

# Lab 01: Create a smart custom copilot using your website data

Hands-on lab step-by-step

March 2024

Microsoft Copilot Studio Workshop

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# Microsoft Copilot Studio

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# Goals for this lab

After this lab you will be able to:

- Access the Copilot Studio authoring experience.
- Create a new custom copilot.
- Make your bot instantly smart by pointing to your website.
- Set advanced creation options

The time to complete this lab is [5] minutes.

# **Prerequisites**

Please note that some labs, especially later labs, do reference previous labs in reference to capabilities and previous tasks. The labs have been designed so as long you have access to a Microsoft Copilot Studio trial. You can get started from most lab without having to complete the previous module to be able to move forward. However, for the best experience that shows the features and functionality that is possible within the product, it is recommended you have completed specific modules before starting some of the labs.

For Lab 01: Create a smart custom copilot using your website data, you need:

- A computer with internet access.
- Be able to log into any Microsoft tenant (some companies enforce users to only connect to their company tenant).

# Exercise 1: Log into Microsoft Copilot Studio

In this exercise, you will use the provided credentials to log into the Microsoft Copilot Studio authoring experience.

### Task 1: setup your browser experience

To avoid conflicting with your existing logged-in experiences, you can do these labs by using **one** of these 3 options:

1. **Set up a new work profile** specific to that workshop

# Exercise 2: Create a copilot

## Task 1: provide a name, language, and website

- 1. If you don't have any existing copilot, you'll be automatically redirected to the creation experience.
- 2. Give your copilot a name, for example 'Microsoft Store'
- 3. Choose the base language of your bot, for example English (United States) (en-us)

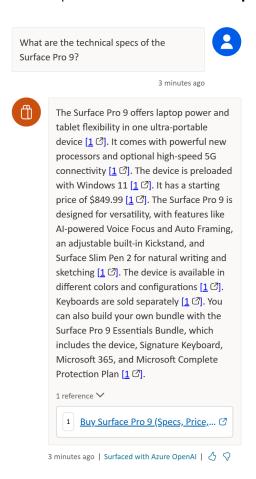
# Task 2: edit advanced options

- 1. Choose a copilot **icon** or upload a new one.
- 2. Uncheck 'Include lesson topics, as they won't be necessary in the lab.
- 3. If desired, select a **solution**.

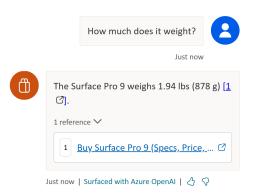
# Exercise 3: Test your copilot

### Task 1: ask questions to your copilot

In the test pane, ask your copilot a question for each the answer exists on the configured website.
For example: "What are the technical specs of the Surface Pro 9?"



2. As context is preserved automatically between questions, ask it follow up questions. For example: "**How much does it weight?**"



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