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ARTICLE

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How to Integrate OpenAI's ChatGPT Playground with Microsoft Dynamics 365 Business Central

The marketing world is abuzz with the many AI tools that have hit over the last few years, including tools that streamline data analysis, allowing marketers to do their jobs more efficiently and effectively. And, with generative AI tools joining the marketplace, few have generated more buzz than OpenAI's ChatGPT, which released its most advanced model—GPT4—earlier this year.

And, with ChatGPT Playground, users can get even better functionality than using ChatGPT alone, with greater control over the output. Best of all, it's possible to integrate ChatGPT Playground, also

known as OpenAI Playground, with various MarTech platforms. Today, we're diving into how to integrate ChatGPT Playground with Microsoft Dynamics 365 Business Central.

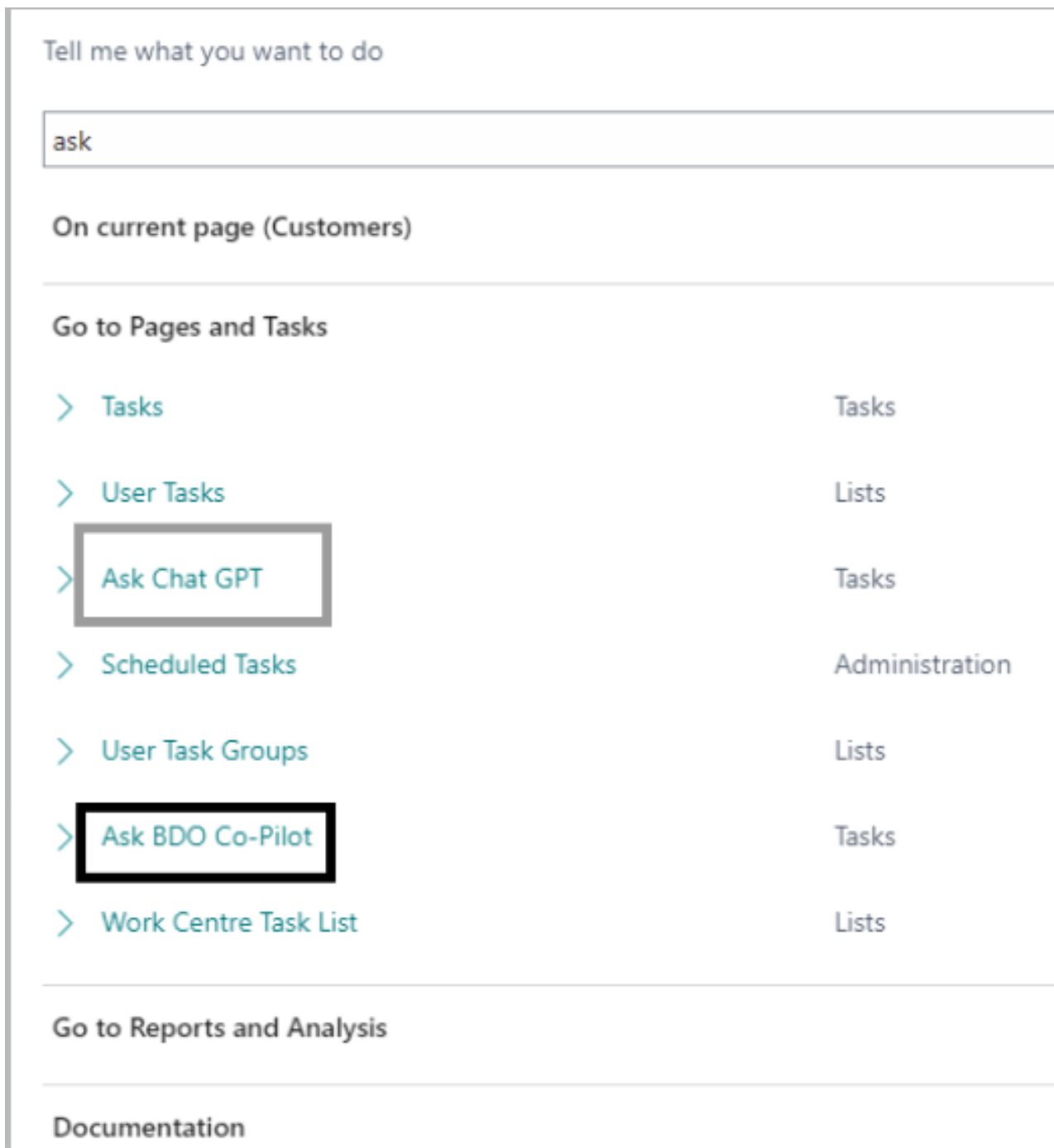
Using ChatGPT Playground with Business Central

At BDO Digital, we've focused on integrating ChatGPT with Business Central in two key ways.

The first focuses on knowledge-based authentication (KBA), where the company trains the GPT chatbot on the company's knowledge base. Users can then ask ChatGPT "How to" questions and get responses applicable to their business needs.

The second uses Dynamics 365 Live Data. By integrating ChatGPT with Business Central, users can ask the chatbot questions about the organization's real-time data and get responses.

Internally, we call this second integration ["BDO Co-Pilot."](#)



Configuring Open AI for Business Central Chat Responses

The first step of integrating ChatGPT with Business Central requires creating an API key on the [Open API Platform](#).

API keys

Your secret API keys are listed below. Please note that we do not display your secret API keys again after you generate them.

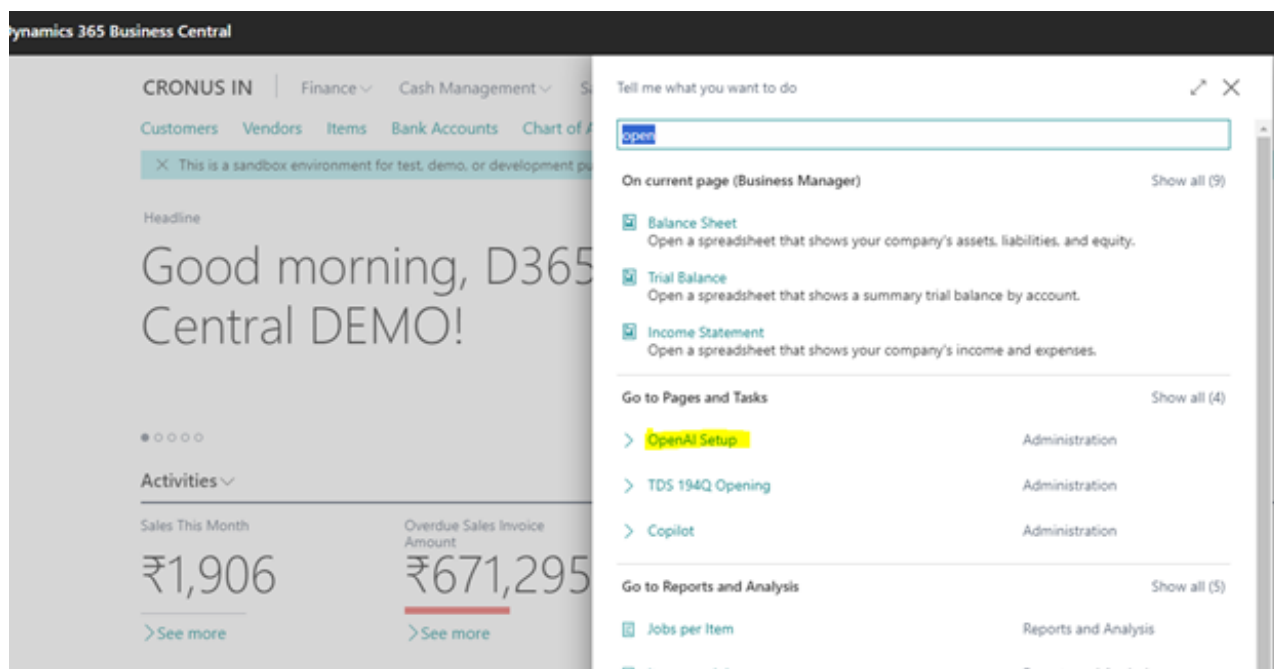
Do not share your API key with others, or expose it in the browser or other client-side code. In order to protect the security of your account, OpenAI may also automatically disable any API key that we've found has leaked publicly.

NAME	KEY	CREATED	LAST USED	
BCchatgpt101	sk-...G2ir	Aug 2, 2023	Aug 4, 2023	 

[+ Create new secret key](#)

Be sure to save the key you create somewhere safe so you can access it when you begin building the integration with Business Central for BDO Co-Pilot.

In Business Central, you'll need to open "OpenAI Setup" to store the API key and parameters so BDO Co-Pilot can communicate with OpenAI.



From there you can enter your API Key.

OpenAI Setup

General

Organization ID	<input type="text" value="org-bCcSdYqYEnSOVgmJf0N5vlwz"/>	Default Max Token	<input type="text" value="1000"/>
API Key	<input type="password" value="*****"/>	Default Temperature	<input type="text" value="0.9"/>

Knowledge-Based Application (KBA) Use Cases for Chat GPT

Once connecting ChatGPT Playground to your Business Central, you can start using the KBA functionality and learn how to use your Business Central account more effectively. While it's possible to get a response from the regular ChatGPT program, ChatGPT alone only draws on data from September 2021 and earlier. So, you won't have access to the information if there have been any more recent changes or updates.

We have created ChatGPT Playground in business central itself, create customized page with the name of "Ask ChatGPT".

To communicate to ChatGPT need to open "Ask ChatGPT" section and type the questions.

Tell me what you want to do



ask gp

Go to Pages and Tasks

> Ask Chat GPT

Tasks

Documentation

Search Help for "ask gp"

Using your new Business Central integration is as simple as typing in prompts like:

“How to create a sales order in Business Central”

Ask Chat GPT

 Create New request  Ask Chat GPT

Request

How to create Sales Order in Business Central

Response

To create a sales order in Business Central, you can follow these steps:

1. Open the Sales Orders page in Business Central by navigating to the Sales & Marketing module and selecting the Sales Orders option.
2. Click on the New button to start creating a new sales order.
3. Fill in the required information in the header section of the sales order, such as the customer name, requested delivery date, and salesperson.
4. Add the items you want to sell by entering the item code, quantity, and any additional details like unit of measure or description. You can either manually enter the item details or use the Look Up button to select items from your item list.
5. Specify any discounts, prices, or other pricing details applicable to the sales order.

“How to close the financial year period in Business Central”

Ask Chat GPT

✳ Create New request 📧 Ask Chat GPT

Request

How to close the financial year period in Business Central

Response

To close the financial year period in Business Central, follow these steps:

1. Open the Business Central application and log in with your credentials.
2. Navigate to the "General Ledger" module and select "General Ledger Entries" from the menu.
3. Filter the entries by the financial year period that you want to close.
4. Review and reconcile all the general ledger entries for that period to ensure accuracy.
5. Ensure that all outstanding transactions, such as invoices or payments, are processed and accounted for.
6. Post any necessary adjusting entries for the period.
7. Once you are confident that all entries are correct and complete, go to the "Finance" module and select "Closing Periods" from the menu.
8. Choose the financial year and period that you want to close.
9. Click on the "Close Period" button to close it.
10. You may be prompted to confirm the action, so review the information and click on "OK" or "Yes" to proceed.
11. After closing the period, you may want to generate financial reports, such as balance sheets and income statements, for the closed period for analysis and auditing purposes.

Ultimately, there are any number of questions you could ask GPT Playground about Business Central to make it easier to use the platform. The best way to dive in is to ask your ChatGPT Playground questions as they arise.

Using BDO Co-Pilot to Gather Business Central D365 Data

Once you configure BDO Co-Pilot, you can start asking questions about your real-time data.

By defining "Customer" and "Sales" datasets, you can get detailed responses to any prompts related to customer and customer ledger entries.

Instead of having to develop the reports manually, this integration means ChatGPT can help you generate reports and accurate results using your Business Central LIVE data.

For the Knowledge-Based Application, you'll want to select "Ask Chat GPT." For your D365 data, you'll need to use "Ask BDO Co-Pilot."

ask	
Go to Pages and Tasks	
> Tasks	Tasks
> User Tasks	Lists
> Ask Chat GPT	Tasks
> Scheduled Tasks	Administration
> User Task Groups	Lists
> Ask BDO Co-Pilot	Tasks
> Work Centre Task List	Lists

Customer dataset use cases include:

"Show me top customer sales"

Ask BDO Co-Pilot

[* Create New request](#) [Ask BDO Co-Pilot](#)

Request

Show me Top Customer Sales.

Response

To show the top customer sales, we need to sort the data based on the "Sales (LCY)" column in descending order. Here are the top customers with their sales:

1. The Cannon Group PLC - Sales: 10,074,640 LCY
2. Guildford Water Department - Sales: 3,789,250 LCY
3. Deerfield Graphics Company - Sales: 3,218,870 LCY
4. Selangorian Ltd.. - Sales: 2,645,000 LCY
5. John Haddock Insurance Co. - Sales: 223,319.34 LCY

Please note that the data provided does not have any non-zero sales for the customers with codes starting with "C".

“Show me top 5 customers”

Ask BDO Co-Pilot

[* Create New request](#) [Ask BDO Co-Pilot](#)

Request

Show me Top 5 Customers.

Response

Based on the provided dataset, the top 5 customers based on sales (LCY) are as follows:

1. The Cannon Group PLC
2. Guildford Water Department
3. Deerfield Graphics Company
4. Selangorian Ltd..
5. John Haddock Insurance Co.

“Show me Customer’s Balance” (this shows you the balance currently in the database)

Ask BDO Co-Pilot

[✦ Create New request](#) [🗨 Ask BDO Co-Pilot](#)

Request

Show me Customer's Balance.

Response

Customer Balance:

- The Cannon Group PLC: -239134.15
- Selangorian Ltd.: 164117.5
- John Haddock Insurance Co.: -107667.45
- Deerfield Graphics Company: 156725.63
- Guildford Water Department: 467692.1
- BDO RISE: 0
- BDO Dgital: 0
- Apple Inc Pvt LTD: 0
- Microsoft: 0
- FPG Pvt LTD: 0
- Mindpath Pvt Ltd: 0
- TurbinePro: 0
- Google PVT LTD: 0

“Show me customers grouped by country”

Ask BDO Co-Pilot

[✦ Create New request](#) [🗨 Ask BDO Co-Pilot](#)

Request

Show me Customers grouped by country.

Response

Here is the list of customers grouped by country:

Country: IN

- The Cannon Group PLC
- Selangorian Ltd..
- Deerfield Graphics Company
- Guildford Water Department

Country: US

- John Haddock Insurance Co.
- BDO Dgital
- Apple Inc Pvt LTD
- Microsoft
- Google PVT LTD

“Show me customer payments”

Ask BDO Co-Pilot

 Create New request  Ask BDO Co-Pilot

Request

Show me Customer Payments

Response

Customer Payments:

10000 - 12467295
20000 - 2980689.2
30000 - 327596.69
40000 - 3691853.4
50000 - 4218352.9

Sales Dataset Use Cases Include:

“What is the commission of salesperson Jim Olive?” (In this case, Jim is a salesperson in your database.)

Ask BDO Co-Pilot

 Create New request  Ask BDO Co-Pilot

Request

What is the commission of Sales Person Jim Olive?

Response

The commission of Sales Person Jim Olive is 5.00%.

“What is the sales amount grouped by country?”

Ask BDO Co-Pilot

[* Create New request](#) [Ask BDO Co-Pilot](#)

Request

What is the sales amount grouped by country?

Response

To calculate the sales amount grouped by country, we need to sum up the sales amounts for each country. Here is the sales amount grouped by country based on the provided data:

IN: 3,468,352.89
US: 3,015.82

Please note that the sales amount for each country is given in LCY.

“What is the sales commission amount for salesperson Otis Falls for the month of March?”

Ask BDO Co-Pilot

[* Create New request](#) [Ask BDO Co-Pilot](#)

Request

What is the sales commission amount for Sales Person Otis Falls for the month of March.

Response

To calculate the sales commission amount for Sales Person Otis Falls for the month of March, we need to sum up all the sales made by Otis Falls in March and then apply the commission rate.

Based on the provided dataset, here are the sales made by Otis Falls in March:

- On 01/20/23, Otis Falls made a sale of 192.89
- On 01/26/23, Otis Falls made a sale of 438.6
- On 02/01/23, Otis Falls made a sale of 1142.89
- On 02/25/23, Otis Falls made a sale of 15265.69
- On 02/28/23, Otis Falls made a sale of 2665.77
- On 03/20/23, Otis Falls made a sale of 385.77
- On 03/26/23, Otis Falls made a sale of 657.9
- On 03/29/23, Otis Falls made a sale of 18641.5
- On 04/01/23, Otis Falls made a sale of 1905.77

Now, we can calculate the total sales made by Otis Falls in March:

“What is the sales amount for Dimension code Medium?”

Ask BDO Co-Pilot

 Create New request  Ask BDO Co-Pilot

Request

What is the Sales Amount for Dimension Code Medium.

Response

To calculate the Sales Amount for Dimension Code Medium, we need to sum all the sales amounts where the Dimension column is equal to "MEDIUM".

Based on the provided dataset, we have the following sales amounts for Dimension Code Medium:

- 34760 (on 01/19/23)
- 539500 (on 01/23/23)
- 117240 (on 01/25/23)
- 438.6 (on 01/26/23)
- 34760 (on 01/28/23)
- 755600 (on 02/21/23)
- 212520 (on 02/22/23)
- 15265.69 (on 02/25/23)
- 122330 (on 02/28/23)
- 43450 (on 03/19/23)
- 657.9 (on 03/26/23)

“What is the sales amount for Dimension code Medium for 03/01/2023 to 03/31/2023?”

Ask BDO Co-Pilot

* Create New request  Ask BDO Co-Pilot

Request

What is the Sales Amount for Dimension Code Medium for 03/01/2023 to 03/31/2023

Response

To calculate the Sales Amount for Dimension Code Medium for the period from 03/01/2023 to 03/31/2023, we need to sum up all the sales amounts where the Dimension is Medium and the Posting Date falls within the specified period.

Based on the provided dataset, the sales amounts for Dimension Code Medium for 03/01/2023 to 03/31/2023 are as follows:

- 192.89 (Posting Date: 01/20/23)
- 117240 (Posting Date: 01/25/23)
- 438.6 (Posting Date: 01/26/23)
- 755600 (Posting Date: 02/21/23)
- 212520 (Posting Date: 02/22/23)
- 195400 (Posting Date: 03/25/23)
- 43450 (Posting Date: 03/28/23)

Therefore, the total Sales Amount for Dimension Code Medium for 03/01/2023 to 03/31/2023 is 1 805 738.49

Of course, it's possible to define other datasets and get additional information from your Business Central database. However, this shows you the potential chat-driven applications to gather valuable data and get accurate, helpful insights.

Unlock the Power of Business Central with ChatGPT Playground

By using a custom API to connect BDO Co-Pilot and the ChatGPT Playground to your database, you can use Business Central more effectively while tapping into your real-time data to make