



Email Classification & Task Planner

Copilot



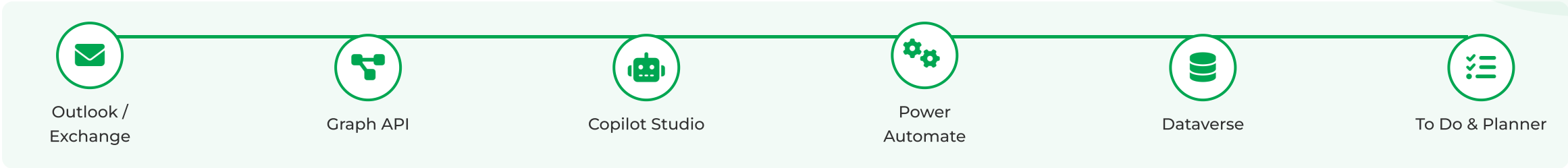
Streamline your workflow with AI-powered email classification and intelligent task planning

Email Classification & Task Planner Copilot



Objective	Approach	Key Highlights	Expected Outcomes
● Streamline email management by automatically classifying messages and generating actionable task plans. ● Convert unstructured email content into organized workflows. ● Reduce time spent sorting, tracking, and assigning follow-up actions.	Built using Copilot Studio + Power Automate + Outlook + Dataverse: ● Process and analyze immediate email body using AI classification ● Rule-based tags (priority, topic, sender) ● Auto-tag and route emails to relevant workspaces ● Create follow-up tasks, reminders, or approvals in Planner / Teams / Dataverse ● Continuously refines classification accuracy through feedback loops	● Intelligent email sorting and auto-labeling (priority, topic, sender). ● Task creation and assignment directly from email context. ● Seamless integration with Microsoft To Do, Planner, and Dataverse. ● Works across desktop, Outlook web, and Teams Copilot.	● 75% faster email triage and task creation. ● Fewer missed follow-ups and delayed responses. ● Improved collaboration across departments. ● Real-time visibility into pending tasks and priorities.

Technical Architecture & Deployment — Copilot Studio, Graph API, Power Platform



Core Components

**Copilot Studio**
Prompt flows, grounding, action plugins to trigger Power Automate and Dataverse operations

**Microsoft Graph API**
Secure access to Outlook mail, users, Planner, To Do with incremental sync and webhooks

**Power Platform**
Power Automate for classification and routing; Dataverse for metadata, tagging, and audit

**Integrations**
Microsoft To Do, Planner, Dynamics 365 (optional), Teams Copilot surfaces

Deployment Workflow

1

Prerequisites: M365 tenant with Copilot, Exchange Online, Power Platform environment with Dataverse; DLP policies defined

2

Provision solution: Import managed Power Platform solution (tables, flows, Copilot Studio assets), configure Graph permissions and app registration

3

Configure classifiers: Tags (priority, topic, sender) and intent mapping; enable feedback loops to improve accuracy

4

Pilot → rollout: Pilot with selected mailboxes, monitor in Dataverse dashboards, then scale to departments

Security & Governance

 Entra ID app registration with least-privilege Graph scopes; conditional access and MFA

 Data stored in Microsoft 365/Dataverse with role-based security and audit logs

 DLP policies, tenant isolation, and environment routing for production vs. dev

Implementation Details

- Multi-model AI system: Uses GPT-4 for extraction, custom models for classification
- Prompt engineering for business context awareness and sensitive data handling
- Auto-syncing task assignments between Planner, To Do, and Dynamics 365
- Real-time notifications through Teams and Outlook Actionable Messages
- Telemetry dashboards for monitoring classification accuracy and usage
- User feedback mechanism that improves classification models over time

Contact Information



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