

- 03 -

Creating a custom agent
from a prebuilt template
in Copilot Studio



MONTHLY MASTERY

FEATURE-A-DAY

with Copilot Studio



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Katerina Chernevskaya



Prebuilt agents

Overview

In Copilot Studio, a **Prebuilt agent** is a predefined framework that helps you quickly create and deploy agents.

Templates offer a starting point, providing ready-made components that can easily be customized to fit your needs.

Think of it as a guide for creating an AI helper, much like following a recipe to bake your favorite Christmas treat.



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Prebuilt agents

Available options

Custom agents:

- Team Navigator Agent
- Safe Travels Agent
- Store Operations Agent
- Sustainability Insights
- Voice Agent
- Weather Agent
- Wellness Check
- Awards and Recognition Agent
- Inclusivity Agent
- Case Management Agent
- IT Helpdesk Agent
- Leave Management Agent
- Financial Insights Agent
- Citizen Services Agent

Microsoft 365 Copilot agent:

- Self-Help Agent
- Benefits Agent



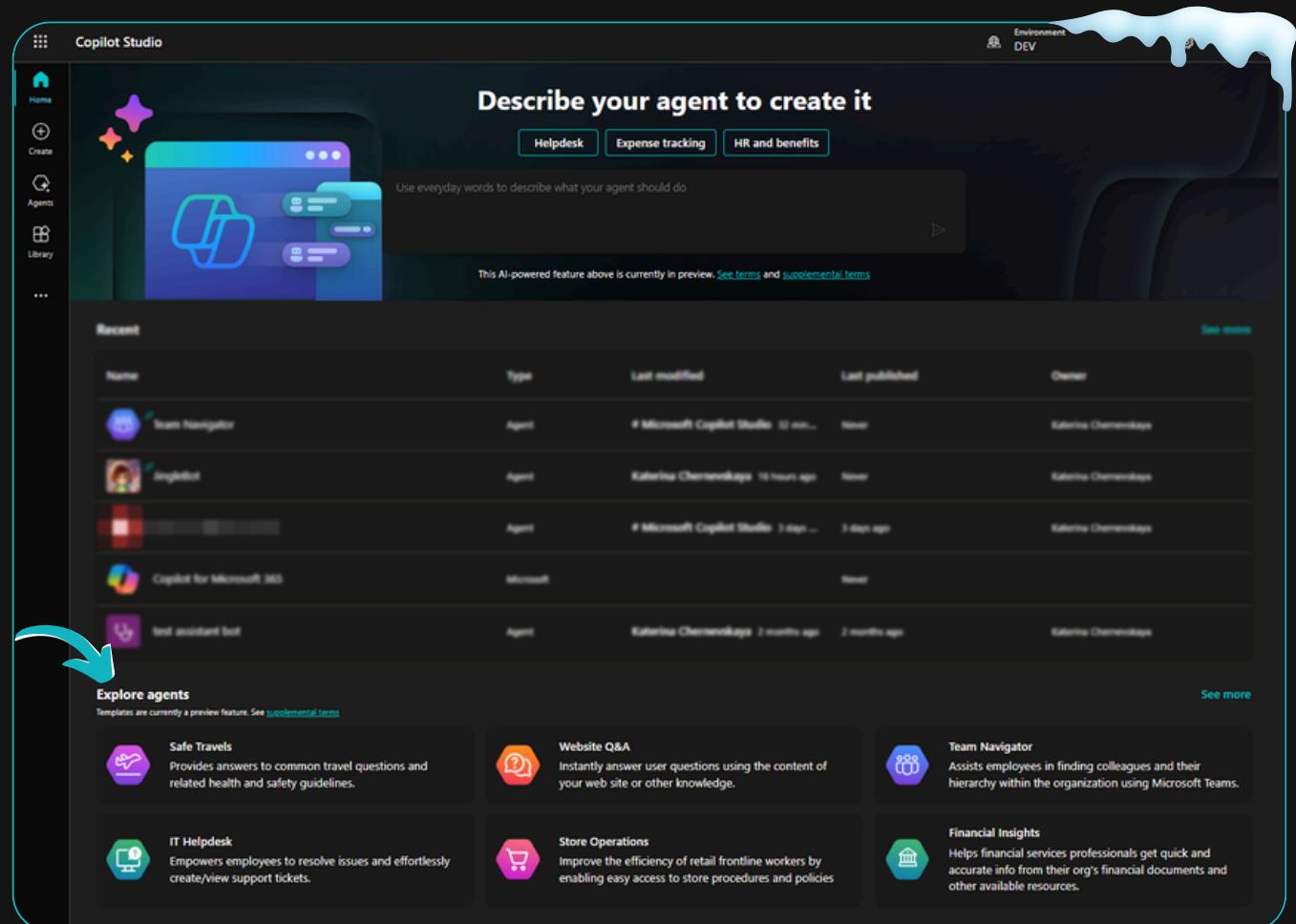
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Create Prebuilt agent

Select agent

1. Open Copilot Studio and head over to the **Explore agents** section. Here, you'll find a variety of templates to choose from.



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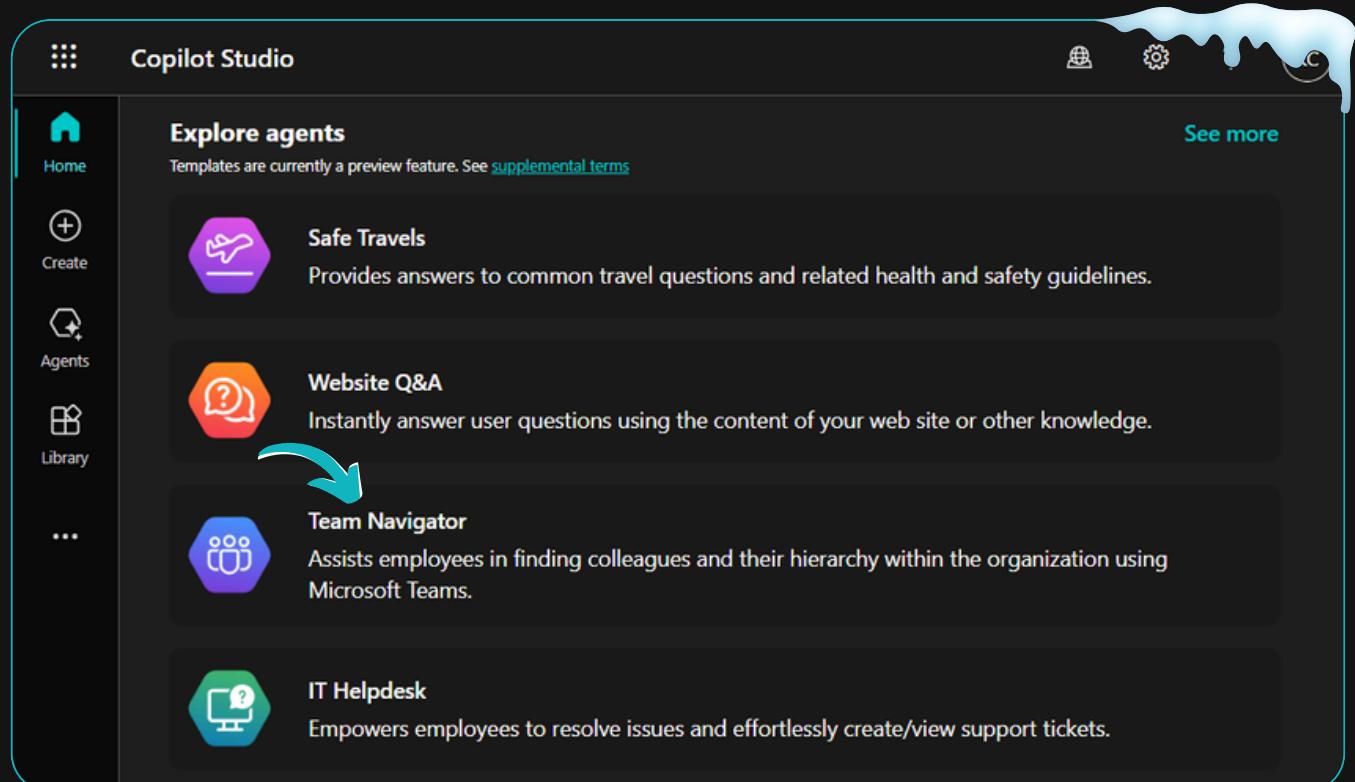


Create Prebuilt agent

Select agent

2. **Browse** through available options and **select** the prebuilt agent that suits your needs.

We select **Teams Navigator**.



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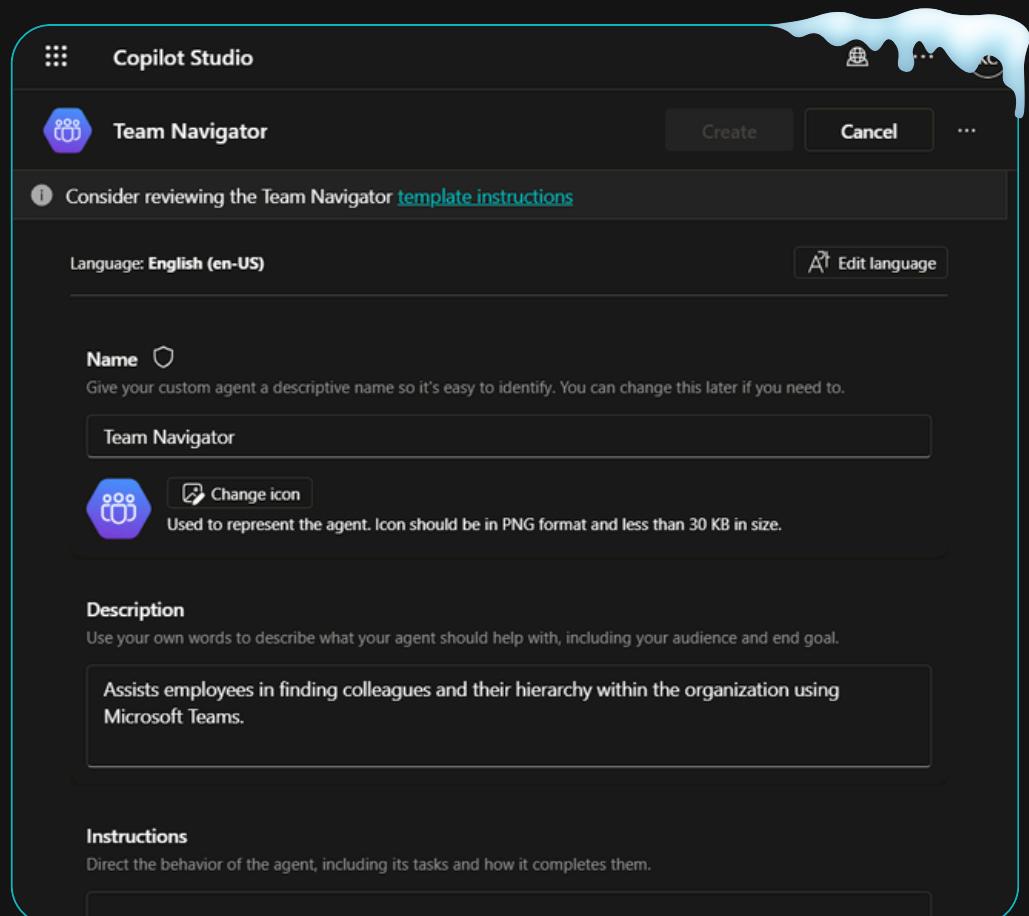


Create Prebuilt agent

Personalize agent

3. Once you've selected a prebuilt agent, **personalize it**.

Update settings such as the agent's name, purpose, and any specific configurations your organization might need.



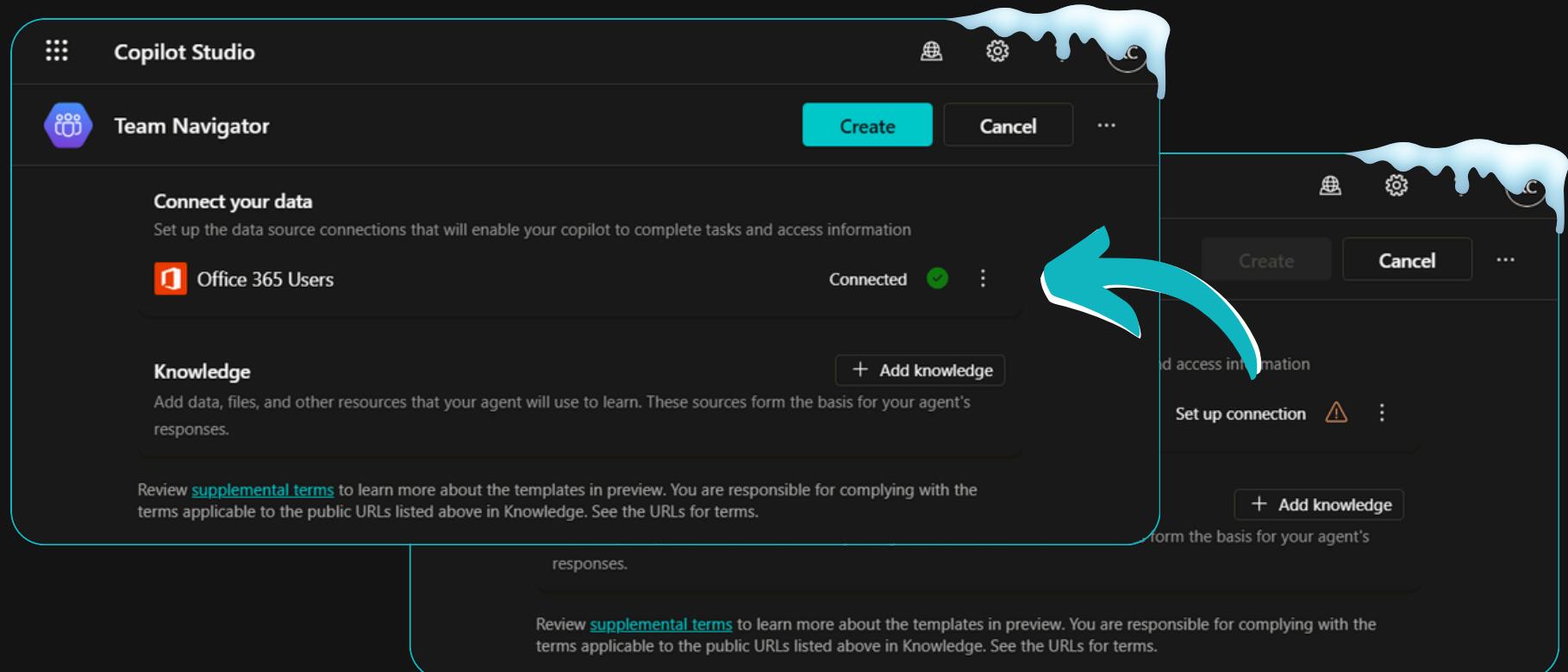
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Create Prebuilt agent

Configure connection

4. Configure the data source connections that will enable your agent to access information and complete tasks effectively.



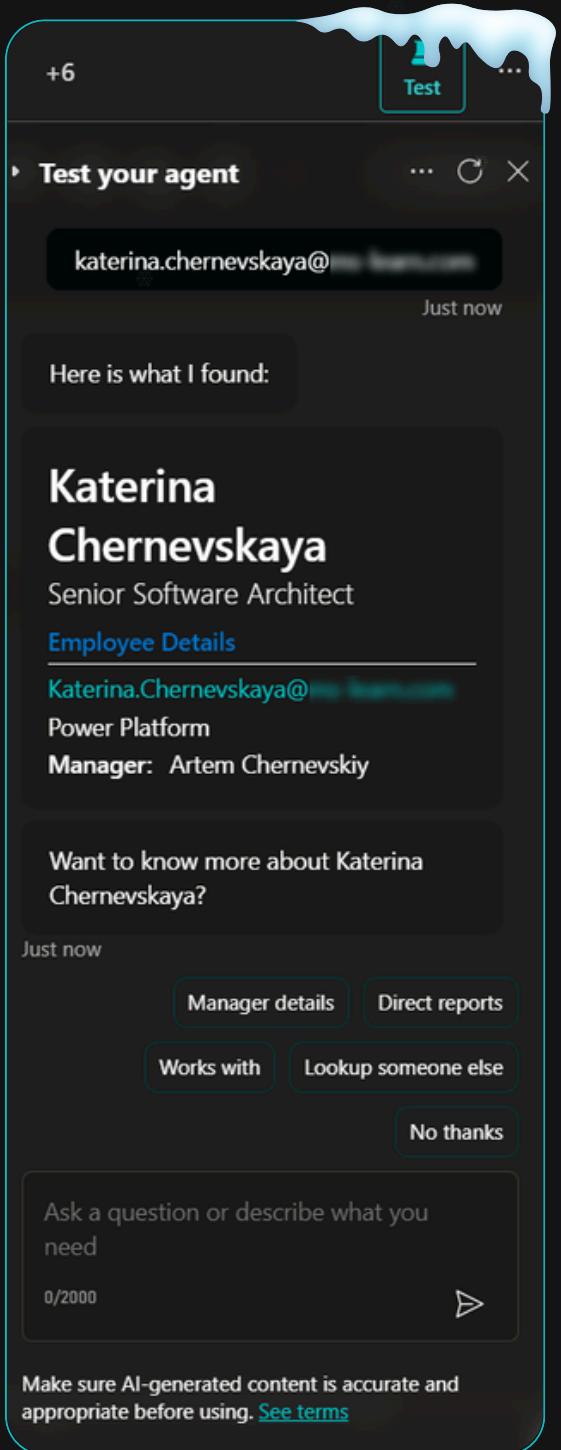
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Create Prebuilt agent

Test agent

5. Use **Test** tool to ensure everything works smoothly.

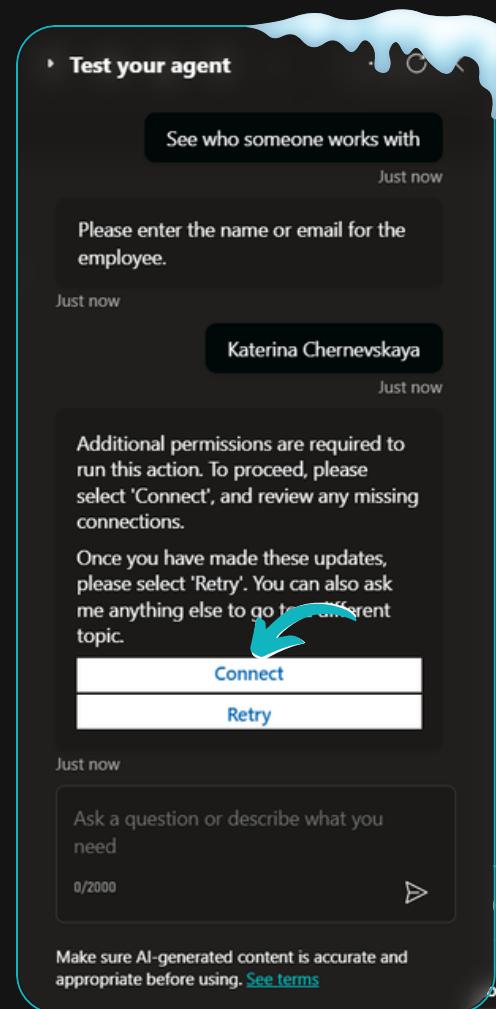


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Create Prebuilt agent

Test agent



- 6. In additional permissions are required, select **Connect** in the Test chat pane.

Use **Connect** option to configure the connection.

A screenshot of the 'Your connections' page in Microsoft Teams. The page shows a list of connections with columns for Name, Used By, and Status. One connection is listed as 'Not Connected' with a 'Connect' button next to it. Another connection is listed as 'Connected' with a 'Manage' button next to it. A blue arrow points to the 'Not Connected' status of the first connection, and another blue arrow points to the 'Connected' status of the second connection.



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Prebuilt agents

Benefits

Speed and simplicity

Prebuilt agents make creating agents fast, without needing to start from scratch.

Customization

Templates offer a great balance between ready-to-use solutions and customization options, helping you adapt to specific needs without much hassle.

Consistency

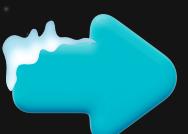
By using predefined structures, you maintain consistency across agents.

Guided setup

They serve as a guide, ensuring you don't miss any crucial steps, like following a checklist to prepare for Christmas dinner.



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Today's Task: Create a custom agent from prebuilt template



1. Explore Prebuilt agents

Open Copilot Studio and explore the available templates.

2. Create an agent from prebuilt samples

Using one of the prebuilt agents, create your own agent. Customize its name and purpose to familiarize yourself with the process.

3. Write down customization Ideas

Think of 2-3 use cases specific to your business and note how you could adapt a prebuilt agent to suit those needs.



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