



Unifii360 AI Support User Manual

Distribution List:

ORGANIZATION	NAME
EAGLE360 CONSULTING	

Revision History:

VERSION	DATE	SECTIONS REVISED	DESCRIPTION
0.1	09-May-2023		Completed document for internal review

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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

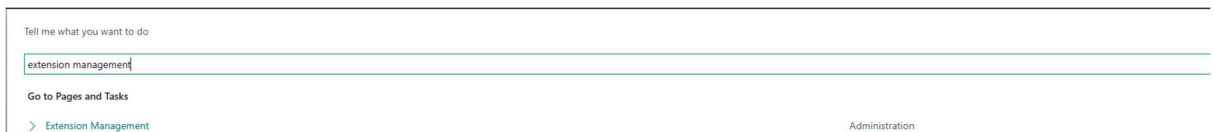


Figure 1-1

II. Select "E360-Unifi360-AISupport" and select "Setup" as shown in figure 1-2

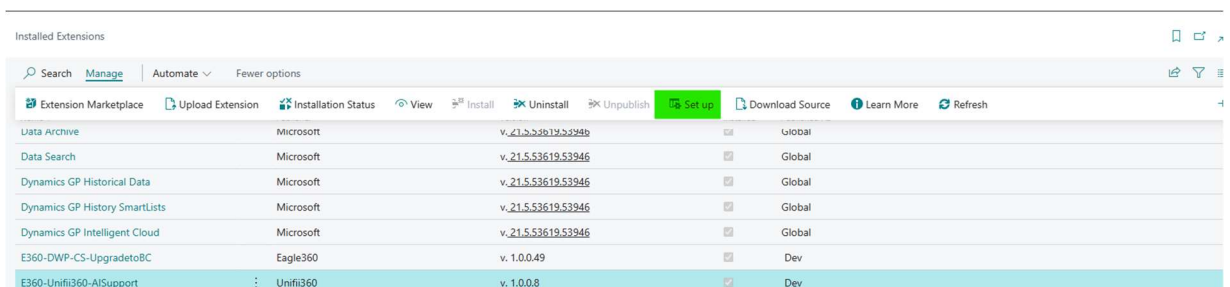


Figure 1-2

Select "Next"

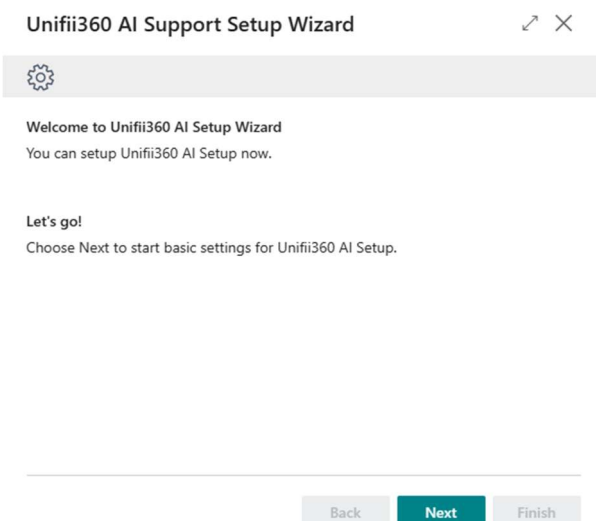


Figure 1-3

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 <https://platform.openai.com/>

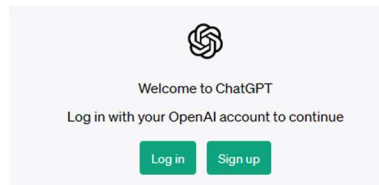


Figure 1-4

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

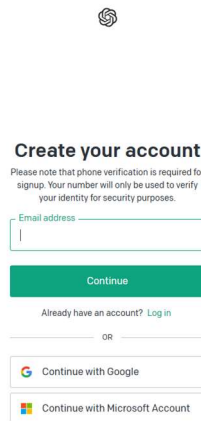


Figure 1-5

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

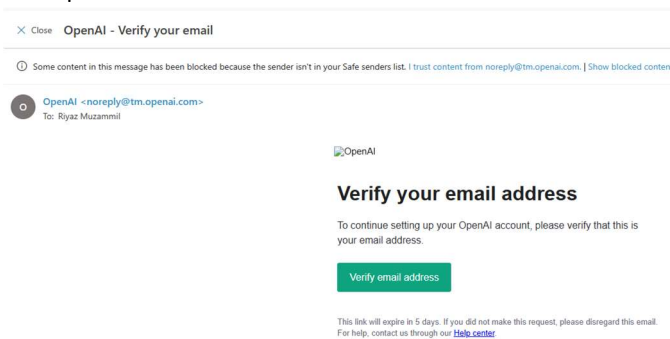


Figure 1-6

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



Tell us about you

First name	Last name
Organization name (optional)	
Birthday	
Continue	

By clicking "Continue", you agree to our [Terms](#) and acknowledge our [Privacy policy](#)

Figure 1-7

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



Verify your phone number

	+61
Send code	

Figure 1-8

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



Enter code

Please enter the code we just sent you.

000 000

Figure 1-9

Once you enter the code you will see the below page

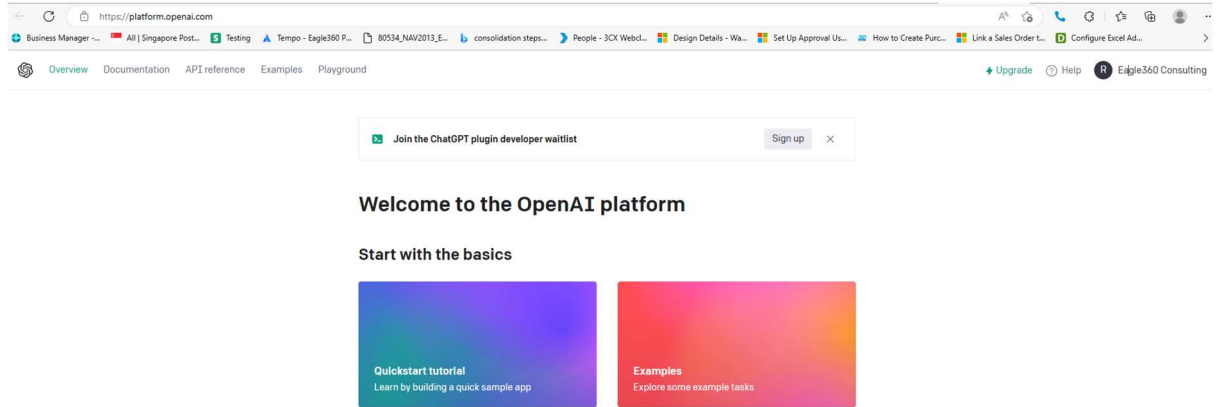


Figure 1-10

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

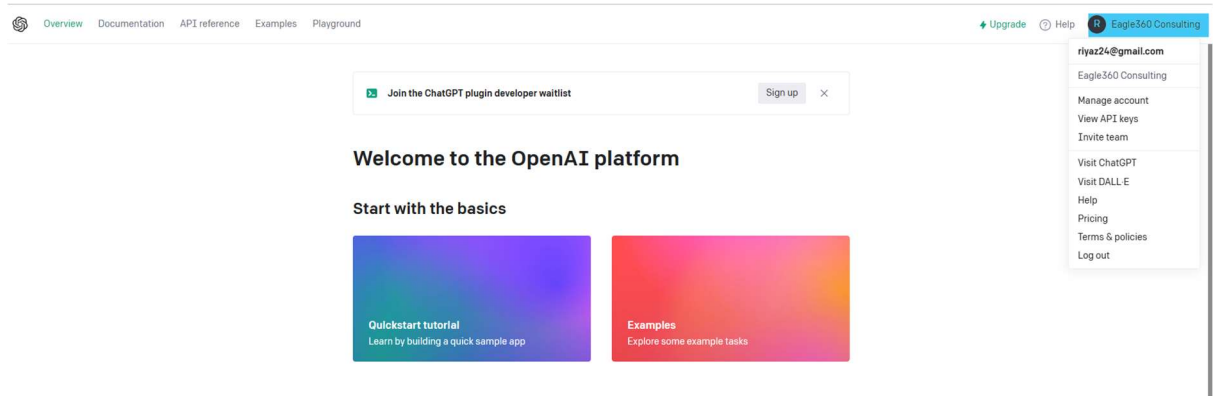


Figure 1-11

Then Click "View API keys"

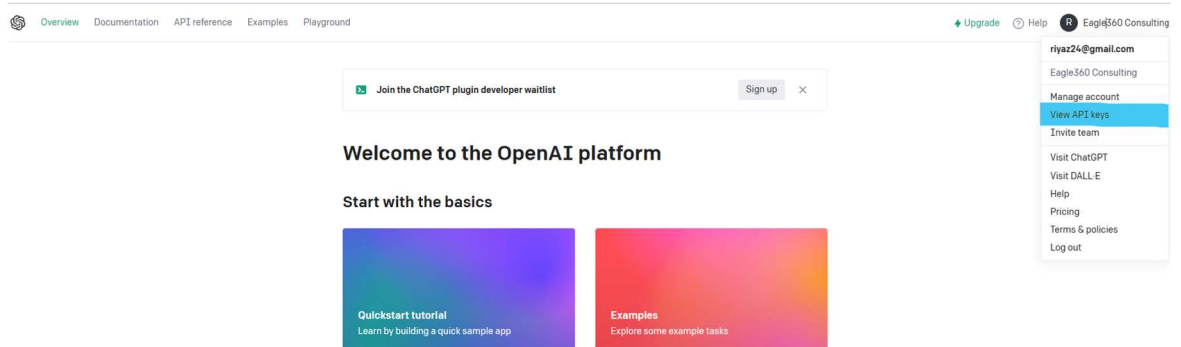


Figure 1-12

Figure 1-13

Then Click “Create new secret Key”

Figure 1-14

Create new secret key

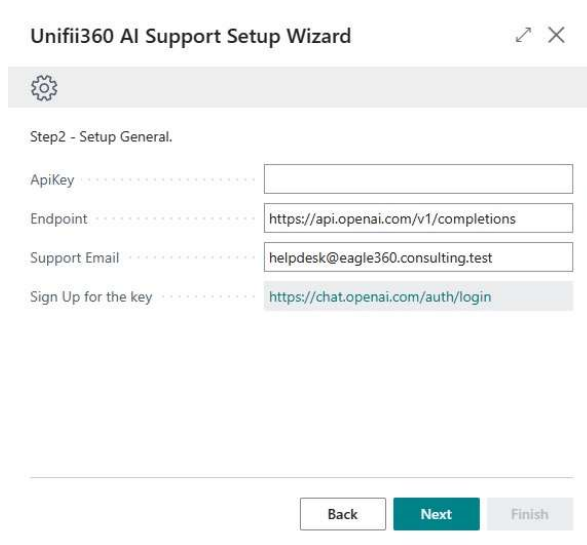
Please save this secret key somewhere safe and accessible. For security reasons, **you won't be able to view it again** through your OpenAI account. If you lose this secret key, you'll need to generate a new one.

Figure 1-15

Copy the created ApiKey and click on “Done”

Figure 1-16

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



Unifii360 AI Support Setup Wizard

Step2 - Setup General.

ApiKey

Endpoint

Support Email

Sign Up for the key

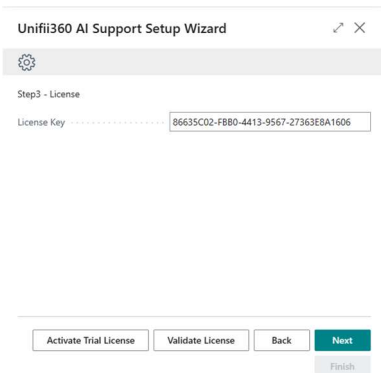
Back Next Finish

Figure 1-17

enter the E360 support email address as helpdesk@eagle360.consulting” 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



Unifii360 AI Support Setup Wizard

Step3 - License

License Key

Activate Trial License Validate License Back Next Finish

Figure 1-18

VI. Click “Next” to complete Unifii360 AI setup.

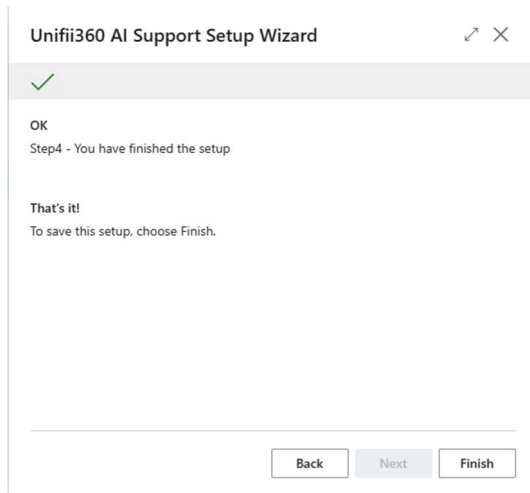


Figure 1-19

VII. Type “Unifii360 AI Setup” on the tell me what to do search as shown below

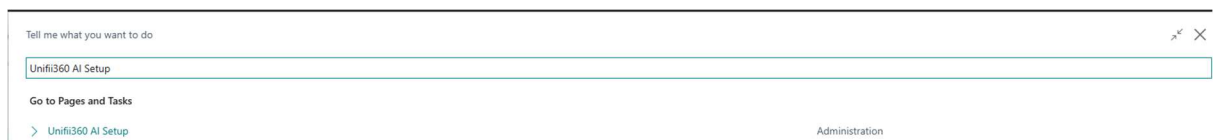


Figure 1-20

VIII. Add the below given “helpdeskcc@eagle360.consulting” to the “CC” and helpdeskbcc@eagle360.consulting to “BCC” email address boxes. Also Activate the “Trigger Request in validate function.”

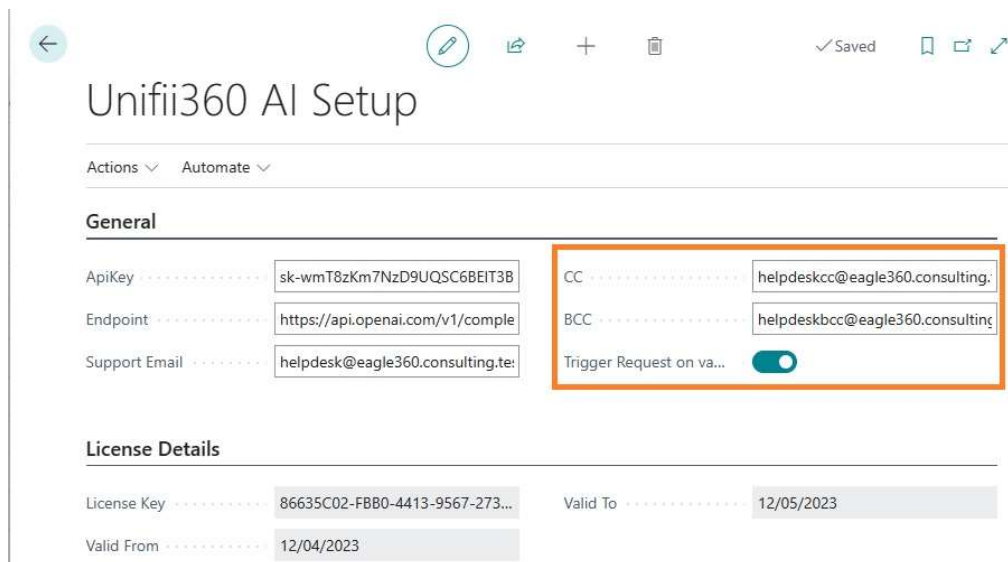


Figure 1-21

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

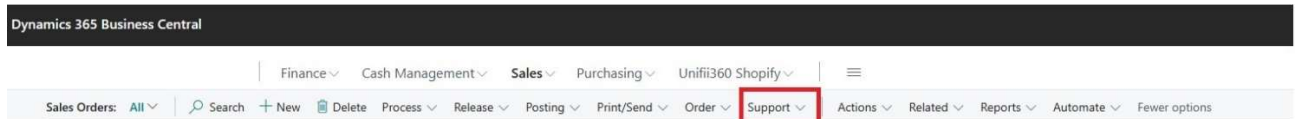


Figure 1-22

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

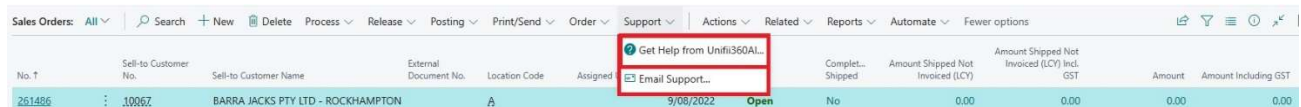


Figure 1-23

- **Get Help from Unifi360AI** – 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.

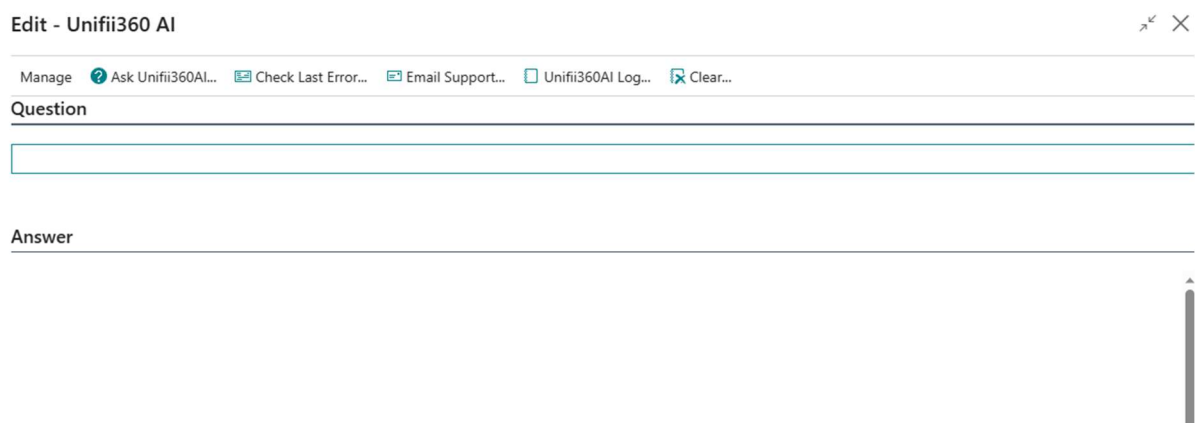


Figure 1-24

- 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.

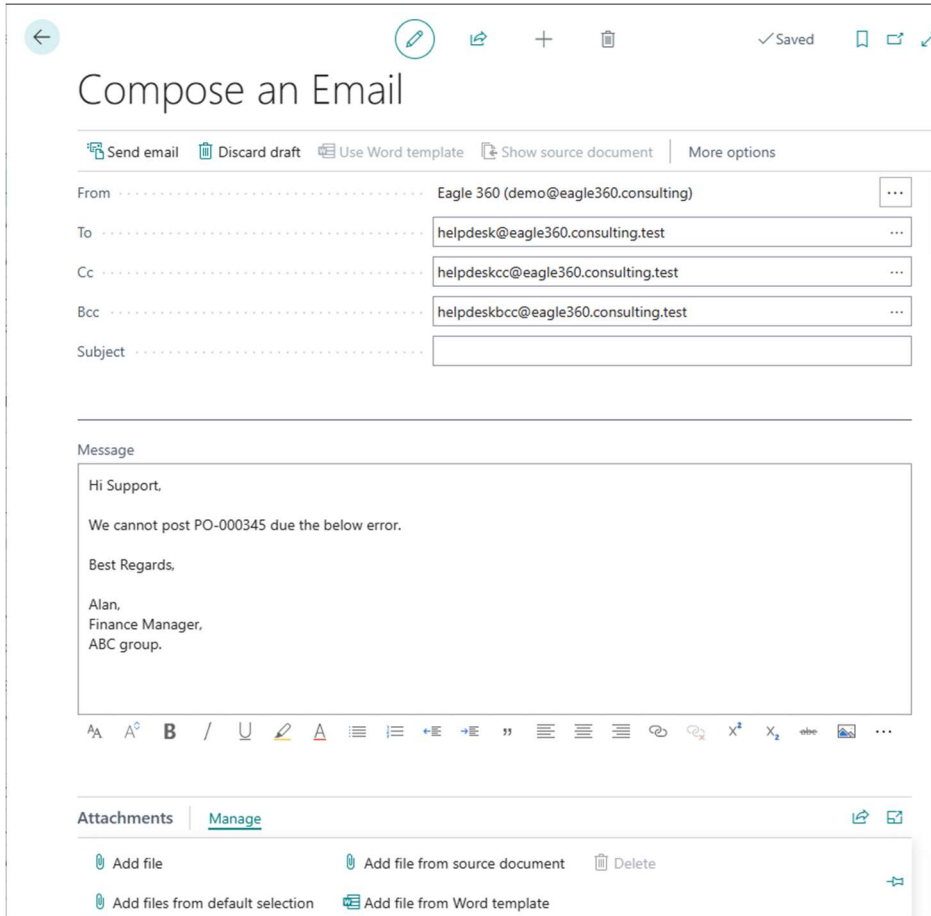


Figure 1-25

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

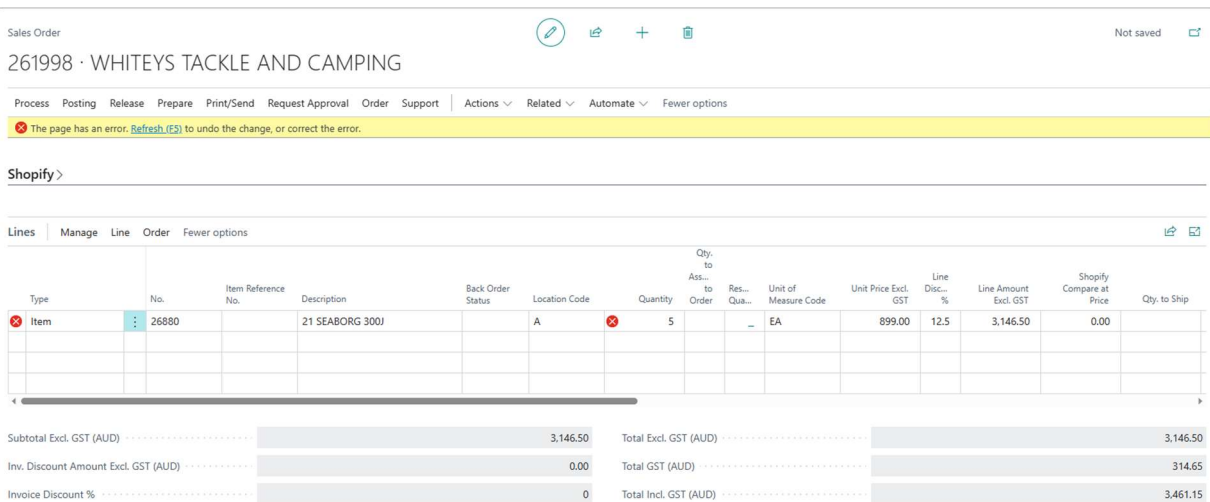


Figure 1-26

III. Then select help using “Unifii360AI”



Figure 1-27

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

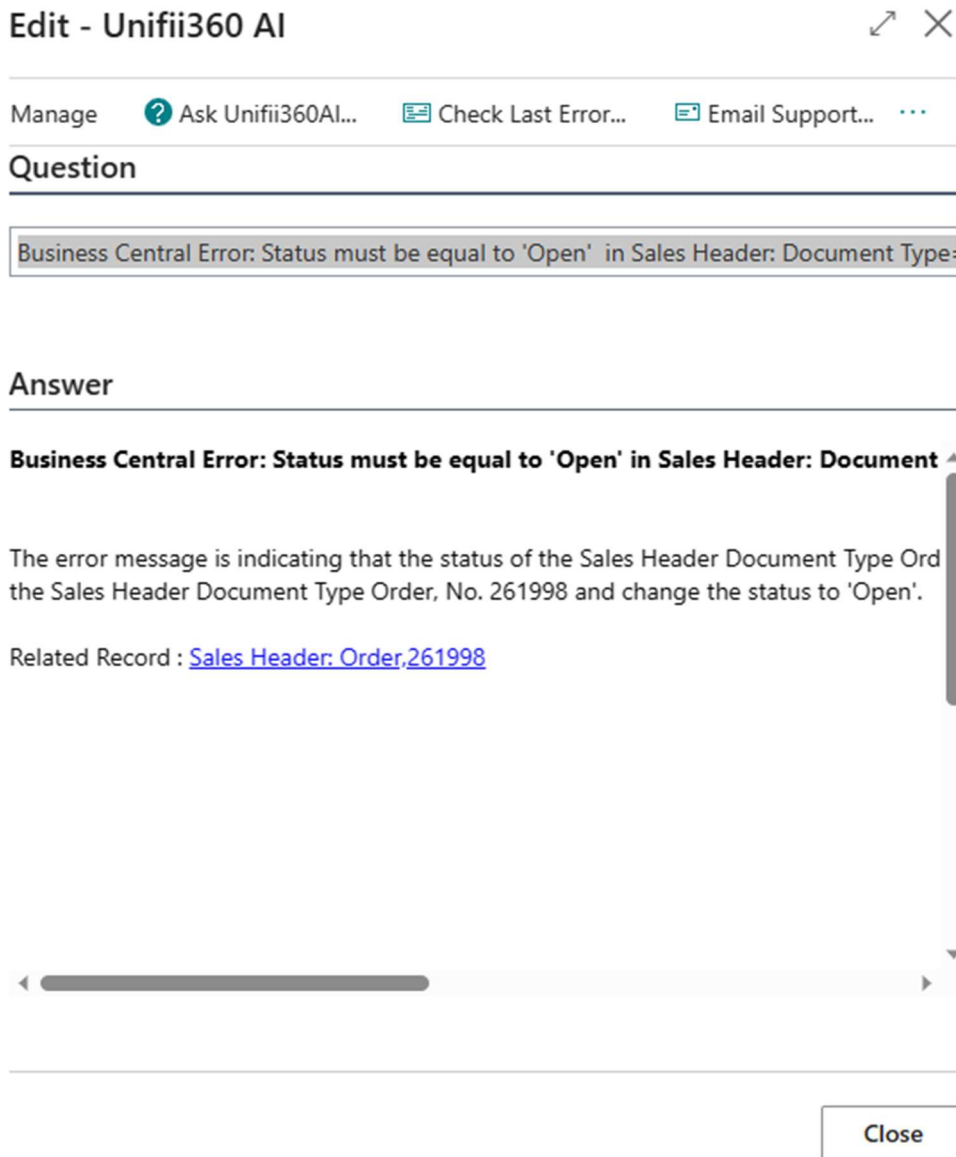


Figure 1-28

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

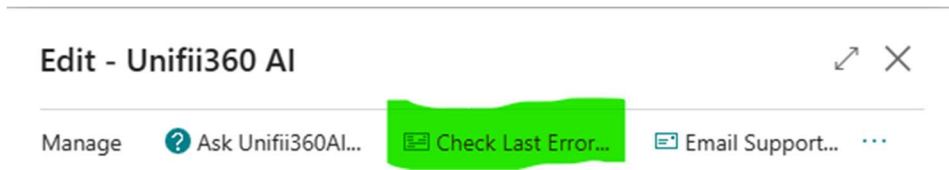


Figure 1-29

IV. If you need direct eagle360 support click on “ Email Support”

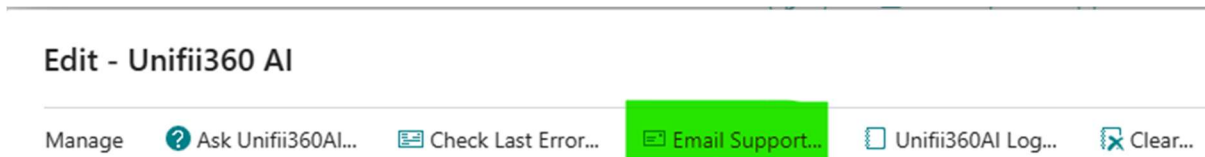


Figure 1-30

This will populate the error in an email template which needs to sent to Eagle360 for support.

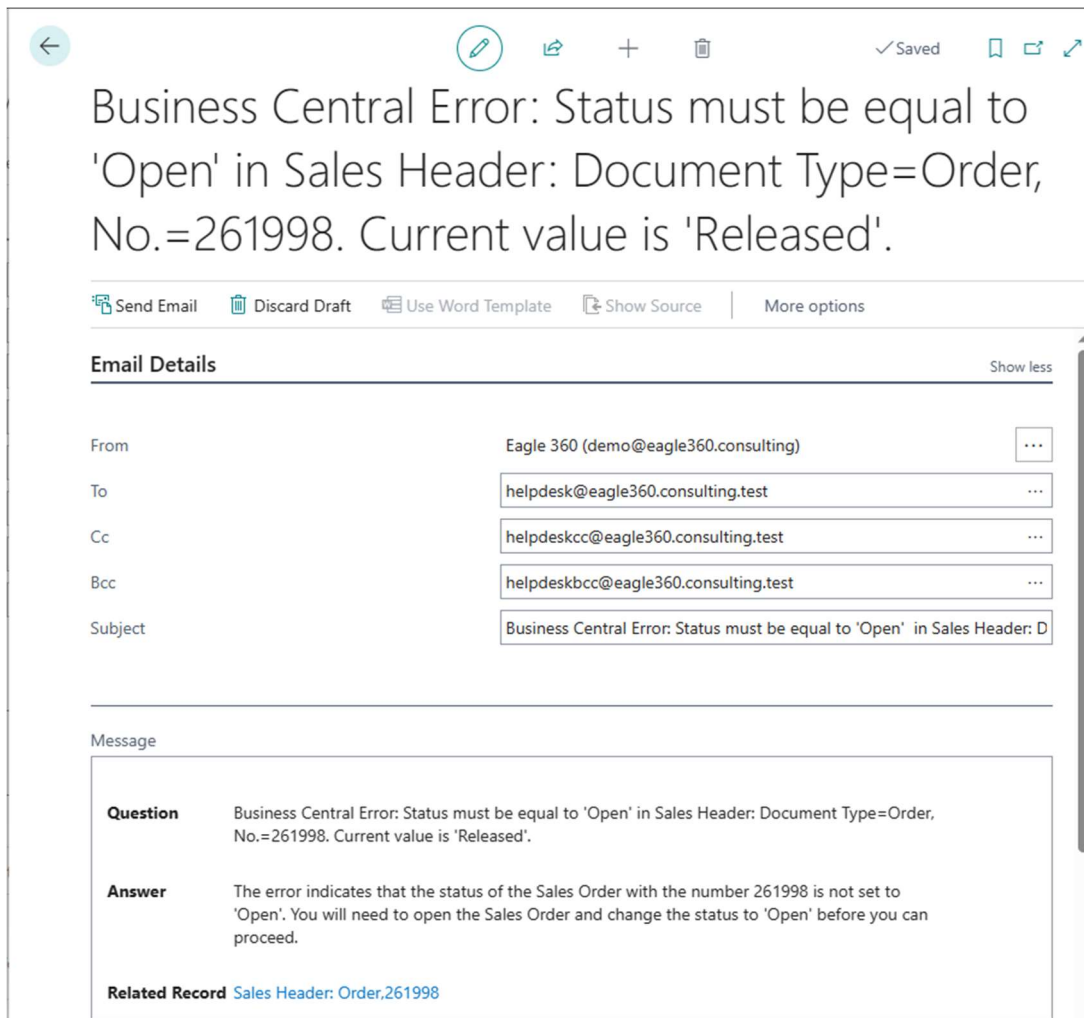


Figure 1-31

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

Manage ? Ask Unifii360AI... 📄 Check Last Error... ✉ Email Support... 📄 Unifii360AI Log... 🗑 Clear...

Figure 1-32

← Unifii360 AI Log ✓ Saved 📄 📄 🔗

🔍 Search Manage 🔗 🔍 ☰

Entry No. ↓	Record ID	Question	Answer	User ID
→ 56	Sales Heade...	Business Central Error: Status mus...	The error indicates that the status...	RIYAZ
55	Sales Heade...	Business Central Error: Status mus...	The error is caused by the fact tha...	RIYAZ
54	Sales Heade...	Business Central Error: Status mus...	The error message is indicating th...	RIYAZ
53		what is the time?	It is currently 11:08 AM.	KASUN
52		what is the time now?	Processing Error You exceeded yo...	KASUN
51		what is the json 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...	

Figure 1-33