

Unifii360 AI Support

User Manual

Distribution List:

ORGANIZATION	ΝΑΜΕ
EAGLE360 CONSULTING	

Revision History:

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1. ChatGPT

ChatGPT is an open-source natural language processing (NLP) model developed by OpenAI. It is designed to generate human-like conversations in response to user input. ChatGPT is based on the GPT-3 model, which has been trained on a massive amount of conversational data, and is able to generate responses that are both meaningful and coherent.

We need to setup ChatGPT AI APP as given below

1.1 Setup Unifi360 AI

I. Type "Extension Management" on the Tell me what you want to do as shown below figure 1-1

Tell me what you want to do	
extension management	
Go to Pages and Tasks	
> Extension Management	Administration



II. Select "E360-Unifii360-AISupport" and select "Setup" as shown in figure 1-2

Installed Extensions				□ c²,
	options			Ŀ ₽ .
🗃 Extension Marketplace 📑 Upload Extension	Sinstallation Status Oview	😤 Install 🔅 Uninstall 🔅 Unpublish 🖷	Set up 📑 Download Source 🕕 Learn More 🤁 Refresh	
Data Archive	Microsoft	V. <u>21.5.53619.53946</u>	Global	
Data Search	Microsoft	v. <u>21.5.53619.53946</u>	Global	
Dynamics GP Historical Data	Microsoft	v. <u>21.5.53619.53946</u>	Global	
Dynamics GP History SmartLists	Microsoft	v. <u>21.5.53619.53946</u>	Global	
Dynamics GP Intelligent Cloud	Microsoft	v. <u>21.5.53619.53946</u>	Global	
E360-DWP-CS-UpgradetoBC	Eagle360	v. 1.0.0.49	Dev Dev	
E360-Unifii360-AlSupport	Unifii360	v. 1.0.0.8	🖸 Dev	



ZX

Select "Next"

Unifii360 AI Support Setup Wizard

203

Welcome to Unifii360 Al Setup Wizard You can setup Unifii360 Al Setup now.

Let's go!

Choose Next to start basic settings for Unifii360 AI Setup.

Back	Next	Finish

Figure 1-3

III. Next you need to obtain the "ApiKey"

An API key is a unique string of characters used to authenticate requests associated with an account or project. API keys are used to track and control how the API is being used, or example to prevent malicious use or abuse of the API.

To obtain an "ApiKey" Please clicking on <u>https://platform.openai.com/</u>



Figure 1-4

Need to Sign up for an OpenAI account by clicking on the "Sign up" button

Cr	eate your account
lease signi	e note that phone verification is required fo up. Your number will only be used to verify your identity for security purposes.
Ema	il address
Ĭ.	
	Already have an account? Log in
	0R
~	Continue with Google
9	

\$

Once you type in your email Id and Password you will receive an verification email to your email account provided as shown below

) Some content in this message has been blocked becau	use the sender isn't in your Safe senders list. I trust content from noreply@tm.openai.com. Show blocked conter
OpenAl <noreply@tm.openai.com> To: Riyaz Muzammil</noreply@tm.openai.com>	
	₽ OpenAl
	Verify your email address
	To continue setting up your OpenAl account, please verify that this is your email address.
	Verify email address
	This link will expire in 5 days. If you did not make this request, please disregard this email. For help, contact us through our <u>Help center</u>
	Figure 1-6

Click "Verify Email Address" This will take you to the below page.

\$

Tell us about you

First name	Last name
Organization nam	e (optional)
Birthday	Ē
C	Continue



Click "continue" once data has been updated correctly on the relevant fields

\$

Verify your phone number



Enter the phone number for the verification code to be sent to

\$

Please enter the code we just ser	nt you.
þoo ooo	

C 🖻 https://platform.openai.com			A" to	📞 🤇 🔄 🖨 🚇
😂 Business Manager 🛄 All Singapore Post 🚺 Testing 🔥 Tempo - Eagle360 P	🗅 80534_NAV2013_E b consolidation steps 🕽 People - 30	X Webcl 🚦 Design Details - Wa 🚦 Set Up Approval Us	How to Create Purc How to Create Purc	Configure Excel Ad >
S Overview Documentation API reference Examples Playgr	ound		✤ Upgrade	⑦ Help R Edgle360 Consulting
	Join the ChatGPT plugin developer waitlist	Sign up 🛛 🗙		
	Welcome to the OpenAI p	latform		
	Start with the basics			
	Dulakatart tutatla	Franks		
	Quickstart tutorial	Examples		



Then click on the profile icon on right hand top corner as shown above.

Overview Documentation API reference Example	es Playground		Upgrade ⑦ Help Regle360 Cor
			riyaz24@gmail.com
		Cine up V	Eagle360 Consulting
	Join the ChatGP1 plugin developer waitlist	aign up X	Manage account
			Invite team
	Welcome to the OpenAI platfo	m	Visit ChatGPT
			Visit DALL-E
	Start with the basics		Help Pricina
			Terms & policies
			Log out
	Quickstart tutorial Exam Learn by building a guick sample app Explor	ples e some example tasks	
		and the second se	
	Figure 1-11		
	-		
en Click "View API kevs"	,		
Overview Documentation API reference Examples	Playground		◆ Upgrade ⑦ Help
			riyaz24@gmail.com
			Eagle360 Consulting
	> Join the ChatGPT plugin developer waitlist	Sign up $ imes$	Manage account
			View API keys
	Walcome to the OpenAT platform		Invite team
	welcome to the openAI platform		Visit ChatGPT
			Help
	Start with the basics		Pricing
			Terms & policies
			Log out



ORGANIZATION	API keys	API keys							
Settings Usage	Your secret API keys are after you generate them.	Your secret API keys are listed below. Please note that we do not display your secret API keys again after you generate them.							
Rate limits Members	Do not share your API ke protect the security of yo found has leaked publicl	Do not share your API key with others, or expose it in the browser or other client-side code. In order to protect the security of your account, OpenAI may also automatically rotate any API key that we've							
Billing	NAME	KEY	CREATED	LAST USED ①					
USER	My Test API key	sk17cH	May 2, 2023	Never	1				
API keys	+ Create new secret key								

Figure 1-13

Then Click "Create new secret Key"

My Test API key1		
	Cancel	Create secret key

Create new secret key

Please save this secret key somewhere safe and accessible. For security reasons, **you won't be able to view it again** through your OpenAI account. If you lose this secret key, you'll need to generate a new one.

k-TKnOhFYQtxMGID8IZdBIT3BlbkFJ4SYnQUjHq0f5A96voGD3

Figure 1-15

Copy the created ApiKey and click on "Done"

Overview Documentation API reference	Examples Playground					🔶 Upgrade	Help	R Eagle360 Consultir
RGANIZATION	APT keys							
D Eagle360 Consulting 🔘								
iettings	Your secret API keys	are listed below. Please note	that we do not display yo	ur secret API key	ys again			
lsage	after you generate the	em.						
late limits	Do not share your AP	I key with others, or expose it	in the browser or other cl	lient-side code. 1	In order to			
fembers	protect the security o	f your account, OpenAI may	also automatically rotate	any API key tha	at we've			
Billing	found has leaked pub	licly.						
	NAME	KEY	CREATED	LAST USED 🛈				
ISER	Secret key	skRjk2	May 9, 2023	Never	/ 8			
PI keys	+ Create new secret k	ev						
	Default organiza If you belong to mult when making request Eagle360 Consulting	tion ple organizations, this setting s with the API keys above.	g controls which organize	ation is used by d	default			

2055	
Step2 - Setup General.	
ApiKey	
Endpoint	https://api.openai.com/v1/completions
Support Email	helpdesk@eagle360.consulting.test
Sign Up for the key	https://chat.openai.com/auth/login

The paste the copied created API key on the API Key field below

Figure 1-17

enter the E360 support email address as <u>helpdesk@eagle360.consulting</u>" then click "Next"

IV. Then contact Eagle360 to obtain the Unifii360 AI License Key

V. Once you receive the Unifii360 AI License Key, enter the License key as shown below

ŝ			
Step3 - License			
License Key	86635C02-FBB0-4413	-9567-27363	BE8A1606

VI. Click "Next" to complete Unifii360 AI setup.

Unifii360 AI Support Setup Wizard	
\checkmark	
OK Step4 - You have finished the setup	
That's it!	
To save this setup, choose Finish.	
Bac	k Next Finish
Figure 1-19	

VII. Type "Uniffi360 AI Setup" on the tell me what to do search as shown below

Tell me what you want to do	× ²	×
Unifii360 Al Setup		
Go to Pages and Tasks		
> Unifii360 AI Setup	Administration	
Figure 1-20		

VIII. Add the below given "<u>helpdeskcc@eagle360.consulting</u>" to the "CC" and <u>helpdeskbcc@eagle360.consulting</u> to "BCC" email address boxes. Also Activate the "Trigger Request in validate function."

Actions \lor Automate \smallsetminus			
General			
ApiKey	sk-wmT8zKm7NzD9UQSC6BEIT3B	сс	helpdeskcc@eagle360.consultin
Endpoint	https://api.openai.com/v1/comple	BCC	helpdeskbcc@eagle360.consulti
Support Email	helpdesk@eagle360.consulting.te:	Trigger Request on va	
License Details			

Figure 1-21

1.2 Using the Unifi chat help function

The help function is available on the below listed business central documents

- Sales documents
- Purchase documents
- Finance documents
- Warehouse documents
- Service-related documents
- Inventory documents
- Production related documents
- Jobs related documents.

I. Using the Unifi chat help function from the sales related documents

As you can see below there is new "Support" button added to the menu

Dynamics 365 Business Central		
	Finance 🗸 Cash Management 🗸 Sales 🗸 Purchasing 🗸 Unifii 360 Shopify 🗸 🚍	
Sales Orders: All \checkmark \bigcirc Search	+ New 🔋 Delete Process 🗸 Release 🗸 Posting 🗸 Print/Send 🗸 Order 🗸 Support 🗸 Actions 🗸 Related 🗸 Reports 🗸 Automate 🗸 Fewer options	



Once you click on it will display the two support options as shown below

Sales Orders:	All Y I A	Search + Ne	w 间 Delete	$Process \lor$	Release \vee	Posting \lor	Print/Send \sim	Order \lor	Support ~ Actions	Rel	ated \lor Reports \lor	Automate 🗸 🛛 Fev	ver options	Ê	$\nabla \equiv$	() , ^e
	Sell-to	Customer			Fyter	mal			🕜 Get Help from Unifii36	i0Al	Complet	Amount Shinned Not	Amount Shipped Not			
No.†	No.	Sell	-to Customer Nan	ne	Doci	ument No.	Location Code	Assigned	🖃 Email Support		Shipped	Invoiced (LCY)	GST	Amount	Amount Inc	Juding GST
261486	1006	Z BA	RRA JACKS PTY	LTD - ROCKHA	AMPTON		A		9/08/2022	Open	No	0.00	0.00	0.00		0.00

Figure 1-23

• Get Help from Unifii360AI – This will allow you to type in any question you have regarding business central or copy any error message which appears when users are processing data using business central to help understand and resolve the error.

Ealt - U	nitii360 Al					7 ×
Manage	🕜 Ask Unifii360Al	E Check Last Error	Email Support	Unifii360AI Log	🔀 Clear	
Questior	1					
Answer						

• Email Support – This option when clicked will open the compose email template with From, To, CC and Bcc email id's filled in as shown below. Where you can type in the issue which needs partner support on the message body and the error message supporting documents as an attachment.

(Compose an Email	
	🖥 Send email 📋 Discard draft 🖷 Use Word template 🕞 Show source document 🛛 More options	
F	rom Eagle 360 (demo@eagle360.consulting)	···
Te	o helpdesk@eagle360.consulting.test	
C	helpdeskcc@eagle360.consulting.test	
В	cc helpdeskbcc@eagle360.consulting.test	
S	ubject	_
	We cannot post PO-000345 due the below error. Best Regards, Alan, Finance Manager, ABC group.	
L	A A° B / U ∠ A ≡ ≔ •≡ •≡ » ≣ ≣ ≅ ⊗ ⊗ X [*] X ₂ ••• ₪ ··	
A	Attachments Manage	53
	Add file Add file from source document Image: Delete	무

Figure 1-25

II. Using chat support on a sales order once an error generated as shown below. Click on "Support"

Destine	Deleses Deces	Drint/Cond Door			Delete d									
The name has an	error Refresh (ES) to a	indo the change or c	orrect the error	t Actions V	Related V A	utomate 🗸 🖓 Few	er optioi	15						
nie page nas an	circle <u>Refresh</u> (19) to t	indo the change, or e	oneer the error.											
hopify>														
nes Manage	Line Order Few	er options												Ŕ
							Qty.							
Туре	No.	Item Reference No.	Description	Back Order Status	Location Code	Quantity	Ass to Order	Res Qua	Unit of Measure Code	Unit Price Excl. GST	Line Disc %	Line Amount Excl. GST	Shopify Compare at Price	Qty. to Ship
ltem	26880		21 SEABORG 300J		A	8 5		-	EA	899.00	12.5	3,146.50	0.00	
-														
	JD)				3,146.50	Total Excl. GS	T (AUD)							3,146
ubtotal Excl. GST (Al	Inv. Discount Amount Evel. (SST (AUD)				0.00	00 Total GST (AUD) 314								
ubtotal Excl. GST (Al	t Excl. GST (AUD)	The Discount Amount Like GST (NOD)												

III. Then select help using "Unifii360AI"



When select "Unifii360AI "you will get the below reason for the error

Manage	🕜 Ask Unifii360AI	🔚 Check Last Error	🖃 Email Support \cdots
Ouestio	n		

Answer

Business Central Error: Status must be equal to 'Open' in Sales Header: Document 📥

The error message is indicating that the status of the Sales Header Document Type Ord the Sales Header Document Type Order, No. 261998 and change the status to 'Open'.

Related Record : Sales Header: Order, 261998

Close

Also, if you click on "Check Last Error" it will show the reason for the last error.

	360 AI			2 X		
Manage 🛛 🤇 A	sk Unifii360AI	E Check Last Error	🖃 Email Support			
		Figure 1-29				
V. If you need dire	ect eagle360 su	pport click on " Email S	Support"			
Edit - Unifii	360 AI					
Manage 🛛 🦓 A	sk Unifii360Al	🔚 Check Last Error	E Email Support	Unifii36	0Al Log	🔀 Clear
		Figure 1-30				
This will populat	e the error in a	n email template which	n needs to sent to Ea	gle360 for su	upport.	
<i>←</i>			+ 1	√ Saved		-
Busine	ess Centr	al Error: Sta	tus must be	e equal	l to	
'Opon	in Color	Londor: Do	cumont Ty	$p_{0} = Or$	dor	
Oper	I IN Sales	neauer. Du	ocument ly	pe=Or	uer,	
$N_{O} = 2$	1000					
1 1 0. ¹ L	201998. (urrent value	e is 'Release	ed'.		
Send Email	Discard Draft	Use Word Template	e is 'Release	ons		
Bend Email	Discard Draft	Urrent Value	e is 'Release	ons	Show less	
Send Email	Discard Draft	Urrent value ∉Use Word Template	e is 'Release	ed'.	Show less	
Send Email Email Detail:	Discard Draft	Use Word Template C S	e is 'Release how Source More opti no@eagle360.consulting)	ed'.	Show less	
From To	Discard Draft	Eagle 360 (dem	e is 'Release how Source More opti no@eagle360.consulting) le360.consulting.test	ed'.	Show less 	
From Cc	Discard Draft	Eagle 360 (dem helpdesk@eag	e is 'Release how Source More opti no@eagle360.consulting) le360.consulting.test agle360.consulting.test	ed'.	Show less	
From To Cc Bcc	Discard Draft	Eagle 360 (dem helpdesk@eag helpdeskcc@ea	e is 'Release how Source More opti no@eagle360.consulting) le360.consulting.test agle360.consulting.test	ed'.	Show less	
From To Cc Subject	Discard Draft	Eagle 360 (dem helpdesk@eag helpdeskcc@ea business Centra	e is 'Release how Source More opti no@eagle360.consulting) le360.consulting.test agle360.consulting.test eagle360.consulting.test al Error: Status must be equal t	ed'. ons to 'Open' in Sales	Show less Header: D	
From To Cc Bcc Subject	Discard Draft	Eagle 360 (dem helpdesk@eag helpdeskbcc@ea Business Centra	e is 'Release how Source More opti no@eagle360.consulting) le360.consulting.test agle360.consulting.test agle360.consulting.test al Error: Status must be equal t	ed'. ons to 'Open' in Sales	Show less Header: D	
From To Cc Bcc Subject Message	Business Central Er No.=261998. Curre	Eurrent Value	e is 'Release how Source More opti no@eagle360.consulting) le360.consulting.test eagle360.consulting.test eagle360.consulting.test al Error: Status must be equal to en' in Sales Header: Document	ed '. ons to 'Open' in Sales Type=Order,	Show less Header: D	
From To Cc Bcc Subject Message Question Answer	Business Central Er No.=261998. Curre The error indicates 'Open'. You will nee proceed.	Eagle 360 (dem helpdesk@eag helpdesk@eag helpdeskc@ea Business Centra ror: Status must be equal to 'Ope nt value is 'Released'.	e is 'Release how Source More opti no@eagle360.consulting) le360.consulting.test agle360.consulting.test al Error: Status must be equal to en' in Sales Header: Document r with the number 261998 is n hange the status to 'Open' bet	cons ons to 'Open' in Sales Type=Order, ot set to fore you can	Show less Header: D	

Figure 1-31

Also, you can attach any attachments you wish to send through

V. You can view all support queries handled by Unifii360AI support APP by clicking on "Unifii360 AI Log entries."

Edit - Unifii360 AI

Mai	Manage 🛛 🤗 Ask Unifii3		360AI 🖼 C	heck Last Error 🖃 Email Suj	pport 🚺 Unifii360AI Log	🔀 Clear
				Figure 1-32		
\leftarrow	Unif	ii360 Al Log			√ Saved	
	Q	Search Manag	e			
		Entry No.↓	Record ID	Question	Answer	User ID
	\rightarrow	56	: Sales Heade	Business Central Error: Status mus	The error indicates that the status	RIVAZ A
	-	55	Sales Heade	Business Central Error: Status mus	The error is caused by the fact that	RIYAZ
		54	Sales Heade	Business Central Error: Status mus	The error message is indicating th	RIYAZ
		53	Suco ricude	what is the time?	It is currently 11:08 AM.	KASUN
		52		what is the time now?	Processing Error You exceeded your	KASUN
	-	51		what is the ison structure to acces	Processing Error You exceeded yo	KASUN
		50	Sales Heade	Business Central Error: The page c	This error usually occurs when the	HERY
	_	49	Sales Heade	Business Central Error: Status mus	The Sales Order in Microsoft Dyna	HERY
	_	48		What is Australia capital ?	The capital of Australia is Canberra.	HERY
		47		What is Business Central	Business Central is a cloud-based	HERY
		46		what is Business Central Microsoft	Microsoft Dynamics 365 Business	HERY
		45		Business Central Error: Status mus	The error is indicating that the Sal	HERY
		44		how to setup user in Business Cen	1. Navigate to the "Users" page in	HERY
		43	Sales Heade	How to do posting receipt in Busi	Posting a receipt in Business Cent	HERY
		42	Sales Heade	Business Central Error: Status mus	The error you are receiving indicat	HERY
		41	Sales Heade	Business Central Error: Status mus	The error you are seeing is caused	HERY
		40	Sales Heade	Business Central Error: An error oc	This is a generic error message th	HERY
		39		Business Central Error: An error oc	This error indicates that an unexp	HERY
		38		what is Australia capital?	The capital of Australia is Canberra.	HERY
		37	Error Messa	Business Central Error: There is not	This error occurs when you try to	KASUN
		36		Business Central : How do I creat	?To create a purchase order in Mi	
		35	Error Messa	Business Central Error:GST Date is	This error occurs when you are try	
		34	Error Messa	Business Central Error:Posting Dat	This error means that the posting	
		33	Sales Heade	Business Central Error: The field S	This error indicates that the value	
		32	Sales Heade	Business Central Error: The field C	This error indicates that the Curre	