



# Power your AI transformation with Copilot Studio

True.org Cloud



# But organizations may encounter challenges when building agents at scale



Budget and time constraints



Infrastructure and resource hosting



Integration with business systems



Technical expertise



Security and compliance risks



Maintaining content

# What is an agent?

Agents use AI to **automate and execute business processes**, working alongside or on behalf of a person, team, or organization.

Deploy to...



Microsoft Copilot

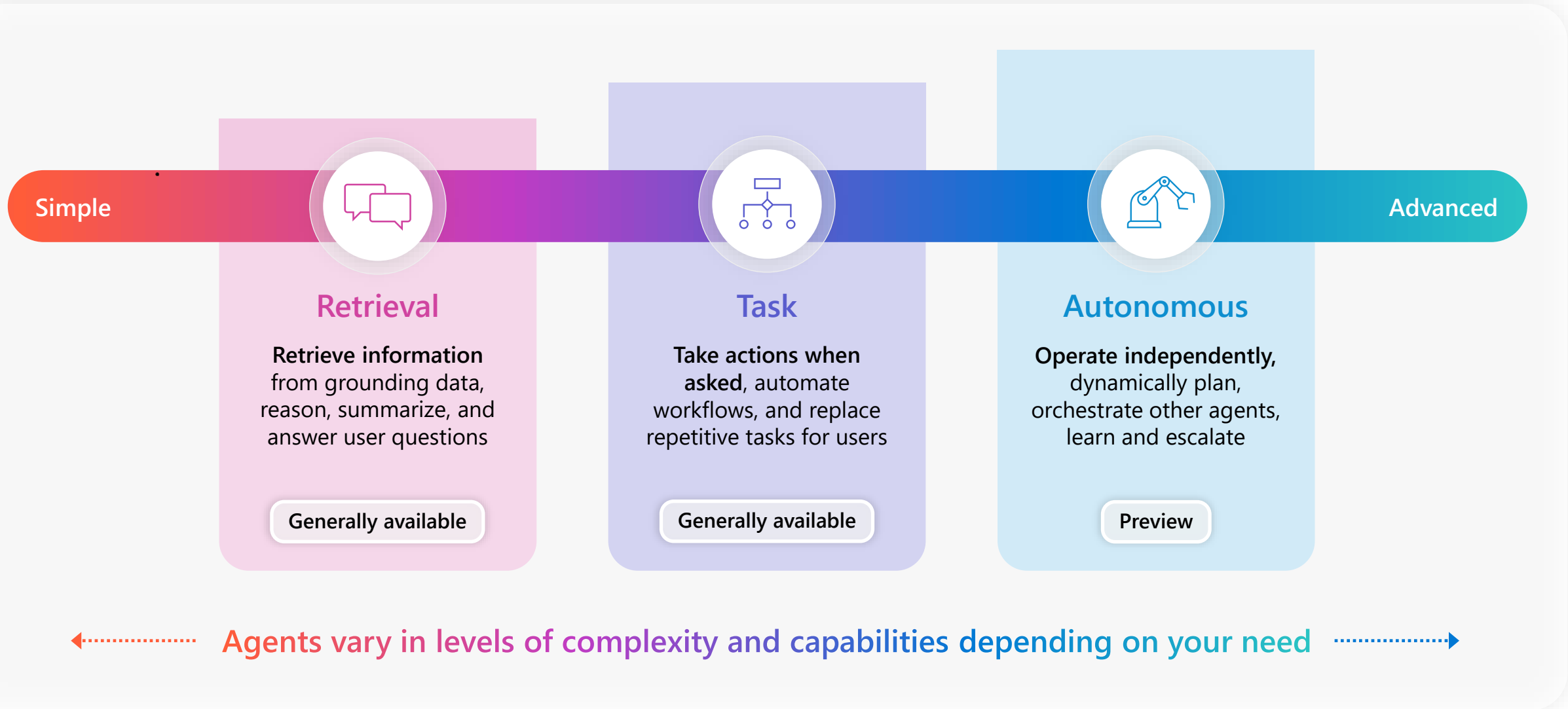


Your applications



Your websites

# Spectrum of agents



# Explore a continuum of solutions

## IT Helpdesk agent

How do I connect to the corporate network?



## Device Refresh agent

Request a new laptop and send approvals via IT Service tool.



## Lead Gen agent

The agent has identified and researched 15 new leads for you to review.



Simple



Advanced

## Project Tracker agent

What is the status of phase 2 for project X and the remaining budget?



## Budget Management agent

Review outstanding open PO's and begin financial planning.



## Customer Support agent

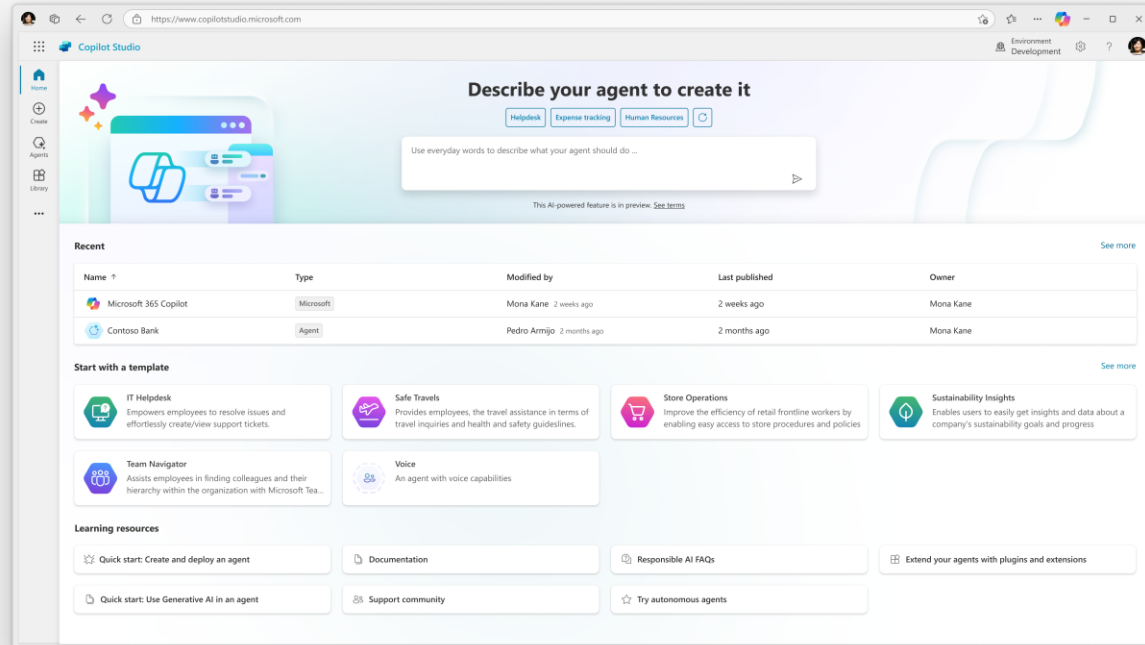
The agent has identified new support issues and triaged to other agents.





# Copilot Studio

Copilot Studio is a low code tool for **building agents** and **extending Microsoft 365 Copilot**.



✔ Meet your users where they already are

✔ Access everything in one place

✔ Automate your workflows

✔ Integrate with your external apps

✔ Connect to your data in Microsoft 365

# Create chat experiences that are...



## Intelligent

Remember and understand user context and intent



## Secure

Maintain industry standards for governance, security and lifecycle management



## Automated

Dynamically complete tasks and automate workflows



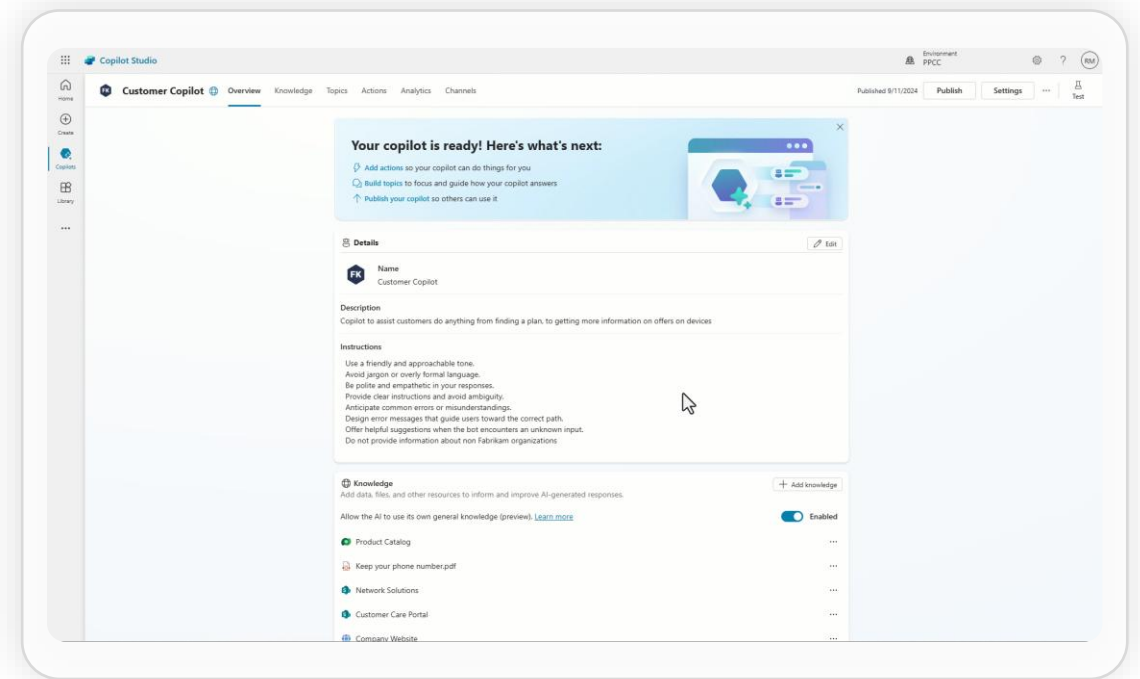
## Customizable

Connect to your data and legacy systems, extend across Microsoft's ecosystem and more



## Collaborative

Interact with agents as if they were another member of the team



## Evolution

2023

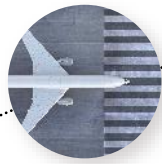
Search • Summarization • Generation

2024+

Customization • Collaboration • Automation



Travel and Transportation



Professional Services



Customer Service



Government



Finance



Retail



HR



Healthcare



IT



Financial Services



Legal



Education



Sales & Marketing



Manufacturing





# Design powerful, connected agents

---

## Handle complex queries with ease

Design intelligent conversations with greater control over the LLM such as robust conversational orchestration, logic, and responses.

## Design personalized, responsive interactions

Engage employees or customers with rich, dynamic interactions that remember user content and context.

## Customize your agent how you want

Build custom actions and surface your business data where you need it.

## Connect to your organization's knowledge bases

Use generative AI to dynamically respond using your organization's real-time content.

## Create automated workflows

Use Power Automate to trigger automation across your business with UI, API, DPA, and RPA automation capabilities.

## Escalate to human agents when needed















Continue the conversation with full context with an end-to-end customer engagement platform.








# Explore agents prebuilt for you

Choose from a variety of agents that are ready to deploy or customize further to fit your business needs

### Copilot Studio

 Safe travels	 Team navigator	 Self-help	 IT helpdesk	 Case management
 Leave management	 Awards & recognition	 Weather	 Wellness check	 Benefits
 Inclusivity	 Financial insights	 Citizen services	 Sustainability insights	+ more coming soon

### Copilot Chat

 Idea Coach	 Prompt Coach
 Career Coach	 Learning Coach
 Writing Coach	+ more coming soon

\* Some listed options may only be available in preview



# Employee Self-Service Agent

In Microsoft 365 Copilot

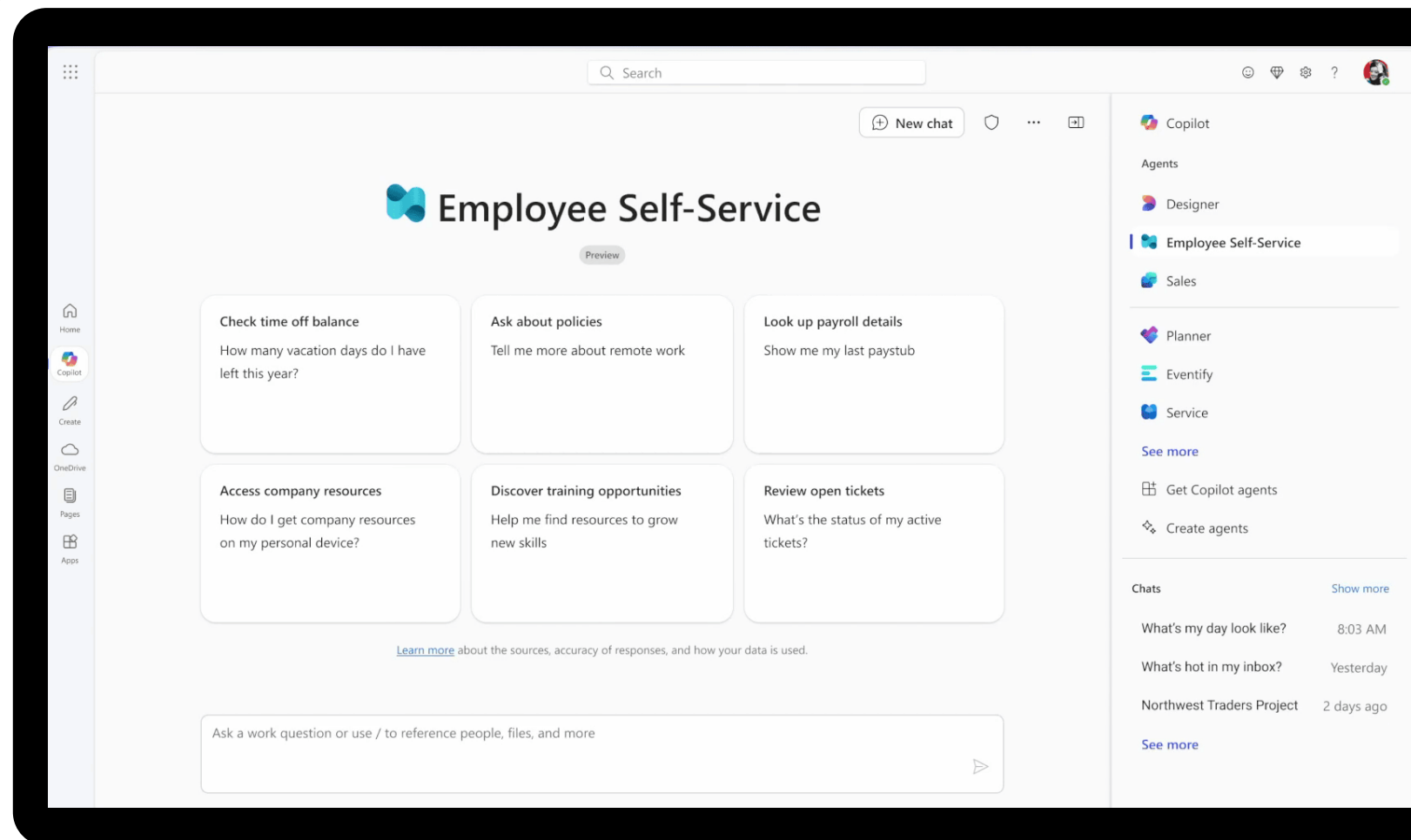
Preview

Answer common workplace policy-related questions and support employees with key HR and IT tasks to improve resolution times

Connect employees to official answers from internal knowledge bases like SharePoint sites

Empower answers and action on HR/IT data from Microsoft-built connectors from Workday, SAP, and ServiceNow

Customize pre-built workflows around common topics like benefits and IT Helpdesk in Copilot Studio



# Customize your agent

Easily tailor your agent's building blocks to meet your unique business needs in a comprehensive, end-to-end studio

## Building blocks



### Knowledge

Existing enterprise data in or outside of M365 that your agent can query



### Actions

Tasks and processes your agent can perform across LOB services/apps



### Logic

Defined conversation paths for your agent to follow when triggered



### Channels

Where and how your end users engage with your agent

# Knowledge

Add your **public and enterprise data** sources using agent connectors.

Your agent will be able to **dynamically generate multi-turn answers** in real time using your enterprise data.

Allows you to create an **immediately useful** agent.

Supported data sources include:

Public websites

SharePoint / OneDrive

Dataverse

Microsoft Fabric *(coming soon)*

File uploads

Microsoft Graph connectors

**Add available knowledge sources** (Powered by Copilot connectors) ✕

Users with edit permissions for this copilot can also reuse your connections for other topics within the copilot. [Manage security settings](#)

🔍 Keywords for the data you're looking for

**Featured**

- Add existing knowledge**  
→ Converts previous data sources to knowledge for this copilot
- Public website**  
Incorporate any relevant web content found on Bing
- Files**  
Upload documents from your local computer
- SharePoint and OneDrive**  
Securely integrate and manage internal data
- Dataverse**  
Customize and deploy structured data tables
- Microsoft Fabric**  
Accelerate data analysis with AI capabilities

**Bring your enterprise data (16)**

- Enterprise website (preview)
- Azure DevOps (preview)
- Custom connector (preview)
- Jira (preview)
- ADLS Gen2 (preview)
- Oracle SQL database (preview)
- ServiceNow (preview)
- File share (preview)
- CSV (preview)
- Microsoft SQL (preview)
- MediaWiki (preview)
- Salesforce (preview)
- Confluence (preview)
- Azure SQL (preview)
- Zendesk (preview)
- Power Platform connector

# Actions

Easily connect to your key line of business systems.

Enable your agent to automate your business processes and complete tasks.

Tell your agent when to execute an action by adding autonomous triggers.

## Types of actions:

### Prebuilt connectors

Choose from 1500+ prebuilt Power Platform connectors to popular data sources and apps

### Custom connectors

Create a custom connector for any publicly available API

### Flows

Bring in automated workflows built using Power Automate

### Prompts

Provide custom instructions to the GPT model using AI Builder

### Skills

Add a bot built using Azure Bot Framework as a skill

## Step 1 of 3: Choose an action

Create an action or browse through our list of actions you want to use to get information from external sources. ✕

[Learn more](#)

### Discover an action

Search for flows, skill actions, and commonly used connector actions

11 actions found

[Connectors](#)

[Custom Connectors](#)

[Flows](#)

[Skills](#)

[Dataverse](#)



Untitled

Get information about industries, solutions, services and cont...



Run a flow built with Power Automate for desktop

Desktop flows



Delete a row

Excel Online (Business)



Run script

Excel Online (Business)



Get a row

Excel Online (Business)



Run script from SharePoint library

Excel Online (Business)

Cancel



1500+

# Logic

Have **complete control over critical scenarios** by designing specific step-by-step topics.

Enable your agent to **automatically select the most appropriate action or topic** to respond to a user using generative AI.

Easily mix and manage both **generative and custom dialog** in one system.

**Connect to your contact center** so your agent can escalate and hand off the conversation with full context to a human agent.

The screenshot displays the 'Expense Budget Assistant' interface, specifically the 'Topics' tab. The main workspace shows a logic flow diagram for a topic named 'Travel budget'. The flow starts with a description box: 'Describe what the topic does' with the text 'Provides details to employees asking questions about travel expense budget availability'. This leads to an 'Action' block titled 'Read SAP table' by user 'Nora@northwindtraders.com'. The 'Table name' is set to 'Travel expense budget'. Below this is an 'Outputs (1)' section. The flow then leads to a 'Create generative answers' block. Its 'Input' is 'OutstandingExpenseBudget table' and it is linked to 'Data sources'. On the right side, a configuration panel titled 'Create generative answers property' is open. It includes sections for 'Data sources' (with search and manual input options for public websites and SharePoint), 'Azure OpenAI Services on your data' (with an 'Add connection' button), and 'Custom data' (with an 'Enter or select a value' field).



# Autonomous agents

Handle variability and complexity at infinite scale

Independently begins work based on autonomous triggers

Automates long running processes

Dynamically reasons over its capabilities

Learns and improves

Follows human guard rails and asks for help

Orchestrate other agents

The screenshot displays the Copilot Studio interface for a project named "Supply Chain Multi-Agent 1". The interface includes a navigation sidebar on the left with options for Home, Create, Agents, Library, and a menu icon. The main content area is titled "Your copilot is ready! Here's what's next:" and lists three tasks: "Add actions so your copilot can do things for you", "Build topics to focus and guide how your copilot answers", and "Publish your copilot so others can use it". Below this, the "Details" section shows the agent's name as "Supply Chain Multi-Agent 1" and its description as "None provided". The "Instructions" section contains a list of five tasks related to processing an Invoice Discrepancy Report, including reading Excel content, comparing invoice details, converting reports to HTML, and sending reports via Outlook. The "Triggers (preview)" section includes a button to "Add trigger" and a list of existing triggers: "Lesson 1 - A simple topic" and "Greeting". On the right side, there is a "Test your agent" section with a chat interface. The chat message reads: "Hello, I'm Supply Chain Multi-Agent 1, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI." The chat interface also shows a timestamp of "A minute ago", a text input field with "Ask a question or describe what you need", and a character count of "0/2000". At the bottom right, there is a disclaimer: "Make sure AI-generated content is accurate and appropriate before using. [See terms](#)".

# Extend Microsoft 365 Copilot

Copilot Studio agent builder allows you to build an agent directly in Copilot Chat and SharePoint

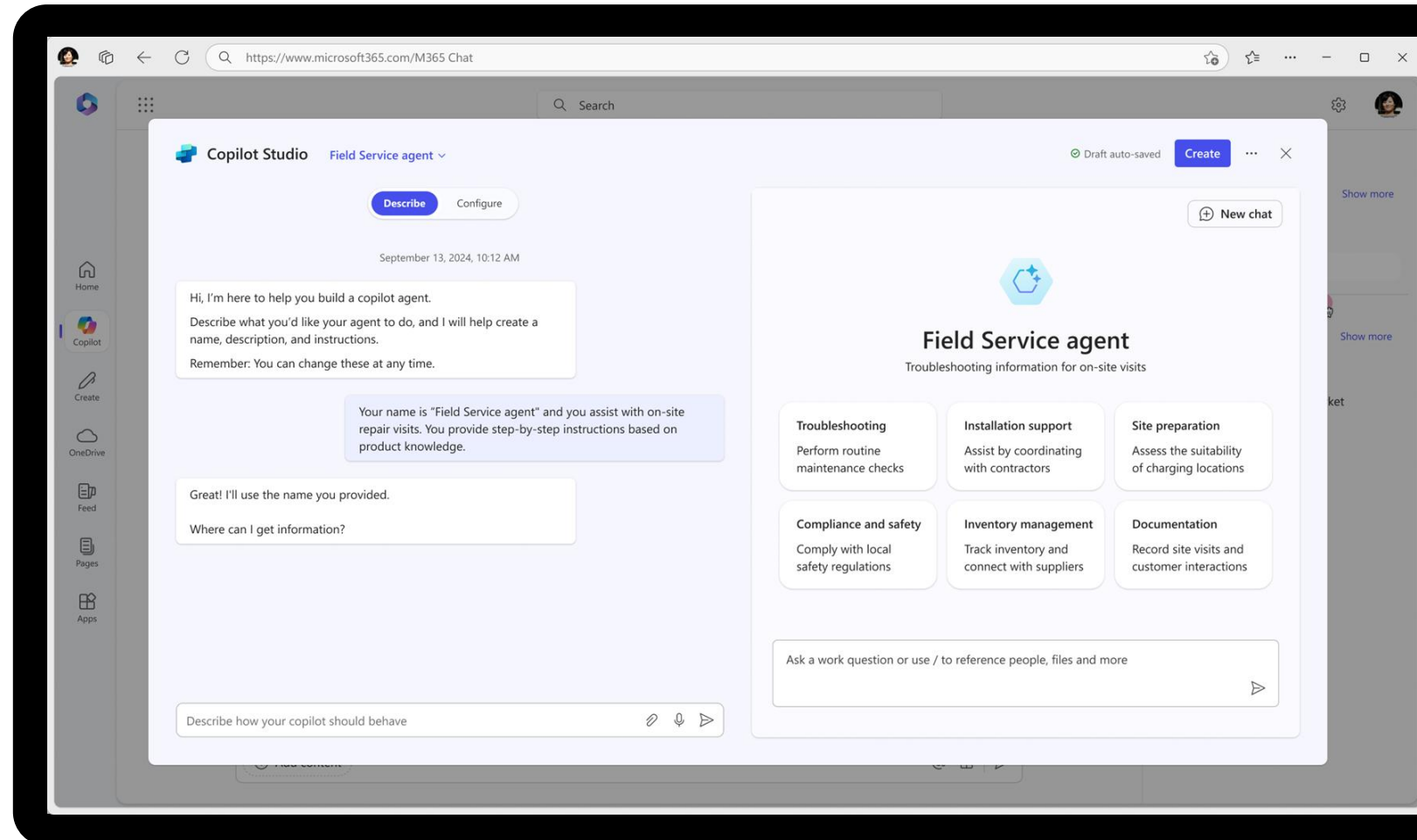
Empower end users to **build knowledge-only agents** using natural language

Get started quickly with **agents pre-built for you** in Copilot Chat

Take your agent a step further by **adding actions** in the full Copilot Studio experience

Seamlessly **share your agent** across your organization with shareable links

Ensure compliance with **centralized management** tools



# Enhance with advanced capabilities

---

## Customize your agent with pro developer tools

Integrate with Azure AI Foundry tools, like Azure AI Search and Model Catalog, for greater control and customization as you scale.

## Analyze your agent's performance

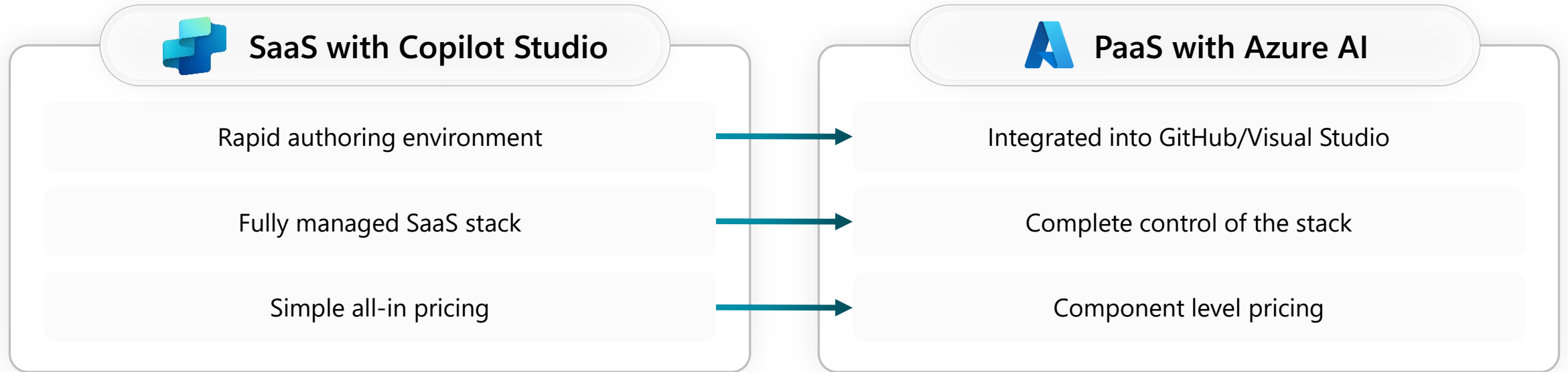
Access built-in conversational analytics that automatically track critical KPIs.

## Continuously improve the conversation

AI-driven features will help you to fine-tune your agent over time by providing suggestions on how to optimize your conversations.

# One conversational AI ecosystem

Access more advanced customization tools by building across Microsoft Copilot stack



Start with Copilot Studio and seamlessly integrate with Azure AI



# Easily optimize with data-driven insights

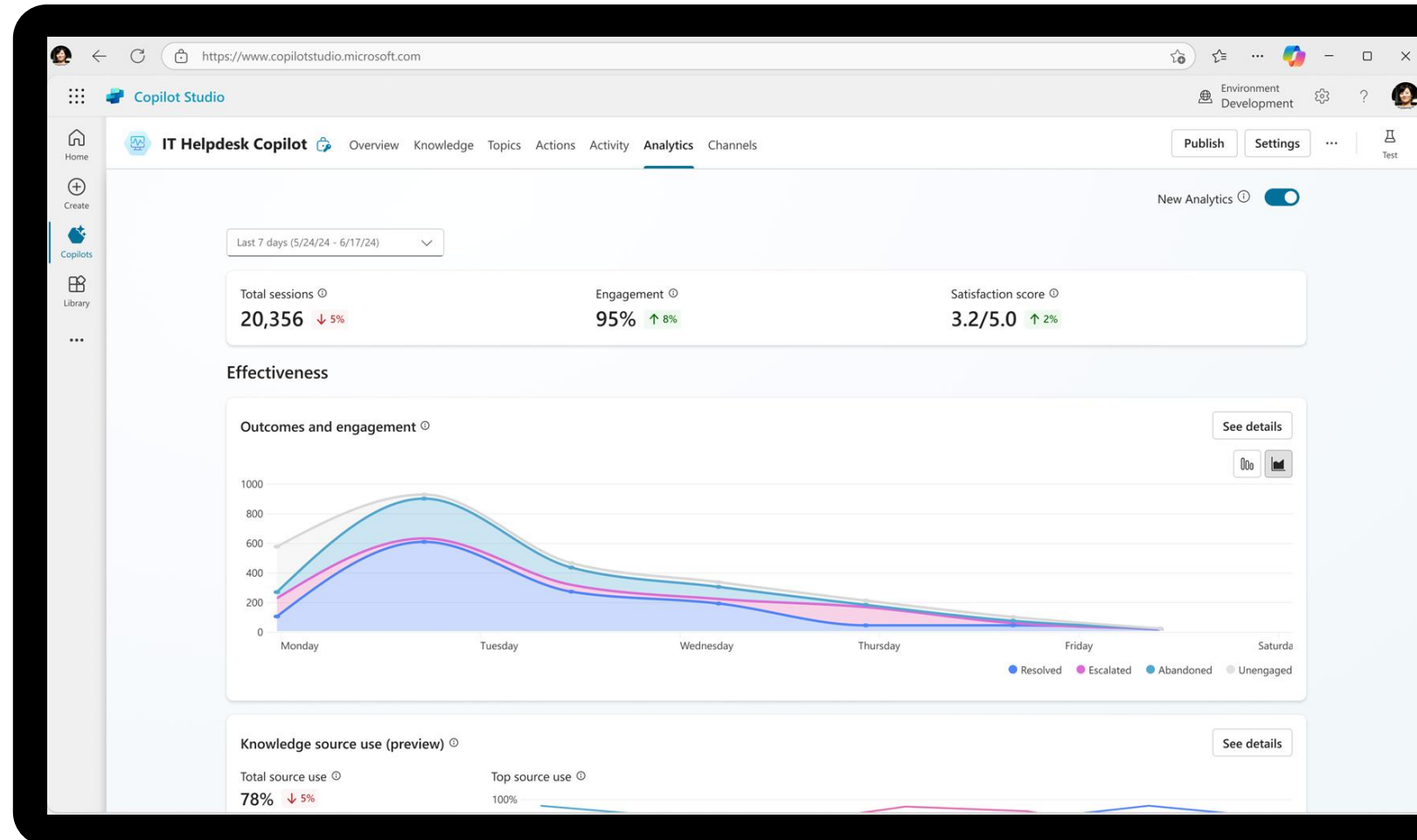
Preview

See which topics are having the greatest impact on **escalation, abandon** and **resolution rates**.

Quickly gain a sense of the **most common questions** your users are asking your agent.

Get access to detailed **CSAT data, user feedback, knowledge sources used** and more.

Identify where your agent **didn't successfully return an answer** so you can fill in the gaps.



# Manage securely across channels

---

## Get the benefits of a global SaaS platform

Eliminate infrastructure concerns, scale securely, and simplify management and governance with unified controls.

## Ensure your agent is compliant

Meet the necessary regulatory standards for your area or industry like GDPR, HIPAA, HITRUST, FedRAMP, PCI, SOC, ISO and more.

## Safeguard your data

Deploy with confidence with automatic enterprise-grade data encryption, data loss prevention policies, and privacy standards.

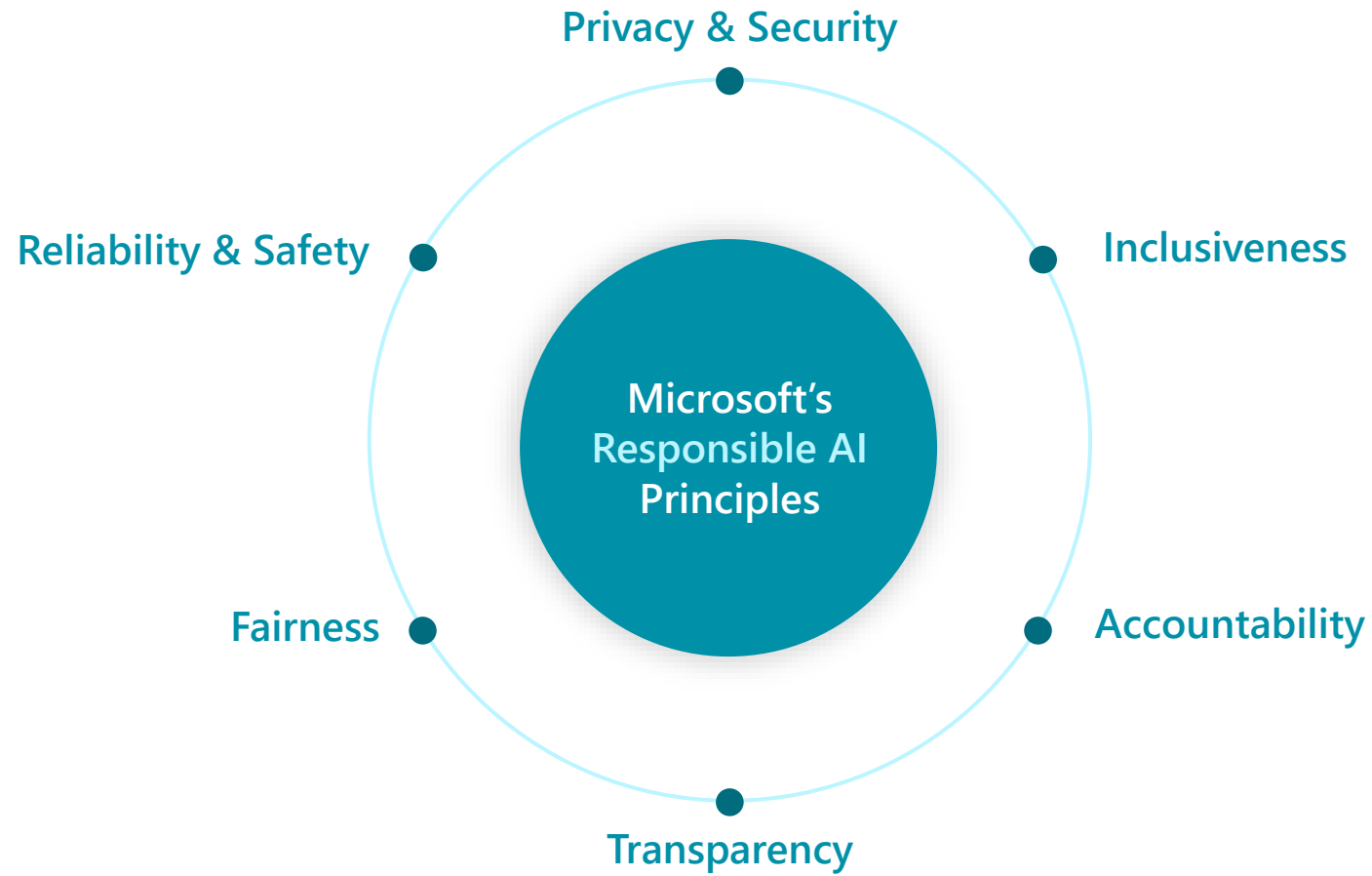
## Govern at scale

Track and manage agents and users across the full lifecycle, control access, monitor usage, and set policies to protect sensitive data.

## Use AI responsibly

All generative AI features are aligned to Microsoft's responsible AI principles and protects against AI risks like prompt injection.

# Responsible AI

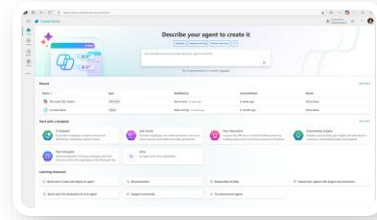
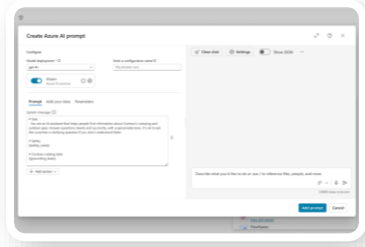


## Building blocks to enact principles

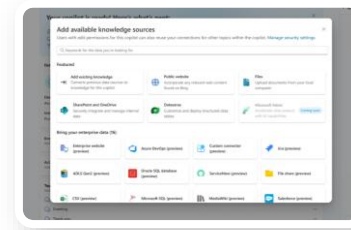


**Design, enhance, and manage agents**  
Build an agent and go live quickly, all from one easy-to-use, E2E SaaS product

**Integrate with AI services**  
Integrate with **Azure AI Studio**, **Azure Cog Services**, **Bot Framework** and other Microsoft conversational services

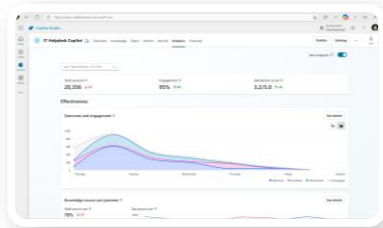


**Build & Publish**



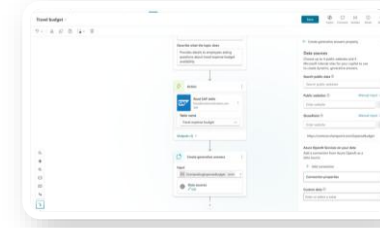
**Chat over knowledge with gen AI**  
Get enterprise-specific answers using your files, websites, **Dataverse**, **third-party apps** and more

**Monitor and improve**  
Access rich out-of-the-box insights and analytics

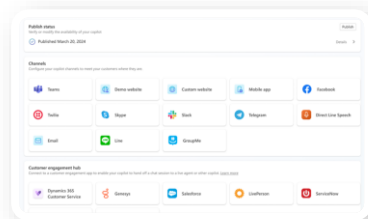


**Copilot Studio**

**Create specific topics**  
Supplement gen AI responses with **specific, curated topics** for when you want more control



**Publish to multiple channels**  
Publish in **20+ languages** and deploy to your channel of choice with a single click, including **Microsoft 365 Copilot**



**Analyze & Improve**

**Build actions**  
Create actions and use **pre-built connectors** or **Power Automate** to call your backends and APIs or complete long-running tasks

