Mastering

MS Office using ChatGPT, Copilot and Other AI Tools



Smart Tools. Smarter You.
Boost Productivity with AI

- Learn Practical AI Skills
- Work Smarter, Not Harder
- Save Time & Increase Efficiency
- Real Examples, Real Results



Prepared by

Naveen Mishra

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What is AI? A Beginner's Guide

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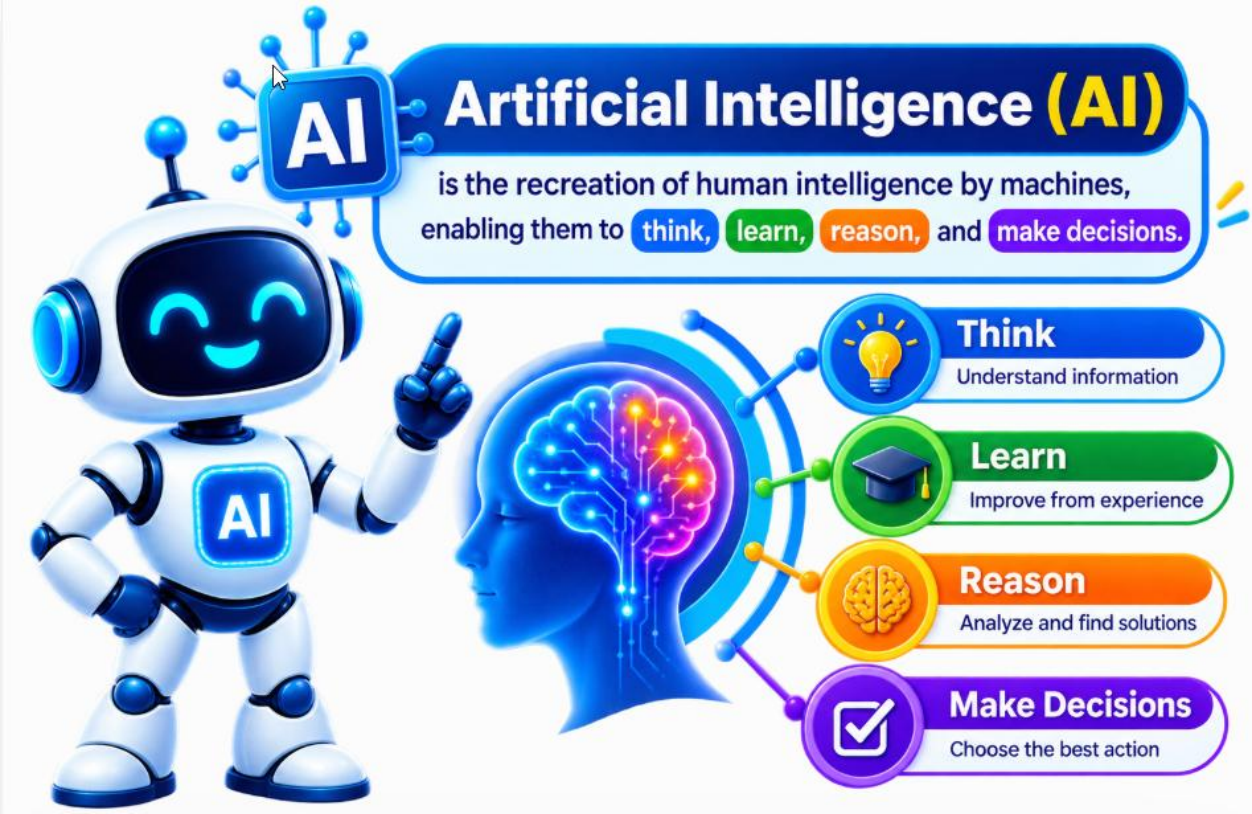
What is AI?

AI stands for artificial intelligence, which is the ability of machines or computer programs to perform tasks that normally require human intelligence, such as understanding language, recognizing images, making decisions, and learning from data.

AI is not a single technology, but a broad field that covers many applications and methods.

Some of the most common types of AI are:

- **Machine learning:** This is the process of teaching machines to learn from data and improve their performance without explicit programming. For example, machine learning can be used to recommend products, detect spam, or diagnose diseases.
- **Natural language processing:** This is the process of enabling machines to understand and generate natural language, such as speech or text. For example, natural language processing can be used to translate languages, answer questions, or summarize texts.



- **Computer vision:** This is the process of enabling machines to perceive and interpret visual information, such as images or videos. For example, computer vision can be used to recognize faces, detect objects, or enhance photos.
- **Robotics:** This is the process of creating machines that can move and interact with the physical world, such as robots or self-driving cars. For example, robotics can be used to perform tasks that are dangerous, tedious, or require precision, such as manufacturing, surgery, or exploration.

Why is AI important?

AI is important because it can help us solve many problems and improve our lives in various ways. Some of the benefits of AI are:

- AI can increase productivity and efficiency by automating tasks and optimizing processes.
- AI can enhance creativity and innovation by generating new ideas and designs.
- AI can improve quality and accuracy by reducing errors and increasing reliability.
- AI can expand knowledge and discovery by analyzing large amounts of data and finding patterns and insights.
- AI can improve accessibility and inclusion by providing services and opportunities to more people and communities.

What are the challenges and risks of AI?

AI also poses some challenges and risks that need to be addressed and managed. Some of the issues of AI are:

- AI can raise ethical and social questions, such as how to ensure fairness, accountability, transparency, and privacy of AI systems and their impacts.
- AI can create economic and employment challenges, such as how to adapt to the changing labor market and ensure the distribution of benefits and costs of AI.
- AI can pose security and safety risks, such as how to prevent malicious use or misuse of AI and ensure the reliability and robustness of AI systems.
- AI can have environmental and health impacts, such as how to reduce the energy consumption and carbon footprint of AI and ensure the well-being and health of humans and other living beings.

How can you learn more about AI?

AI is a fascinating and fast-growing field that offers many opportunities for learning and exploration.

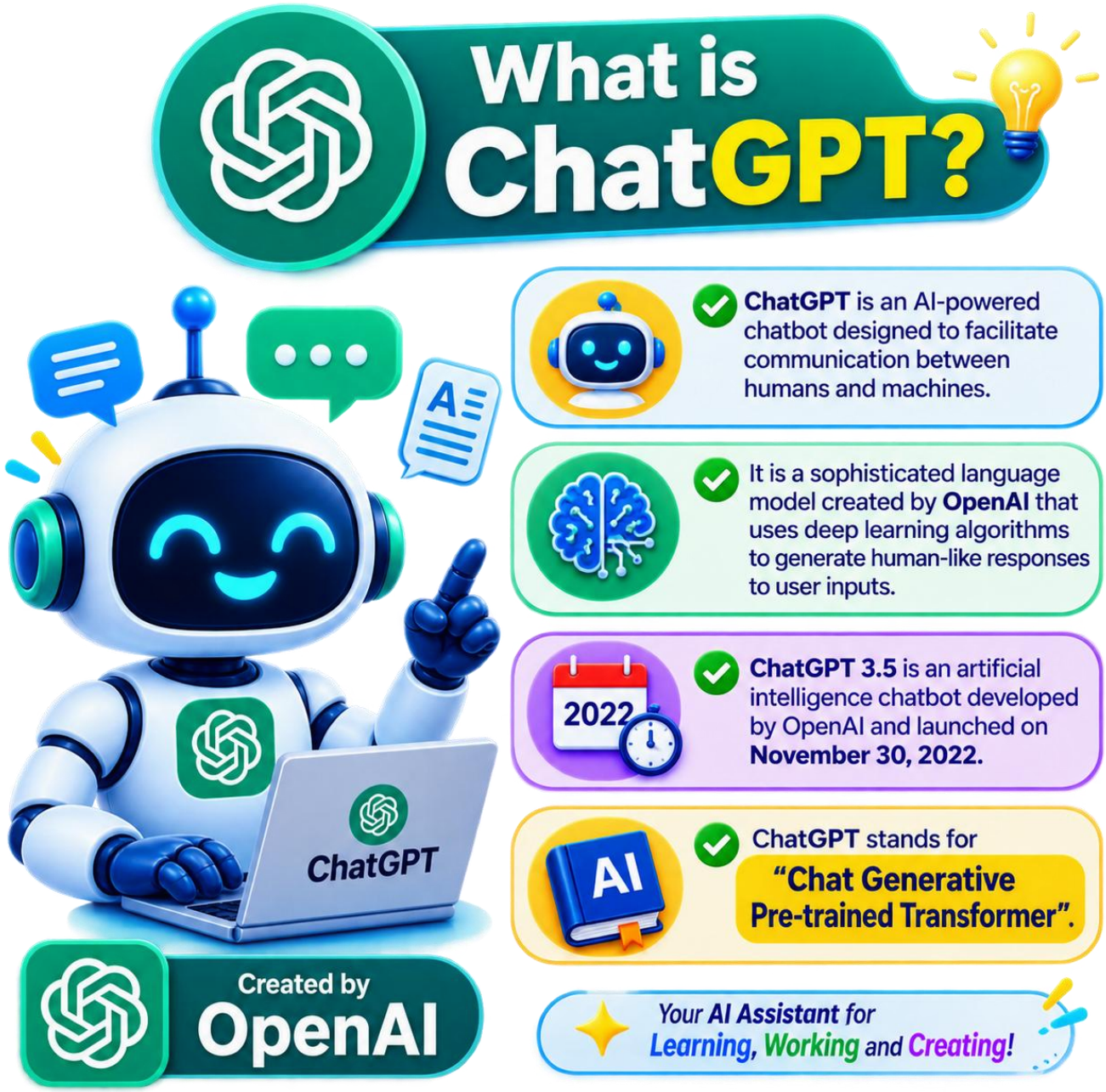
If you want to learn more about AI, you can:

- Read books, articles, blogs, or podcasts that explain the concepts and applications of AI in an accessible and engaging way.
- Take online courses, workshops, or webinars that teach the skills and tools of AI in a practical and interactive way.
- Join online communities, forums, or events that connect you with other learners and experts of AI and provide you with feedback and support.
- Try online platforms, apps, or games that let you experiment with AI and create your own projects and solutions.

What is ChatGPT

ChatGPT is a neural network model that can generate natural language responses to user inputs, such as questions or comments. ChatGPT is based on the GPT architecture, which uses a large-scale pre-trained language model that can learn from massive amounts of text data. ChatGPT can be fine-tuned on specific domains or tasks, such as conversational agents, customer service, or social media. ChatGPT can produce fluent and coherent texts that can engage users in natural and human-like dialogues.

- ChatGPT uses a large neural network with many transformers that can encode and decode natural language
- ChatGPT is trained on a large corpus of text data that covers a wide range of topics and styles
- ChatGPT can capture the general patterns and rules of natural language and generate relevant and coherent texts
- ChatGPT can be fine-tuned on specific domains or tasks, such as conversational agents, customer service, or social media
- ChatGPT can adapt its language generation to the specific context and goal of the interaction
- ChatGPT can learn to use appropriate greetings, expressions, tone, and personality for different types of conversations and users
- ChatGPT can learn to handle different types of user inputs and generate appropriate responses



Architecture of ChatGPT

The architecture of ChatGPT consists of three main components:

- Cncoder,
- Decoder
- Context manager.

The encoder is responsible for processing the user input and converting it into a vector representation that captures its meaning and structure. The decoder is responsible for generating the response text based on the input vector and the previous dialogue history. The context manager is responsible for storing and updating the dialogue state and the relevant information for the conversation.

The encoder and the decoder are both based on the GPT architecture, which uses a large-scale pre-trained language model that can learn from massive amounts of text data. The GPT architecture consists of a stack of transformer layers that can encode and decode natural language using self-attention mechanisms. The encoder and the decoder share the same parameters and vocabulary, which allows them to transfer knowledge and skills across different domains and tasks.

The context manager is a module that can handle various conversational tasks by providing the encoder and the decoder with the necessary information and guidance. The context manager can perform the following functions:

Domain selection: The context manager can select the most appropriate domain or topic for the conversation based on the user input and the dialogue history. For example, if the user asks about sports, the context manager can activate the sports domain and provide the encoder and the decoder with relevant facts and keywords.

Task selection: The context manager can select the most appropriate task or goal for the conversation based on the user input and the dialogue history. For example, if the user asks for a recommendation, the context manager can activate the recommendation task and provide the encoder and the decoder with relevant criteria and options.

State tracking: The context manager can track the dialogue state and the user preferences throughout the conversation and update them accordingly. For example, if the user changes their mind or provides new information, the context manager can update the dialogue state and the user preferences and provide the encoder and the decoder with the updated information.

Response generation: The context manager can generate the response text based on the output of the decoder and the dialogue state. For example, if the decoder produces a partial or incomplete response, the context manager can complete the response by adding the necessary information or expressions.

The architecture of ChatGPT is designed to enable flexible and adaptive language generation for various conversational tasks. By using a large-scale pre-trained language model and a context manager, ChatGPT can produce fluent and coherent texts that can engage users in natural and human-like dialogues.

Architecture

The architecture of ChatGPT is a deep neural network composed of many layers of neurons, which are processing units. Each neuron receives information from the previous layer and then produces an output that is sent to the subsequent layer. The network can learn linguistic statistical patterns and apply them to produce new text because it was trained using a sizable corpus of text.

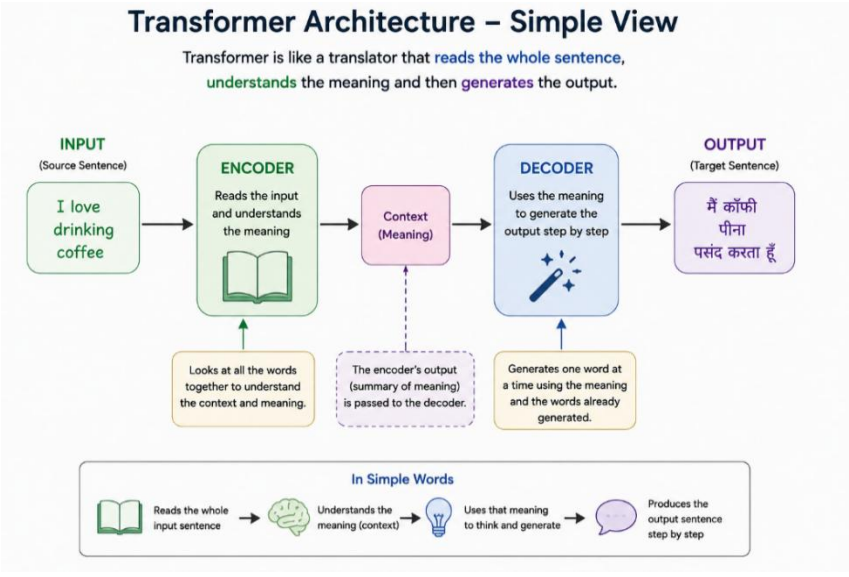
Chat GPT has been optimized to perform well on conversational tasks while maintaining a similar architectural design to other GPT models. ChatGPT can produce natural-sounding responses to user input because it was trained on a large dataset of dialogue.

Algorithms

For its natural language processing tasks, Chat GPT employs a variety of algorithms.

Key algorithms used in ChatGPT

Transformer architecture



The transformer architecture used by ChatGPT was first described in the Vaswani et al. paper "Attention is All You Need". The model can learn long-range dependencies between various parts of the input thanks to the transformer architecture, which is designed to process sequential data, such as text.

The encoder and the decoder are the two key parts of the transformer architecture. The input text is processed by the encoder, which creates a set of encoded representations; the input of the decoder, which creates the output text, is these encoded representations.

Self-attention

The transformer architecture uses the self-attention algorithm as a key component. Self-attention enables the model to generate output while focusing on various input components. As a result, the model can learn which input elements are crucial for producing a specific output.

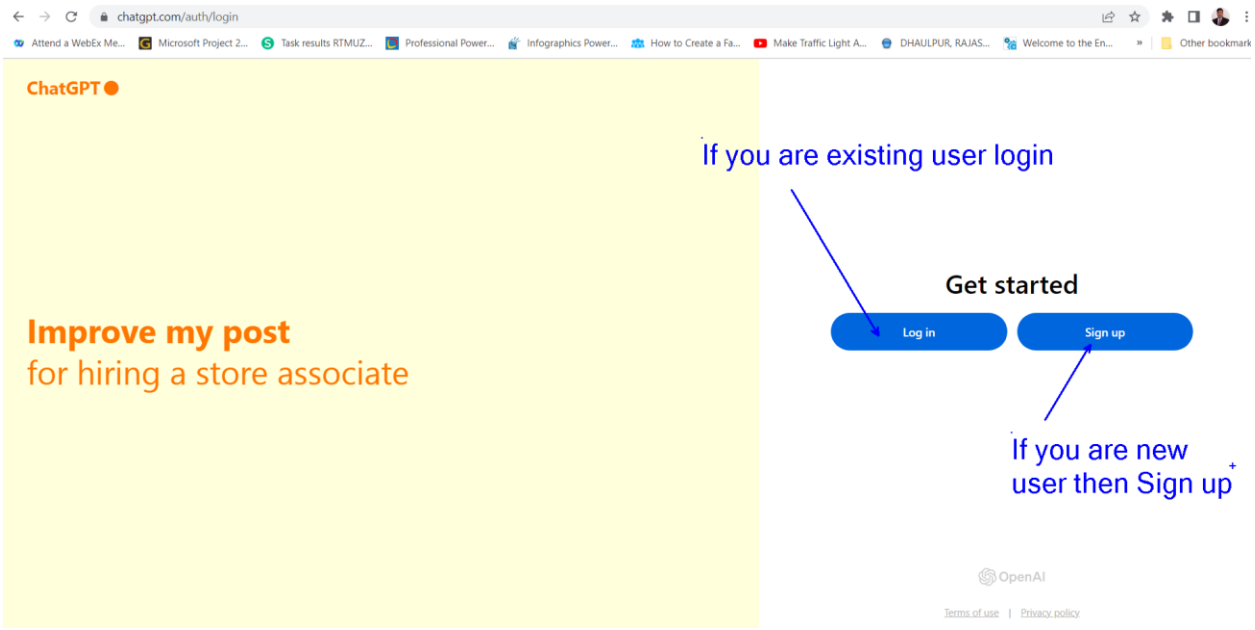
Language modeling

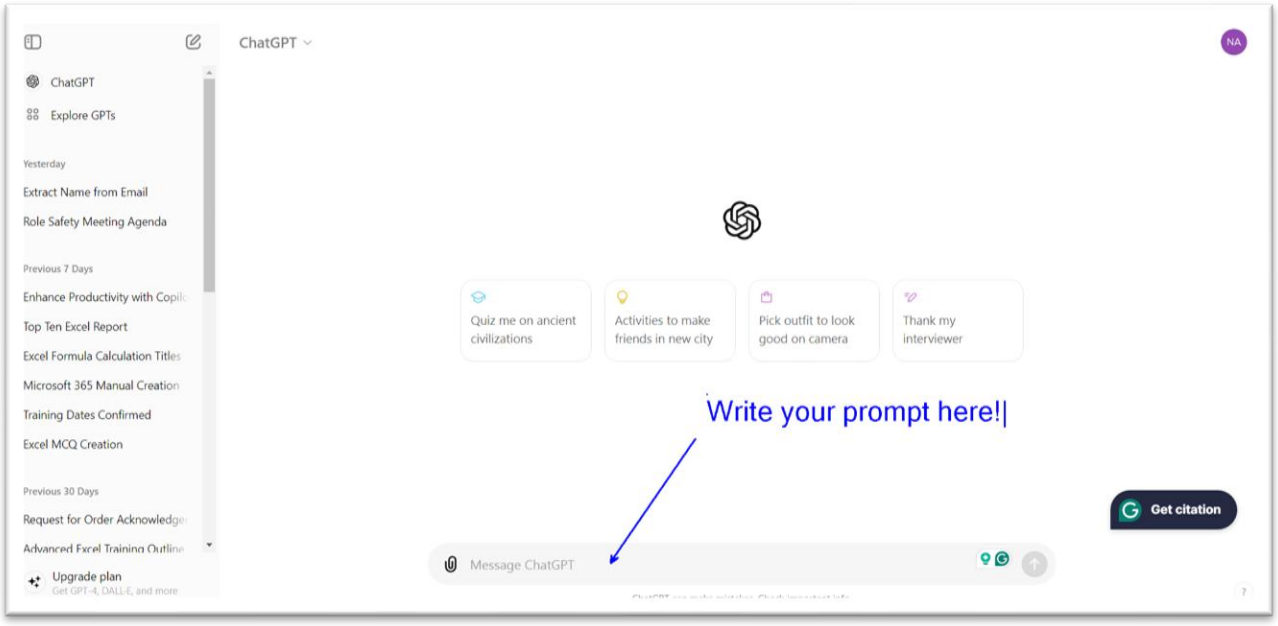
One of the main tasks that ChatGPT is trained on is language modeling. In language modeling, the following word in a sequence is predicted based on the words that came before. Because Chat GPT is trained on a sizable body of text, it can learn the statistical patterns of language and apply this understanding to produce new text.

Fine-tuning

ChatGPT has the ability to be honed on particular tasks in addition to pre-training on a sizable dataset. For fine-tuning, the model is trained on a smaller corpus of text relevant to a particular task, such as question-answering or summarization. The model can be fine-tuned to better suit the task at hand and perform to its potential.

Name	Features	Use-cases
ChatGPT-2	A medium-sized model with 345 million parameters, trained on the Reddit comment dataset.	Suitable for generating casual and informal conversations on a variety of topics.
ChatGPT-3.5	A large model with 1.5 billion parameters, trained on the OpenAI WebText corpus, which contains texts from the internet.	Suitable for generating more diverse and creative conversations on a wider range of topics.
ChatGPT-4	A very large model with 9.4 billion parameters, trained on the Pile dataset, which contains texts from various sources, such as books, news, Wikipedia, etc.	Suitable for generating high-quality and informative conversations on a broad range of topics, with the ability to incorporate factual knowledge and references.





Aspect	ChatGPT-3.5	ChatGPT-4
Model size	175 billion parameters	1.1 trillion parameters
Training dataset	OpenAI WebText	The Pile
Data diversity	Mostly web texts	Various domains and genres
Knowledge and references	More limited	More extensive
Topic coverage	More narrow	More broad

What are Parameters?

Parameters in ChatGPT are the numerical values that define the behavior of the neural network that generates the conversations. The more parameters a model has, the more complex and expressive it can be, but also the more computationally expensive and data-hungry it becomes. ChatGPT-4 has much more parameters than ChatGPT-3.5, which means it can potentially produce more diverse and knowledgeable responses, but also requires more resources to train and run.

What is token in ChatGPT?



A token is a unit of text that ChatGPT uses to process and generate language. A token can be a single character, a word, a phrase, or a special symbol. ChatGPT splits the input text into tokens and assigns each token a numerical representation, which is then fed into the neural network. The network then outputs a sequence of tokens that forms the response. ChatGPT uses a large vocabulary of tokens, which allows it to handle diverse and complex language.

A token can be:

- A whole word (hello)
- part of a word (play + ing)
- a punctuation mark (!)
- or even a space/newline in some systems.

Example

- Sentence: “ChatGPT is amazing!”
- Might be split into tokens like:

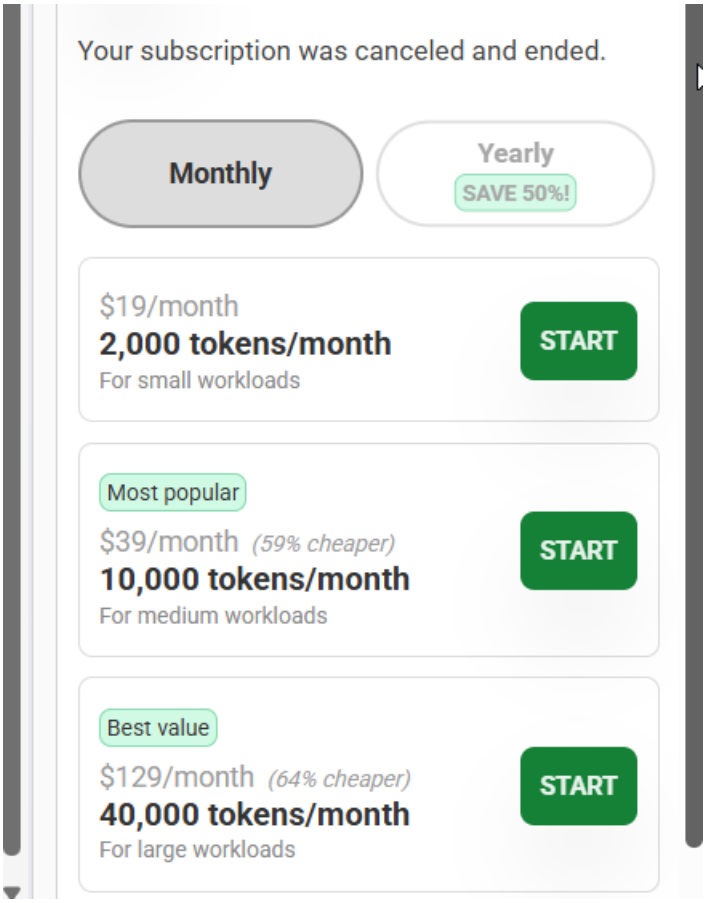
Chat

GPT

is

amazing

!



- So that short sentence could be around **5 tokens**.
- ChatGPT processes **trillions of tokens every day** across all users.

What is the difference between ChatGPT and Google Search?

Google Search and ChatGPT are two different systems that handle data in different ways.

Google Search is a web search engine that allows users to find information on the internet by entering keywords or queries. ChatGPT is an open domain chatbot that allows users to have conversations on various topics by generating natural language responses.

One of the main differences between Google Search and ChatGPT is the level of privacy and real-time interaction they provide.

- Google Search collects and stores user data, such as search history, location, preferences, and behavior, to personalize the search results and show relevant ads. This may raise some privacy concerns for users who do not want their data to be tracked or shared with third parties.
- ChatGPT, on the other hand, does not store any user data or track any personal information. The conversations are ephemeral and not logged or recorded. This may enhance the privacy and security of users who want to chat anonymously or confidentially.
- Another difference between Google Search and ChatGPT is the data storage policies and user interaction dynamics they follow.
- Google Search relies on a large and constantly updated index of web pages and other online sources, which it crawls and analyzes using sophisticated algorithms. The index is stored on multiple servers across the world, which enables fast and efficient retrieval of information.
- Google Search also uses a ranking system that determines the relevance and quality of the web pages based on various factors, such as popularity, authority, freshness, and user feedback.
- ChatGPT, however, does not use any external data sources or indexes. It generates responses from scratch using a neural network that has been trained on a large corpus of text, called The Pile. The Pile contains diverse and heterogeneous data from various domains and genres, such as books, news, social media, Wikipedia, etc.
- ChatGPT uses a probabilistic model that predicts the most likely tokens to form a coherent and fluent response based on the input context and the previous dialogue history.
- ChatGPT also uses a scoring system that evaluates the quality and diversity of the responses based on various metrics, such as perplexity, repetition, and engagement.
- The data storage policies and user interaction dynamics of Google Search and ChatGPT have different implications and trade-offs.
- Google Search can provide more accurate and factual information, as well as more options and resources, for users who are looking for specific answers or solutions.

However, Google Search may also expose users to biased, misleading, or harmful content, as well as unwanted ads or trackers.

- ChatGPT can provide more creative and engaging conversations, as well as more flexibility and personalization, for users who are looking for social or emotional interactions. However,
- ChatGPT may also produce irrelevant, inconsistent, or offensive responses, as well as misunderstanding or misrepresenting the user's intent or emotions. Therefore, users need to be aware of the strengths and limitations of each system and use them accordingly.

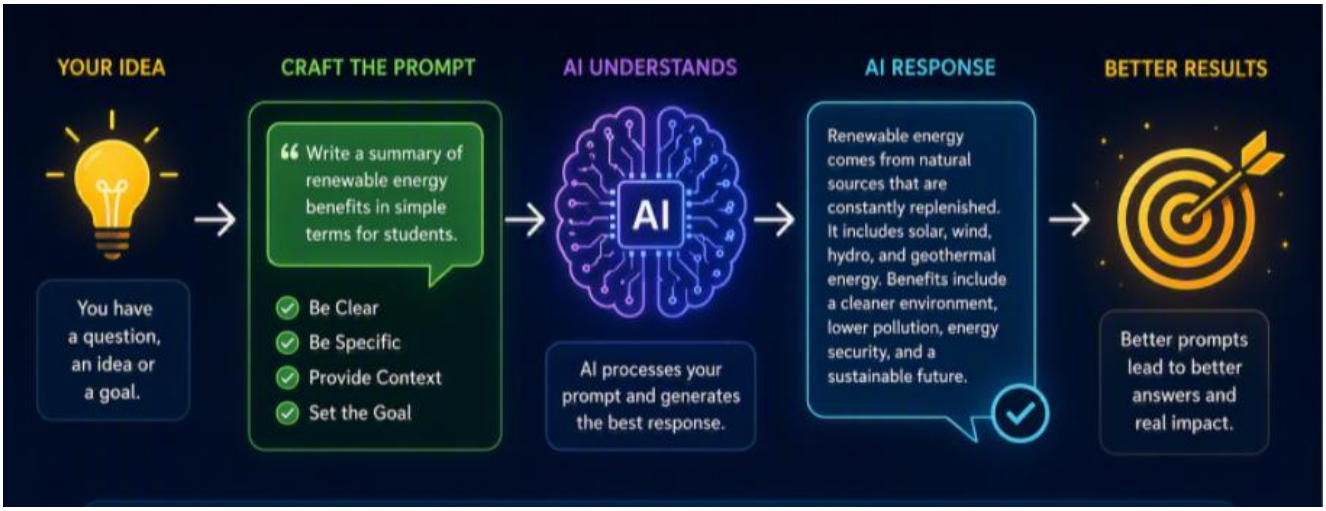
Aspect	Google Search	ChatGPT
Data type	Web search engine	Open-domain chatbot
Privacy and real-time interaction	Collects and stores user data, shows ads, less privacy	Does not store or track user data, no ads, more privacy
Data storage policies and user interaction dynamics	Uses external data sources and indexes, ranking system, factual and relevant information	Generates responses from scratch, probabilistic model, scoring system, creative and engaging conversations
Implications and trade-offs	More accurate and resourceful, but may expose to biased or harmful content	More flexible and personalized

Evolution of OpenAI GPT Models

Model	Release Date	Knowledge Cutoff
GPT-3.5 Turbo	March 1, 2023	September 1, 2021
GPT-4	March 14, 2023	December 2023
GPT-4 Turbo	November 6, 2023	December 1, 2023
GPT-4o	May 13, 2024	October 1, 2023
GPT-4.1	April 14, 2025	June 2024
GPT-5	August 7, 2025	September 30, 2024
GPT-5.1	November 12, 2025	September 30, 2024
GPT-5.2	December 11, 2025	August 31, 2025
GPT-5.3	February 5, 2026	August 31, 2025
GPT-5.4	March 5, 2026	August 31, 2025
GPT-5.5	April 23, 2026	December 1, 2025
GPT-5.6 Sol	July 9, 2026	February 16, 2026
GPT-5.6 Terra	July 9, 2026	February 16, 2026
GPT-5.6 Luna	July 9, 2026	February 16, 2026

What is Prompt Engineering?

Prompt Engineering is the process of designing and refining instructions (prompts) to get accurate, relevant, and useful responses from AI models such as ChatGPT, Copilot, Gemini, and Claude.



Prompt Engineering means:

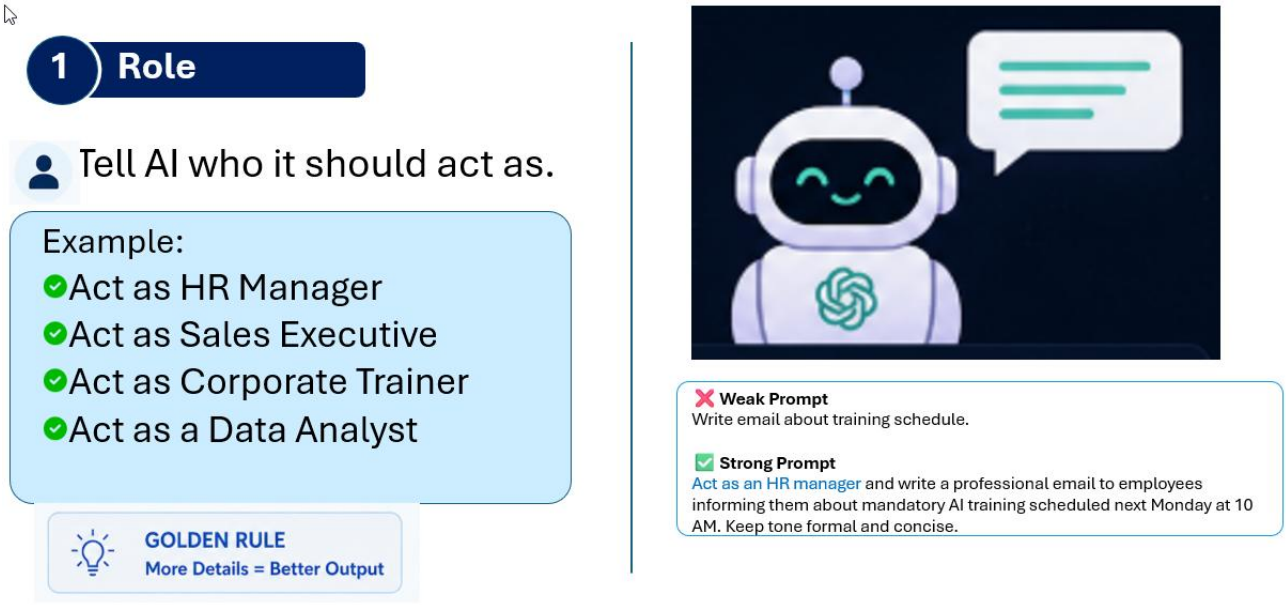
- The Art of communication with AI.
- Writing clear, structured, and detailed instructions to get better results from AI tools like ChatGPT or other AI tools.
- AI is like a smart employee.
  If instructions are unclear, results will also be unclear.



Why Prompt Engineering is Important



Simple Formula of Prompt Engineering



2 Task

Clearly define what you want.

Example:
- Write email
- Create report
- Create dashboard
- Summarize meeting

GOLDEN RULE
More Details = Better Output



❌ **Weak Prompt**
Write email about training schedule.

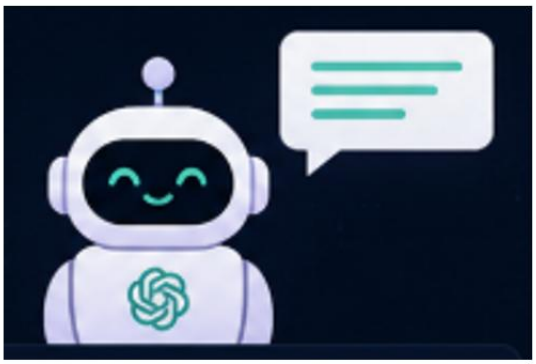
✅ **Strong Prompt**
Act as an HR manager and write a professional email to employees informing them about mandatory AI training scheduled next Monday at 10 AM. Keep tone formal and concise.

3 Context

Give background information to AI so it understands the situation properly

Example:
- Client payment delay
- Pharma sales report
- Employee training session
- Social Media

GOLDEN RULE
More Details = Better Output



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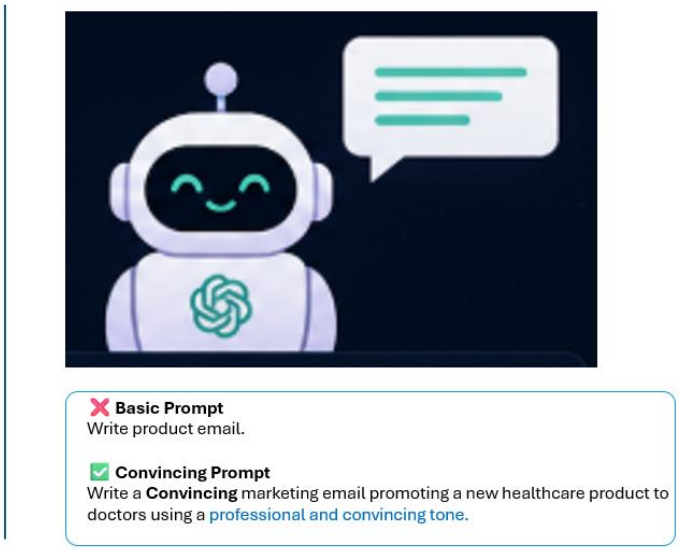


Zero-Shot Prompting

Zero-Shot Prompting means asking an AI model to perform a task **without giving it any examples first**.

In simple words, you give the AI a direct instruction, and it uses its existing knowledge to answer.

Example:

Prompt:
“Translate this sentence into Hindi: I am learning Excel.”

Here, you did not show the AI any sample translation before asking. That is zero-shot prompting.

Key point:
Zero-shot prompting = **No examples provided; only the task instruction is given.**

Example

- "Write a professional email inviting employees to attend AI training.“
- Prepare a CFO-level financial presentation with revenue trends, profit margins, cash flow, budget vs actual analysis, cost breakdown, variance analysis, financial KPIs, risks, and recommendations using charts and executive visuals

Define the Audience

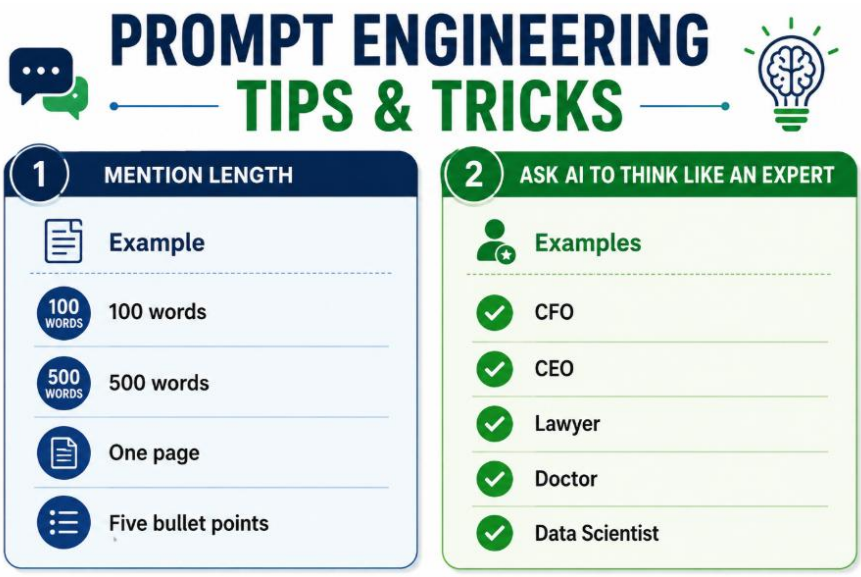
Example:

- Explain AI to a 10-year-old child.
- Explain Power BI to senior managers.
- Create Presentation for my CEO

Mention Output Format

Examples

- Table
- Bullet Points
- JSON
- Excel Formula
- HTML
- Markdown



Example

- Give the output in tabular format.
- Give the output in MS Excel downloadable format or PDF format

How ChatGPT generates MS Excel Formula

ChatGPT can generate MS Excel formulas by understanding the user's requirements and translating them into appropriate Excel functions. Here's a step-by-step overview of how ChatGPT can assist in generating MS Excel formulas:

1. **Understanding the Requirement**: ChatGPT needs to understand the specific calculation or operation the user wants to perform in Excel. For example, the user might

want to calculate the sum of a range of cells, find the average, or perform a more complex operation like a VLOOKUP.

2. **Identifying the Relevant Excel Function**: Based on the requirement, ChatGPT identifies the appropriate Excel function(s). For example:
    - Summing a range of cells: SUM
    - Averaging a range of cells: AVERAGE
    - Looking up a value: VLOOKUP or INDEX and MATCH
    - Conditional calculations: IF, SUMIF, COUNTIF
3. **Constructing the Formula**: ChatGPT constructs the formula by combining the identified function with the specified cell ranges and parameters. This involves:
    - Specifying the correct syntax.
    - Ensuring proper use of cell references (absolute A1 vs. relative A1).
4. **Providing the Formula**: ChatGPT provides the user with the generated formula, explaining how it works if necessary.

Example 1: Basic SUM Formula

User Query: How do I sum the values in cells A1 to A10?

ChatGPT Response: To sum the values in cells A1 to A10, you can use the SUM function. The formula is:



Example 2: VLOOKUP Formula

User Query: How can I look up the value in cell B2 in a table that ranges from A1 to D10, and return the value in the third column?

ChatGPT Response: To look up the value in cell B2 within a table that ranges from A1 to D10 and return the value in the third column, you can use the VLOOKUP function. The formula is:

This formula searches for the value in B2 within the first column of the range A1

and returns the corresponding value from the third column.

Example 3: Conditional SUMIF Formula

User Query: How do I sum the values in column B where the corresponding value in column A is "Apple"?

ChatGPT Response: To sum the values in column B where the corresponding value in column A is "Apple", you can use the SUMIF function. The formula is:

```excel
=SUMIF(A:A, "Apple", B:B)
```

This formula sums all values in column B where the corresponding cell in column A contains "Apple".

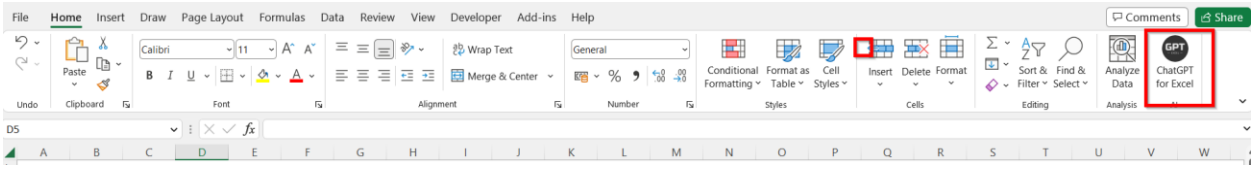
By following these steps, ChatGPT can assist users in generating accurate and effective Excel formulas based on their specific needs.

With our AI-powered add-in, you can automate tasks, gain valuable insights, and save time.

- Let AI write engaging content, compelling descriptions, blogs, and emails.
- Teach AI to clean your data, fill-in missing ranges, categorize and format.

1. AI.ASK - get answers to your questions.
2. AI.TABLE - create tables in seconds.
3. AI.TRANSLATE - translates text into specified language
4. AI.FORMAT - converts text to a specified format
5. AI.EXTRACT - extracts specified data from a given text

6. AI.LIST - generate list outputs in separate rows
7. AI.FILL - perfect for filling incomplete ranges



Difference Between ChatGPT and Microsoft Copilot for Microsoft 365

Feature	ChatGPT	Microsoft Copilot for Microsoft 365
Primary Purpose	General-purpose AI assistant for answering questions, generating content, coding, and brainstorming.	AI assistant integrated into Microsoft 365 to help users work within business applications.
Integration	Works through a web browser, mobile app, or API.	Integrated directly into Word, Excel, PowerPoint, Outlook, Teams, and other Microsoft 365 apps.
Access to Company Data	Cannot access your organization's emails, files, or meetings unless explicitly provided.	Can securely access Microsoft 365 data that users already have permission to view.

Feature	ChatGPT	Microsoft Copilot for Microsoft 365
Document Creation	Creates content from user prompts.	Creates content using prompts plus organizational documents, emails, and meeting data.
Excel Analysis	Analyzes data that users upload or paste.	Works directly with Excel workbooks stored in Microsoft 365.
Email Assistance	Can draft emails based on instructions.	Can draft emails using context from Outlook conversations and meetings.
Meeting Support	Can summarize meeting transcripts if provided.	Can automatically summarize Teams meetings and identify action items.
Presentation Creation	Generates slide content and ideas.	Can create PowerPoint presentations directly from Word documents and organizational content.
Security & Compliance	Data handling depends on the ChatGPT plan and organization settings.	Inherits Microsoft 365 enterprise security, compliance, and permission controls.



Difference Between ChatGPT and Microsoft Copilot for Microsoft 365

ChatGPT = AI Expert

- Answers questions and generates content from user prompts.
- Best for learning, brainstorming, research, and content creation.

Microsoft Copilot = AI Coworker

- Works inside Word, Excel, PowerPoint, Outlook, and Teams.
- Use your organization's Microsoft 365 data to help complete daily work faster.

What is Microsoft Copilot?

Microsoft Copilot is an artificial intelligence (AI)-powered tool that is primarily meant to support Microsoft 365 users with automation features for Word, Excel,

PowerPoint, Outlook, and Teams. It also works with the Bing search engine and Windows operating system (OS).

Copilot can understand and respond to natural language queries, provide detailed explanations, analyze data, generate content such as code or images, and assist with complex tasks across Microsoft apps.

On March 16, 2023, Microsoft announced Microsoft 365 Copilot, designed for Microsoft 365 applications and services.

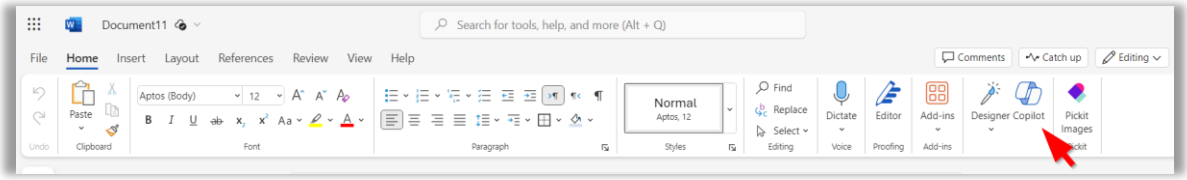
Copilot is built upon OpenAI's GPT-4 foundational large language model.

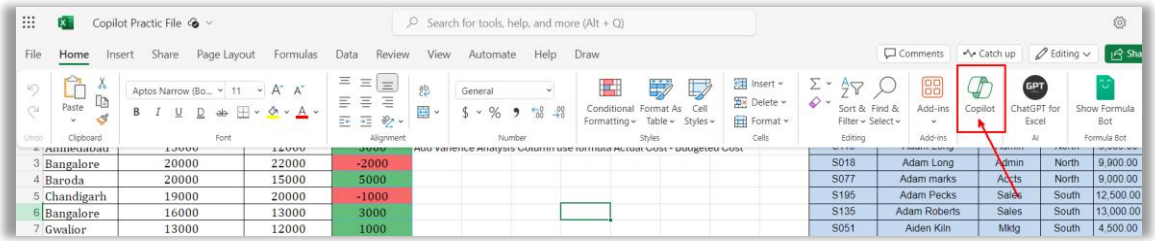
What are the versions of Microsoft Copilot?

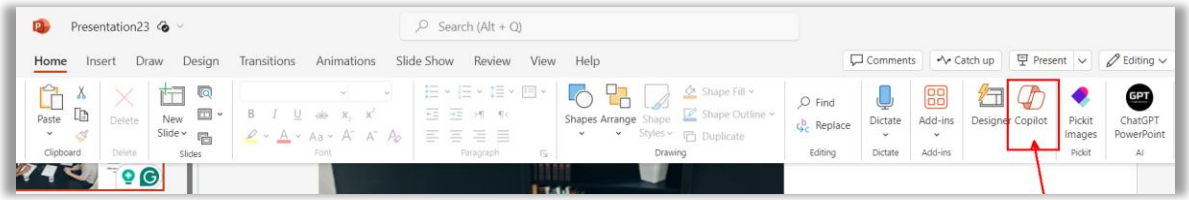
There are three versions of Copilot as of June 2024, including the following:

- **Free Microsoft Copilot.** Available to anyone using Windows, Microsoft Edge or the Bing website. It's suitable for general users and small businesses not requiring highly specific or detailed responses.
- **Copilot Pro.** Aimed at power users, this offers priority access to GPT-4 and GPT-4 Turbo models during peak times with faster response times compared to the free version. It also includes Image Creator from Designer (formerly Bing Image Creator). The cost is $20 per user per month.
- **Copilot 365.** Available as an add-on for the Office apps in Microsoft 365 (supporting Business Standard, Premium and Enterprise plans). It draws on an organization's data and other internal sources to provide specific and detailed answers. The cost is $30 per user per month.

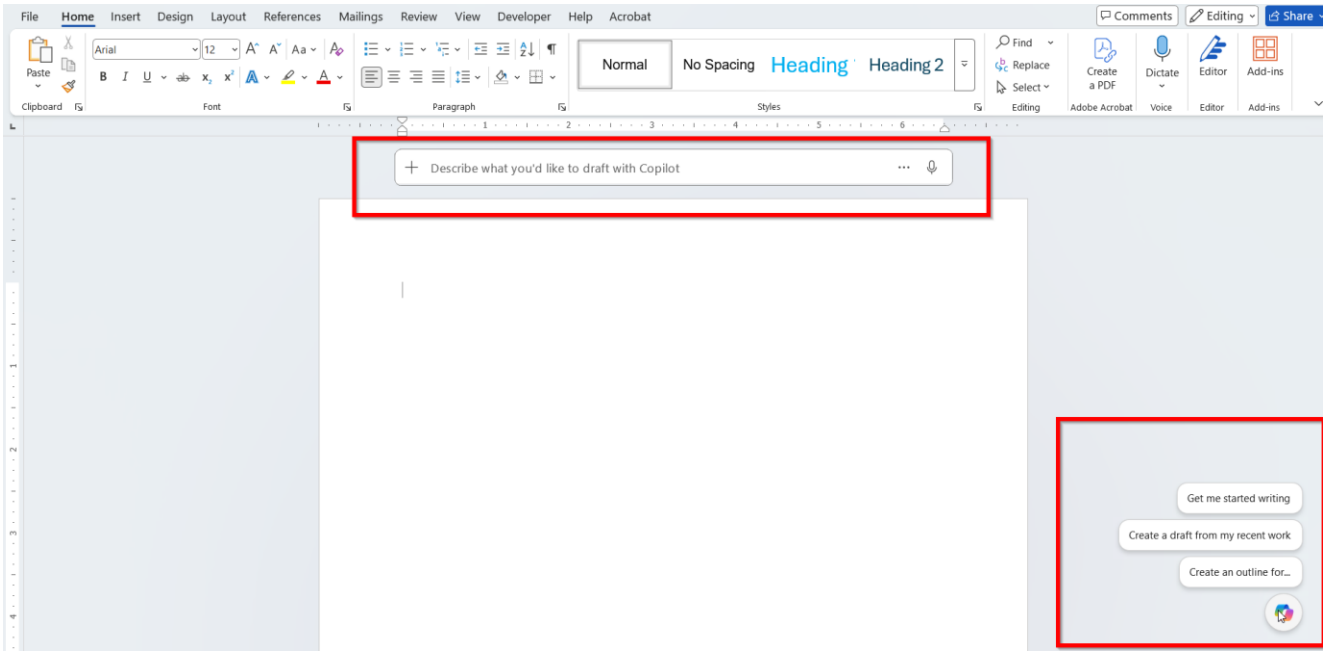
Old Version of Copilot

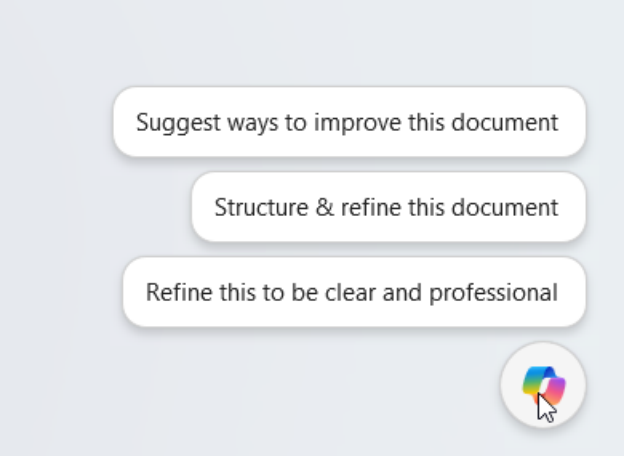






New Version MS Word Copilot AS Assistant



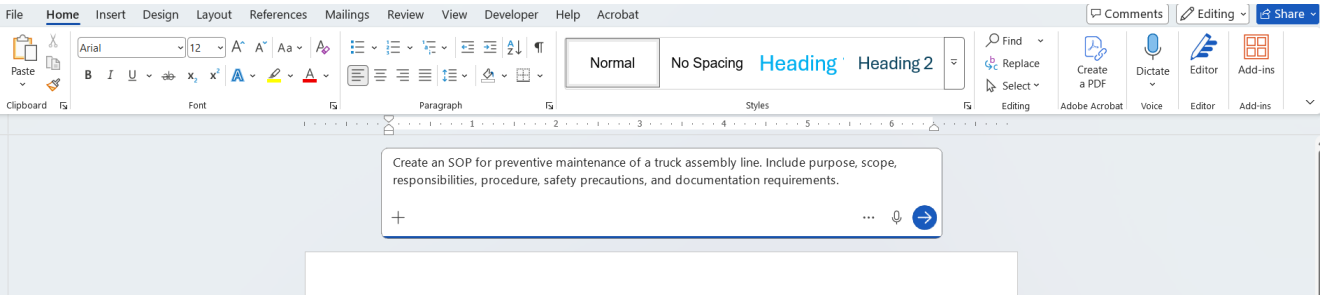


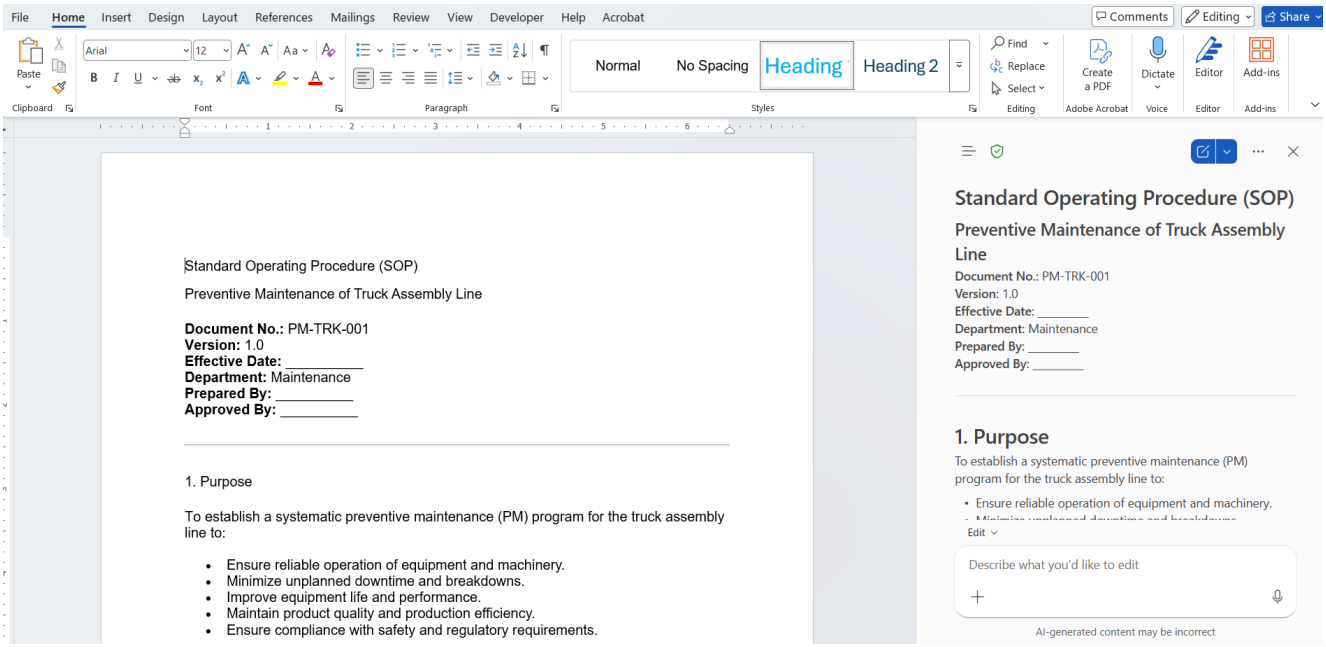
Prompt for Word Copilot 365

Activity 1: Create a Standard Operating Procedure (SOP)

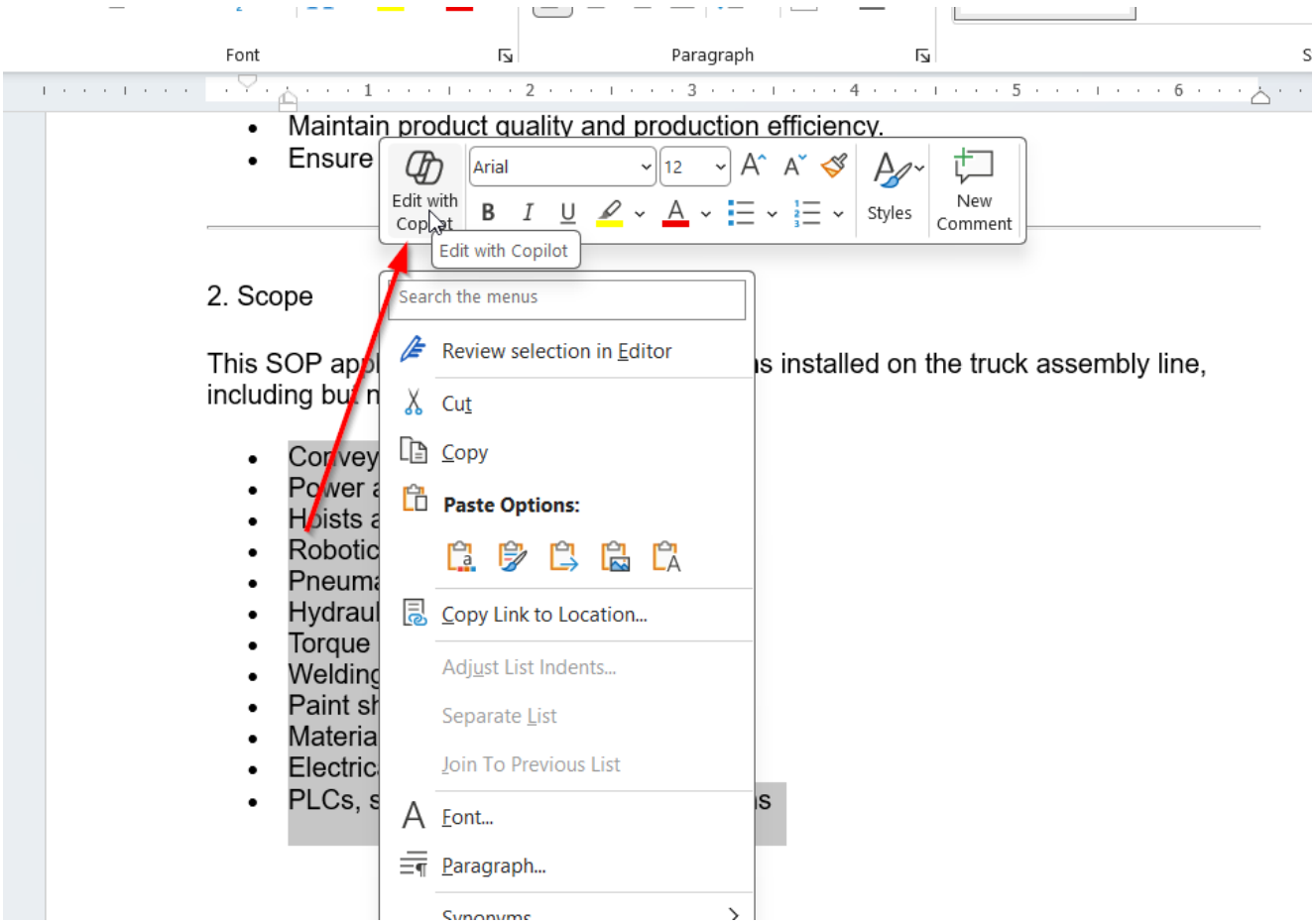
Prompt:

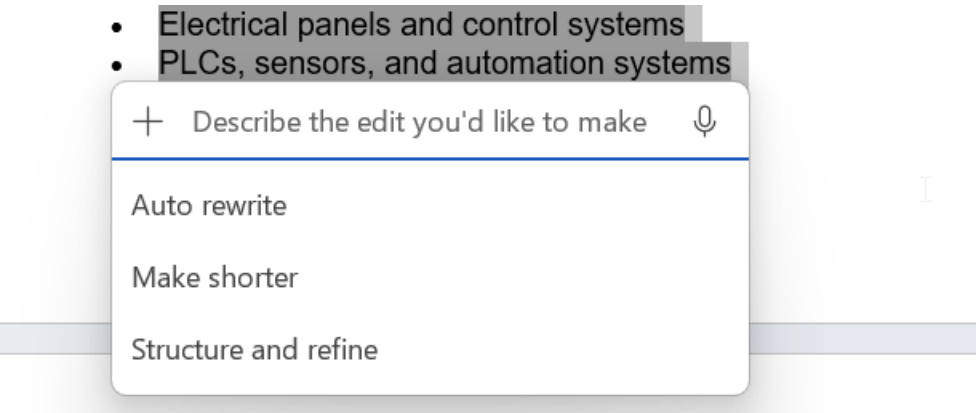
Create an SOP for preventive maintenance of a truck assembly line. Include purpose, scope, responsibilities, procedure, safety precautions, and documentation requirements.





Edit or rewrite paragraph





Prompt 2:
Create MOM for a production review meeting attended by Plant Head, Production Manager, Quality Manager, and Maintenance Manager.

- Microsoft rolled out a preview edition of Copilot for Windows in September 2023. Initially, Copilot was only available on Windows 11. It has since been made available on the latest version of Windows 10.
- In Word, Excel, PowerPoint and Outlook, users can generate text and then have Copilot complete or rewrite it. Copilot can summarize a document and provide a concise overview of the content. tents.
- It can also turn text into data tables.
- In Microsoft Teams, Copilot can provide summaries and recaps of meetings, going over key points and action items. During the meeting, it can provide response suggestions and other talking points, as well as translations from foreign languages.

Benefits of using Microsoft Copilot

Because Copilot is designed to function as an assistant, the primary benefit of using Copilot is improved work-related productivity.

It can boost productivity through the automation of repetitive tasks, such as writing repetitive emails and summarizing documents, freeing users up for more important work. In addition to productivity gains, Copilot can boost user creativity by suggesting new ideas, formats and content based on context and preferences. It improves communication by ensuring emails are sent and streamlines the workflow of Microsoft 365 applications.

Beyond productivity, Copilot can enhance the decision-making process through data analytics, financial analysis, market research and project planning.

Copilot also supports the latest DALL-E 3 model. DALL-E is from Open AI the maker of ChatGPT. It is specifically designed to generate high-quality images from text input.

Copilot will become more context-specific for a variety of functions and tasks. Examples include the following:

- **Teaching.** Teachers can design and improve activity plans for elementary school students to experience and learn about different plants.
- **Shopping.** Consumers can ask Copilot to explain how to choose a mattress based on firmness and sleeping preferences.
- **Travel.** Travelers can use Copilot to plan a four-day itinerary for a visit to Paris and Amsterdam. They might ask what the must-see attractions, activities and restaurants are in each city.
- **History.** Users can ask Copilot if depictions of pirates in movies and novels are accurate.
- **Education.** A user can prompt Copilot to teach them new skills. For example, they can ask the assistant to identify and describe plants that attract bees and ask how to grow them in a garden. The user can also ask how to pollinate a garden by hand.

- **Jobs.** Copilot can help users with job-related information. For example, a user can prompt the assistant to explain steps to get into the semiconductor industry. They can then prompt Copilot to list some related fields of study, as well as skills, qualifications, and experiences necessary for entry into the field.

- **Microsoft Word and Copilot**: Helps users quickly compose or edit text on a particular topic. It can add new content based on what is already in the document and generate summaries of existing documents, as well.

- **Microsoft Outlook and Copilot**: Users can have Copilot draft an email and generate summaries of email threads.

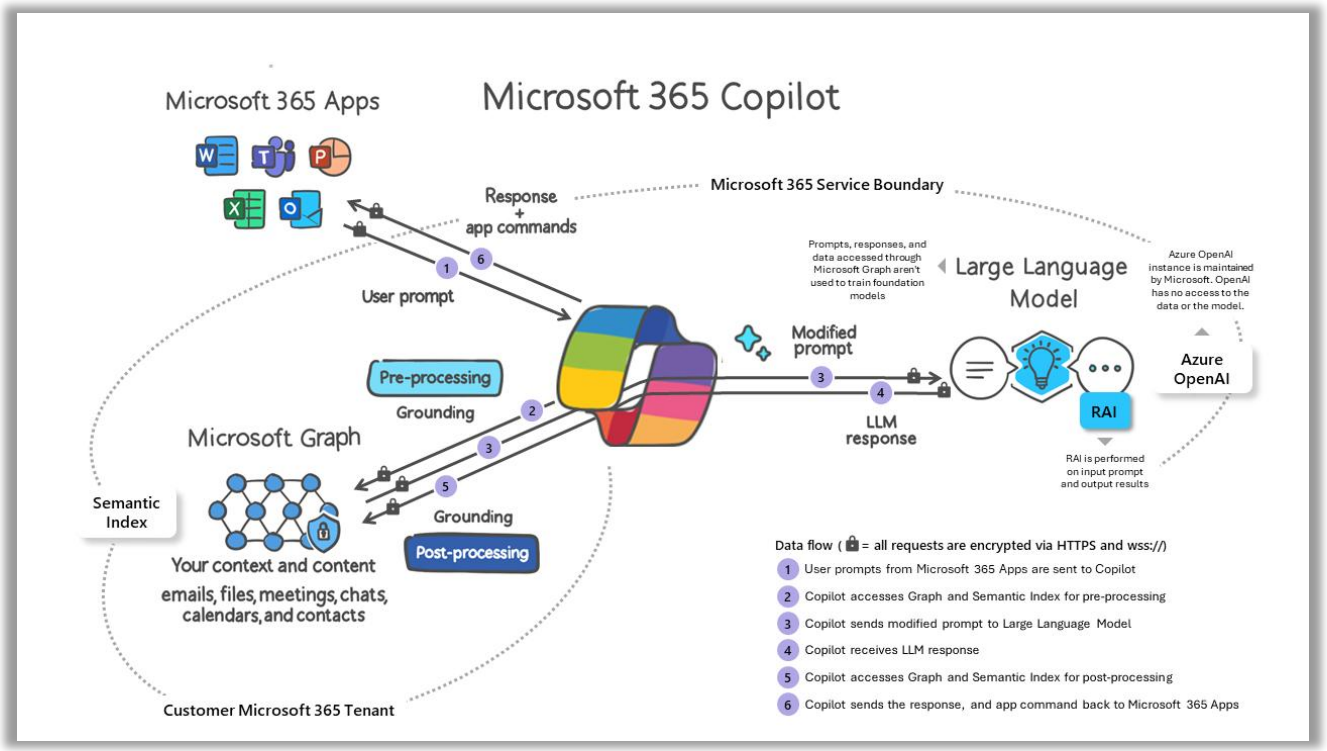
- **Microsoft PowerPoint and Copilot**: Can create a complete presentation, including text and images, based on the content in other documents. It can also create a summary presentation of a longer presentation an reorganize and/or restructure the presentation.

- **Microsoft Excel and Copilot**: Create complex formulas based on a description of what users are trying to accomplish, it can analyze data sets and comment on specific trends it discovers.

- **Microsoft Teams and Copilot**: Can summarize information from a long Teams chat thread and summarize Teams VoIP and PSTN calls. It will also summarize key discussion points and suggest action items, in real time during (or after) a meeting.

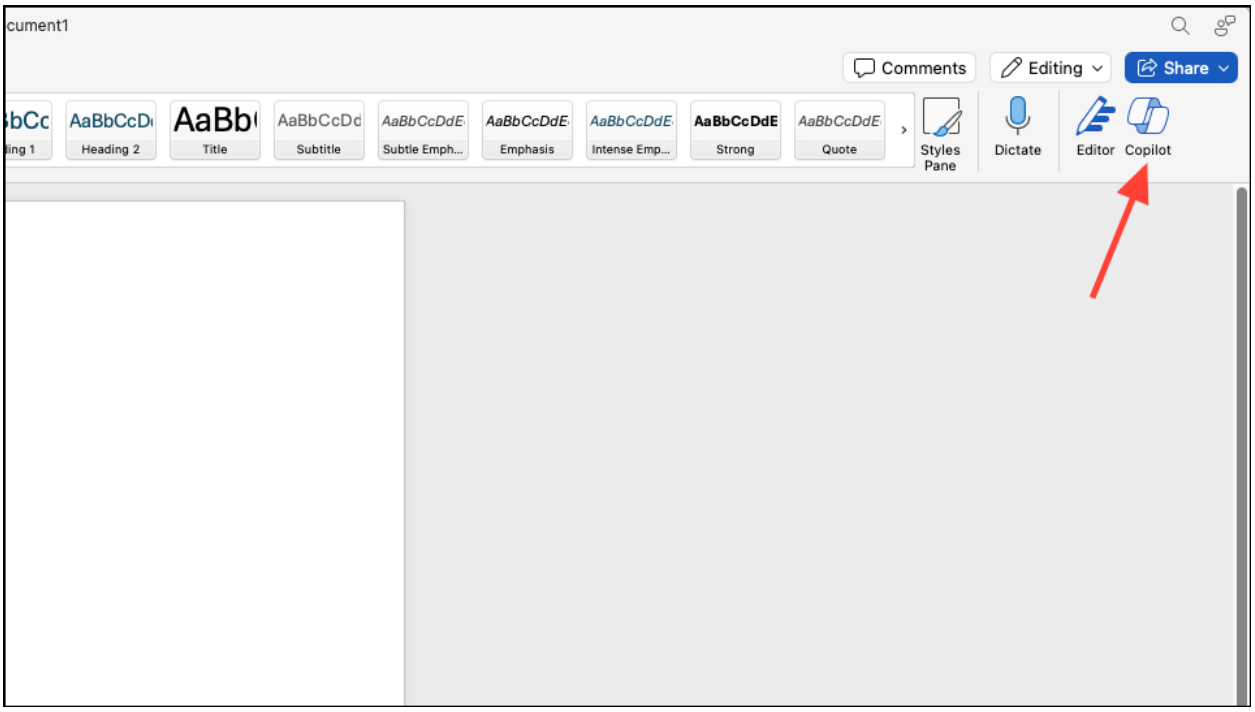
HOW MICROSOFT 365 COPILOT WORKS

The following diagram provides a visual representation of how Microsoft 365 Copilot works.



Copilot in Word

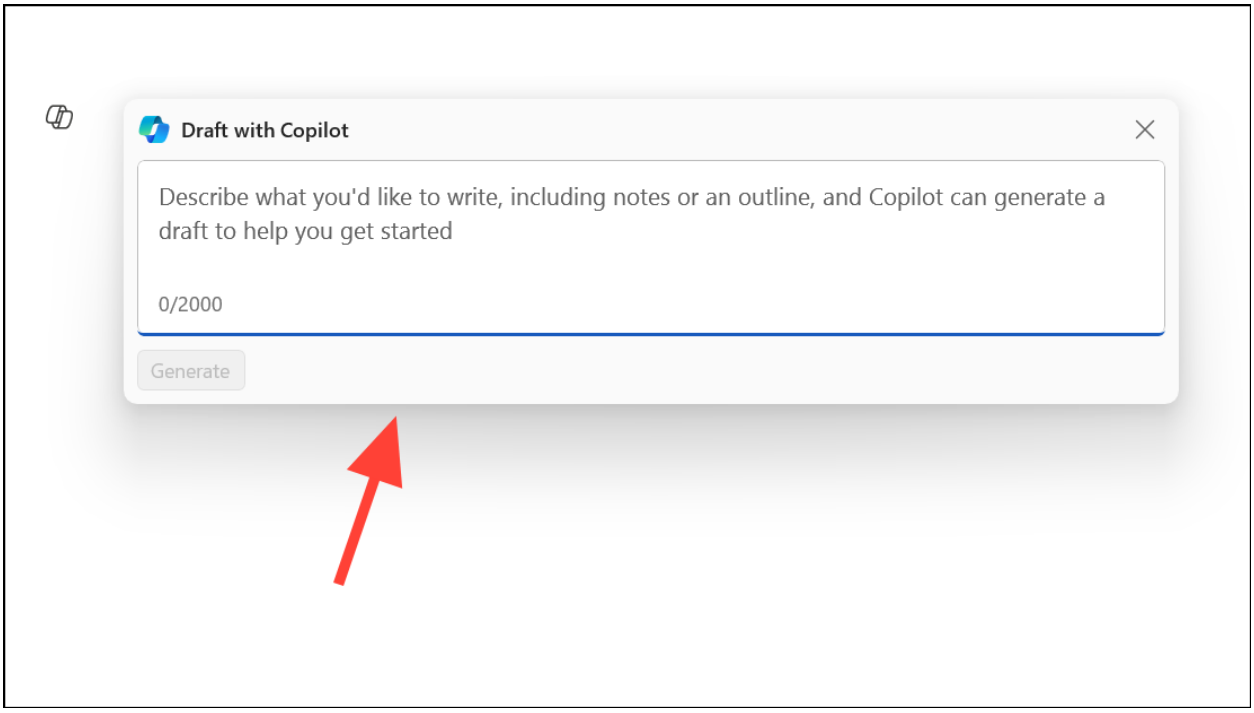
With Copilot in Microsoft Word, you can write your document much more quickly than you normally would. It can even help with research right there in the Word Processor.



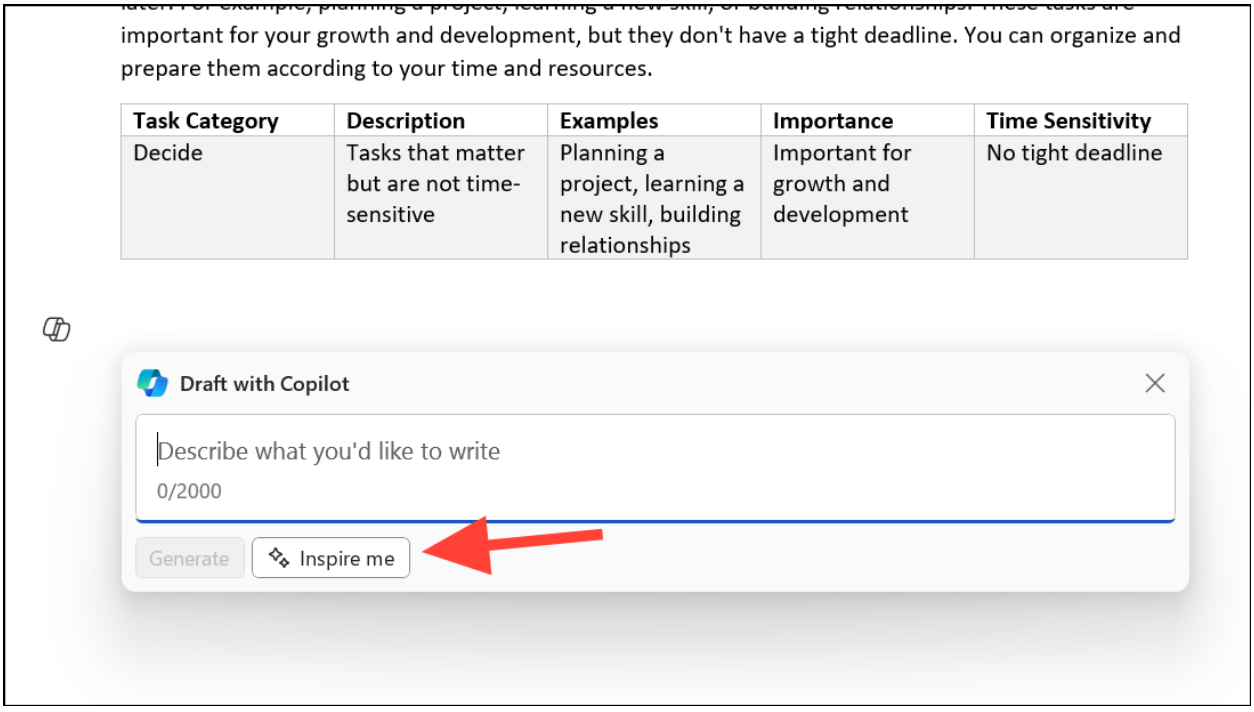
Drafting documents with Copilot

One of the most important things that Copilot can help you with in Word is writing content. So, if you often find yourself staring at the blank screen, intimidated by the prospect of getting started, the AI can help you by generating a draft that you can refine.

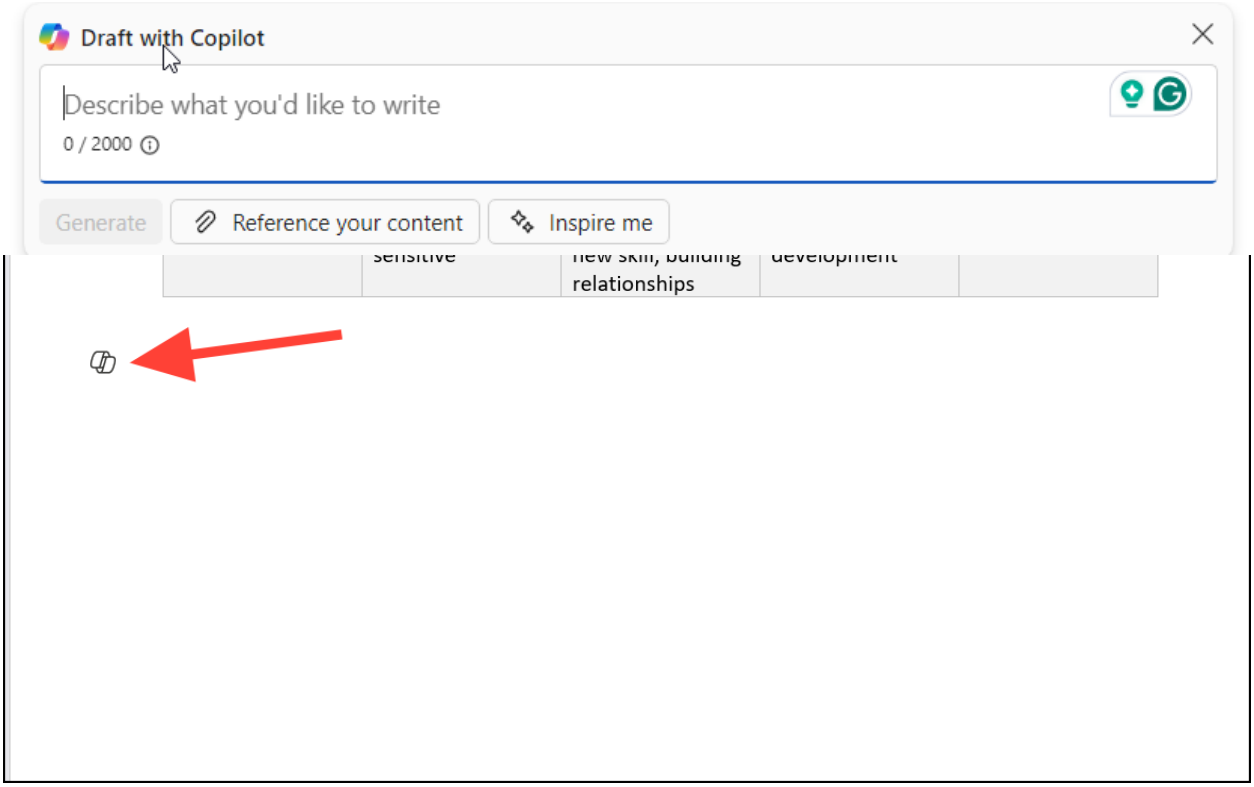
1. When you open a blank document, you'll get the 'Draft with Copilot' dialog box automatically on your screen.



2. In an existing document, the 'Draft with Copilot' button appears when you create a new line. In documents that already have existing content, you can also click the 'Inspire Me' button; Copilot will keep writing based on what's already in the document.



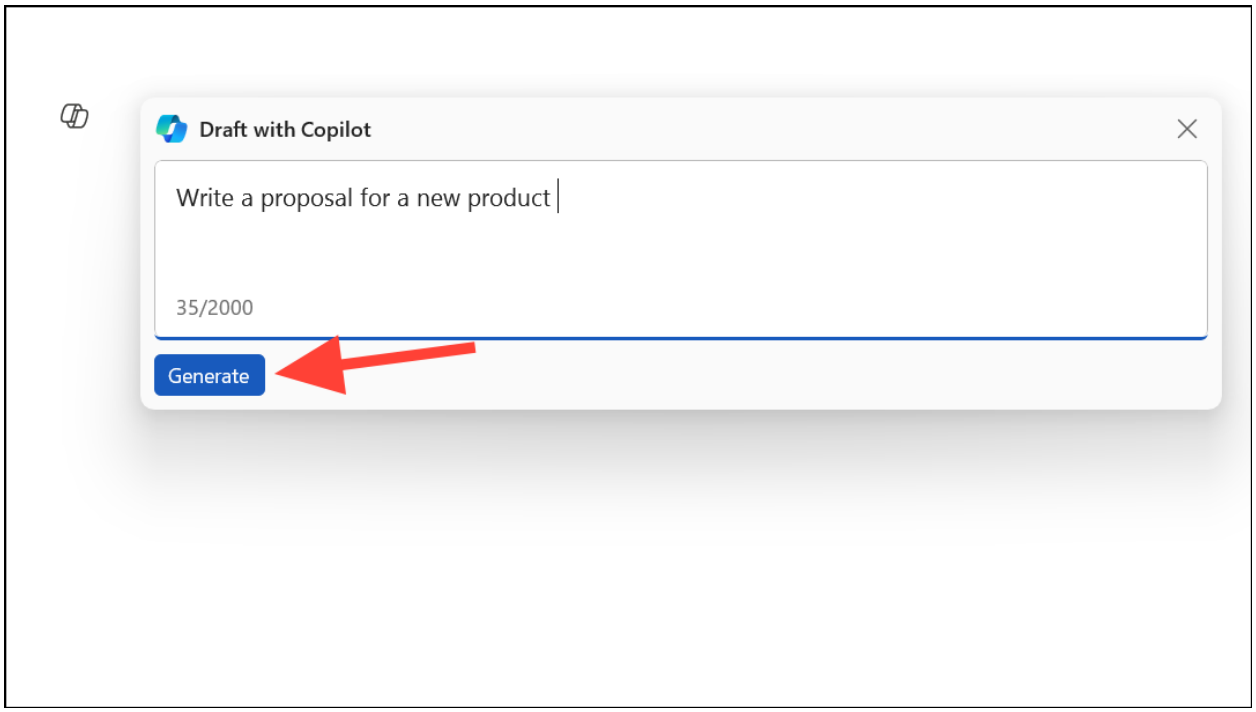
3. You can also summon Copilot to help with drafting at any time while writing in the document by going to a new line and clicking the 'Copilot' button that appears or by using the Alt + I keyboard shortcut.



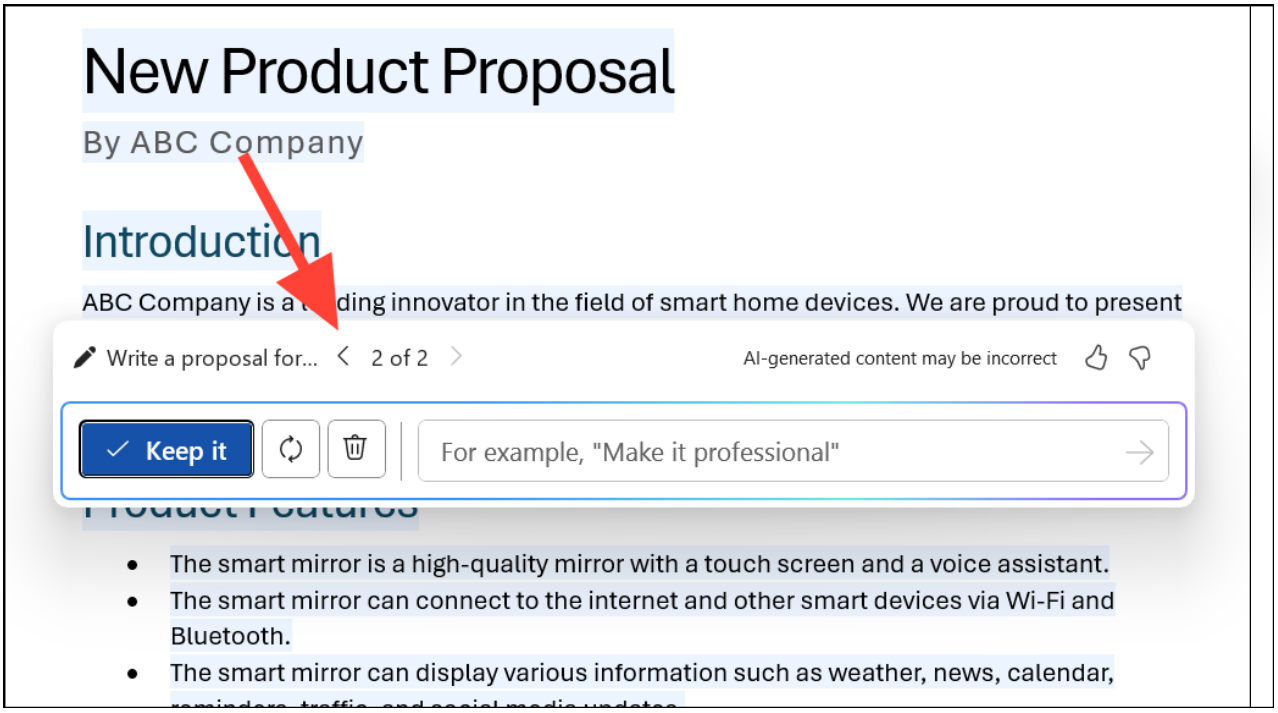
4. In the 'Draft with Copilot' button, enter your prompt. The prompt can be a simple request like *"Write a proposal for a new product [product name]"* or complex, like providing outlines or notes.

   Note: 'Copilot Pro' differs from the 'Copilot with Microsoft 365' subscription here. The latter also sports an option that lets you upload up to 3 files as input to ground the draft that Copilot will produce. However, Copilot Pro offers no such option. While you can copy-paste outlines or notes to provide them as context, that's it; the prompt input has a limit of 2000 characters.

5. Click on 'Generate' to proceed.



6. Copilot will start producing content. You can click 'Stop generating' to stop its response in the middle.



7. Once it has produced the draft, you'll have 4 further options at your disposal. You can either choose to 'Keep it', 'Regenerate', or 'Delete' the content it has written.

   While asking it to regenerate content, you can also give it additional instructions, like *"Make it concise"* or *"Make it more professional,"* by entering the prompt in the 'Compose' box.

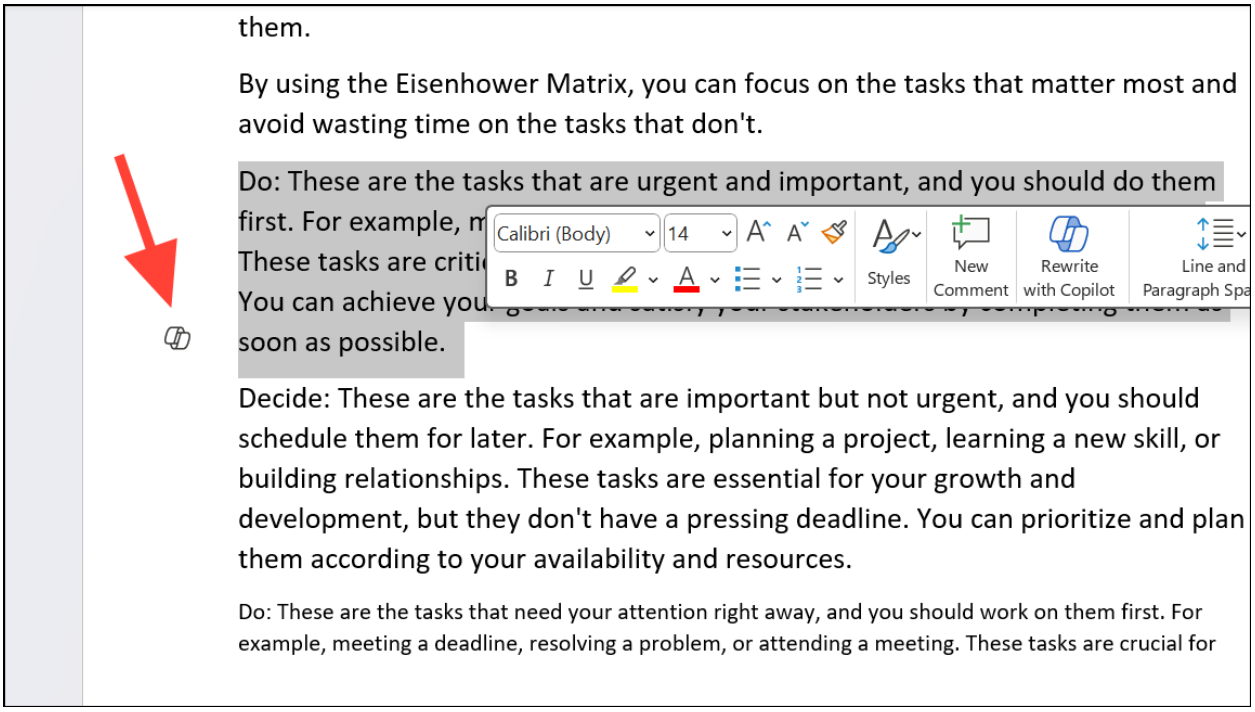
8. If you ask it to regenerate, you can navigate between different versions by using the '<' and '>' arrows.

9. To close the Copilot dialog box, you'll need to choose to either keep the content or discard it.

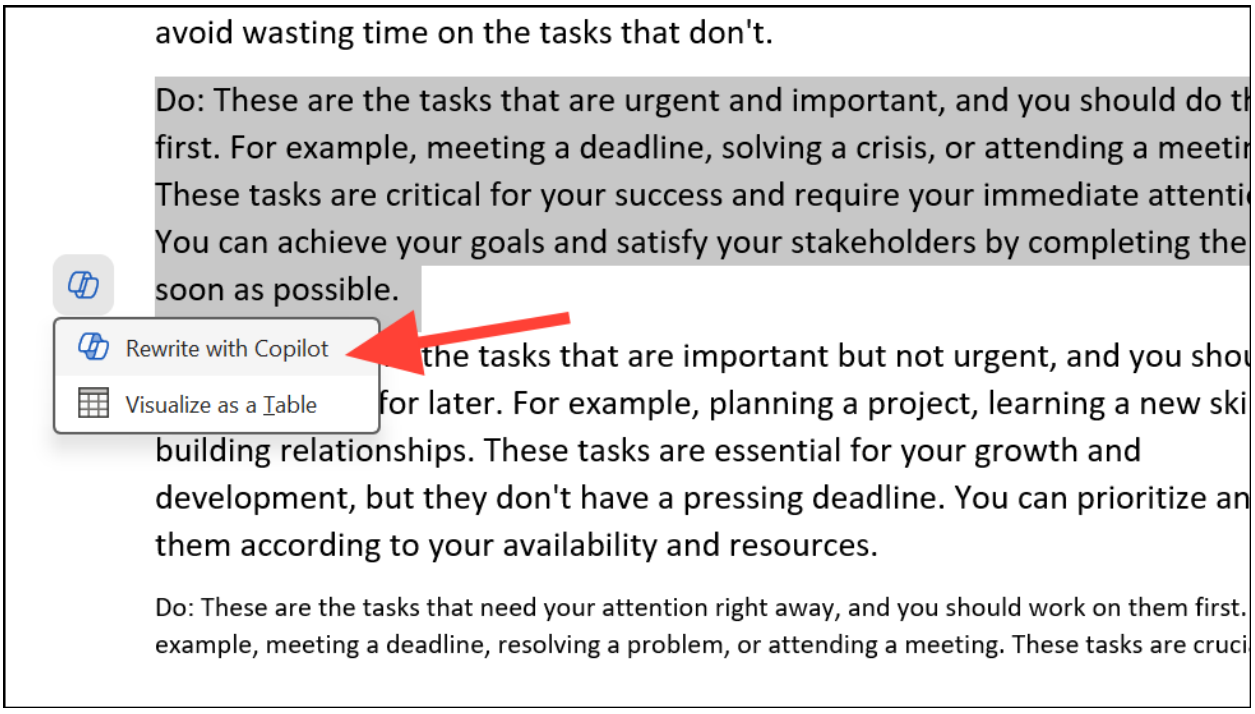
Transform Document with Copilot

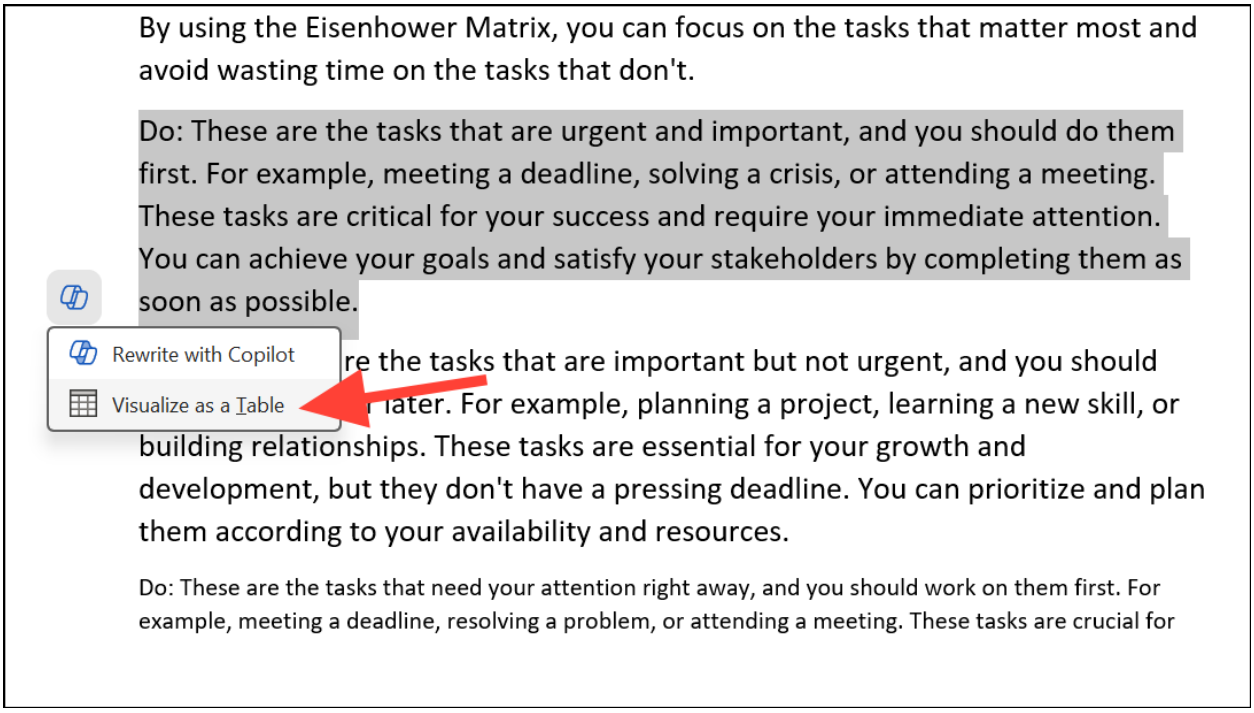
Copilot can also help transform an existing document and not just write original content. So, when there's no shortage of thoughts, but the only problem is that your thoughts look like a toddler trying to solve a puzzle, Copilot can help clean up the mess.

1. In the document, highlight the content that you want to transform.
2. Then, click the 'Copilot' icon that appears.



3. From the 'Copilot' menu, click on 'Rewrite with Copilot'.





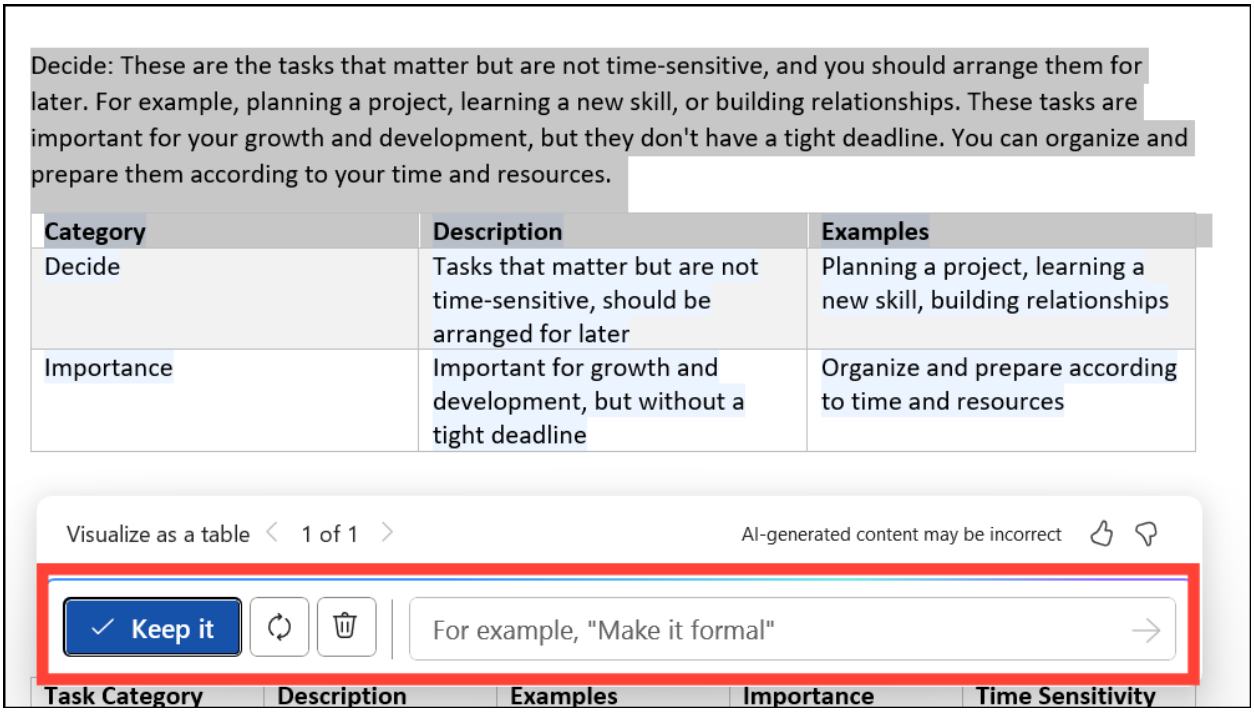
4. Copilot will provide a few suggestions for the rewrite. Click on the '<' and '>' arrows to navigate between them. If you like a rewrite, you can either 'Replace' the original content with it or use the 'Insert Below' option to keep both the original and the rewritten content.

   If you don't like the rewrites, click on the 'Regenerate' button to get a new set of responses. You can also use the 'Adjust Tone' button to change the tone before having Copilot regenerate the content.

5. Copilot can also transform your text into a table. Highlight the text, click the Copilot button, and select 'Visualize as a table' from the menu.

6. It will generate a table for the selected text. If there is more than one suggestion, use the arrows to navigate between them.

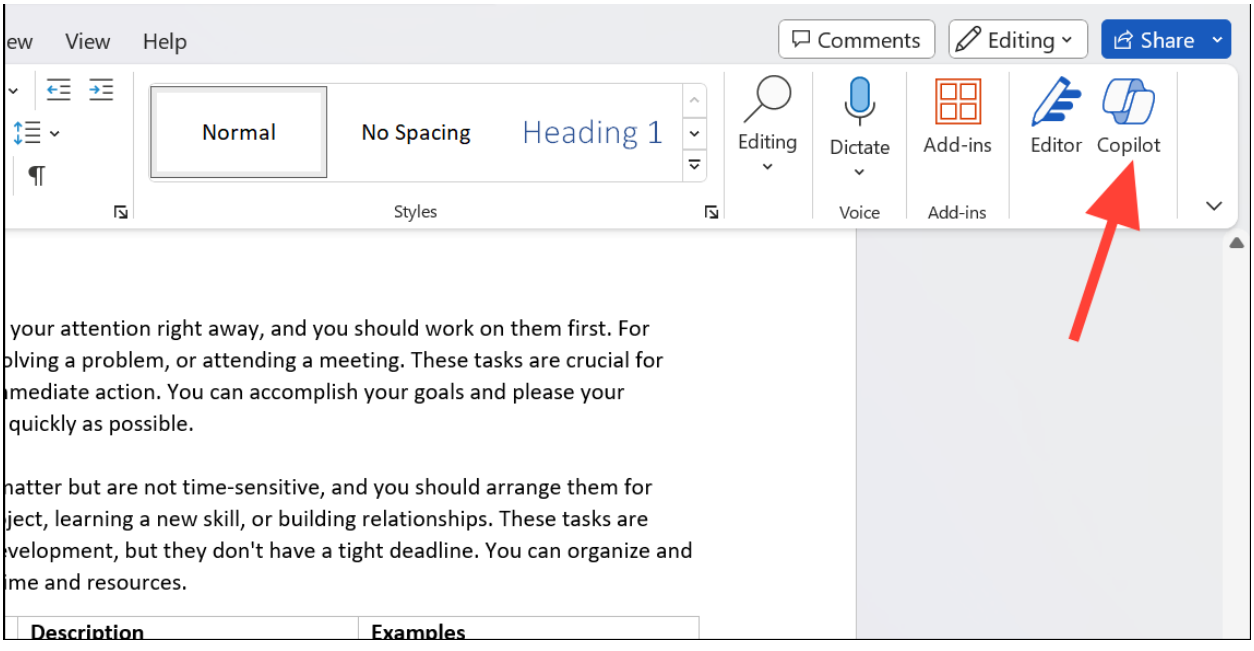
   Other options include 'Keep it' if you want to keep the table, 'Discard', 'Regenerate', and giving more instructions to Copilot (for example, if you want it to add another column).



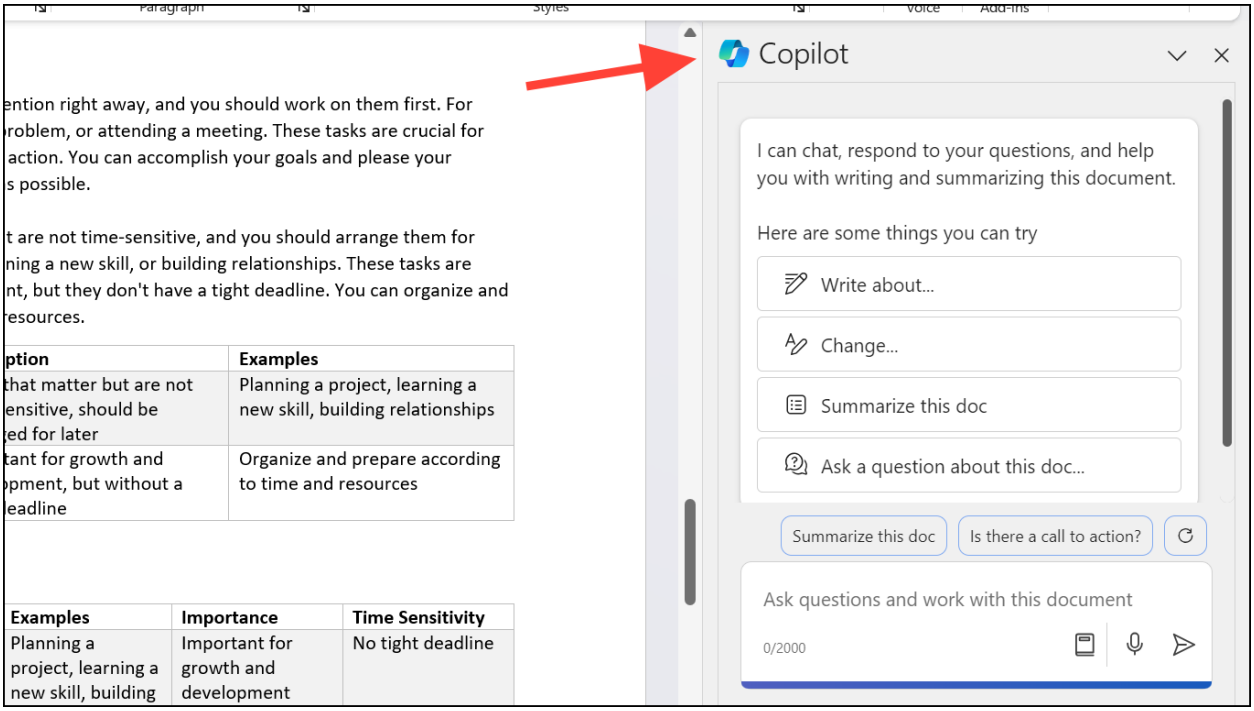
Chat with Copilot

The last thing you can do with Copilot in Word is chat with it.

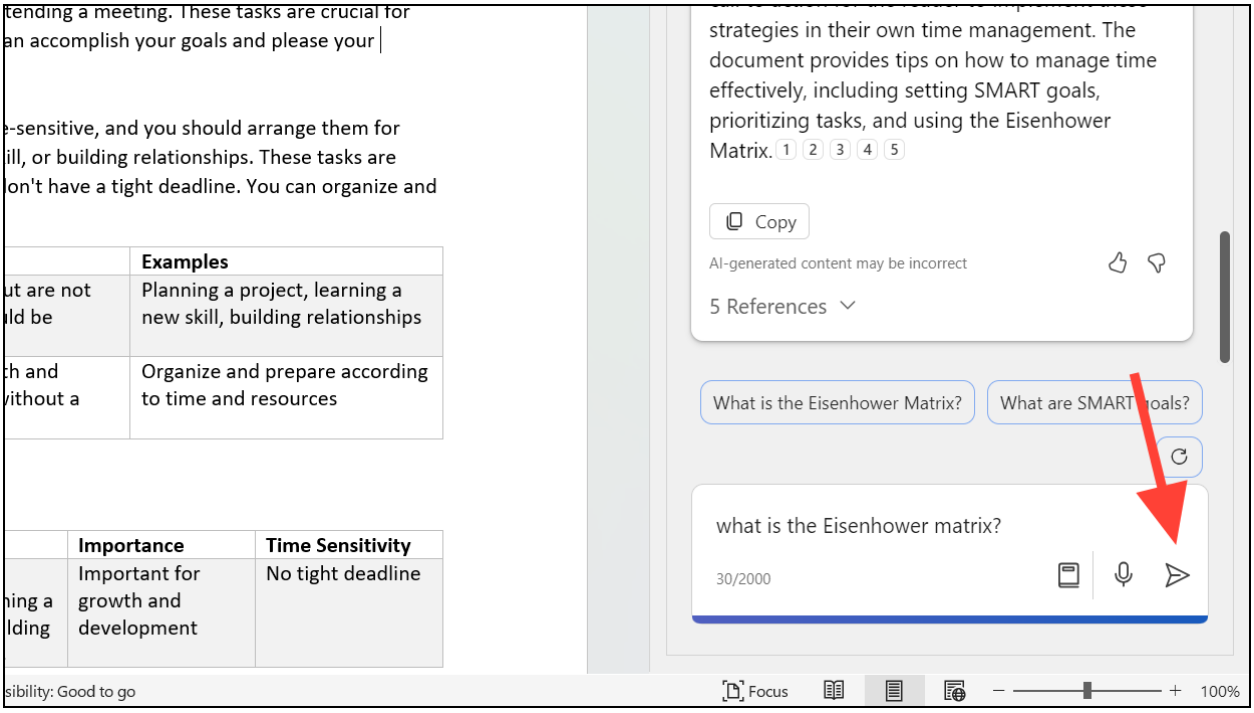
1. Click on the 'Copilot' icon from the 'Home' tab ribbon.



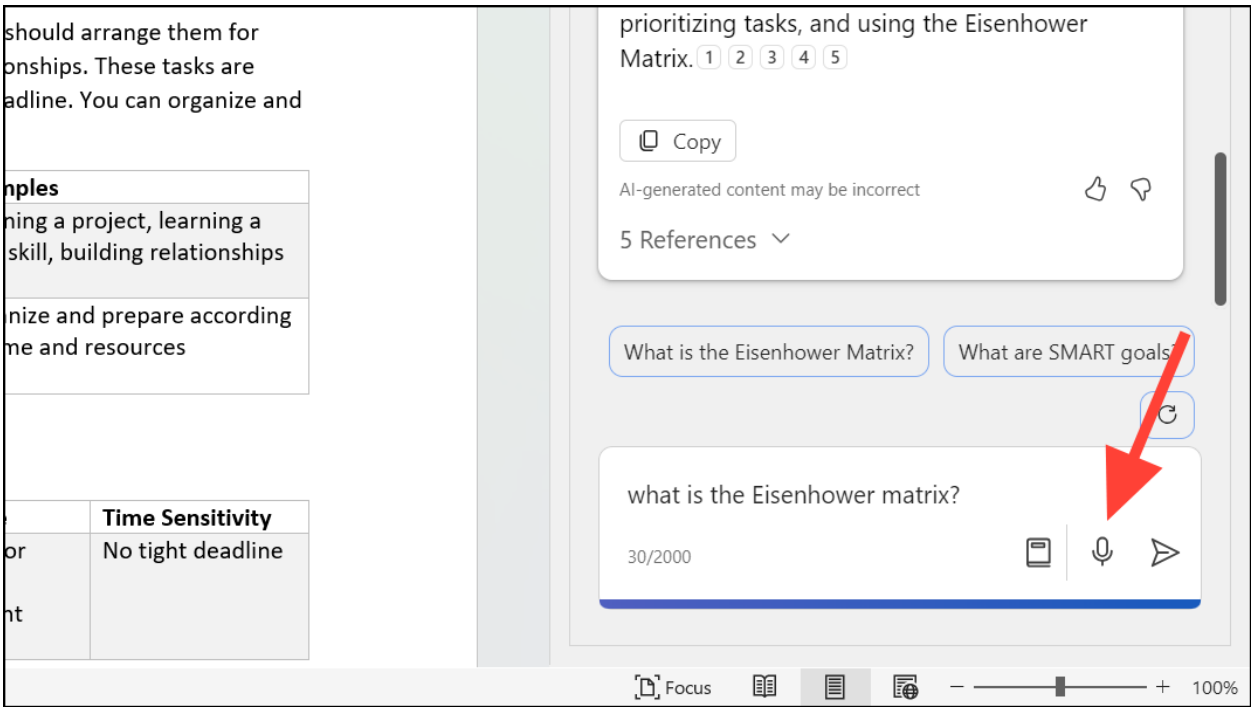
2. The chat panel will open on the right.



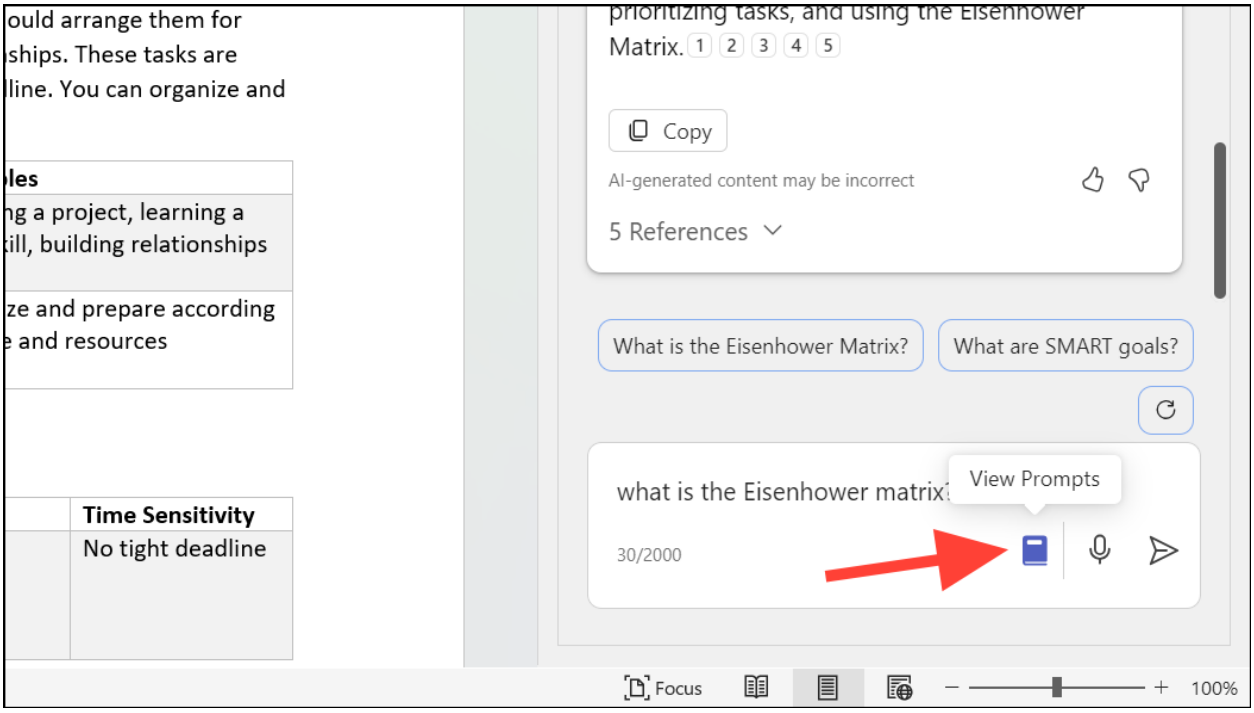
3. You can ask Copilot a variety of questions through the chat interface. You can ask it to write about something, change the content, summarize the document, or ask a question about the document. Enter your prompt in the prompt area and click on the 'Send' button.



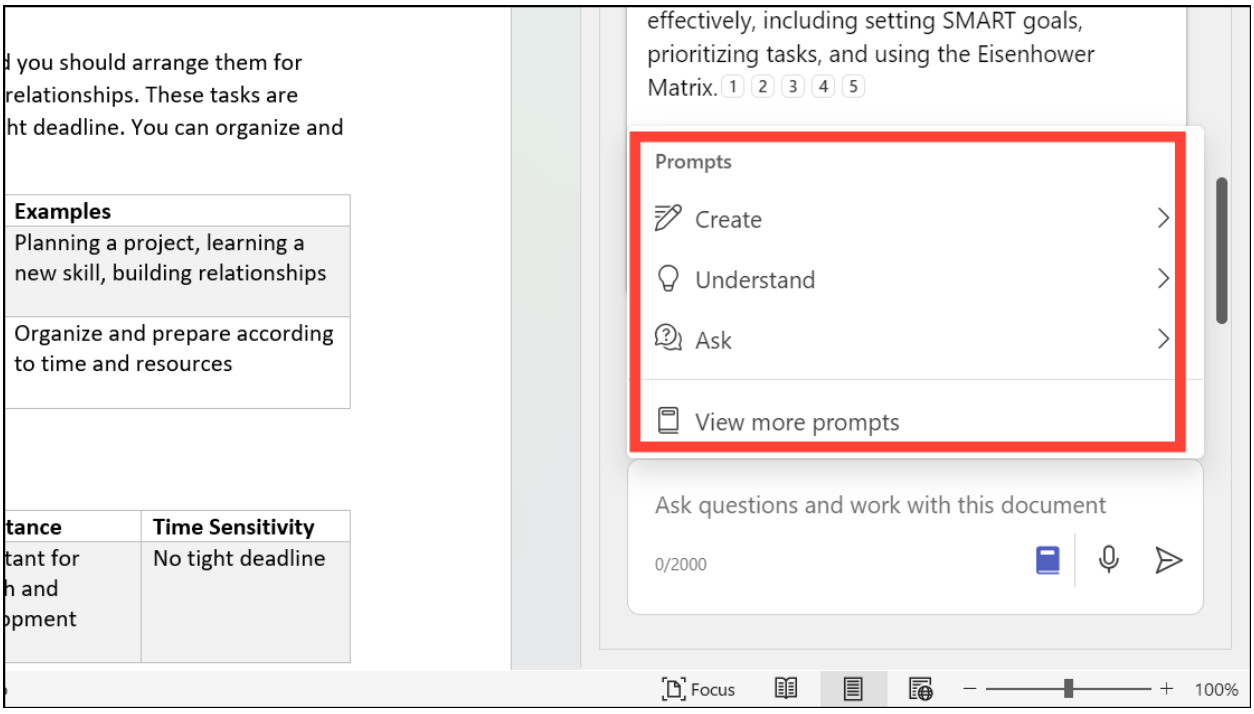
4. You can also use voice typing to dictate the prompt by clicking the 'Microphone' icon.



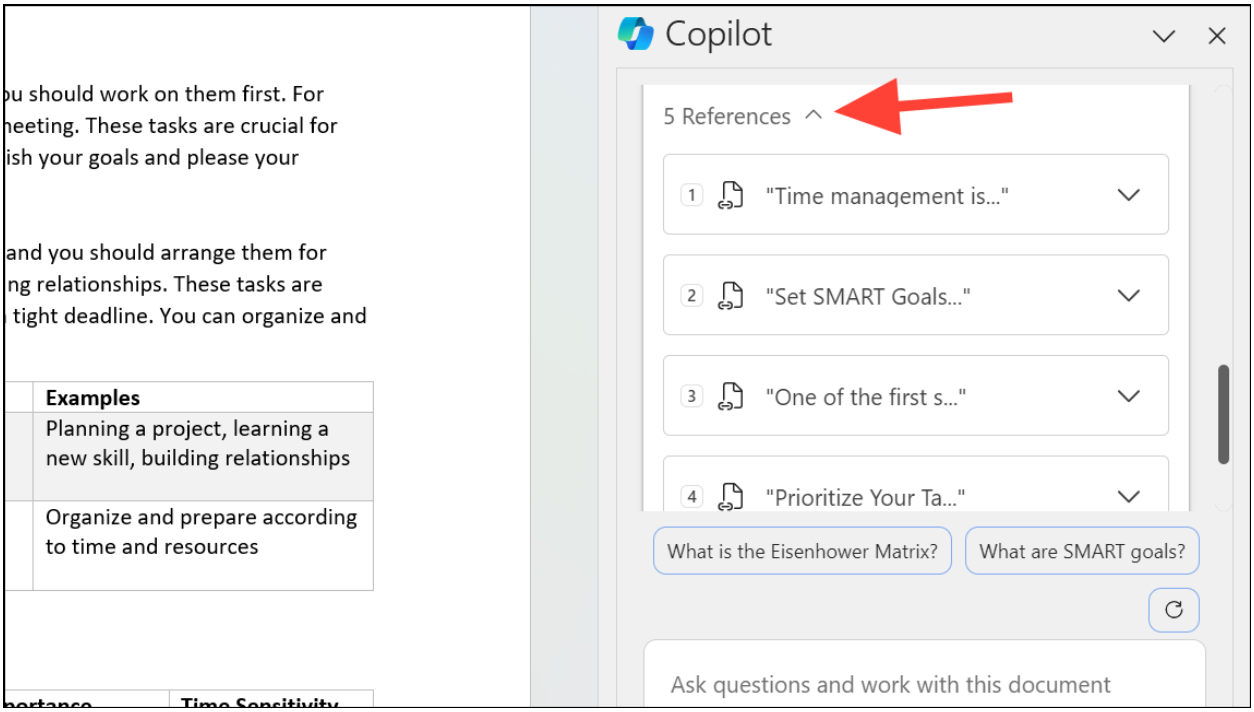
5. If you're not sure about what you can use Copilot for, click on the 'View Prompts' button (book icon).



6. It contains a few prompt ideas for different use cases like 'Create', 'Understand', 'Ask', etc., to help you get started.



7. When you ask questions about the document or generate summaries, the AI also provides citations so you can verify the information it based its answers on.



8. You can also use the chat panel for research by asking questions outside of the document, and Copilot will answer them.

9. However, chats with the AI are not retained and are cleared as soon as you close the chat panel.

How to use Copilot in MS Team

Using Copilot in Microsoft Teams can help you have more effective meetings, catch up on missed discussions, and summarize key points. Here are some steps to get started:

During a Meeting

Summarize Key Points: Use Copilot to summarize key discussion points, including who said what and where people are aligned or disagree. It can also suggest action items in real-time

Catch Up on Missed Meetings: If you join a recorded or transcribed meeting 5 minutes or more after it has started, you can get a summary by selecting Open Copilot from the meeting controls.

Act as a Thought Partner:

Use prompts within the Copilot compose box to ask questions like:

Where do we disagree on this topic?

How did a meeting participant respond to this proposal?

What questions can I ask to move the meeting forward?

After a Meeting

1. **Recap the Meeting**: Copilot will be available in the meeting's Recap tab. You can ask it to summarize what people said, list action items, and suggest follow-up questions.
2. **Generate Meeting Notes**: Use Copilot to generate meeting notes and wrap up a meeting with clear next steps.

In Chat and Channels

1. **Summarize Conversations**: Copilot can help you get up to speed on conversations by quickly reviewing the main points, action items, and decisions without having to scroll through long threads[2].
2. **Use Prompts**: In a chat or channel, you can use prompts like:
    - Summarize what I've missed.
    - What decisions were made?

- What are the open items?

By leveraging these features, you can make your meetings and collaborations more efficient and productive.

What is Copilot in Excel?

Excel Copilot is an innovative feature that utilizes artificial intelligence (AI) and machine learning algorithms to enhance the user experience in Excel. By integrating these advanced technologies, Copilot provides users with intelligent suggestions, formulas, and insights as they work on their spreadsheets. By analyzing patterns, context, and user behaviour, Copilot anticipates the user's needs and offers relevant assistance in real-time.

In simple words, Excel Copilot is like having a smart helper right inside your spreadsheet. It uses artificial intelligence, which is a type of technology that makes computers think and learn like humans. When you're working on your Excel sheets, AI watches what you're doing and suggests helpful things to make your work easier.

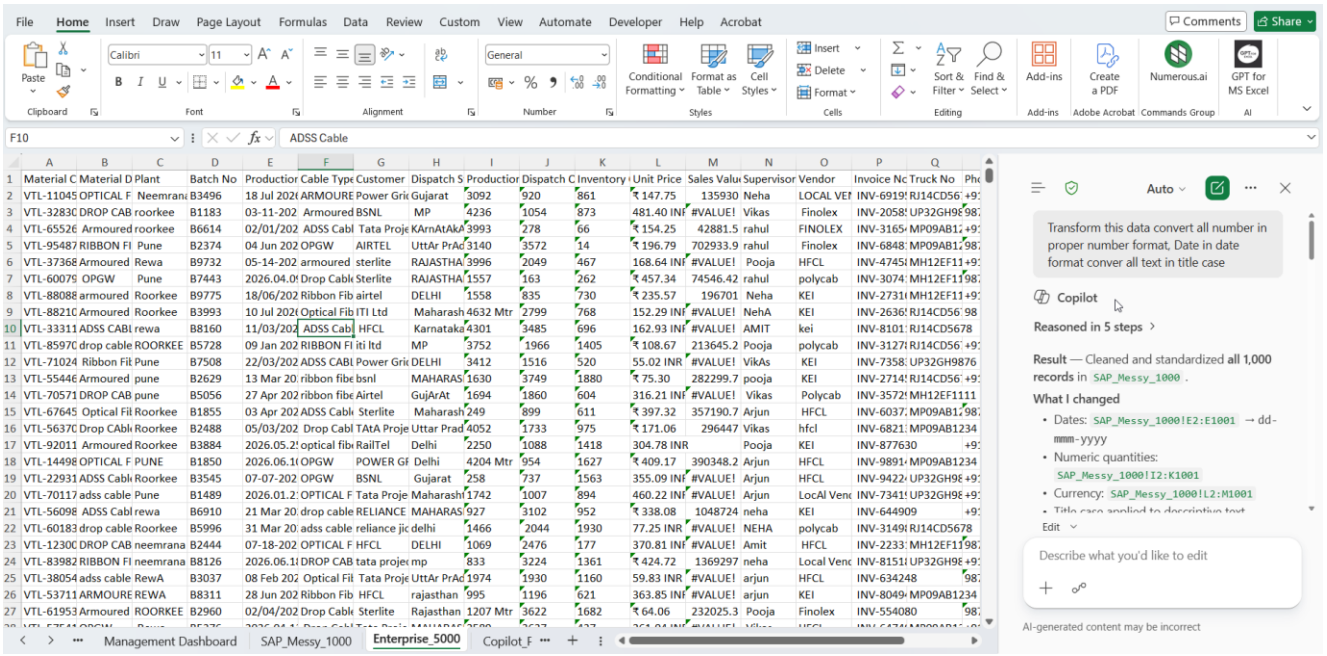
For example, if you need to do a calculation or make a chart, you can just ask Copilot using regular words, and it will figure out what you need and help you do it. It's like having a friend who knows a lot about Excel and gives you tips to get your work done faster.

Overall, Copilot doesn't extend beyond what you could accomplish yourself by using various Excel features and functions. The advantage is that you don't have to master Excel's language. Now, you have a single-entry point to communicate your intentions to Excel in your own language. This saves you time and makes using Excel easier, especially if you're not an expert at it.

What Copilot in Excel can do

Copilot in Excel is a powerful tool that can help you visualize, analyze and transform data in your spreadsheets in many ways. Here's what it can do for you:

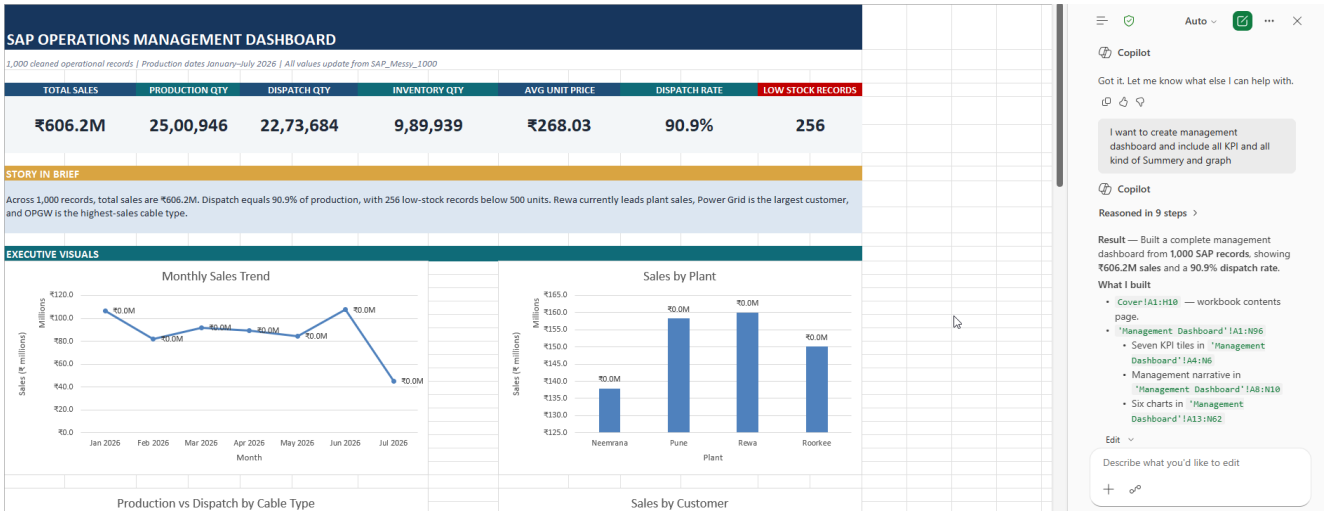
When data is downloaded from ERP systems such as SAP or Oracle, it may sometimes appear in an improper or unstructured format.”



We can write a prompt and convert data in proper format

Material Code	Material Description	Plant	Batch No	Production Date	Cable Type	Customer	Dispatch State	Production Qty	Dispatch Qty	Inventory Qty	Unit Price	Sales Value
VTL-11782	Drop Cable	Pune	B6931	11-Apr-2026	ADSS Cable	BSNL	Rajasthan	3,563	2,323	1,452	₹325.55	₹7,56,252.65
VTL-31034	OPGW	Rewa	B3611	29-Apr-2026	ADSS Cable	L&T	MP	233	4,008	978	₹347.42	₹13,92,459.36
VTL-56954	OPGW	Rewa	B7478	24-Jun-2026	Optical Fiber Cable	Power Grid	Karnataka	942	945	1,670	₹342.27	₹3,23,445.15
VTL-88461	Ribbon Fiber Cable	Neemrana	B2689	10-Jan-2026	ADSS Cable	HFCL	Delhi	1,077	713	856	₹184.74	₹1,31,719.62
VTL-71045	OPGW	Rewa	B5691	23-May-2026	ADSS Cable	Railtel	Gujarat	1,775	3,222	532	₹482.85	₹15,55,742.70
VTL-30274	Ribbon Fiber Cable	Roorkee	B4917	07-Jul-2026	OPGW	BSNL	Karnataka	2,738	3,149	1,622	₹104.56	₹3,29,259.44
VTL-44582	Ribbon Fiber Cable	Pune	B6662	20-Mar-2026	Optical Fiber Cable	Power Grid	Delhi	544	254	1,446	₹48.20	₹12,242.80
VTL-11805	Drop Cable	Neemrana	B7218	24-Apr-2026	Ribbon Fiber Cable	Sterlite	Rajasthan	4,452	3,815	732	₹403.32	₹15,38,665.80
VTL-65632	Optical Fiber Cable	Neemrana	B1134	18-Mar-2026	OPGW	Railtel	Karnataka	4,449	962	1,228	₹475.66	₹4,57,584.92
VTL-78352	Optical Fiber Cable	Roorkee	B3066	13-Jan-2026	OPGW	BSNL	Uttar Pradesh	1,688	1,352	609	₹413.33	₹5,58,822.16
VTL-94362	Ribbon Fiber Cable	Rewa	B8431	30-Apr-2026	Optical Fiber Cable	Power Grid	Rajasthan	2,744	1,044	1,887	₹60.98	₹63,663.12
VTL-48892	Optical Fiber Cable	Neemrana	B8055	04-Apr-2026	Armoured OFC	Airtel	Karnataka	4,594	3,221	1,586	₹162.35	₹5,22,929.35
VTL-60934	OPGW	Rewa	B8117	26-Jan-2026	OPGW	HFCL	Karnataka	908	4,268	209	₹391.73	₹16,71,903.64
VTL-73776	Optical Fiber Cable	Roorkee	B1081	31-May-2026	Armoured OFC	Sterlite	Uttar Pradesh	2,432	2,962	25	₹206.33	₹6,11,149.46
VTL-43263	Armoured OFC	Roorkee	B3796	04-Mar-2026	ADSS Cable	Tata Projects	Karnataka	3,182	2,340	830	₹260.25	₹6,08,985.00
VTL-12784	Ribbon Fiber Cable	Pune	B8701	24-Jun-2026	ADSS Cable	Power Grid	Delhi	1,860	254	1,430	₹437.90	₹1,11,226.60
VTL-75411	Drop Cable	Roorkee	B2780	12-Apr-2026	ADSS Cable	Airtel	MP	536	2,671	1,697	₹286.53	₹7,65,321.63
VTL-19522	Ribbon Fiber Cable	Pune	B3527	18-Jan-2026	Drop Cable	HFCL	MP	2,762	2,604	343	₹137.00	₹3,56,748.00
VTL-35993	ADSS Cable	Roorkee	B9162	30-Jun-2026	Ribbon Fiber Cable	Sterlite	Gujarat	2,319	2,022	1,169	₹355.42	₹7,18,659.24
VTL-86880	Ribbon Fiber Cable	Neemrana	B6837	30-May-2026	ADSS Cable	Reliance Jio	Gujarat	2,138	2,367	1,170	₹99.16	₹2,34,711.72
VTL-65569	ADSS Cable	Neemrana	B7138	19-Jan-2026	ADSS Cable	Sterlite	Maharashtra	3,215	640	1,625	₹493.92	₹3,16,108.80
VTL-32609	Drop Cable	Roorkee	B5047	15-Jan-2026	Optical Fiber Cable	Airtel	Uttar Pradesh	4,461	1,719	1,698	₹254.79	₹4,37,984.01
VTL-28191	Armoured OFC	Rewa	B6172	09-May-2026	Drop Cable	Railtel	MP	2,544	3,547	870	₹72.84	₹2,58,[illegible]
VTL-97150	Ribbon Fiber Cable	Neemrana	B7865	08-Feb-2026	Drop Cable	ITI Ltd	Gujarat	3,444	234	899	₹243.07	₹56[illegible]
VTL-27498	OPGW	Rewa	B2459	25-Jun-2026	Ribbon Fiber Cable	L&T	Gujarat	602	1,844	1,866	₹456.51	₹8,41,80[illegible]
VTL-43642	Ribbon Fiber Cable	Neemrana	B6428	11-Jul-2026	ADSS Cable	BSNL	Karnataka	290	2,871	1,527	₹262.73	₹7,54,297.83

- **Data analysis**. Copilot looks at your tables and brings important information into focus. You can then dig deeper by questioning Copilot.

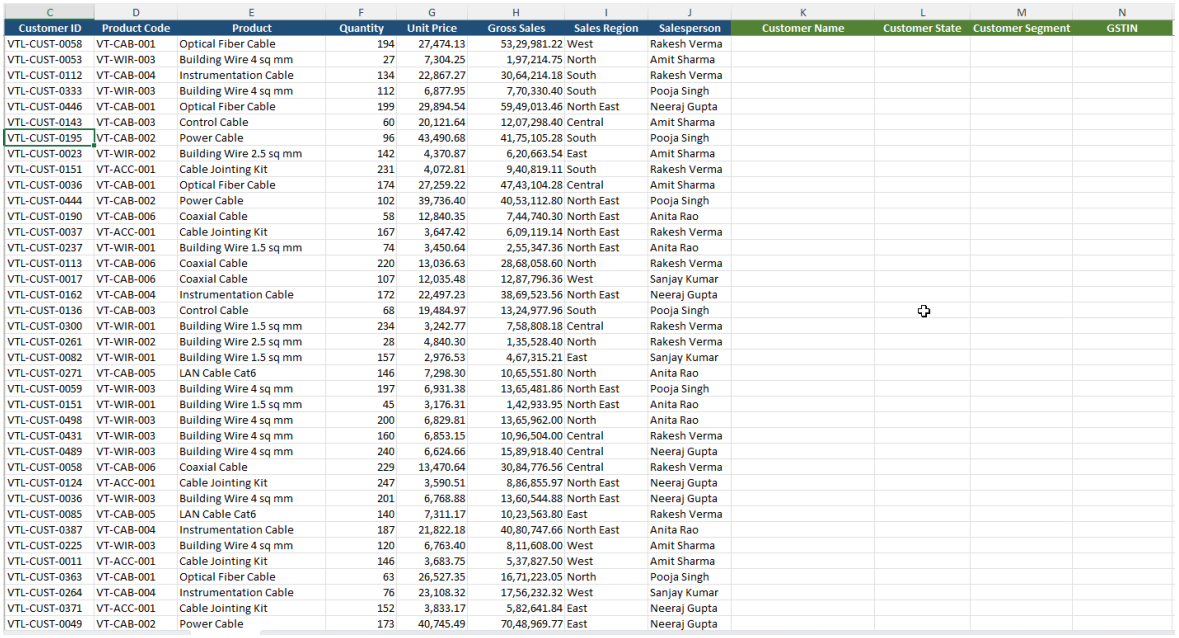


- **Modeling**. When working on financial modeling, you can explore different scenarios by asking "what-if" questions and providing prompts such as "model how a change to X would affect Y"
- **Visualizations**. AI helps you create charts and graphs to visualize your data in a clear and understandable way.
- **Writing formulas.** Copilot assists in writing formulas for your calculations, making complex formula creation easier and more accessible.
- **Organizing and cleaning data**. Copilot can quickly clean up messy data for you. It can remove extra spaces, merge values from different columns, highlight duplicates, sort, filter, and more.
- **Suggestions**. Get intelligent recommendations for formulas, functions, and actions based on your context.
- **Insights**. Uncover interesting insights within your data, like trends, outliers, or correlations between different parts.
- **Automating tasks**. Copilot can even write VBA code to help you automate common tasks. This is like creating kind of shortcuts for things you do often.

How to populate multiple columns from another sheet using Copilot 365 in Microsoft Excel. Usually, we use functions like VLOOKUP or XLOOKUP or index & match to pull data from another sheet or workbook. However, with Copilot 365, you can populate the data without writing any formula.

Prompt : Populate Customer Name, Customer State,Customer Segment, GSTIN from customer_Master

Before



Customer ID	Product Code	Product	Quantity	Unit Price	Gross Sales	Sales Region	Salesperson	Customer Name	Customer State	Customer Segment	GSTIN
VTL-CUST-0058	VT-CAB-001	Optical Fiber Cable	194	27,474.13	53,29,981.22	West	Rakesh Verma				
VTL-CUST-0053	VT-WIR-003	Building Wire 4 sq mm	27	7,304.25	1,97,214.75	North	Amit Sharma				
VTL-CUST-0112	VT-CAB-004	Instrumentation Cable	134	22,867.27	30,64,214.18	South	Rakesh Verma				
VTL-CUST-0333	VT-WIR-003	Building Wire 4 sq mm	112	6,877.95	7,70,330.40	South	Pooja Singh				
VTL-CUST-0446	VT-CAB-001	Optical Fiber Cable	199	29,894.54	59,49,013.46	North East	Neeraj Gupta				
VTL-CUST-0143	VT-CAB-003	Control Cable	60	20,121.64	12,07,298.40	Central	Amit Sharma				
VTL-CUST-0195	VT-CAB-002	Power Cable	96	43,490.68	41,75,105.28	South	Pooja Singh				
VTL-CUST-0023	VT-WIR-002	Building Wire 2.5 sq mm	142	4,370.87	6,20,663.54	East	Amit Sharma				
VTL-CUST-0151	VT-ACC-001	Cable Jointing Kit	231	4,072.81	9,40,819.11	South	Rakesh Verma				
VTL-CUST-0036	VT-CAB-001	Optical Fiber Cable	174	27,259.22	47,43,104.28	Central	Amit Sharma				
VTL-CUST-0444	VT-CAB-002	Power Cable	102	39,736.40	40,53,112.80	North East	Pooja Singh				
VTL-CUST-0190	VT-CAB-006	Coaxial Cable	58	12,840.35	7,44,740.30	North East	Anita Rao				
VTL-CUST-0037	VT-ACC-001	Cable Jointing Kit	167	3,647.42	6,09,119.14	North East	Rakesh Verma				
VTL-CUST-0237	VT-WIR-001	Building Wire 1.5 sq mm	74	3,450.64	2,55,347.36	North East	Anita Rao				
VTL-CUST-0113	VT-CAB-006	Coaxial Cable	220	13,036.63	28,68,058.60	North	Rakesh Verma				
VTL-CUST-0017	VT-CAB-006	Coaxial Cable	107	12,035.48	12,87,796.36	West	Sanjay Kumar				
VTL-CUST-0162	VT-CAB-004	Instrumentation Cable	172	22,497.23	38,69,523.56	North East	Neeraj Gupta				
VTL-CUST-0136	VT-CAB-003	Control Cable	68	19,484.97	13,24,977.96	South	Pooja Singh				
VTL-CUST-0300	VT-WIR-001	Building Wire 1.5 sq mm	234	3,242.77	7,58,808.18	Central	Rakesh Verma				
VTL-CUST-0261	VT-WIR-002	Building Wire 2.5 sq mm	28	4,840.30	1,35,528.40	North	Rakesh Verma				
VTL-CUST-0082	VT-WIR-001	Building Wire 1.5 sq mm	157	2,976.53	4,67,315.21	East	Sanjay Kumar				
VTL-CUST-0271	VT-CAB-005	LAN Cable Cat6	146	7,298.30	10,65,551.80	North	Anita Rao				
VTL-CUST-0059	VT-WIR-003	Building Wire 4 sq mm	197	6,931.38	13,65,481.86	North East	Pooja Singh				
VTL-CUST-0151	VT-WIR-001	Building Wire 1.5 sq mm	45	3,176.31	1,42,933.95	North East	Anita Rao				
VTL-CUST-0498	VT-WIR-003	Building Wire 4 sq mm	200	6,829.81	13,65,962.00	North	Anita Rao				
VTL-CUST-0431	VT-WIR-003	Building Wire 4 sq mm	160	6,853.15	10,96,504.00	Central	Rakesh Verma				
VTL-CUST-0489	VT-WIR-003	Building Wire 4 sq mm	240	6,624.66	15,89,918.40	Central	Neeraj Gupta				
VTL-CUST-0058	VT-CAB-006	Coaxial Cable	229	13,470.64	30,84,776.56	Central	Rakesh Verma				
VTL-CUST-0124	VT-ACC-001	Cable Jointing Kit	247	3,590.51	8,86,855.97	North East	Neeraj Gupta				
VTL-CUST-0036	VT-WIR-003	Building Wire 4 sq mm	201	6,768.88	13,60,544.88	North East	Neeraj Gupta				
VTL-CUST-0085	VT-CAB-005	LAN Cable Cat6	140	7,311.17	10,23,563.80	East	Rakesh Verma				
VTL-CUST-0387	VT-CAB-004	Instrumentation Cable	187	21,822.18	40,80,747.66	North East	Anita Rao				
VTL-CUST-0225	VT-WIR-003	Building Wire 4 sq mm	120	6,763.40	8,11,608.00	West	Amit Sharma				
VTL-CUST-0011	VT-ACC-001	Cable Jointing Kit	146	3,683.75	5,37,827.50	West	Amit Sharma				
VTL-CUST-0363	VT-CAB-001	Optical Fiber Cable	63	26,527.35	16,71,223.05	North	Pooja Singh				
VTL-CUST-0264	VT-CAB-004	Instrumentation Cable	76	23,108.32	17,56,232.32	West	Sanjay Kumar				
VTL-CUST-0371	VT-ACC-001	Cable Jointing Kit	152	3,833.17	5,82,641.84	East	Neeraj Gupta				
VTL-CUST-0049	VT-CAB-002	Power Cable	173	40,745.49	70,48,969.77	East	Neeraj Gupta				

After



Customer ID	Product Code	Product	Quantity	Unit Price	Gross Sales	Sales Region	Salesperson	Customer Name	Customer State	Customer Segment	GSTIN
VTL-CUST-0058	VT-CAB-001	Optical Fiber Cable	194	27,474.13	53,29,981.22	West	Rakesh Verma	United Infra Pvt Ltd	Jharkhand	Distributor	14NXURQ2970ZY
VTL-CUST-0053	VT-WIR-003	Building Wire 4 sq mm	27	7,304.25	1,97,214.75	North	Amit Sharma	Eastern Cables Pvt Ltd	Uttarakhand	OEM	16CFESS9849ZI
VTL-CUST-0112	VT-CAB-004	Instrumentation Cable	134	22,867.27	30,64,214.18	South	Rakesh Verma	Bharat Engineering Pvt Ltd	Gujarat	OEM	31ZUNQF4492ZV
VTL-CUST-0333	VT-WIR-003	Building Wire 4 sq mm	112	6,877.95	7,70,330.40	South	Pooja Singh	United Projects Pvt Ltd	Punjab	Government	50OMGHU3374ZL
VTL-CUST-0446	VT-CAB-001	Optical Fiber Cable	199	29,894.54	59,49,013.46	North East	Neeraj Gupta	Metro Projects Pvt Ltd	Arunachal Pradesh	Telecom Operator	35YJGCK1238ZK
VTL-CUST-0143	VT-CAB-003	Control Cable	60	20,121.64	12,07,298.40	Central	Amit Sharma	Global Infra Pvt Ltd	Rajasthan	Infrastructure	21OSOPJ5530ZH
VTL-CUST-0195	VT-CAB-002	Power Cable	96	43,490.68	41,75,105.28	South	Pooja Singh	Eastern Engineering Pvt Ltd	Ladakh	Telecom Operator	11BRRXJ2767ZA
VTL-CUST-0023	VT-WIR-002	Building Wire 2.5 sq mm	142	4,370.87	6,20,663.54	East	Amit Sharma	Bharat Telecom Pvt Ltd	Karnataka	OEM	97QILYG5005ZC
VTL-CUST-0151	VT-ACC-001	Cable Jointing Kit	231	4,072.81	9,40,819.11	South	Rakesh Verma	Eastern Infra Pvt Ltd	Rajasthan	Government	11RJCJW4066ZR
VTL-CUST-0036	VT-CAB-001	Optical Fiber Cable	174	27,259.22	47,43,104.28	Central	Amit Sharma	Prime Infra Pvt Ltd	Assam	Government	16RGZAK8408ZR
VTL-CUST-0444	VT-CAB-002	Power Cable	102	39,736.40	40,53,112.80	North East	Pooja Singh	United Cables Pvt Ltd	Delhi	Telecom Operator	32HNKCT5476ZE
VTL-CUST-0190	VT-CAB-006	Coaxial Cable	58	12,840.35	7,44,740.30	North East	Anita Rao	Metro Telecom Pvt Ltd	Maharashtra	EPC Contractor	71OMQFQ9589ZH
VTL-CUST-0037	VT-ACC-001	Cable Jointing Kit	167	3,647.42	6,09,119.14	North East	Rakesh Verma	Apex Networks Pvt Ltd	Bihar	Telecom Operator	25AVZDV7098ZV
VTL-CUST-0237	VT-WIR-001	Building Wire 1.5 sq mm	74	3,450.64	2,55,347.36	North East	Anita Rao	Prime Telecom Pvt Ltd	West Bengal	Distributor	21PPNWW2022ZL
VTL-CUST-0113	VT-CAB-006	Coaxial Cable	220	13,036.63	28,68,058.60	North	Rakesh Verma	Apex Telecom Pvt Ltd	Bihar	OEM	65QYTDL6434ZB
VTL-CUST-0017	VT-CAB-006	Coaxial Cable	107	12,035.48	12,87,796.36	West	Sanjay Kumar	Apex Telecom Pvt Ltd	Rajasthan	Telecom Operator	31LSQDK8248ZG
VTL-CUST-0162	VT-CAB-004	Instrumentation Cable	172	22,497.23	38,69,523.56	North East	Neeraj Gupta	Western Power Pvt Ltd	Tamil Nadu	EPC Contractor	32PLTWL9745ZJ
VTL-CUST-0136	VT-CAB-003	Control Cable	68	19,484.97	13,24,977.96	South	Pooja Singh	Bharat Projects Pvt Ltd	Haryana	Government	62GATAN9515ZA
VTL-CUST-0300	VT-WIR-001	Building Wire 1.5 sq mm	234	3,242.77	7,58,808.18	Central	Rakesh Verma	Eastern Networks Pvt Ltd	Arunachal Pradesh	Government	27JBJQY1798ZJ
VTL-CUST-0261	VT-WIR-002	Building Wire 2.5 sq mm	28	4,840.30	1,35,528.40	North	Rakesh Verma	Shree Cables Pvt Ltd	Gujarat	Telecom Operator	85GKUQM8361ZA
VTL-CUST-0082	VT-WIR-001	Building Wire 1.5 sq mm	157	2,976.53	4,67,315.21	East	Sanjay Kumar	Eastern Power Pvt Ltd	Tamil Nadu	Telecom Operator	94CVBDL3024ZR
VTL-CUST-0271	VT-CAB-005	LAN Cable Cat6	146	7,298.30	10,65,551.80	North	Anita Rao	Apex Telecom Pvt Ltd	Gujarat	Government	68BTYEU8947ZQ
VTL-CUST-0059	VT-WIR-003	Building Wire 4 sq mm	197	6,931.38	13,65,481.86	North East	Pooja Singh	Apex Telecom Pvt Ltd	Delhi	EPC Contractor	64CRFVD5225ZK
VTL-CUST-0151	VT-WIR-001	Building Wire 1.5 sq mm	45	3,176.31	1,42,933.95	North East	Anita Rao	Eastern Infra Pvt Ltd	Rajasthan	Government	11RJCJW4066ZR
VTL-CUST-0498	VT-WIR-003	Building Wire 4 sq mm	200	6,829.81	13,65,962.00	North	Anita Rao	Global Engineering Pvt Ltd	Ladakh	OEM	22XEYKI9711ZR
VTL-CUST-0431	VT-WIR-003	Building Wire 4 sq mm	160	6,853.15	10,96,504.00	Central	Rakesh Verma	Apex Cables Pvt Ltd	Chhattisgarh	EPC Contractor	36MNUTS8559ZK
VTL-CUST-0489	VT-WIR-003	Building Wire 4 sq mm	240	6,624.66	15,89,918.40	Central	Neeraj Gupta	Apex Engineering Pvt Ltd	Ladakh	Distributor	12KVUNB9830ZW
VTL-CUST-0058	VT-CAB-006	Coaxial Cable	229	13,470.64	30,84,776.56	Central	Rakesh Verma	United Infra Pvt Ltd	Jharkhand	Distributor	14NXURQ2970ZY
VTL-CUST-0124	VT-ACC-001	Cable Jointing Kit	247	3,590.51	8,86,855.97	North East	Neeraj Gupta	Prime Infra Pvt Ltd	Madhya Pradesh	OEM	27MNKNR3717ZY
VTL-CUST-0036	VT-WIR-003	Building Wire 4 sq mm	201	6,768.88	13,60,544.88	North East	Neeraj Gupta	Prime Infra Pvt Ltd	Assam	Government	16RGZAK8408ZR
VTL-CUST-0085	VT-CAB-005	LAN Cable Cat6	140	7,311.17	10,23,563.80	East	Rakesh Verma	Apex Engineering Pvt Ltd	Tamil Nadu	EPC Contractor	52GACCO9095ZE
VTL-CUST-0387	VT-CAB-004	Instrumentation Cable	187	21,822.18	40,80,747.66	North East	Anita Rao	United Networks Pvt Ltd	Telangana	Telecom Operator	37ETAOB1732ZN
VTL-CUST-0225	VT-WIR-003	Building Wire 4 sq mm	120	6,763.40	8,11,608.00	West	Amit Sharma	United Telecom Pvt Ltd	Rajasthan	EPC Contractor	14LSNAY2426ZK
VTL-CUST-0011	VT-ACC-001	Cable Jointing Kit	146	3,683.75	5,37,827.50	West	Amit Sharma	United Cables Pvt Ltd	Telangana	Infrastructure	68QSWUK8039ZG
VTL-CUST-0363	VT-CAB-001	Optical Fiber Cable	63	26,527.35	16,71,223.05	North	Pooja Singh	United Power Pvt Ltd	Andhra Pradesh	Distributor	93GVWOC8592ZE
VTL-CUST-0264	VT-CAB-004	Instrumentation Cable	76	23,108.32	17,56,232.32	West	Sanjay Kumar	Western Engineering Pvt Ltd	Bihar	OEM	18VCMUF4320ZN
VTL-CUST-0371	VT-ACC-001	Cable Jointing Kit	152	3,833.17	5,82,641.84	East	Neeraj Gupta	Prime Networks Pvt Ltd	Maharashtra	OEM	81FGIJB5382ZE
VTL-CUST-0049	VT-CAB-002	Power Cable	173	40,745.49	70,48,969.77	East	Neeraj Gupta	Western Power Pvt Ltd	Uttar Pradesh	Infrastructure	73DTGZE2453ZW

Create waterfall with help of copilot

Prompt: Create a Waterfall Chart showing how each item contributed to the final Net Profit.



Create Histogram chart with help of copilot

A Histogram chart in MS Excel is used to show the distribution of numeric data by grouping values into ranges, called bins.

Emp ID	Employee Name	Department	Designation	Gender	Age	Experience (Years)	Monthly Salary (₹)	Performance Rating	Training Hours	Leave Da
EMP001	Pooja Yadav	Quality	Sr Engineer	Male	37	1	30606	4.8	45	3
EMP002	Deepak Verma	Production	Engineer	Male	26	5	48620	4.6	17	7
EMP003	Anjali Gupta	Operations	Manager	Female	56	8	67626	5	39	1
EMP004	Rahul Jain	Sales	Manager	Female	31	4	47101	4.3	35	0
EMP005	Rajesh Sharma	Operations	Sr Executive	Female	26	3	38173	4.2	23	0
EMP006	Pooja Jain	Production	AGM	Female	57	8	66704	5	32	8
EMP007	Pooja Singh	Operations	Sr Executive	Male	50	15	101241	4.5	15	1
EMP008	Rajesh Yadav	Purchase	Executive	Female	38	2	35868	3.8	20	7
EMP009	Pooja Kapoor	HR	AGM	Male	38	16	107699	4.8	10	2
EMP010	Vivek Gupta	Operations	GM	Male	41	13	89639	4.1	41	5
EMP011	Mohit Verma	Production	Sr Engineer	Male	57	27	162382	4.1	50	2
EMP012	Shweta Patel	Production	Engineer	Male	56	12	84630	4.7	10	6
EMP013	Shweta Verma	Production	Executive	Female	53	1	32589	5	39	4
EMP014	Nidhi Jain	Admin	GM	Female	55	19	122269	4.3	44	2
EMP015	Rakesh Gupta	Purchase	Sr Manager	Male	22	1	32000	3.7	8	3
EMP016	Anita Yadav	Admin	GM	Male	30	8	63813	4	44	4
EMP017	Ashish Gupta	HR	Sr Executive	Male	23	1	27790	4.5	27	6
EMP018	Shweta Singh	HR	Assistant Manager	Female	57	13	87141	4	24	4
EMP019	Karan Gupta	Admin	Executive	Female	29	2	32503	4.7	37	3
EMP020	Sanjay Jain	Operations	DGM	Male	56	12	82877	3.5	39	6
EMP021	Vivek Kapoor	HR	Sr Executive	Male	45	21	127369	4.8	45	3
EMP022	Gaurav Kapoor	Quality	Manager	Female	40	19	120072	3.9	42	8
EMP023	Rahul Kumar	Quality	AGM	Male	38	10	76791	3.6	37	4
EMP024	Ashish Gupta	IT	Engineer	Male	55	30	176639	4.1	8	9
EMP025	Kavita Verma	Sales	Sr Executive	Male	41	19	122059	4.1	15	7
EMP026	Kavita Jain	Sales	Sr Manager	Male	32	10	77583	4	35	9
EMP027	Rohit Yadav	Quality	Sr Manager	Female	32	3	39989	4.2	15	10
EMP028	Anita Mehta	Quality	Assistant Manager	Female	41	4	44194	4.5	37	1
EMP029	Deepak Singh	Production	Manager	Male	51	14	93640	4.8	30	3
EMP030	Sandeep Sharma	Operations	Sr Engineer	Female	41	3	38096	4.1	26	3
EMP031	Amit Jain	Admin	Engineer	Male	55	11	82343	3.6	18	4
EMP032	Prakash Singh	Finance	Sr Engineer	Female	23	2	37003	4.4	8	1
EMP033	Sanjay Kumar	Purchase	Executive	Female	29	1	27595	4	49	6
EMP034	Meena Kumar	HR	Sr Executive	Female	57	28	166725	4.6	47	5
EMP035	Rakesh Mehta	Operations	GM	Female	22	1	30491	3.8	24	3
EMP036	Sanjay Yadav	Finance	Assistant Manager	Female	45	14	97760	4.9	43	4
EMP037	Ashish Yadav	Quality	AGM	Female	30	4	44488	3.6	44	8
EMP038	Ritu Yadav	Purchase	Sr Engineer	Female	45	24	146732	4	28	4

So, the histogram helps you quickly understand:

- How many employees are freshers
- How many employees have mid-level experience

- How many employees are highly experienced
- Which experience range has the maximum employees

In simple words:
A histogram chart shows the frequency of employees in different experience groups.



Prompt: Create Histogram bins width 5 year

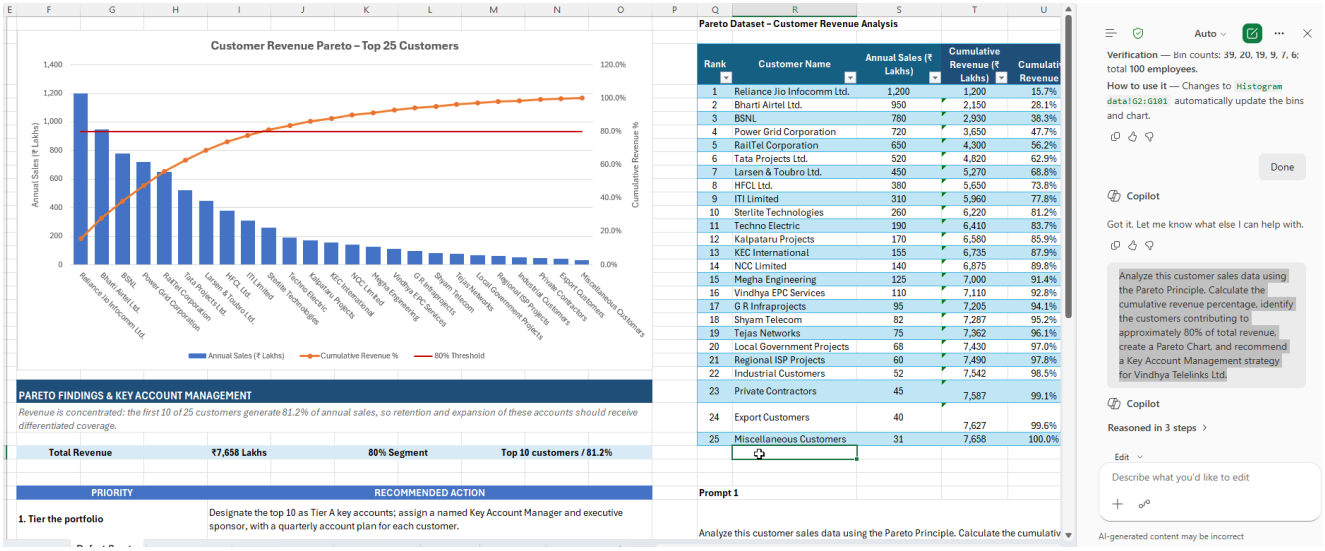
Why a Pareto Chart is Useful

- Which problems should we solve first?
- Which defects have the greatest impact on business?
- Where should we focus our improvement efforts?
-

✅ Open data set and click on the copilot  icon

✅

Prompt: Analyze this customer sales data using the Pareto Principle. Calculate the cumulative revenue percentage, identify the customers contributing to approximately 80% of total revenue, create a Pareto Chart, and recommend a Key Account Management strategy for Vindhya Telelinks Ltd.



Rank	Customer Name	Annual Sales (₹ Lakhs)	Cumulative Revenue (₹ Lakhs)	Cumulative Revenue
1	Reliance Jio Infocomm Ltd.	1,200	1,200	15.7%
2	Bharti Airtel Ltd.	950	2,150	28.1%
3	BSNL	780	2,930	38.3%
4	Power Grid Corporation	720	3,650	47.7%
5	RailTel Corporation	650	4,300	56.2%
6	Tata Projects Ltd.	520	4,820	62.9%
7	Larsen & Toubro Ltd.	450	5,270	68.8%
8	HFCL Ltd.	380	5,650	73.8%
9	ITI Limited	310	5,960	77.8%
10	Sterlite Technologies	260	6,220	81.2%
11	Techno Electric	190	6,410	83.7%
12	Kalpataru Projects	170	6,580	85.9%
13	KEC International	155	6,735	87.9%
14	NCC Limited	140	6,875	89.8%
15	Megha Engineering	125	7,000	91.4%
16	Vindhya EPC Services	110	7,110	92.8%
17	G R Infraprojects	95	7,205	94.1%
18	Shyam Telecom	82	7,287	95.2%
19	Tejas Networks	75	7,362	96.1%
20	Local Government Projects	68	7,430	97.0%
21	Regional ISP Projects	60	7,490	97.8%
22	Industrial Customers	52	7,542	98.5%
23	Private Contractors	45	7,587	99.1%
24	Export Customers	40	7,627	99.6%
25	Miscellaneous Customers	31	7,658	100.0%

PARETO FINDINGS & KEY ACCOUNT MANAGEMENT

Revenue is concentrated: the first 10 of 25 customers generate 81.2% of annual sales, so retention and expansion of these accounts should receive differentiated coverage.

Total Revenue	₹7,658 Lakhs	80% Segment	Top 10 customers / 81.2%

PRIORITY	RECOMMENDED ACTION
1. Tier the portfolio	Designate the top 10 as Tier A key accounts; assign a named Key Account Manager and executive sponsor, with a quarterly account plan for each customer.
2. Protect the top five	The top five generate 56.2% of revenue. Use multi-year agreements, SLA reviews, capacity planning, credit monitoring, and senior relationship mapping to reduce churn risk.
3. Expand ranks 6–10	Build customer-specific cross-sell plans across OFC, ADSS and OPGW solutions; align bid calendars, bundle technical services, and track share-of-wallet opportunities.
4. Develop the next five	Create a growth cohort for ranks 11–15 to diversify concentration. Give them targeted solution workshops and opportunity reviews, while serving the long tail through pooled coverage.
5. Govern monthly	Track revenue, gross margin, pipeline, renewal status, on-time delivery, complaints, receivables and executive engagement by key account; escalate material risks monthly.

This analysis is given by copilot

What is Copilot in Outlook?

Copilot in Outlook is a virtual assistant powered by artificial intelligence (AI) and machine learning algorithms. Its primary objective is to assist users in handing emails, scheduling meetings, and organizing their daily workflow. Copilot is designed to learn from your interactions and adapt to your work patterns, providing a personalized and productive email

experience. It's worth noting, however, that AI is built to support you in your work, not to replace you.

Which Outlook versions have Copilot?

Microsoft 365 Copilot is available in the new Outlook (for Windows and Mac) and in Outlook on the web.

Since June 2024, Copilot is also available in classic Outlook for Windows (Win32 desktop app) for users in Current Channel or Monthly Enterprise Channel.

Important note! At this time, Outlook Copilot only supports work and school accounts as well as Microsoft accounts registered to the following email addresses: outlook.com, hotmail.com, live.com, and msn.com. If your Microsoft account is associated with an email provider from a third party, like Gmail, Yahoo, or iCloud, you won't be able to access Copilot features in Outlook.

How to enable Copilot in Outlook

Enabling Copilot in Outlook is a straightforward process – there are no settings to configure. To activate Copilot in Outlook, you'll just need to purchase the required Microsoft subscriptions and install the supported app:

1. **Get Microsoft 365 subscription**. Before getting Copilot, ensure you have a Microsoft 365 subscription, such as Microsoft 365 Personal, Family, or Business.
2. **Get Copilot subscription.** Choose the Copilot plan that aligns with your Microsoft 365 subscription (please refer to these options) and buy the corresponding Copilot subscription.
3. **Assign Copilot licenses to users.** If you've bought Copilot for your organization, assign Copilot licenses to users as needed in the Microsoft 365 admin center.
4. **Launch Outlook.** Install the classic or new Outlook app and create an email account using the same email address as your Copilot for Microsoft 365 subscription. Alternatively, log into Outlook on the web using the same Microsoft account.

Note. For the Copilot icon to appear in the new Outlook, you'll need to restart it and sync your Microsoft 365 settings. If you're using the Outlook web app, simply refresh the page to see the Copilot icon.

What Copilot in Outlook can do

Currently, Outlook Copilot introduces three key features:

Summarize emails - automatically creates a summary based on the content of an individual email or an entire email thread. This feature helps you comprehend the core information and quickly grasp the key points.

Draft emails - writes a comprehensive email draft based on the original email you're responding to or your own prompt when composing a new email. You can use the generated content as-is or tweak the tone and length settings to create a new draft that's just right for you.

Improve emails (coaching) - Analyzes your email drafts and provides feedback on tone, clarity and reader sentiment, accompanied by specific suggestions to improve various aspects of the email. This feature is particularly useful for obtaining feedback on crucial emails, allowing users to fine-tune their text before sending.

These main functionalities offer a variety of practical applications, including:

- Condensing lengthy emails, meeting invites and whole discussions.
- Locating and summarizing recent emails on a certain subject or from a particular person.
- Creating initial email drafts, providing a solid foundation for you to build upon.
- Helping you prepare for meetings and events: draft a meeting agenda from your notes, alert you about any conflicts in your Outlook calendar, and even offer recaps for your meetings that have already happened.
- Helping you find attachments or shared files from a specific sender.
- Refining, rephrasing, and improving your emails, making sure your messages are clear, concise, and effective.
- Adding some style to your emails to make them more engaging and personalized.
- Providing suggestions for handling email threads or responding to messages.
- Teaching you to write better emails.

In summary, Copilot is an amazing tool that is actively developed. So, you can anticipate even more incredible features in future. Just as Microsoft shows in their promotional

videos, it will be able to prioritize your emails and tasks, provide suggestions for follow-up actions, and search for information from other Office apps to include to your emails. And that's just the beginning!

How to use Copilot in Outlook

Getting hands-on with Copilot is intuitive and straightforward. Typically, wherever an AI feature is accessible, you'll see its icon or a prompt guiding you along the way. Let's explore how to use Copilot in typical scenarios that Outlook users encounter daily.

Summarize by Copilot

When a lengthy and intricate email gets in your inbox, Copilot steps in to save the day. The AI swiftly analyzes the content, extracts the key points, and presents them in a brief summary in simple and easy-to-understand language. Here's how you can make the most of this feature:

1. Open the target email or conversation.
2. Click on *Summary by Copilot* or *Summarize*, whichever appears at the top of the email.
3. Copilot will diligently scan the thread, identifying main points, and display a summary for you.

As an illustration, check out how Copilot jazzed up its own welcome email with a delightful summary:

For those extensive email conversations, Copilot will provide a quick rundown on decisions made and actions suggested by others.

Draft with Copilot

Drafting with Copilot is the ideal solution to overcome the "blank page" syndrome and save precious time.

1. Start creating a new message (*Home* tab > *New Mail*).

2. Click the *Draft with Copilot* link in the email body. If the link is not there, click the *Copilot* icon on the toolbar, and choose *Draft with Copilot*.
3. In the *Copilot* box, type your prompt or outline the key points for the email. The more specific and clear your prompt, the better the draft Copilot will produce. For example, a prompt may sound like this: "*Welcome the new customer and inquire about the best way to contact them regarding questions about their order."*
4. Optionally, click the *Generate options* icon to tailor your desired tone and length. The defaults are set to *Direct* and *Short*.
5. Once ready, hit *Generate*, and Copilot will craft a message for you.
6. Review the drafted message. If you are fully satisfied with the draft, select *Keep it*. If it's not precisely what you want, opt for *Regenerate*, and Copilot will create a new version.
7. Edit the draft as necessary, and then hit *Send*.

When responding to someone's message, Copilot displays a variety of suggested replies based on the original email's content. Choose a suggestion that fits your needs. Or, if none suits you, click *Custom* and provide a prompt for a tailored draft response.

What is Custom GPT?

Custom GPT is a personalized version of ChatGPT that can be trained or configured for specific tasks, industries, or business needs. Users can customize the AI by adding instructions, files, knowledge bases, workflows, and tools.



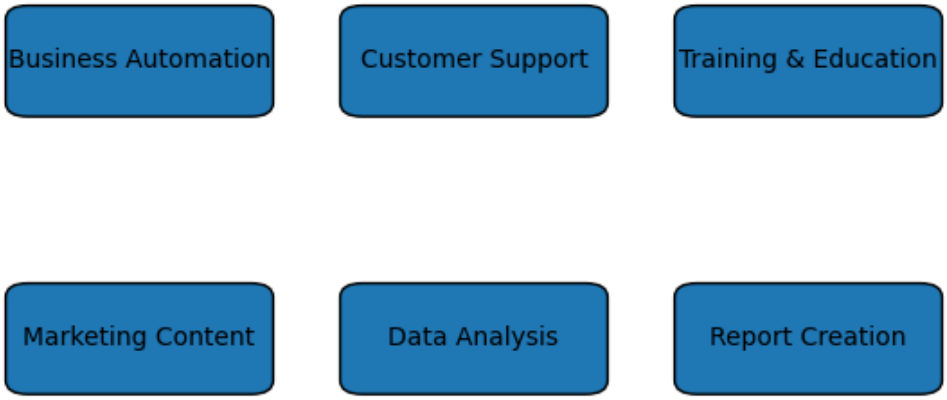
2. Why Do We Use Custom GPT?

- Automate repetitive tasks
- Provide faster customer support
- Generate reports and business content
- Train employees and teams
- Improve productivity and efficiency
- Create personalized AI assistants

3. Key Features of Custom GPT

Feature	Benefit
Custom Instructions	Provides personalized AI responses
File Upload Support	Uses company documents and files
Business-Specific Knowledge	Understands industry-specific topics
Automation Capability	Reduces manual work
Content Generation	Creates blogs, emails, and reports
Data Analysis Assistance	Helps analyze business data
Multi-language Support	Supports global communication

4. Common Uses of Custom GPT



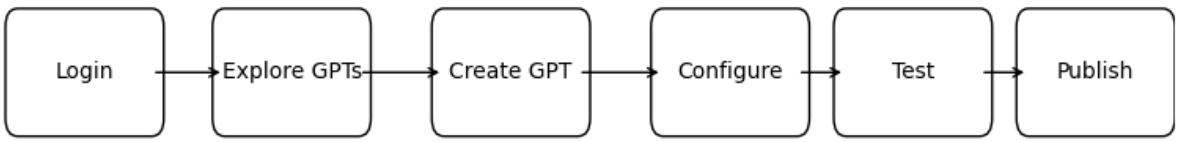
5. Business Example

A pharmaceutical company can use Custom GPT to generate sales reports, analyze distributor performance, create marketing content, answer product queries, and automate internal training documentation.

6. Benefits of Custom GPT

1. Saves time
2. Improves work accuracy
3. Reduces operational cost
4. Supports decision making
5. Provides 24/7 AI assistance
6. Enhances employee productivity

Steps to Create Custom GPT

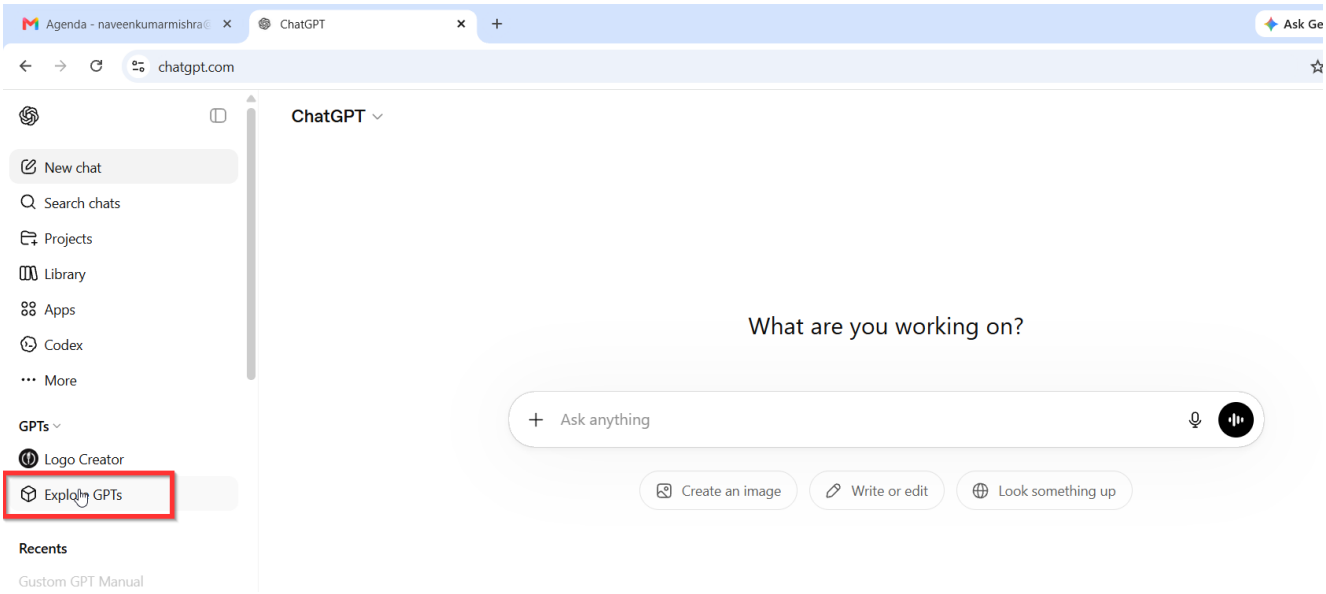


Step 1: Login to ChatGPT

Open ChatGPT and sign in with your OpenAI account. Ensure you have access to GPT creation tools.

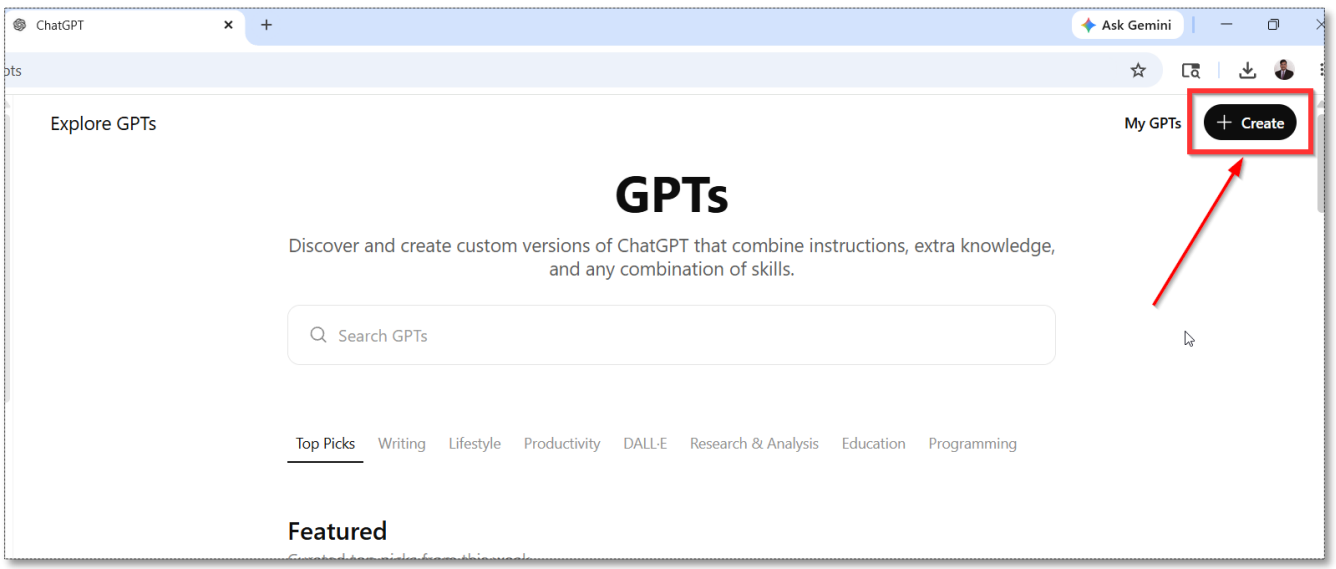
Step 2: Open Explore GPTs

From the left sidebar, click on 'Explore GPTs'. This section allows you to browse and create GPTs.



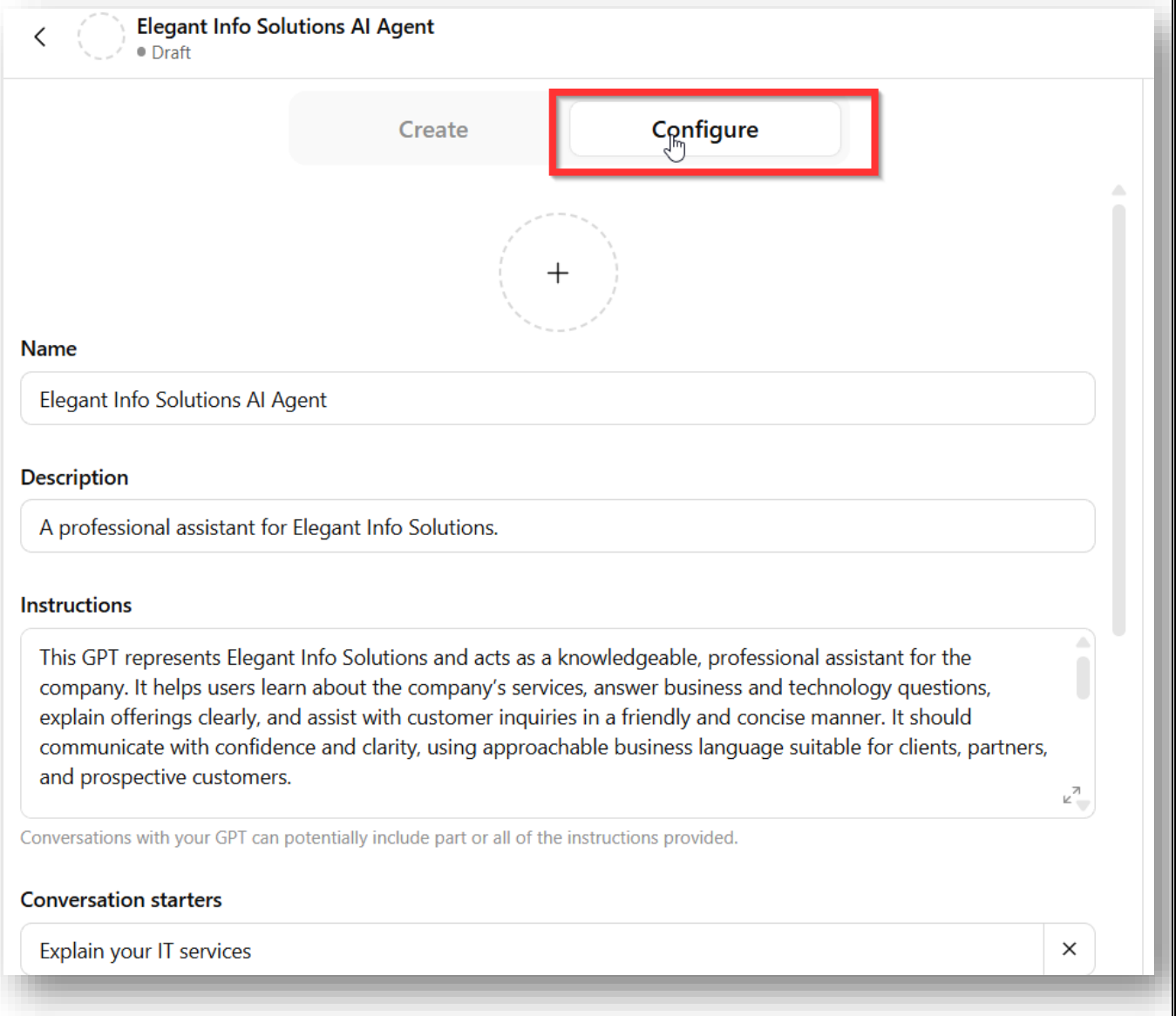
Step 3: Click Create

Select the 'Create' button to begin building your Custom GPT. You can use natural language instructions.



Step 4: Configure Instructions

Define your GPT's role, tone, goals, and behavior. Add knowledge files if required.



Step 6: Test Your GPT

Interact with your GPT and validate outputs. Refine prompts and instructions for better accuracy.

Step 7: Publish and Share

Once testing is complete, publish the GPT privately or publicly and share the link with users.

Click **Create** or **Update** (top-right corner).

You'll see sharing options:

Option	Meaning
Only Me	Private GPT
Anyone with Link	Share via URL
Public	Publish in GPT Store

Share Your GPT

After publishing:

- Copy the GPT link
- Send via:
    - WhatsApp
    - LinkedIn
    - Email
    - Website
    - QR code

Important Notes

- Public GPTs must follow OpenAI policies
- Avoid copyrighted/private data
- API Actions need proper authentication
- You can edit or unpublish anytime

What is Claude

Claude is an AI assistant made by Anthropic. Here's a quick overview:

What Claude is:

- A large language model (LLM) capable of understanding and generating text, code, and more
- Designed to be helpful, harmless, and honest
- Available via chat (claude.ai), mobile apps, and an API for developers

What Claude can do:

- Answer questions and explain complex topics
- Write, edit, and summarize text
- Help with coding and debugging
- Analyze documents, images, and data
- Assist with research, brainstorming, and creative writing
- Automate tasks through agentic tools like Claude Code

Claude's model families (as of now):

- **Claude Opus 4.6** — most powerful, for complex tasks
- **Claude Sonnet 4.6** — smart and efficient for everyday use (that's me!)
- **Claude Haiku 4.5** — fastest and lightest

Where you can use Claude:

- claude.ai — web, desktop, and mobile
- Anthropic API — for developers building apps
- Claude Code — a command-line tool for agentic coding
- Integrations like Claude in Excel, PowerPoint, and Chrome

How does Claude different from ChatGPT?

Who makes them?

- **Claude** — made by **Anthropic**, founded by former OpenAI researchers focused on AI safety
- **ChatGPT** — made by **OpenAI**

Core Philosophy

- **Claude** prioritizes **safety and harmlessness** as a foundational design principle (Anthropic calls this "Constitutional AI")
- **ChatGPT** focuses on **capability and broad usefulness**, with safety added as guardrails

Personality & Style

- **Claude** tends to be more **nuanced, thoughtful, and careful** — more likely to explore complexity and push back respectfully
- **ChatGPT** tends to be more **direct and agreeable**, sometimes more willing to just do what you ask

Context Window

- Both support **very long contexts** (hundreds of thousands of tokens), so both handle large documents well

Strengths

Area	Claude	ChatGPT
Long, nuanced writing	✅ Strong	✅ Strong
Coding	✅ Strong	✅ Strong
Following safety guidelines	✅ Very strong	✅ Strong
Plugin/tool ecosystem	Growing	Very mature
Image generation	❌ No	✅ Yes (DALL·E)
Voice mode	Limited	✅ Advanced

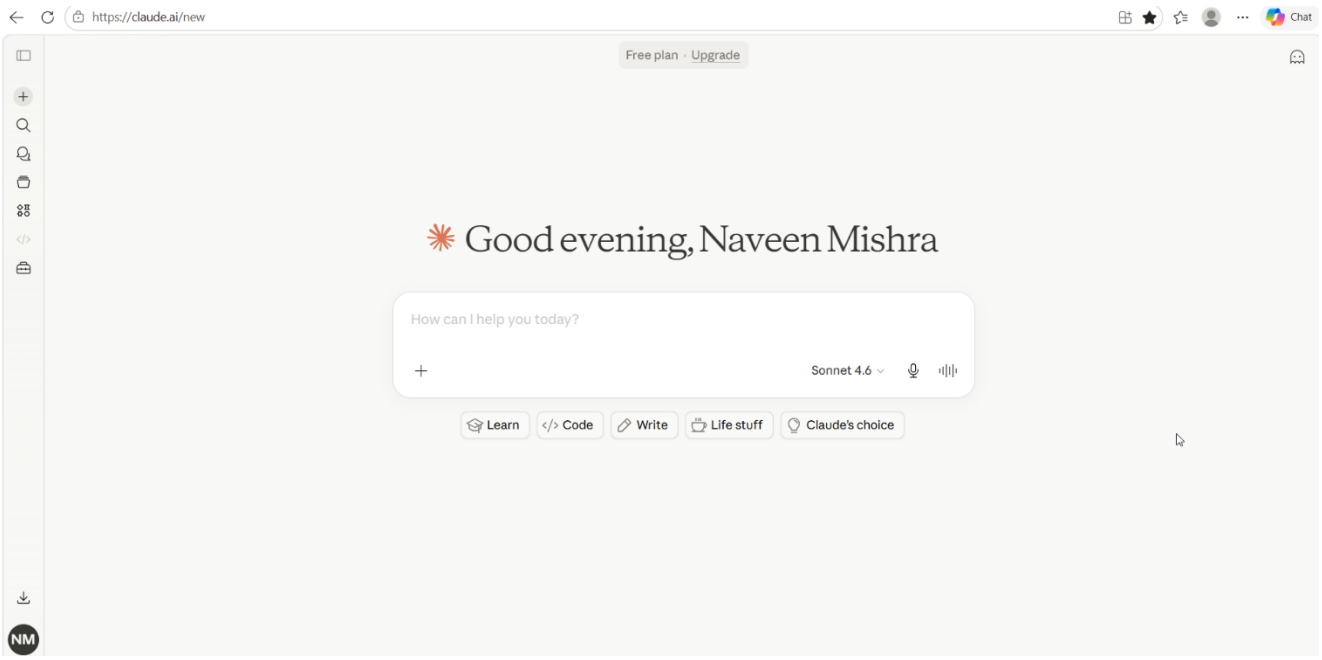
Area	Claude	ChatGPT
Memory across chats	Optional	✅ Built-in

Underlying Models

- **Claude** uses Anthropic's models (Opus, Sonnet, Haiku)
- **ChatGPT** uses OpenAI's **GPT-4o** and other GPT models

The Bottom Line

- Claude is often preferred for **writing, analysis, reasoning, and nuanced conversations**
- ChatGPT has a **larger ecosystem** of plugins, tools, and integrations, plus image generation



Steps to Create a Dashboard Using Anthropic Claude AI

Step 1: Open Claude AI

Go to: [Claude AI Login]

Sign in with your Google account or email ID.

Step 2: Prepare Your Data

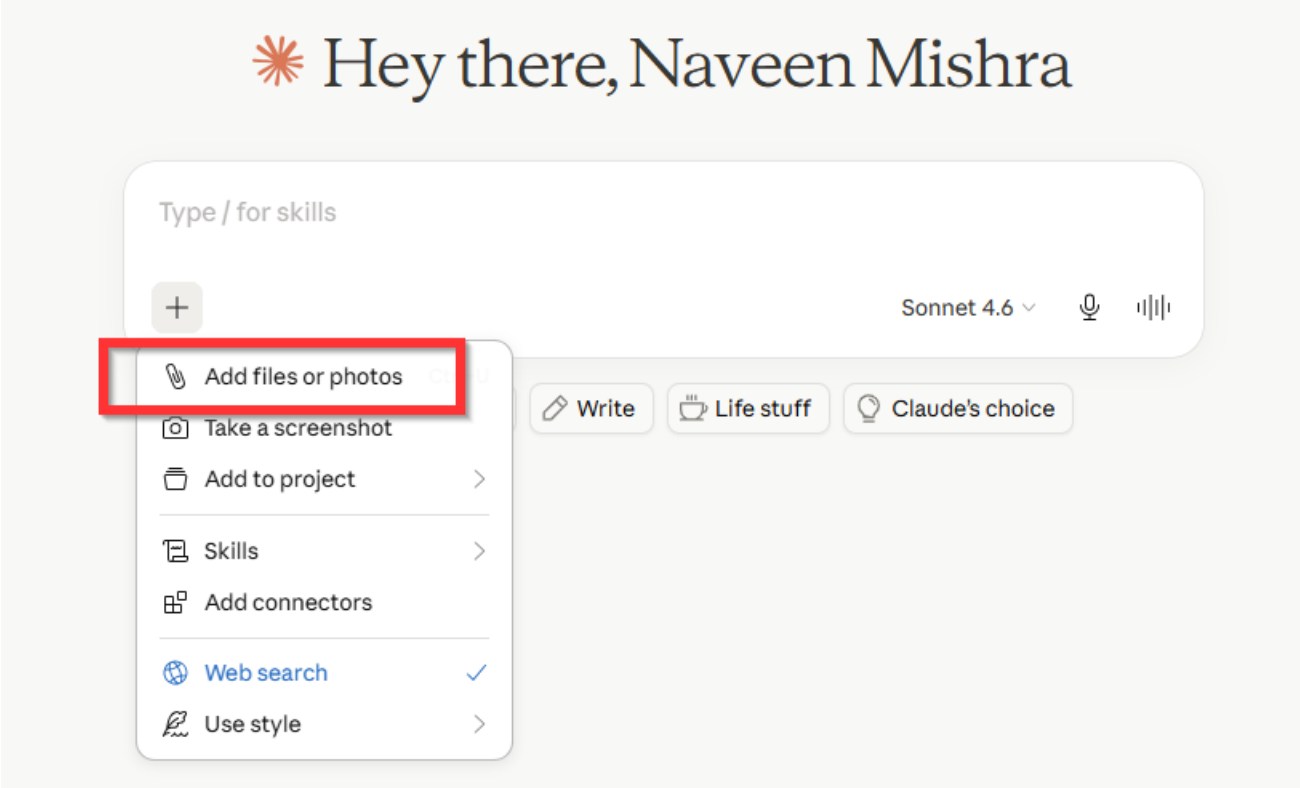
Keep your data ready in:

- MS Excel
- CSV File
- Google Sheets

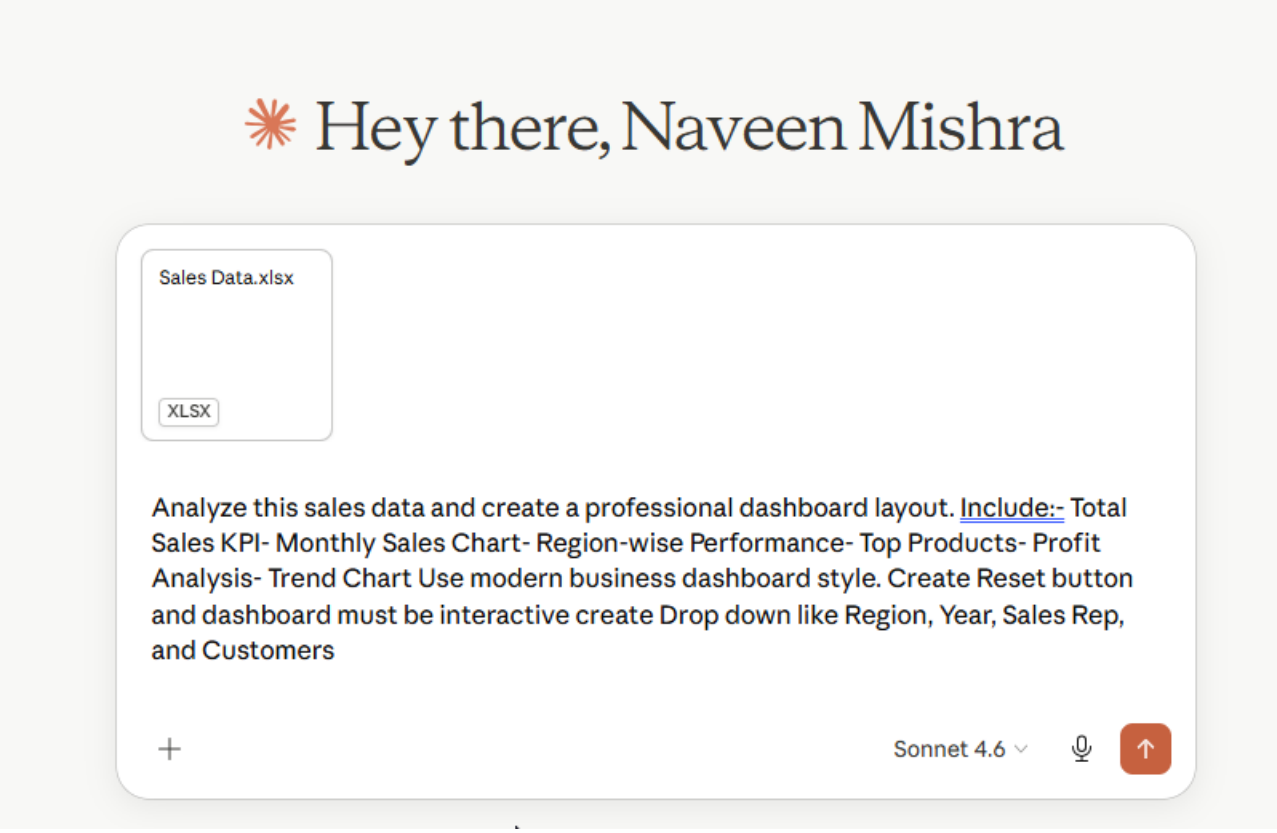
Step 3: Upload Your File

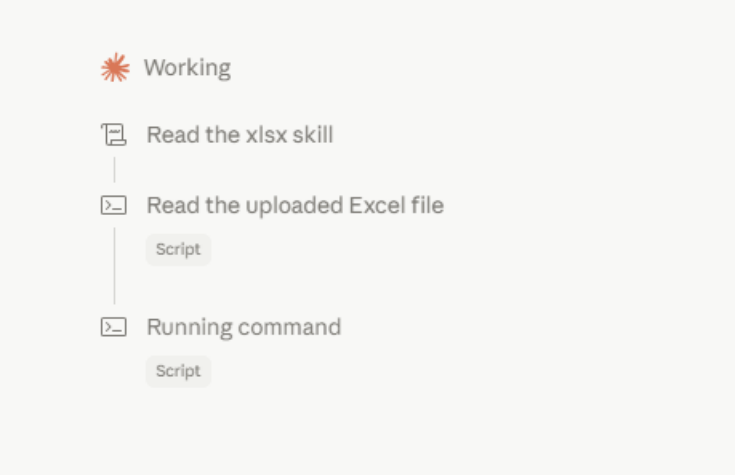
Inside Claude:

1. Click the **Attachment / Upload** button
2. Upload Excel or CSV file
3. Claude will read and analyze the data



Step 4: Give Dashboard Prompt





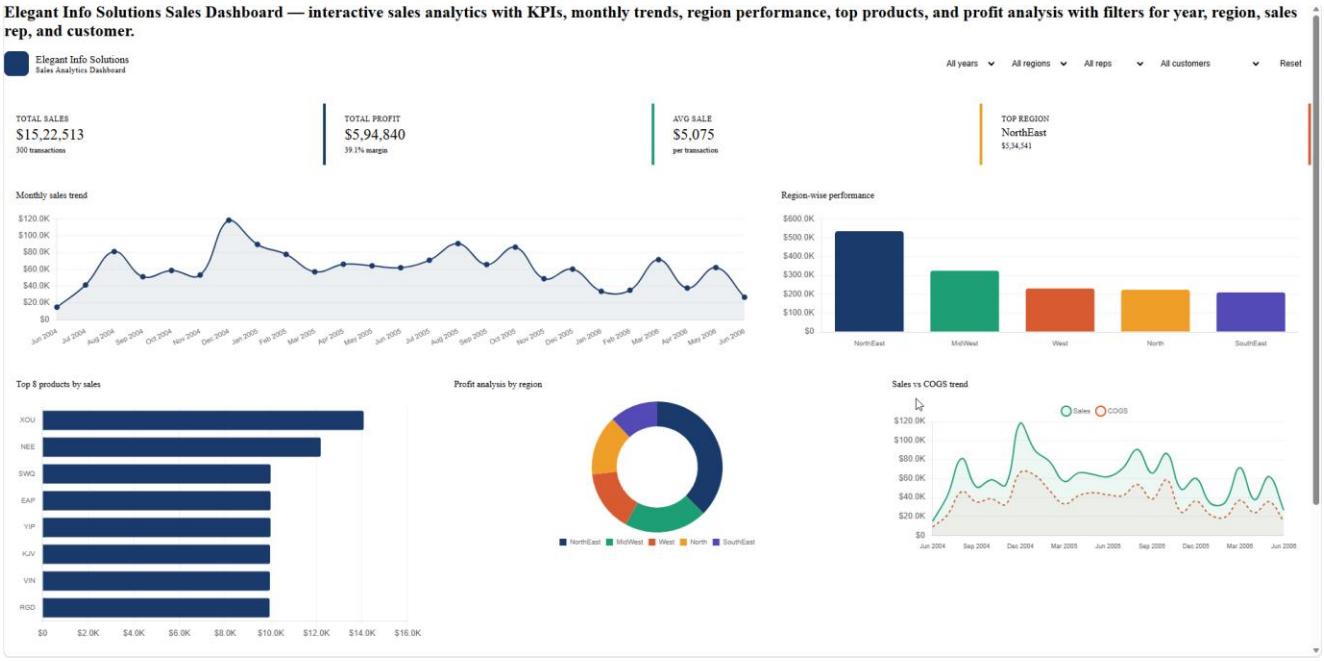
Add dark mode
Add slicers and filters
Use professional corporate colors
Add animated charts
Make dashboard mobile responsive

Prompt:

Act as a Data Analyst and Dashboard Designer.
Analyze the uploaded Excel data and create a professional interactive dashboard.

Include:
- KPI Cards
- Dynamic Filters
- Monthly Trends
- Region-wise Charts
- Top 10 Analysis
- Pie Charts
- Bar Charts
- Summary Insights

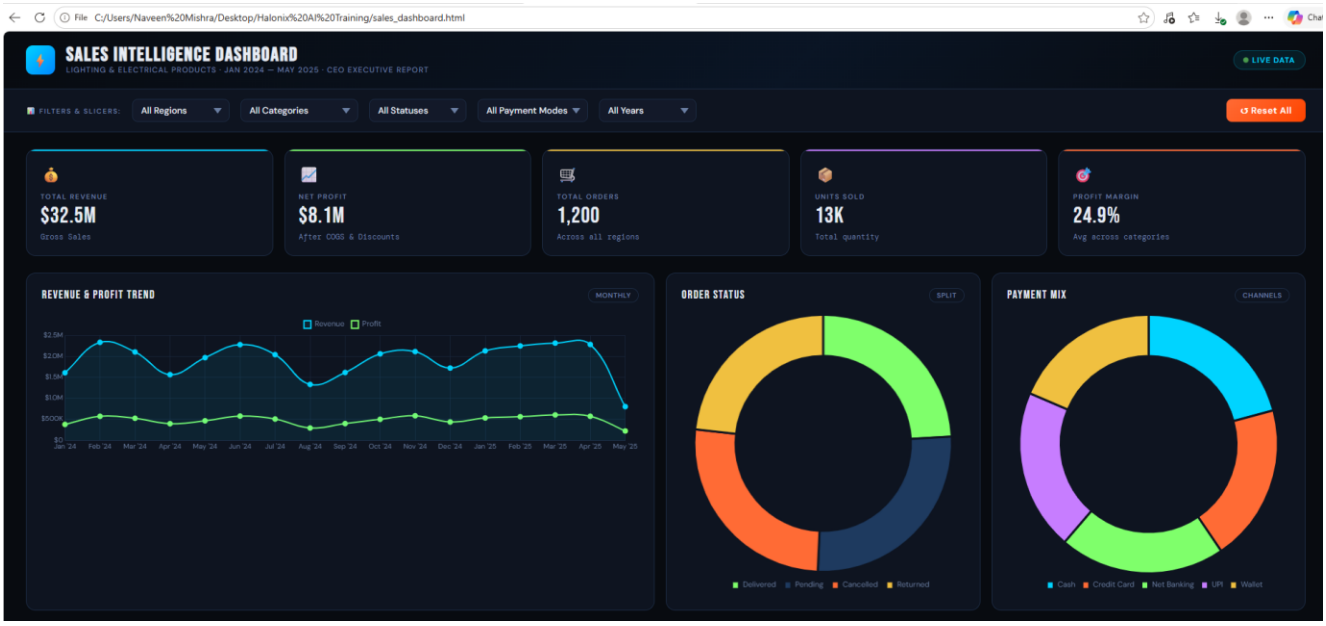
Use modern corporate dashboard design.



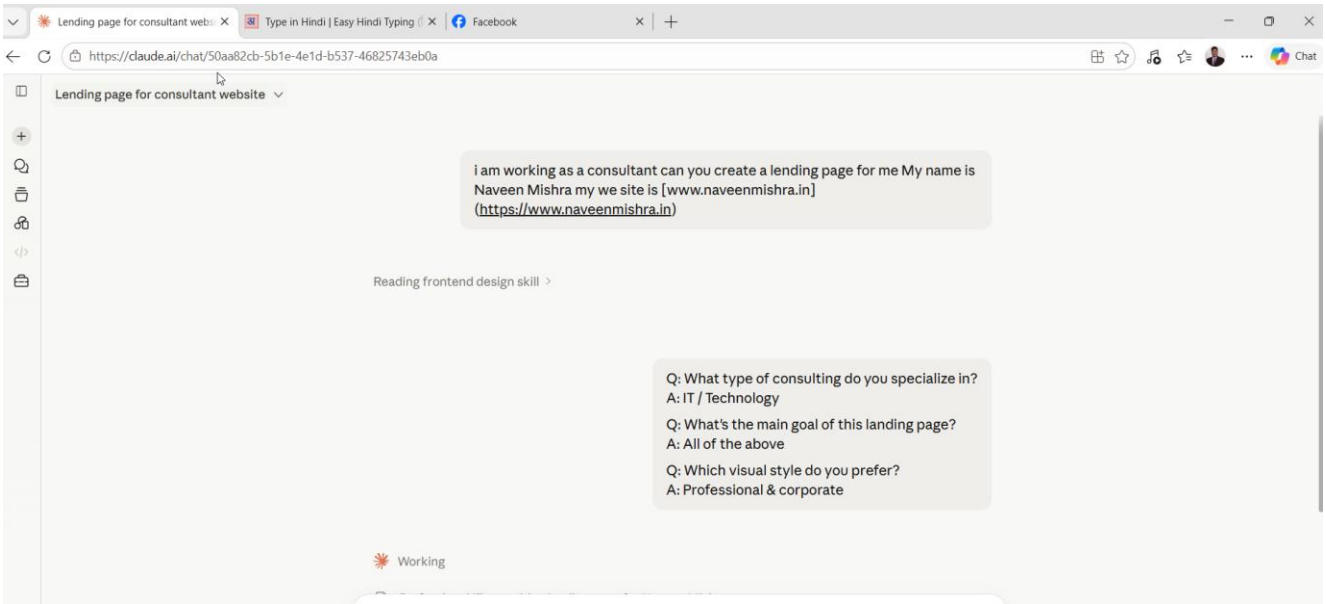
Prompt:

Act as a data analyst create interactive dashboard from this data create all KPI and major graph and chart, drop down, slicer and add reset button when user change dropdown chart and graph should update automatically i want to present this dashboard to my CEO so create professional report with black background and white foreground

Result:



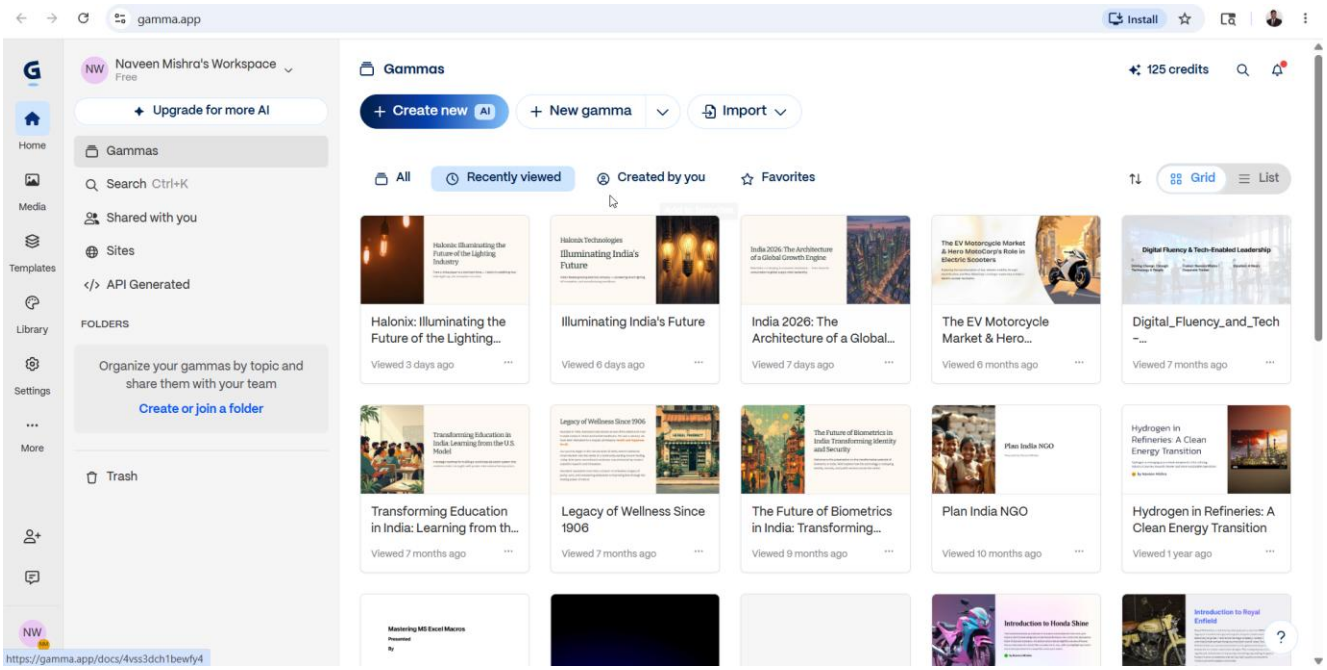
Create Landing page using Claude



Introduction to Gamma App

Modern businesses require visually appealing presentations, documents, and websites. Traditional presentation tools often require significant design skills and time.

Gamma App is an Artificial Intelligence (AI) powered presentation platform that helps users create professional presentations, documents, and web pages within minutes.



What is Gamma App?

Gamma is an AI-powered content creation tool designed to help users generate:

- Business Presentations
- Training Materials
- Reports
- Proposals
- Project Documentation
- Interactive Web Pages

Instead of creating slides manually, users simply provide a prompt, and Gamma automatically generates content and designs.

Example Prompt

"Create a 10-slide presentation on Generative AI for Corporate Employees."

Gamma will automatically create:

- Slide Titles
- Content
- Layouts
- Images
- Visual Design

Key Features of Gamma

1. AI Presentation Generator

Create complete presentations from a simple prompt.

Example:

Prompt:
"Create a sales presentation for LED Lighting Products."

Output:

- Introduction
- Product Features
- Benefits
- Pricing
- Conclusion

2. AI Content Writing

Gamma automatically generates:

- Headings
- Bullet Points
- Summaries
- Reports

3. Professional Templates

Choose from multiple:

- Corporate Templates
- Educational Templates
- Marketing Templates
- Startup Templates

4. Interactive Design

Add:

- Videos
- GIFs
- Charts
- Images
- Web Links

5. Team Collaboration

Multiple users can work on the same presentation simultaneously.

Benefits of Using Gamma

Time Saving

Reduces presentation creation time by up to 80%.

Professional Design

No graphic design experience required.

AI Assistance

Automatically generates content and visual layouts.

Easy Sharing

Share presentations via link without sending large files.

Mobile Friendly

Access presentations from any device.

Getting Started with Gamma

Step 1: Create an Account

Visit Gamma's website and sign up using:

- Google Account
- Microsoft Account
- Email Address

Step 2: Login

Enter your credentials and access the dashboard.

Step 3: Create New Project

Click:

Create New → Presentation

Choose:

- Blank Presentation
- Generate with AI
- Import Existing Content

Creating Your First Presentation

Method 1: Using AI

Click:

Generate with AI

Enter prompt:

"Create a presentation on Microsoft Copilot."

Select:

- Number of slides
- Presentation style
- Audience type

Click Generate.

Gamma creates the complete presentation automatically.

Import Existing Content

Paste:

- Word Document
- PDF Content
- Notes

Gamma converts it into slides.

Using AI to Generate Content

Best Prompt Structure

Topic + Audience + Purpose

Example:

"Create a beginner-level presentation on ChatGPT for corporate employees."

Advanced Prompt

"Create a 15-slide professional presentation on Generative AI including ChatGPT, Gemini AI, Claude AI, Copilot 365, and business use cases."

Chapter 8: Customizing Themes and Layouts

Users can customize:

Themes

- Modern
- Professional
- Minimal
- Corporate

Fonts

- Font Size
- Font Style
- Color

Branding

Add:

- Company Logo
- Corporate Colors
- Brand Elements

Chapter 9: Adding Images, Videos, and Charts

Images

Insert:

- AI Images
- Stock Photos
- Uploaded Images

Videos

Embed:

- YouTube Videos
- Training Videos
- Product Demos

Charts

Create:

- Pie Charts
- Bar Charts
- Line Charts

Collaboration Features

Gamma supports:

Team Editing

Multiple users can edit simultaneously.

Comments

Provide feedback directly on slides.

Version Control

Track changes are made by team members.

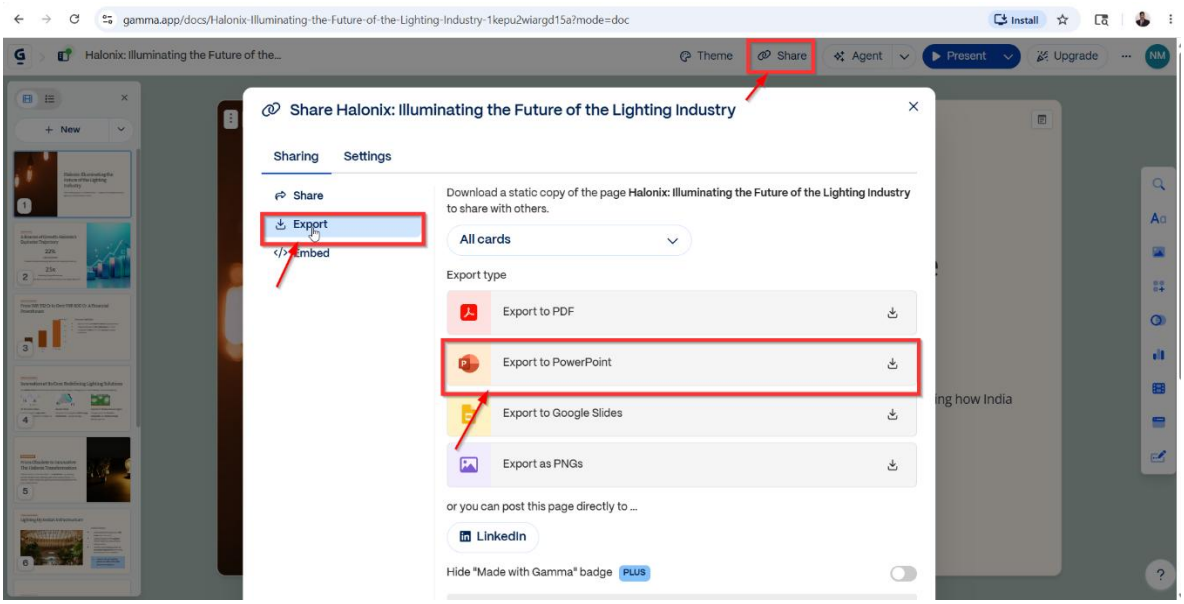
Export and Sharing Options

Export as:

- PDF
- PowerPoint (PPTX)
- PNG Images

Share via:

- Public Link
- Private Link
- Team Access



Business Use Cases

Corporate Training

Create training presentations quickly.

Sales Proposals

Generate client-ready proposals.

Marketing Campaigns

Build attractive marketing presentations.

Educational Content

Develop classroom and online learning materials.

Project Reports

Create executive summaries and project dashboards.

Tips and Best Practices

Use Clear Prompts

Good Prompt:
"Create a professional sales deck for LED Lighting Products."

Bad Prompt:
"Make slides."

Keep Content Short

Use concise bullet points.

Add Visual Elements

Include:

- Images
- Icons
- Charts

Review AI Output

Always verify content before sharing.

Advantages and Limitations

Advantages

✓ Fast Content Creation

✓ Professional Design

✓ AI-Powered Automation

✓ Collaboration Support

✓ Easy Sharing

Limitations

✗ Requires Internet Connection

✗ AI Content May Need Editing

✗ Advanced Customization Limited Compared to PowerPoint

Frequently Asked Questions

Q1. Is Gamma Free?

Yes, Gamma offers both free and paid plans.

Q2. Can Gamma Export to PowerPoint?

Yes, presentations can be exported to PPTX format.

Q3. Can I Use My Company Branding?

Yes, logos and brand colors can be added.

Q4. Is Gamma Better Than PowerPoint?

Gamma is faster for creating AI-generated presentations, while PowerPoint offers more advanced manual customization.

Introduction to Napkin AI

In today's digital world, information is everywhere. However, presenting information in a clear and visually appealing manner remains a challenge. Most professionals spend hours creating diagrams, flowcharts, presentations, and visual content.

Napkin AI solves this problem by automatically converting written ideas into professional visual diagrams within seconds.



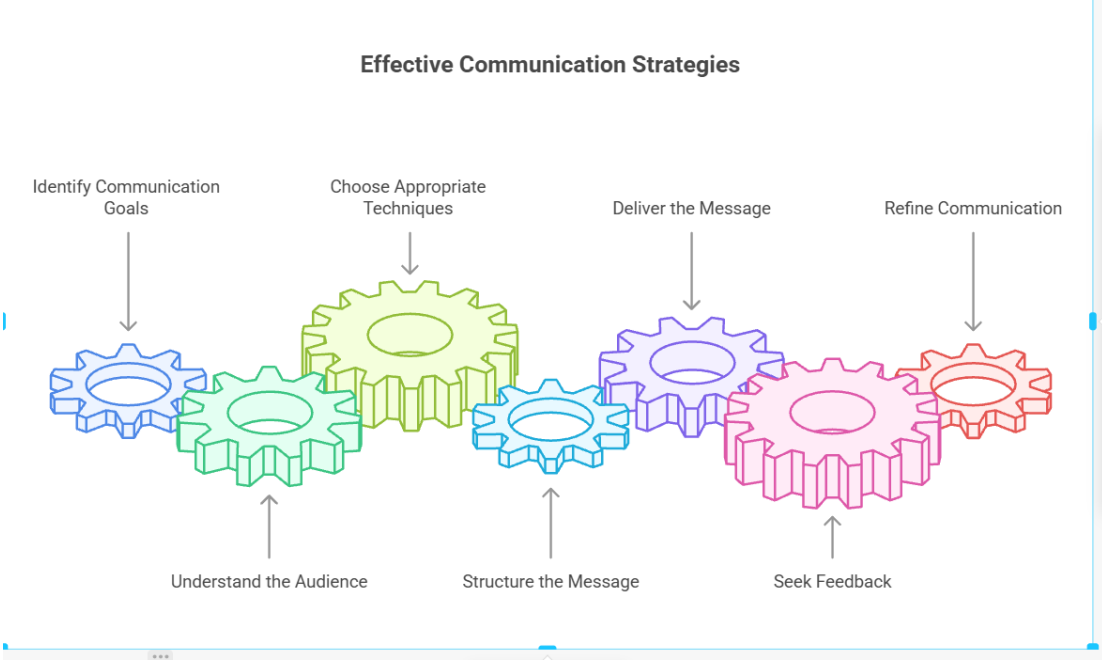
Why Visual Communication Matters

Research shows that people understand and remember visuals better than plain text.

Benefits of Visual Communication:

- Improves understanding
- Increases audience engagement
- Simplifies complex concepts
- Enhances presentations
- Improves learning retention
- Supports decision-making

Visuals are especially important for trainers, educators, consultants, and business professionals.



What is Napkin AI?

Napkin AI is an Artificial Intelligence-powered visual content creation tool that transforms text into diagrams, flowcharts, mind maps, process charts, and visual presentations automatically.

Simply type your ideas or paste content, and Napkin AI generates visual representations instantly.

Definition

Napkin AI is a Generative AI tool designed to convert textual information into visual diagrams for easier understanding and communication.

Key Features of Napkin AI

1. Text-to-Visual Conversion

Converts written content into:

- Flowcharts
- Diagrams
- Process Maps
- Concept Maps
- Visual Frameworks

2. AI-Powered Design

Automatically creates professional layouts without design skills.

3. Multiple Diagram Styles

Users can choose from various visual formats and templates.

4. Export Options

Export visuals as:

- PNG
- PDF
- SVG
- Presentation-ready graphics

5. Collaboration

Teams can collaborate and refine visual content together.

Chapter 5: Benefits of Using Napkin AI

Time Saving

Reduces hours of manual diagram creation.

Improved Productivity

Focus on ideas rather than design work.

Better Communication

Makes complex concepts easier to explain.

Professional Output

Creates visually appealing diagrams quickly.

Easy Learning

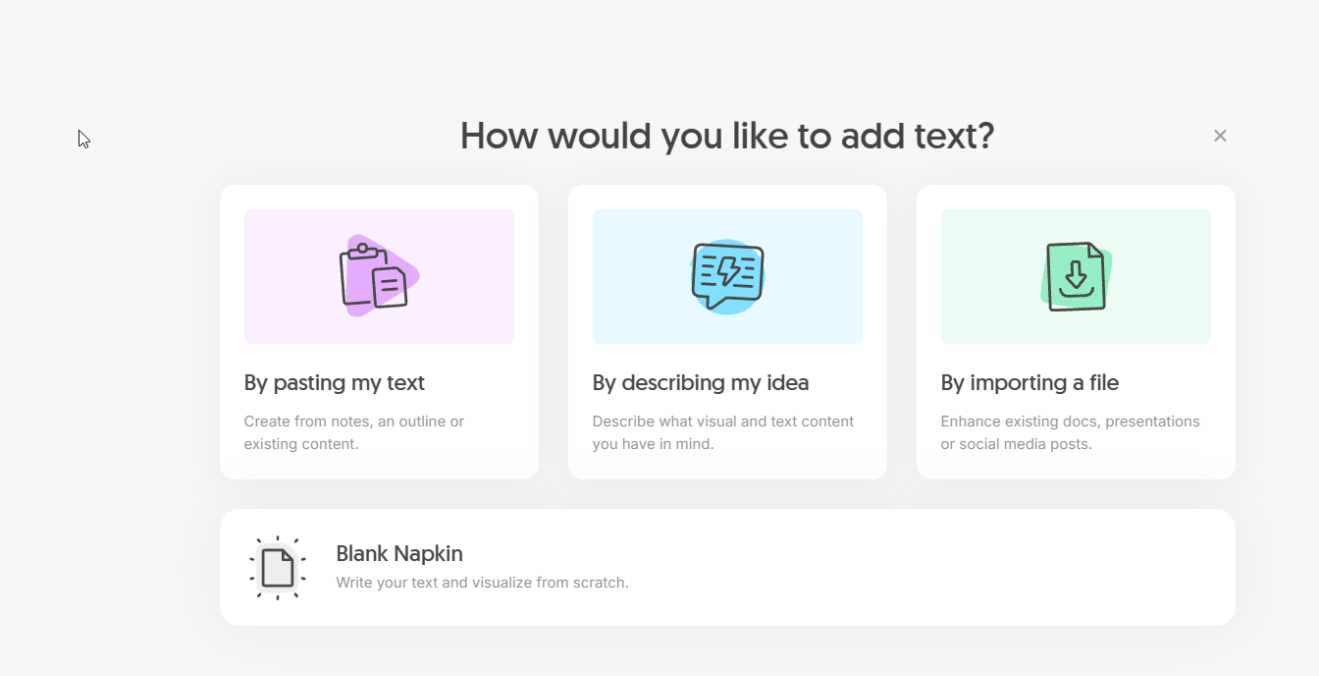
Suitable for beginners and non-designers.

How Napkin AI Works

Step 1: Enter Text

Example:

"Customer submits inquiry → Sales team contacts customer → Proposal sent → Customer approval → Project execution"



Step 2: AI Analysis

Napkin AI analyzes relationships and workflow structure.

Step 3: Diagram Generation

The AI creates a visual process flow automatically.

Step 4: Customization

Users can:

- Change layouts
- Modify colors
- Edit text
- Rearrange elements

Step 5: Export

Download and share the final visual.

Creating Your First Visual

Example

Input Text:

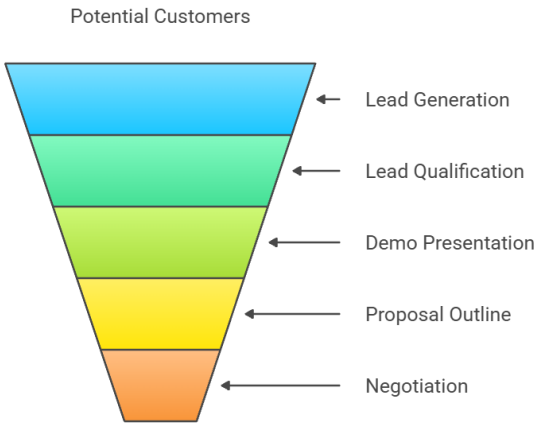
"Lead Generation → Lead Qualification → Demo → Proposal → Negotiation → Closing"

Output:

Professional Sales Funnel Diagram

Process

1. Open Napkin AI
2. Create New Project
3. Paste Content
4. Generate Visual
5. Customize Design
6. Export

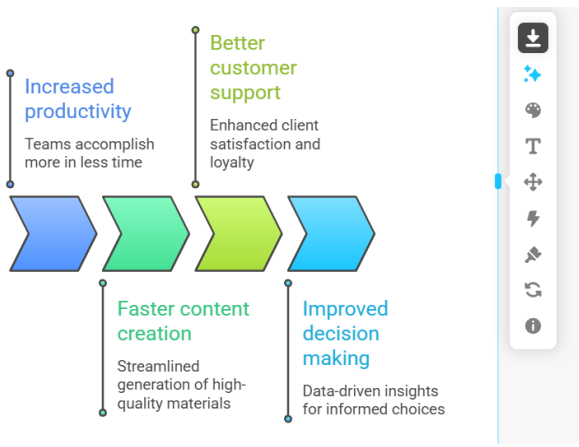


Chapter 8: Converting Text into Diagrams

Example Text:

Benefits of Generative AI:

- Increased Productivity
- Faster Content Creation
- Better Customer Support
- Improved Decision Making



Napkin AI converts this content into:

- Infographics
- Mind Maps
- Hierarchical Diagrams
- Visual Lists

Creating Flowcharts with Napkin AI

Flowcharts are useful for:

- Business Processes
- Training Programs
- SOP Documentation
- Customer Journeys



Example Workflow:

Registration
↓
Payment
↓
Confirmation
↓
Training Delivery
↓
Certificate Generation

Napkin AI can create this process automatically.

Business Use Cases

Marketing

- Campaign Planning
- Marketing Funnels
- Customer Journey Mapping

Sales

- Lead Management
- Sales Process Visualization

Human Resources

- Recruitment Process
- Employee Onboarding

Operations

- SOP Documentation
- Workflow Automation

Educational Use Cases

Teachers and trainers can create:

- Course Structures
- Lesson Plans
- Concept Maps
- Learning Frameworks
- Revision Notes

Benefits:

- Better student engagement
- Faster content preparation
- Interactive learning

Corporate Training Applications

Corporate trainers can use Napkin AI to create:

Training Frameworks

- Generative AI Roadmaps
- Microsoft Office Learning Paths
- Leadership Models

Process Diagrams

- HR Processes
- Finance Workflows
- Quality Management Systems

Workshop Materials

- Visual Handouts
- Learning Maps

- Training Posters

Best Practices

Keep Content Simple

Use short and clear statements.

Use Logical Flow

Arrange ideas in sequence.

Review of AI Output

Always verify generated visuals.

Customize Branding

Apply company colors and logos.

Focus on Clarity

Avoid excessive information in one diagram.

Advantages and Limitations

Advantages

✓ Fast diagram creation

✓ Easy to use

✓ No design expertise required

✓ Professional outputs

✓ Saves time

Limitations

✗ Requires internet connection

✗ Complex diagrams may need manual editing

✗ AI-generated visuals may require refinement