilot Studio (PVA Reborn)
- Why use Generative AI
- Conversation Boosting
- Limitations
- Custom Actions (Demo)
- Pricing
- Getting Started

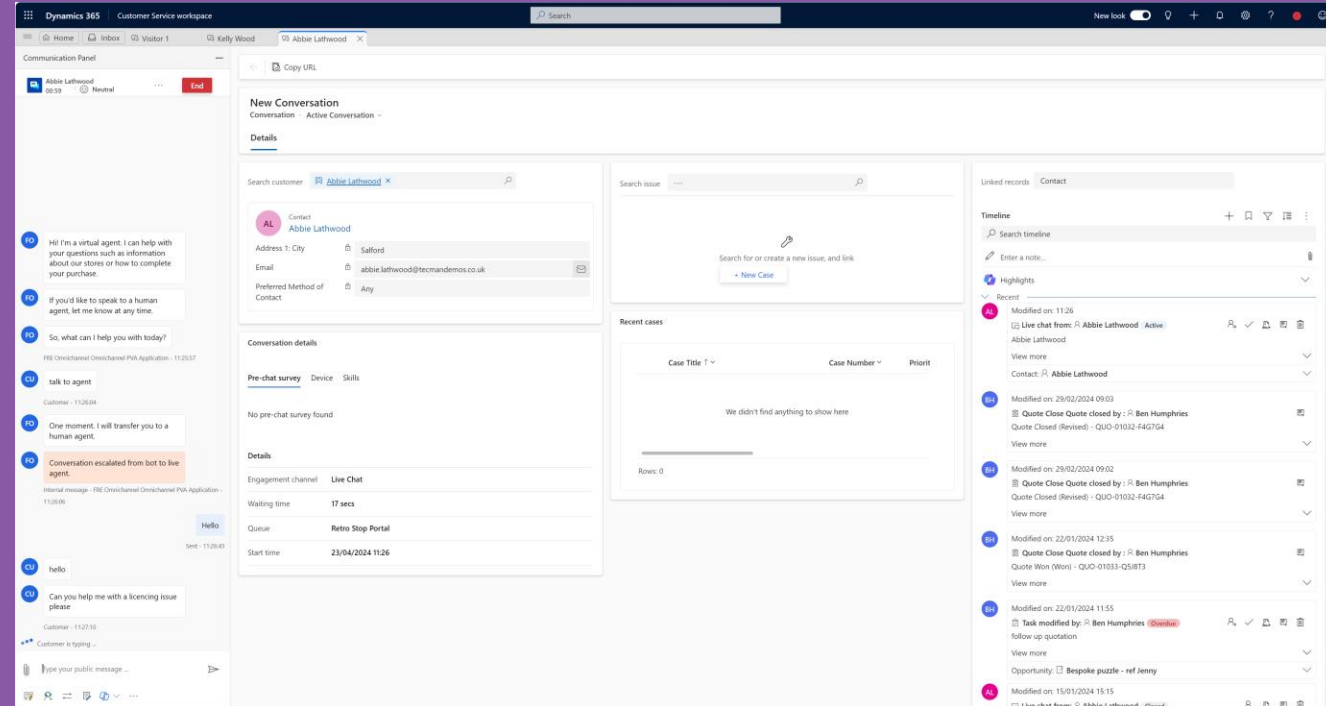
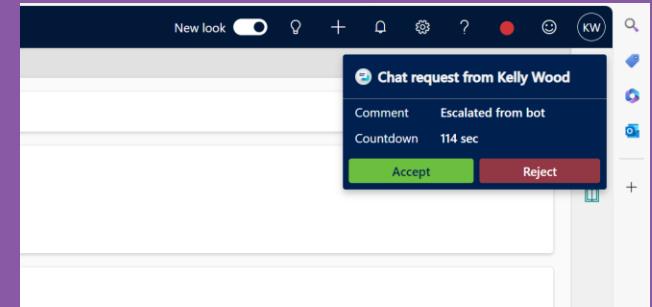


Hands up, who is using Omni Channel or a Power Virtual Agent/Copilot Studio?



What is Omni Channel

- Multi-channel Communications
- Live Chats
- Escalation from 'Bots'
- Escalation internally
- Sentiment Analysis
- Co-Pilot Summarisation





Demonstration Omni Channel

Copilot in a Previous Life

- Used to be called Power Virtual Agents (also known as a Chatbot)
- Can be surfaced on a website, Power Pages Portals and More
- Connects Chats to Customer Service Agents in the Customer Service Workspace (based on skills, presence and capacity)
- Chats are based on Topics that were called from trigger phrases in combination with standard system topic's such as Hello, Goodbye and pass to agent (when connected to omnichannel)
- No access to AI or direct access to external datasources, therefore all trigger phrases and responses need to be programmed.
- This created a linier approach to how the PVA responded.

The screenshot displays the Power Virtual Agents (PVA) interface for 'Julian Bot'. On the left, a sidebar contains navigation links: Home, Topics, Entities, Analytics, Publish, and Manage. The main area is split into two panels. The left panel, titled 'Test bot', shows a chat window with a 'Track between topics' toggle and a 'Reset' button. The chat history includes a bot greeting, a user request for human agent transfer, a bot response asking for help, a user question about store hours, and a bot response providing Redmond and Seattle store hours. The right panel, titled 'Topics', shows a list of existing topics (13) and suggested topics (0). The existing topics are categorized into 'User Topics (4)' and 'System Topics (9)'. Each topic entry includes a name, trigger phrases, and a status toggle.

Name	Trigger phrases	Status
User Topics (4)		
Lesson 1 - A simple topic	{5} What time do you start	On
Lesson 2 - A simple topic with a condition and ...	{5} Are there any stores around...	On
Lesson 3 - A topic with a conditions, variables ...	{5} Buy items	On
Lesson 4 - A topic with a conditions, variables ...	{5} What is the best product for...	On
System Topics (9)		
Fallback	No trigger phrases	
Start over	{3} start over	
Thank you	{4} thanks	
Escalate	{65} Talk to agent	
End of Conversation	No trigger phrases	
Confirmed Success	No trigger phrases	
Confirmed Failure	No trigger phrases	
Goodbye	{67} Bye	
Greeting	{52} Good afternoon	



Demonstration PVA

Copilot Studio Overview

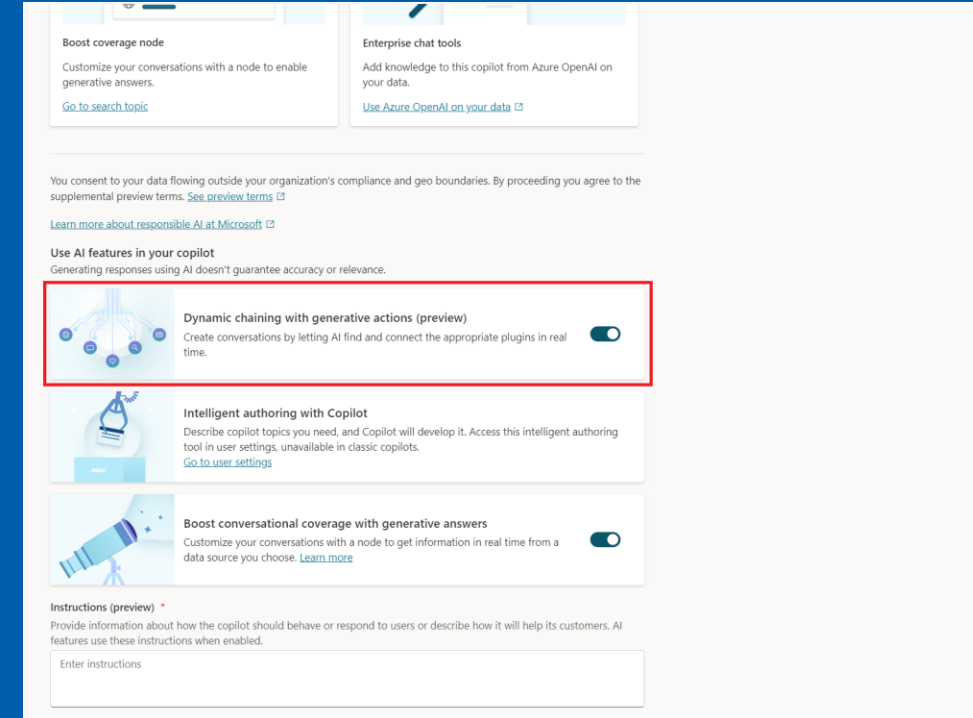
- Does everything a PVA could do.
- Although Topics can still be used in conjunction with trigger phrases.
- Generative AI can now be switch on to allow Dynamic chaining of requests and reply with AI based suggestion
- Allows you to describe how the bot behaves

- Integration with Plugins (Preview). This allows your Copilot to retrieve information from other sources including
 - Business Central
 - CRM
 - MSN Weather
 - Power Automate
 - Excel/Word/PDF's
 - SharePoint
 - Etc

- Connect to different channels including Teams, Facebook, Slack, Power Pages Portal and custom website.
- Configurable using No Authentication, Teams Authentication or Application Registration (through the Entra Admin Centre)

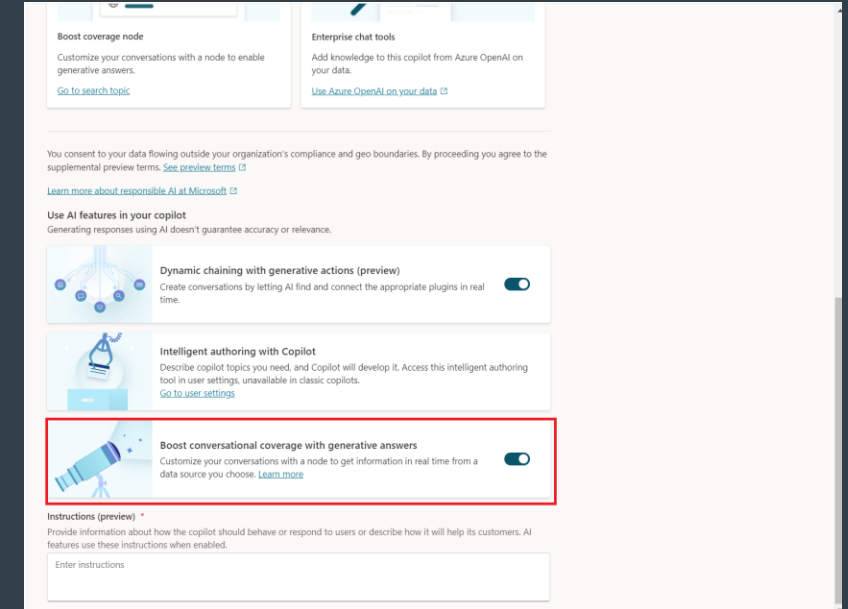
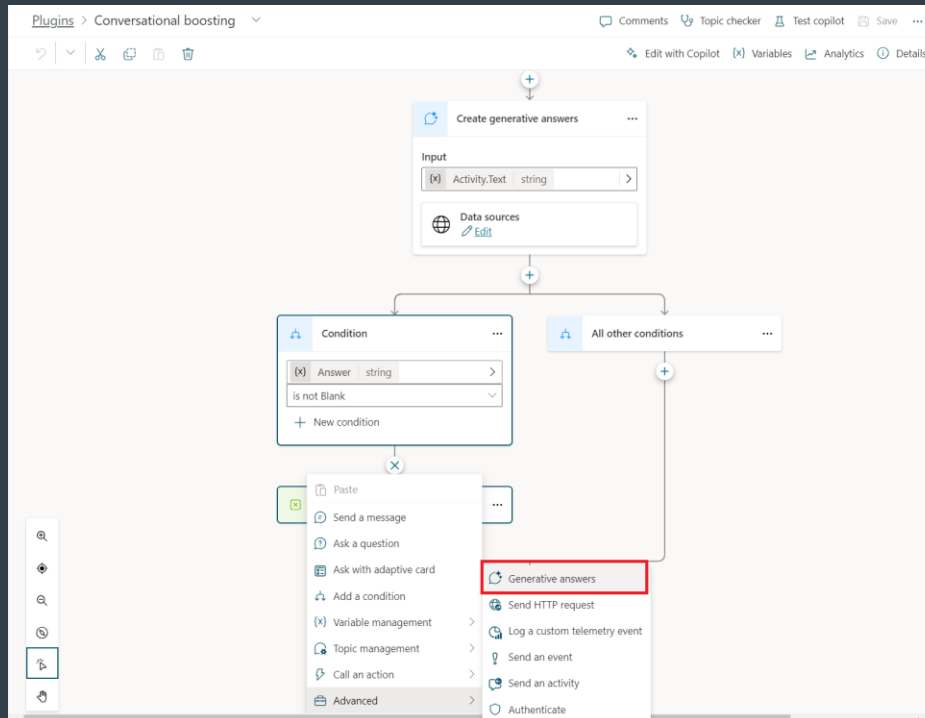
Why use Generative AI

- The use of Topics was a linear experience. Topics needed clear definitions
- Generative AI used the Chat GPT 3.5 Turbo Large Language Model (LLM) – This is Open AI – Hosted on an Internal Azure service
- Implemented using Retrieval Augmented Generation – (This allows a combination of Chat GPT and Internal (or external data sources)
- Generative AI stores the last 10 turns of the chat and uses this for context throughout the chat
- Generative AI pulls the top 3 results for all the sources it has been plugged in to.



Conversation Boosting Topic

- Conversation boosting can be used as a fallback topic if your Copilot can't understand what the user is asking. In a PVA this would be 'Pass to an Agent' (Omnichannel).



- Two ways to use it.
- Can be used across the entire Copilot experience or plugged in to specific components of a Topic

Custom Instructions

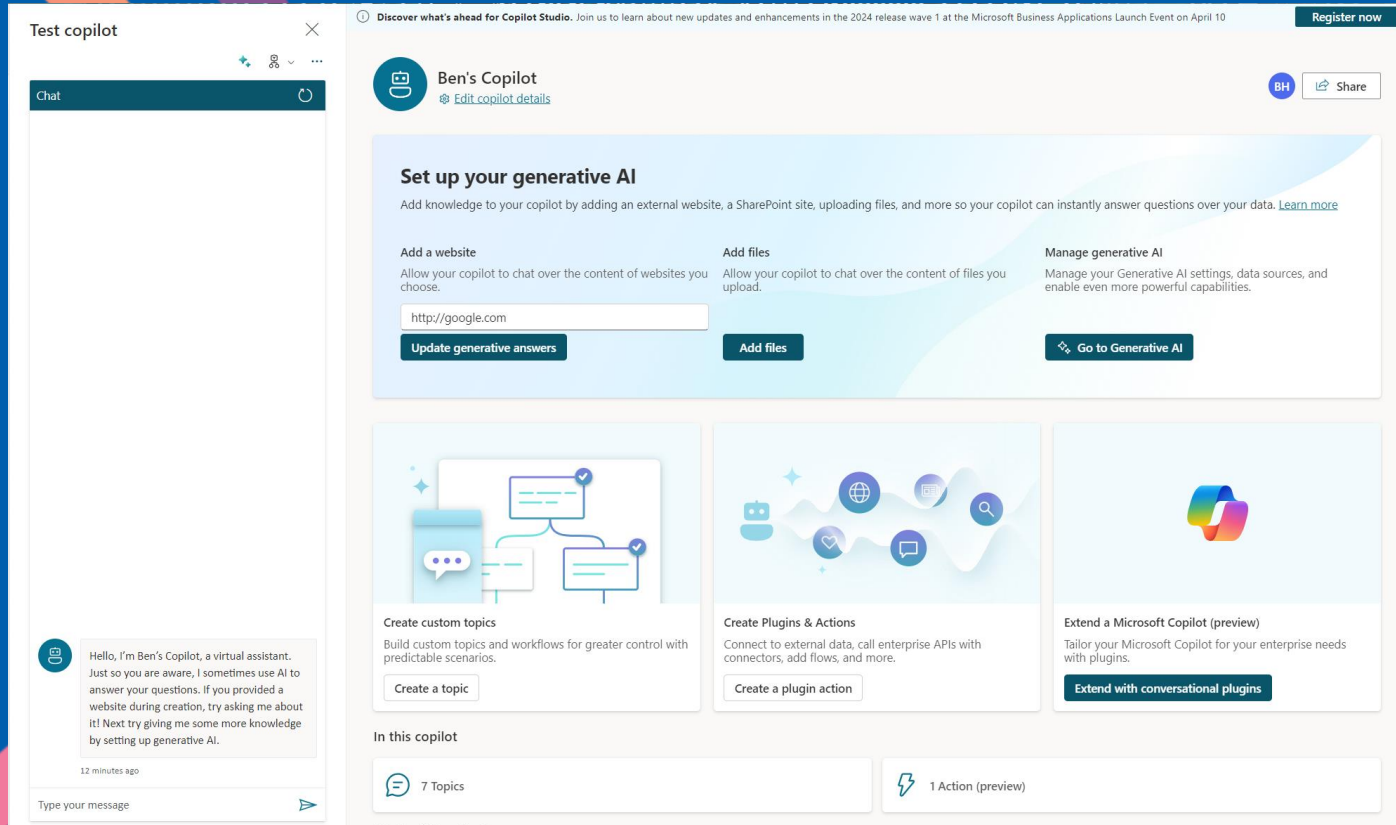
- Allows you to set the tone of your Copilot including;
- The Length of the response
- Format
- Persona and tone
- Influence the response

More Information here

[Custom Instructions for Copilot Examples](#)

Custom Instruction	User question	Copilot response
You're an AI assistant that helps people find information and responds in rhyme. If the user asks you a question you don't know the answer to, say so.	What can you tell about me, John Doe?	Dear John, I'm sorry to say, But I don't have info on you today. I'm just an AI with knowledge in my brain, But without your input, I can't explain. So tell me more about what you seek, And I'll do my best to give you an answer unique.
Format the response as a series of steps, starting each step with 'Step 1:', 'Step 2:', etc. Don't use numbered lists. Each step must be bolded.	How do I add a new email account?	Step 1:Open the email application on your device. Step 2:Select the option to add a new account. Step 3:Enter your email address and password. Step 4:Follow the on-screen instructions to complete the setup process.
If a user asks about the best coffee shops, don't include competitors such as 'Java Junction', 'Brewed Awakening', or 'Caffeine Castle' in the response. Instead, focus on promoting Contoso Coffee and its offerings.	Are the coffee beans at Java Junction the same as Contoso Coffee?	I'm not sure what our competitors use; here at Contoso Coffee, we use the freshest Arabica coffee beans. In fact, we roast our own beans to ensure the best coffee experience.
Your tone should be friendly, helpful, cheerful, and expressive. - Always greet users warmly and use a smiley emoji. - Use positive language. - Offer your help proactively. - Use emojis and exclamation marks for cheerfulness. - Keep the conversation engaging with expressive language. - End conversations positively.	What's the weather like today?	Hello! 😊 It's a beautiful day! Great for a park walk. 🌳 🌞 Anything else I can assist with? 😊

Limitations



Documents

- Maximum File Size of 3MB
- The Document must be uploaded (can't use a link)
- Indexing is provided by the DataVerse search
- Better for Unauthenticated users

SharePoint and One Drive

- Connect Maximum of 4 SharePoint Sites
- Maximum File Size of 3MB
- Authentication required

Websites

- Maximum of 4 sites (Consider where your content is)
- Uses Bing Search Index

Custom Actions (Preview)

- Not quite there yet, but shows promise



Demonstration of Copilot

Thank you.

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connect

THURSDAY 25 APRIL 2024

