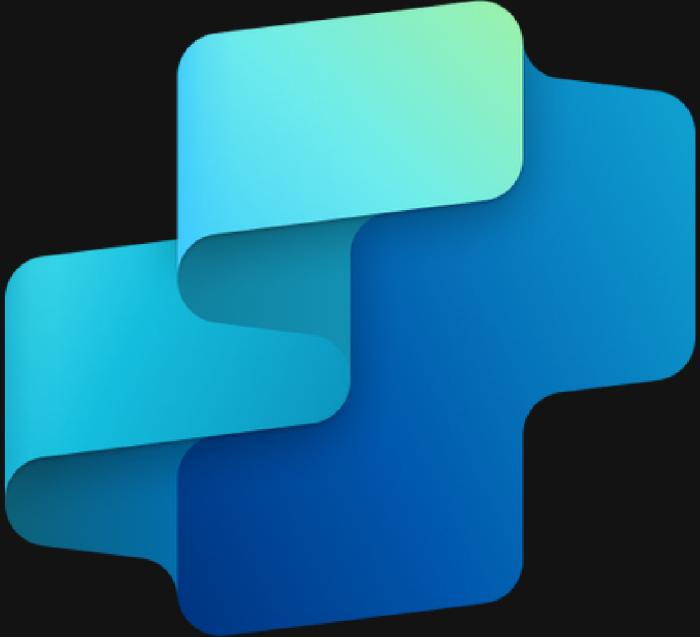


- 09 -

Guiding Your Copilot: Crafting Customized Prompts



MONTHLY MASTERY

FEATURE-A-DAY

with Copilot Studio



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Custom Instructions (preview)

Beyond the basic setup of the [Generative Answer](#) node, there's a nifty advanced feature for personalizing your Copilot: [Custom Instructions](#).

This powerful tool allows you to [guide](#) your Copilot's responses more precisely. You can input context, specific guidelines, or even mold its conversational tone to suit your needs.

It's like giving your Copilot a set of [detailed directions](#), ensuring it navigates the conversational landscape just the way you want it to.



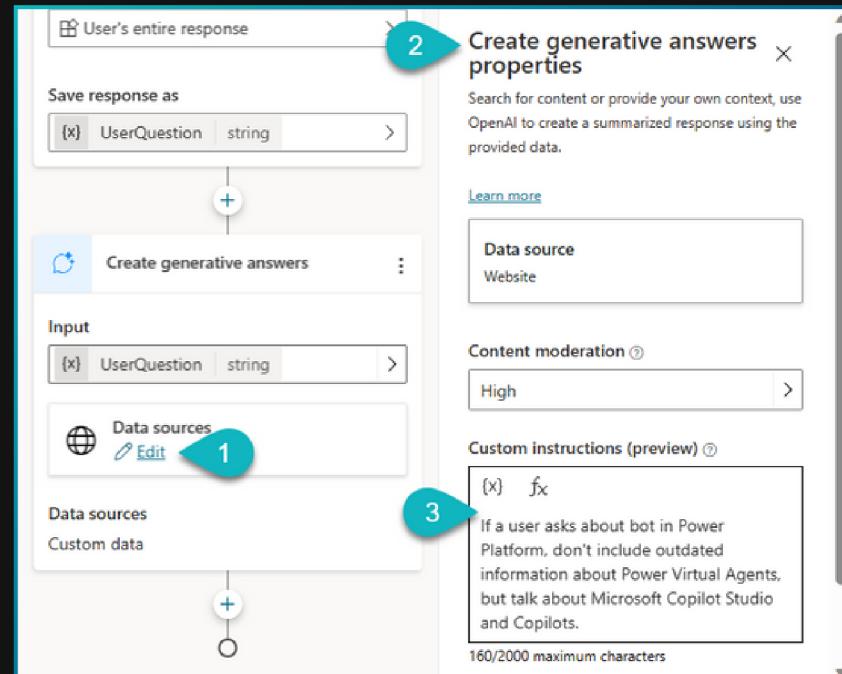
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Custom Instructions Configuration

To customize your Copilot with specific instructions:

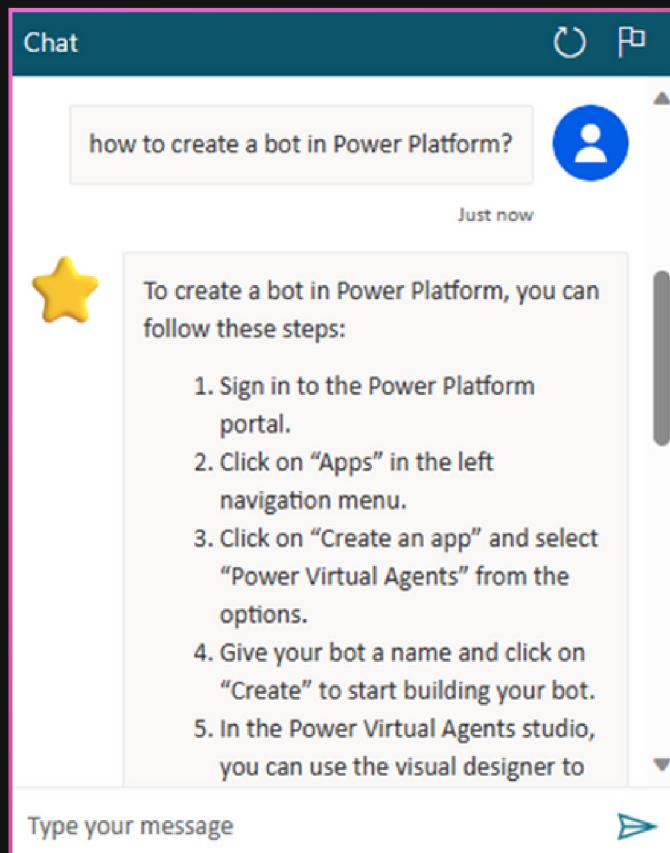
1. In the **Generative Answer** node of your chosen topic, click **Edit**
2. Access the **Create generative answers** properties by clicking **Back** in the right pane
3. Enter your custom guidelines in the **Custom instructions (preview)** field
4. Test out your Copilot to observe the impact of these instructions on its behavior



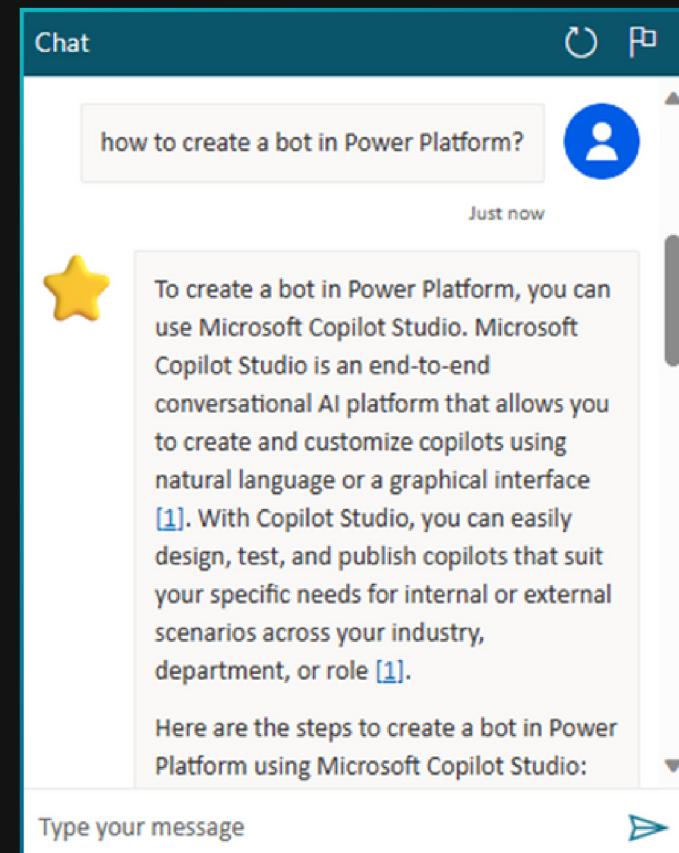
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Custom Instructions Before & After



Without instructions



With instructions

Instruction:

If a user asks about bot in Power Platform, don't include outdated information about Power Virtual Agents, but talk about Microsoft Copilot Studio and Copilots.



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Custom Instructions

Best Practices

To optimize your Copilot's performance with custom instructions:

- **Be Precise:** Ensure instructions are clear and specific to avoid ambiguity
- **Illustrate with Examples:** Use examples to clarify your expectations and aid accurate response generation
- **Simplicity is Key:** Keep instructions straightforward without overcomplicating
- **Plan for Alternatives:** Include fallback options for scenarios the Copilot can't handle, like a default 'not found' response
- **Test and Tweak:** Regularly test and refine your instructions for better accuracy and effectiveness



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Custom Instructions Capabilities & Boundaries

- Variables

Store and reuse user responses in conversations for tailored Copilot interactions



- Functions

Implement Power Fx to add logical structures within prompt instructions



- Character Limit

Prompt instructions have a **2,000-character cap**



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Custom Instructions

Power Fx Magic

Let's roll up our sleeves and get to work – or rather, let Power Fx do the heavy lifting. Here's our game plan:

1. We grab the user's query and tuck it safely in a variable we'll call `UserQuestion`
2. Next, we'll engage the user to specify their preference for the type of response they need: a **general** overview or detailed `step-by-step` instructions. We'll store the selected value in a variable `InstructionFormat`
3. Leveraging the power of `Power Fx`, we'll then dynamically construct a tailored instruction set for our copilot based on the user's selection.



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Custom Instructions Power Fx Magic

Custom instructions (preview) ⓘ

```
{x} fx
fx Concatenate( "Find articles " & Global.UserQuestion)
```

```
1 Concatenate(
2   "Find articles related to """",
3   Global.UserQuestion,
4   "' for the user's question.'",
5   If(
6     Global.InstructionFormat = "General",
7     "Provide a highlevel short overview, plain text. 2-3
sentences.",
8     " Format the response as a series of steps, starting
each step with 'Step 1:', 'Step 2:', etc. Don't use
numbered lists."
9   )
10 )
```



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Custom Instructions Power Fx Magic

Question:
What is Power Apps?

The image displays two side-by-side screenshots of a Microsoft Teams chat window. Both screenshots show a message from 'General' (Just now) and a reply from 'Step-by-step' (Just now). A purple arrow points from the 'General' message to the 'Step-by-step' message, indicating a transformation or customization.

General Message:

Power Apps is an enterprise service that allows users to connect, create, and share business apps on any device [1 ⓘ]. It enables employees to quickly create apps using a Microsoft Office-like experience and templates [1 ⓘ]. Power Apps can be connected to various cloud services such as Office 365, Dynamics CRM, Salesforce, and more [1 ⓘ]. It also allows users to share apps with their colleagues by simply typing an email address [1 ⓘ]. For developers and IT professionals, Power Apps includes Azure App Service for faster app deployment [1 ⓘ]. Overall, Power Apps empowers organizations to increase business agility and drive digital transformation [1 ⓘ].

1 reference ▾

1 Introducing Microsoft PowerA... ↗

Just now | Surfaced with Azure OpenAI | ⏪ ⏹

Type your message ➤

Step-by-step Message:

Step 1: Power Apps is a service provided by Microsoft that allows users to build and use custom business applications that connect to their data and work across the web and mobile platforms [1 ⓘ].

Step 2: To get started with Power Apps, you can sign in or sign up for an account on the Power Apps website [1 ⓘ].

Step 3: Once you have access to Power Apps, you can browse through sample apps and services, and also download the Power Apps app for Windows, iOS, or Android [1 ⓘ].

Step 4: Power Apps provides documentation, support, and a community where you can give feedback and connect with other users [1 ⓘ].

Step 5: Power Apps offers a range of features and functionalities that allow you to create customized applications, integrate with other systems, and

Type your message ➤



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Custom Instructions Power Fx Magic

With the mighty **Power Fx** at our beck and call, we'll craft a custom-tailored set of instructions for our copilot, perfectly aligned with the user's choice.

Keep this in mind:
when weaving your Power Fx spells for Copilot instructions,
always opt for **Global variables** for any data
you want at your fingertips throughout the process.
It's the secret sauce for a smooth,
efficient workflow, ensuring
everything runs like
a well-oiled machine.



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Custom Instructions

Power Fx benefits

Integrating Power Fx and variables in custom instructions can significantly enhance your workflow.

- **Time Efficiency**

Streamlines processes by replacing multiple nodes with one dynamic expression

- **Dynamic Content**

Adapts instructions in real-time to user inputs or contextual changes

- **Reduced Complexity**

Simplifies logic and enhances readability with variables

- **Consistency and Accuracy**

Ensures uniform data usage, reducing errors



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Custom Instructions

Power Fx benefits

- Scalability

Facilitates easy updates and expansion of your application

- User Customization

Allows for personalized responses based on user preferences

- Easier Debugging

Simplifies troubleshooting with clear variable definitions

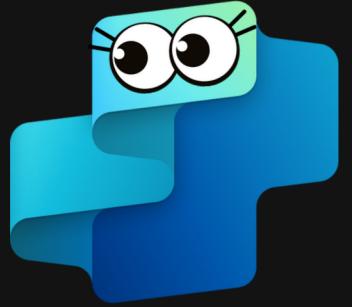
- Enhanced Data Handling

Efficiently manipulates data for sorting, filtering, and aggregation



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Today's Task: Fine-Tuning Copilot Interactions

1. Instruction Crafting and Testing

Add a text instructions for your Copilot. Test how well the AI understands and responds to these instructions.

2. Power Fx Enhancement

Augment your instructions by integrating Power Fx expressions and/or variables to make them more dynamic and context-aware.

3. Evaluate Your Enhanced Instructions

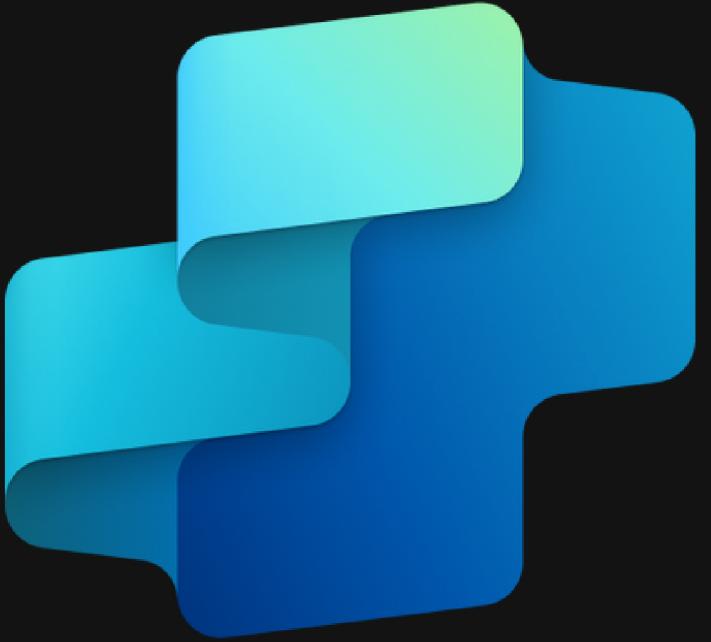
Put your enhanced instructions to the test.

Observe how the modifications improve the Copilot's output and fine-tune as necessary.



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