Copilot Studio and Azure AI Workshop

Lab 4: Deploying the Sales Buddy Agent.

Hands-on Lab Step-by-Step Guide

April 2025

Lab Overview and Pre-requisites

Learning Objectives

In this lab, participants will deploy the **Sales Buddy Agent** to **Microsoft Teams** and a **demo website**, enabling seamless collaboration and customer interaction.

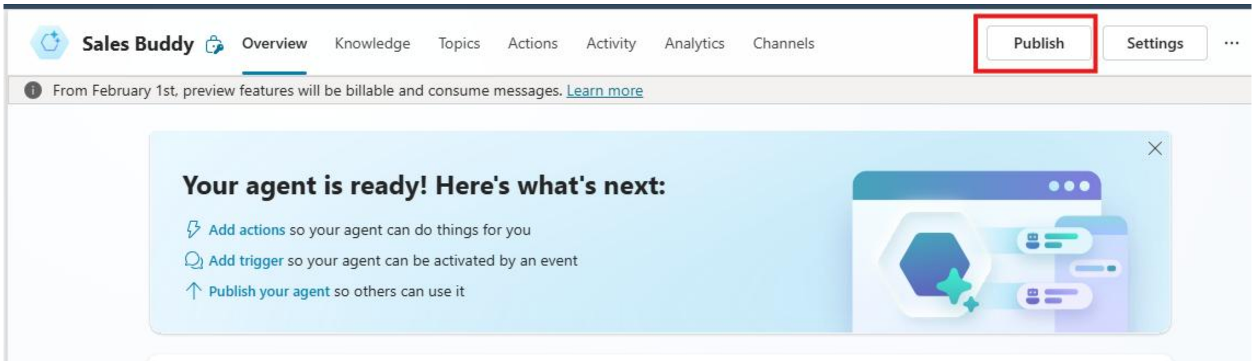
Pre-requisites

- You will need credentials to a demo tenant that has Copilot Studio and AI Builder trial enabled.
- You should have completed Lab 2
- Access to Lab 4 Assets folder

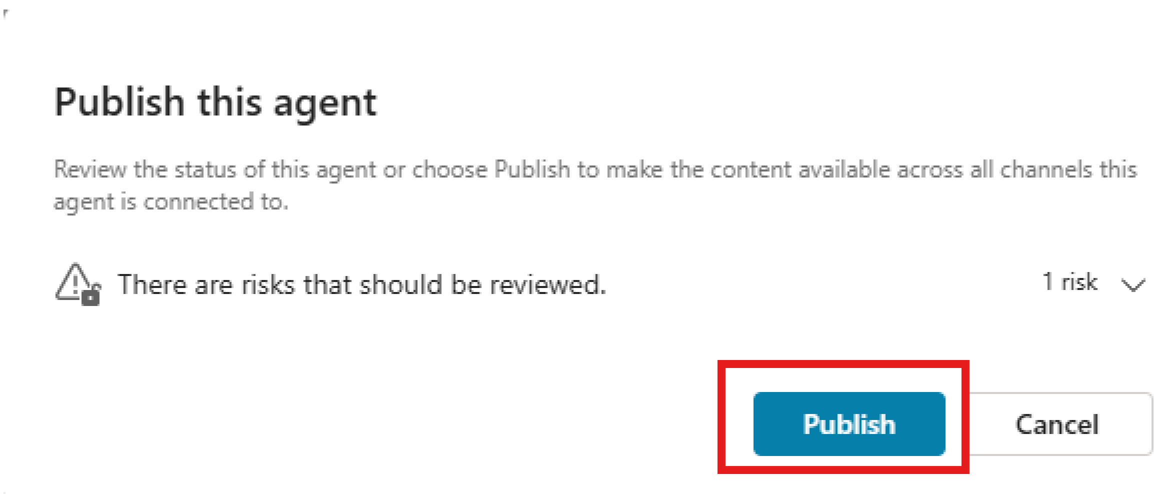
Lab 4: Deploying the Sales Buddy Agent.

>>Publish the Sales Buddy agent<<

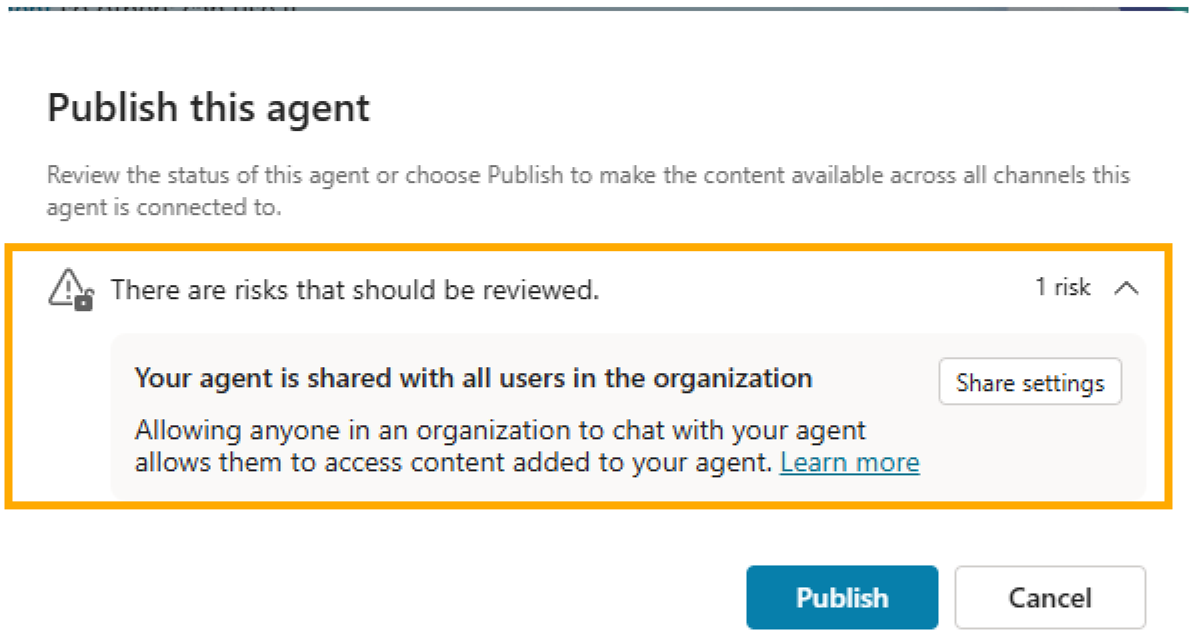
1. Login to Copilot Studio https://copilotstudio.microsoft.com/ and click on the Sales Buddy agent you have worked on. Click on Publish



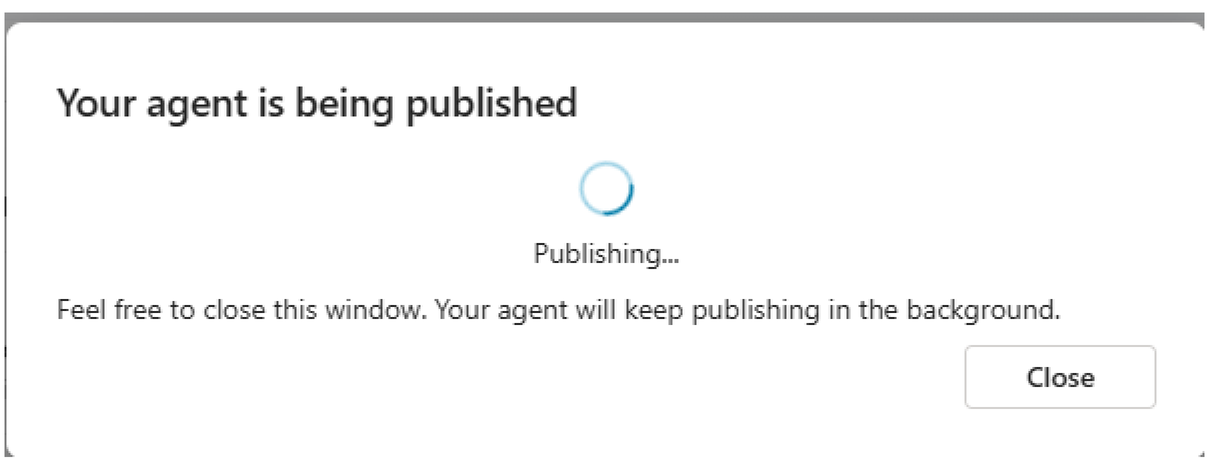
2. Click on Publish, again



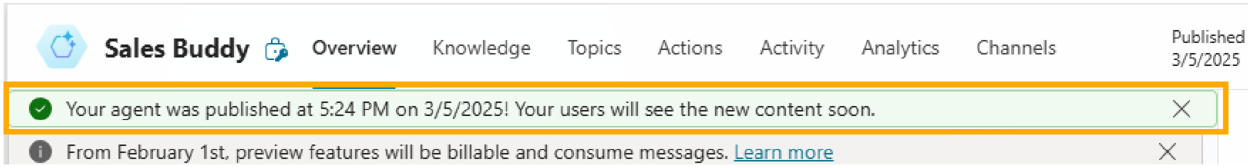
Just FYI: There might be risks, depending on the agent configuration. You can proceed and click on Publish



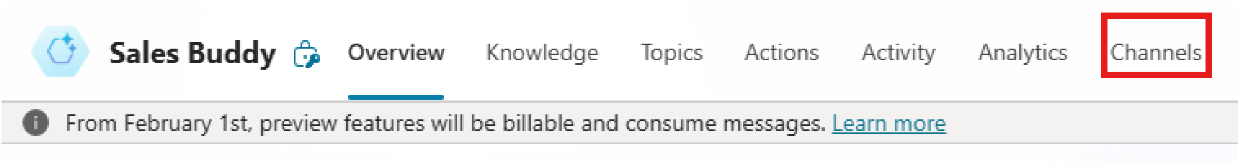
While the agent is being published, you can close the window. This will not impact the process.



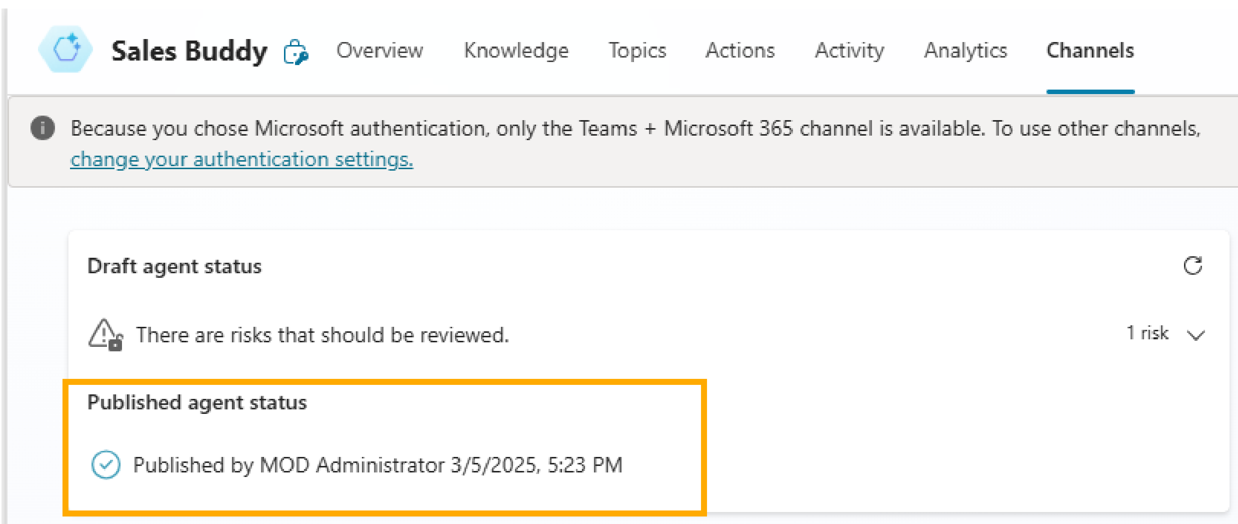
3. You will see confirmation that the agent is now published



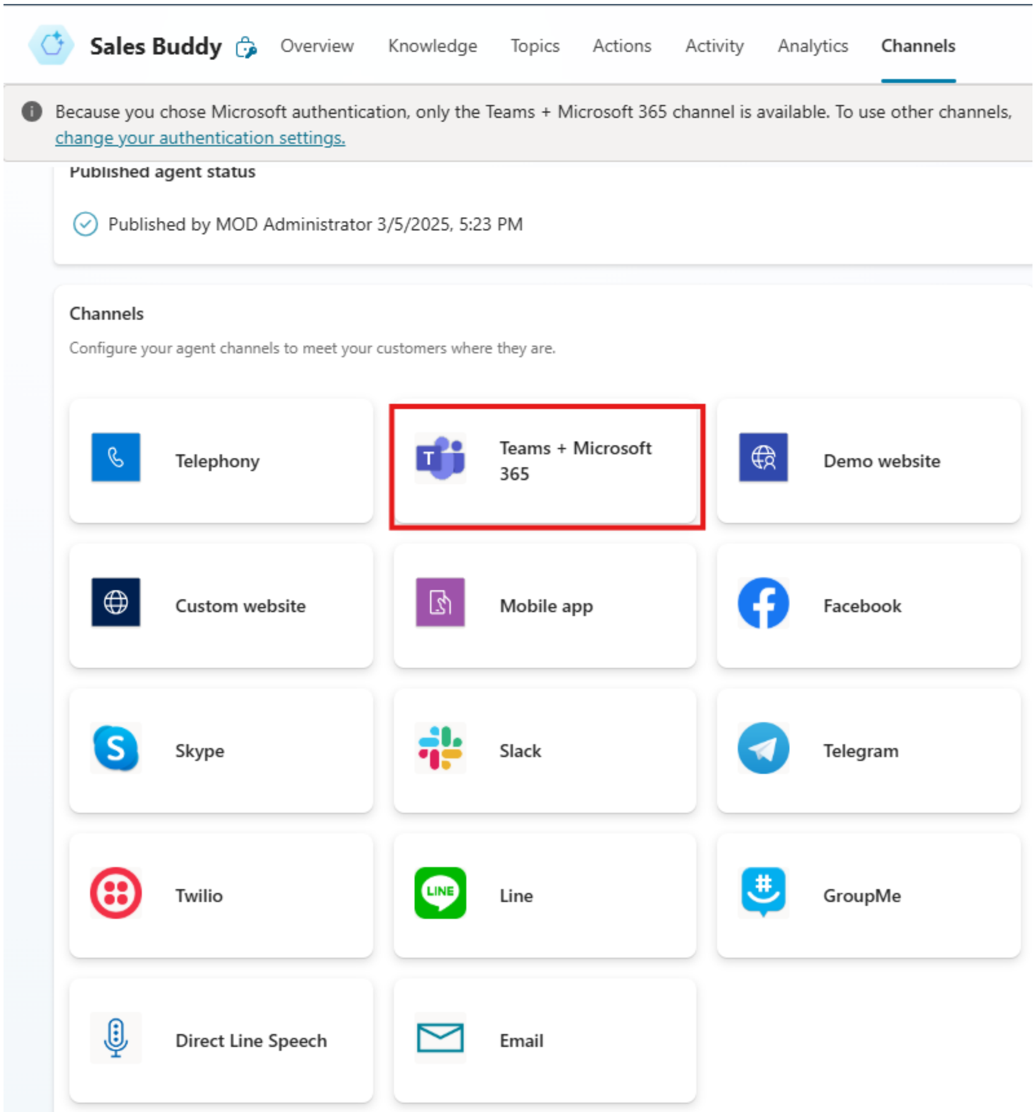
4. Click on **Channels**



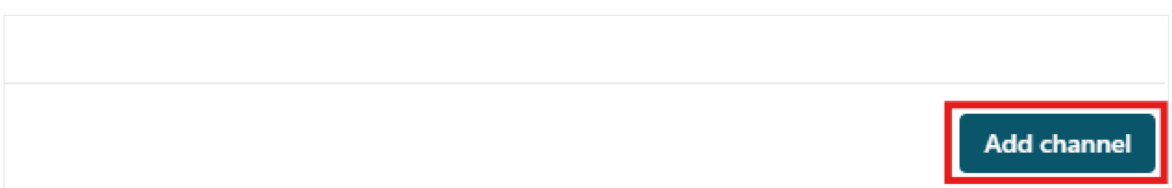
You will also see that the agent is published



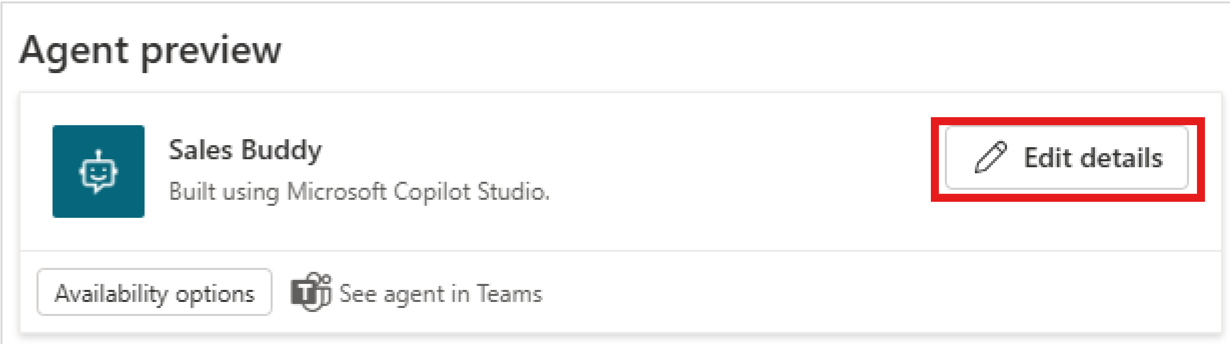
5. Scroll down and click on **Teams + Microsoft 365**



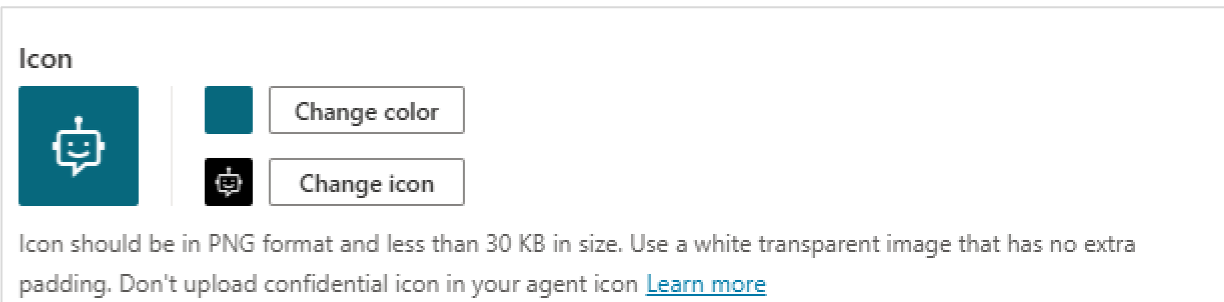
6. Click on Add Channel



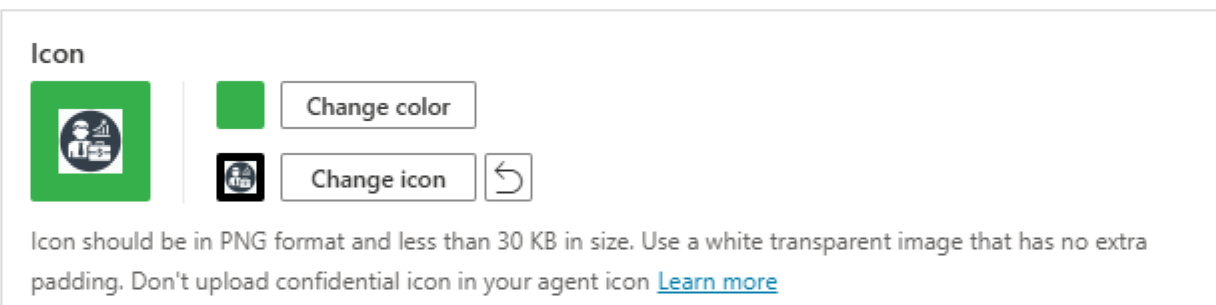
7. Here you have the chance to customize some aspects by clicking on **Edit Details**



8. You can change the color and Icon. Click **Change Icon** and upload the PNG file as Icon available in **Lab 4 Assets** folder. Click **Change Color** and select a new background color.

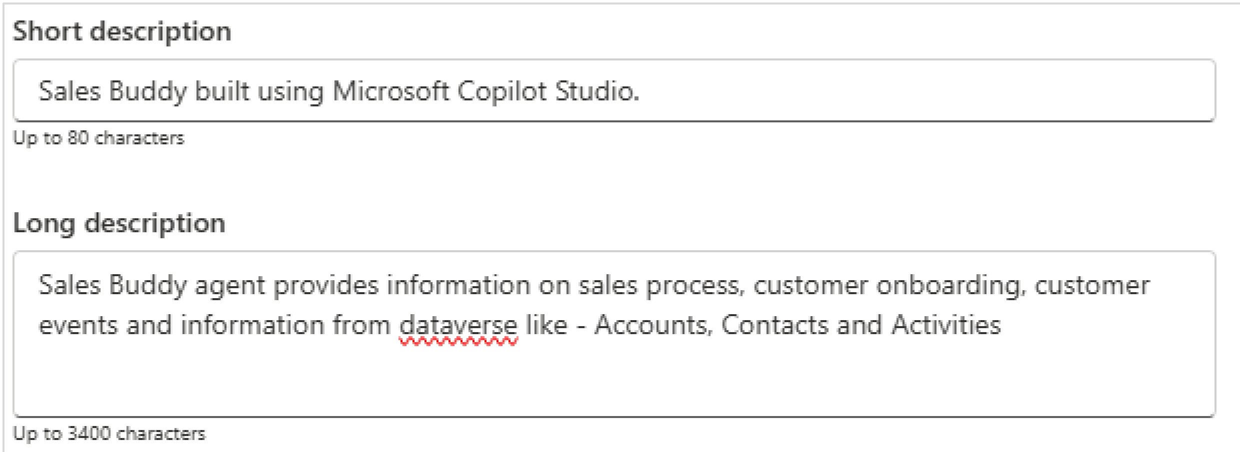


Example:

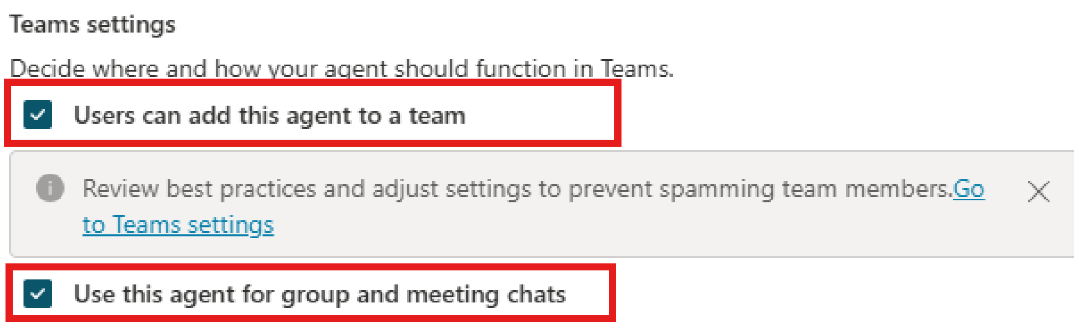


9. Provide **Short Description**: *Sales Buddy built using Microsoft Copilot Studio.*

   In the long description, you can use the same description as the initial one provided when the agent was created: *Sales Buddy agent provides information on sales process, customer onboarding, customer events and information from dataverse like - Accounts, Contacts and Activities*

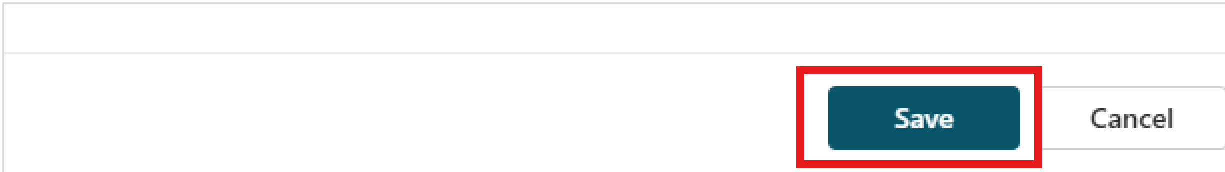


10. Select both: **Users can add this agent to a team** and **Use this agent for group and meeting chats**

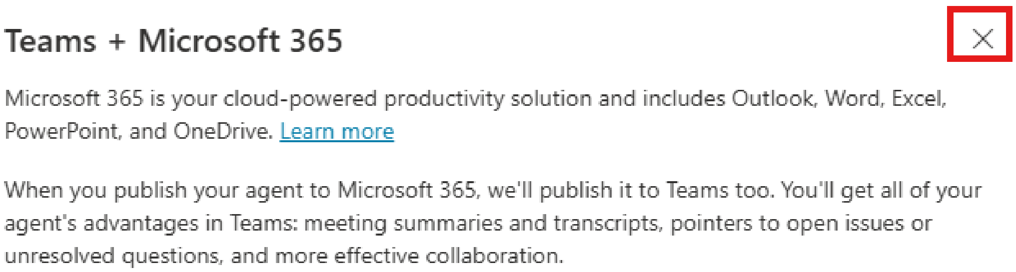


11. Click on **More** and Complete with your name

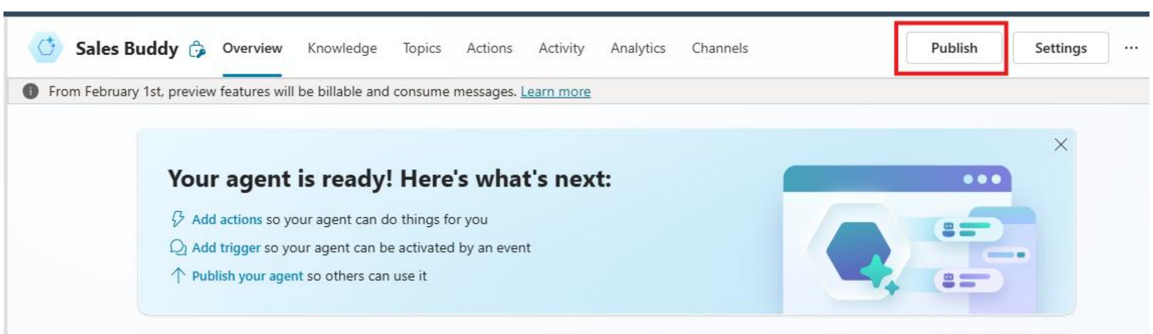
12. Click on **Save**



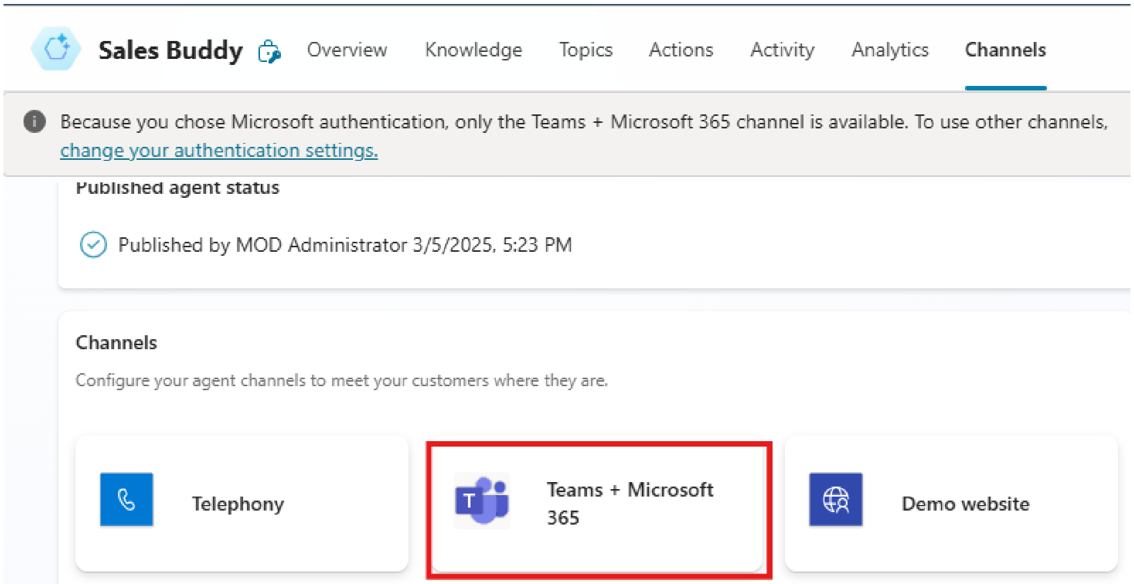
13. **Close** the Teams + M365 Channel



14. **Publish** the agent again (Steps 1 to 3)

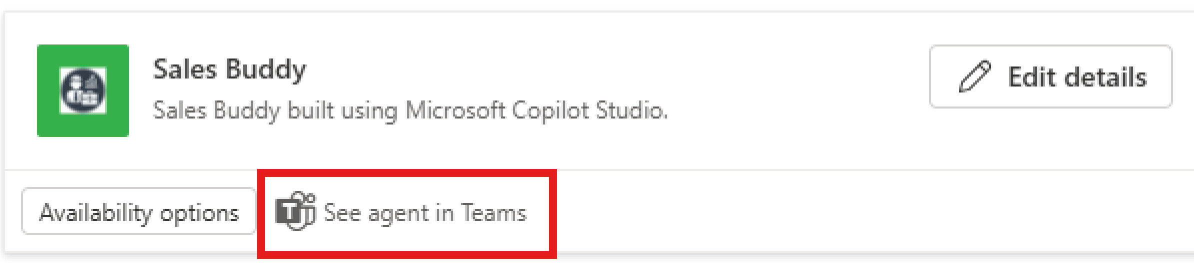


15. Go back to **Teams + M365 Channel**



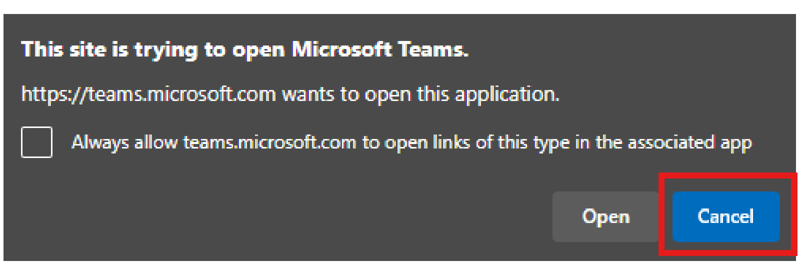
16. Click on See agent in Teams

    Important: This will show the agent in your Microsoft Teams app only. This will not make the agent available to anyone else. This step is useful for testing. We will cover how to make the agent available to the entire organization later in this guide

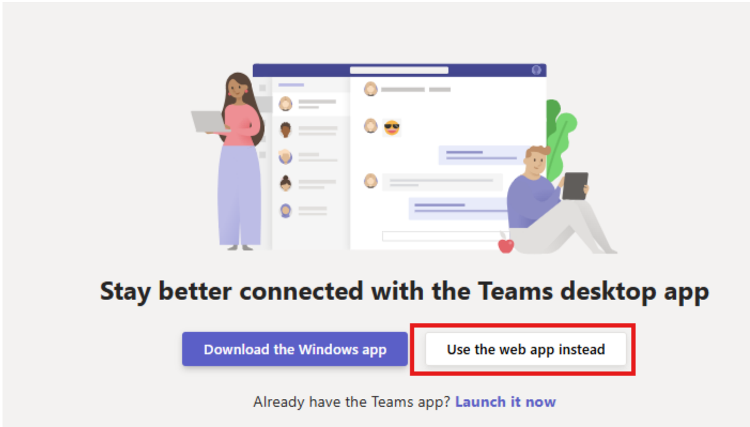


If it tries to open the Teams application, click Cancel to open Teams on web.

Note: In case you already have MS Teams app configured, you can proceed and use the application. Keeping the Teams on Edge will help you to save time if your Teams app is not installed and/or configured

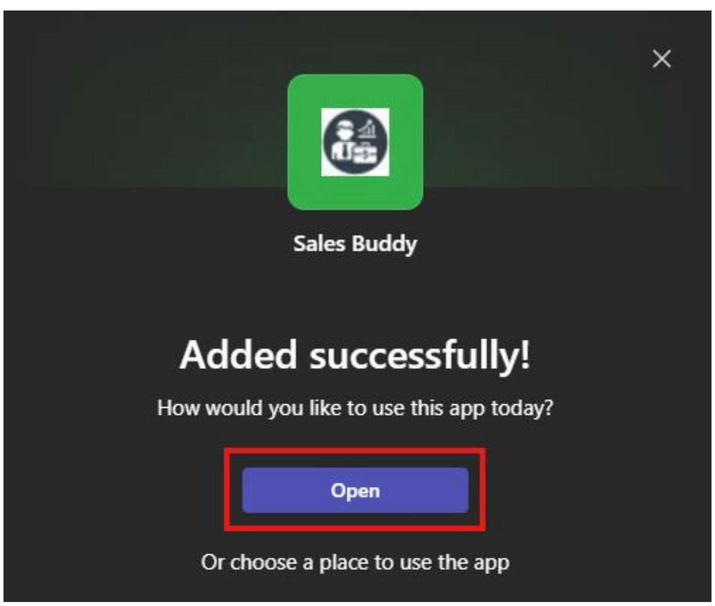


Click on Use the web app instead



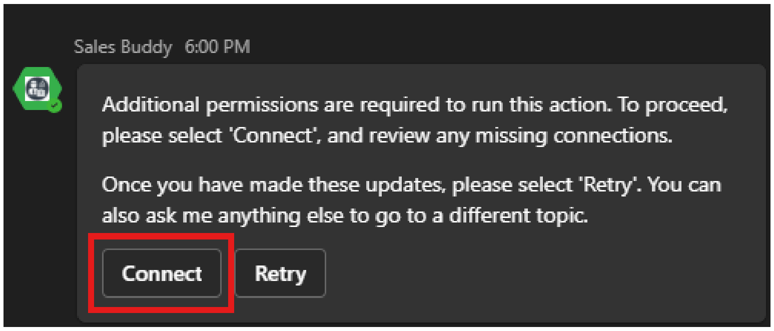
17. On MS Teams, click on Add

18. Then click on Open

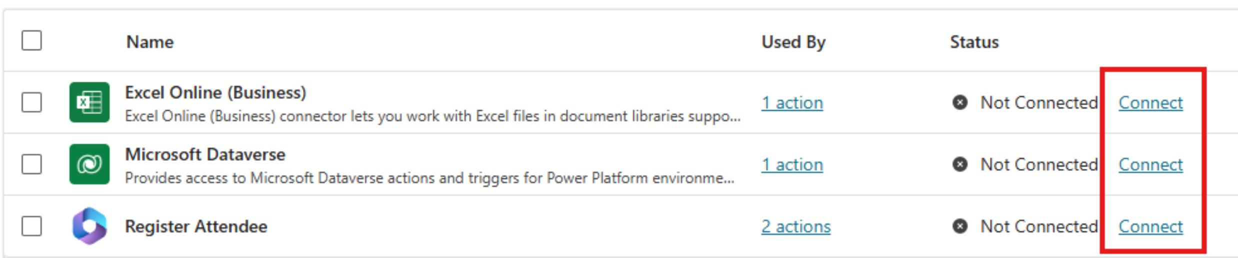


19. Now you have the agent ready on your MS Teams. You can ask questions like you did while testing on Copilot Studio

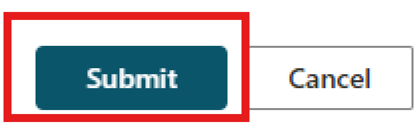
    For the first time, it might ask you to connect to access the connectors



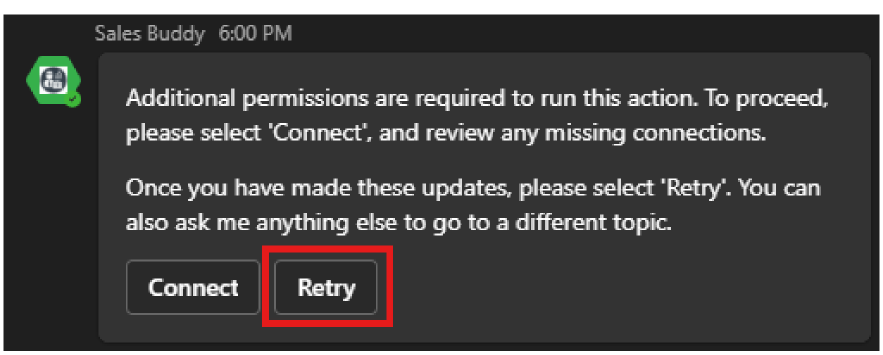
20. Click on each **connect** option



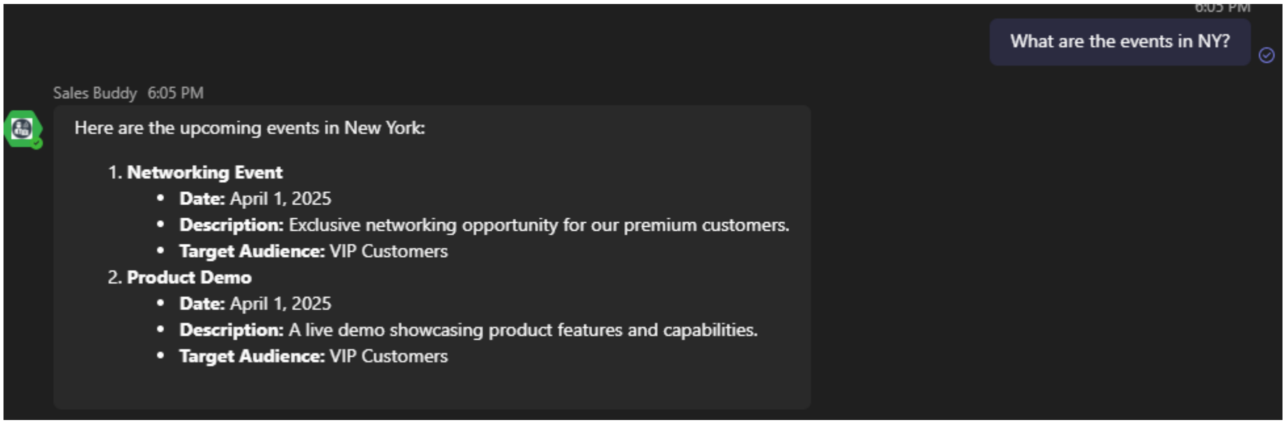
21. And then on **Submit**.



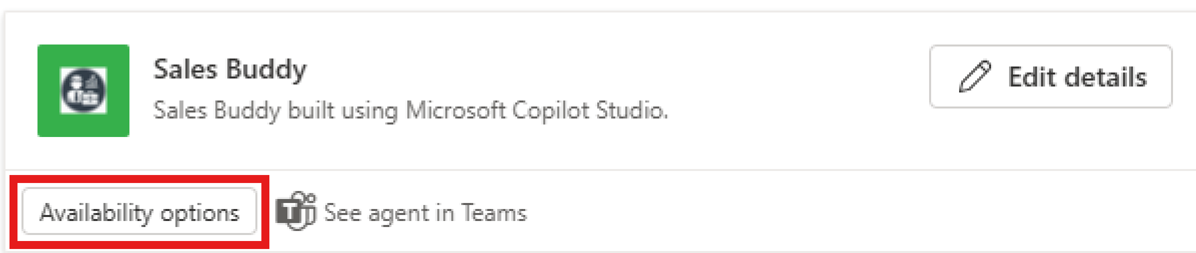
22. Once all connectors are connected, you can go back to Teams and click on Retry



23. You now have the agent working in your Microsoft Teams. You can ask a question.



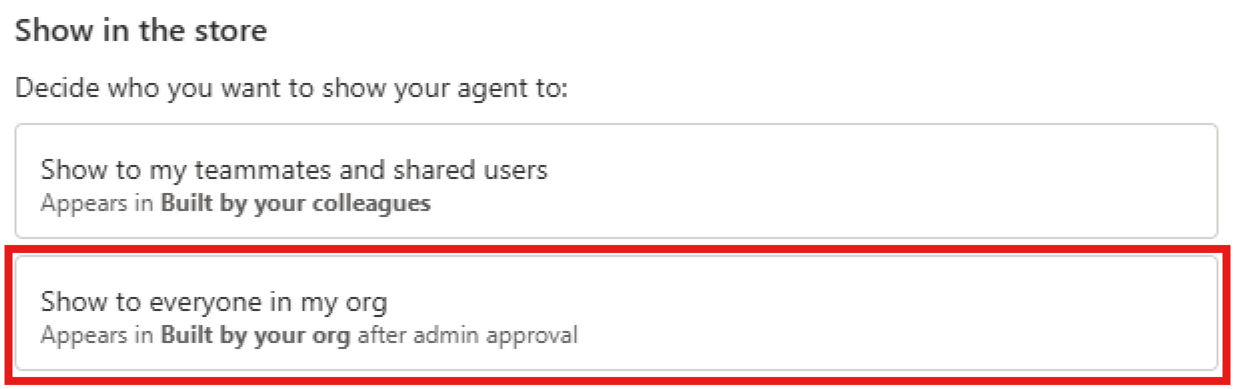
24. Let's make sure the agent is available to the entire organization. Back to Copilot Studio, you will see the Teams + Microsoft 365 Channel. Click on Availability Options



Here you will see 4 options:

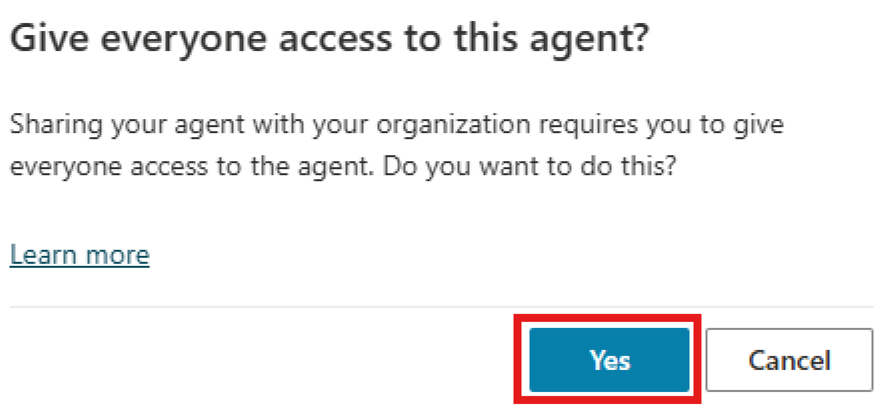
A. Get a link and manage who can open the agent in Microsoft Teams using this link
B. Download a file so you can add this agent to Microsoft Teams or M365 Store
C. Use the store to show the agent to selected people
D. Use the store to make the agent available to the entire organization. This guide will cover this option

25. Click on Show to everyone in my org

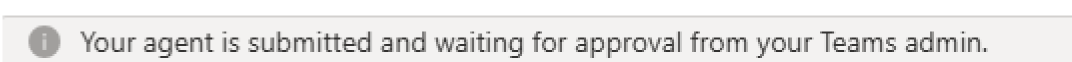


26. Click on submit for admin approval. This will send the Agent to be approved by the Admin

27. Click on Yes

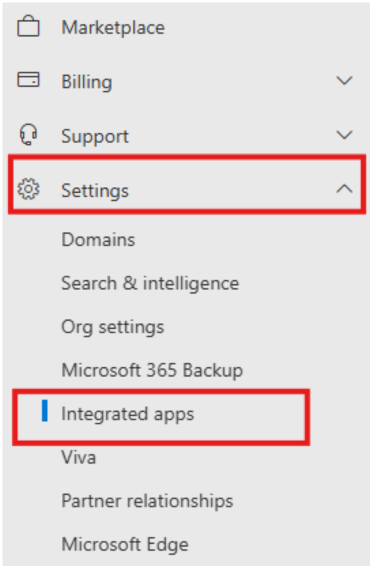


You will see the confirmation that the agent was submitted for approval

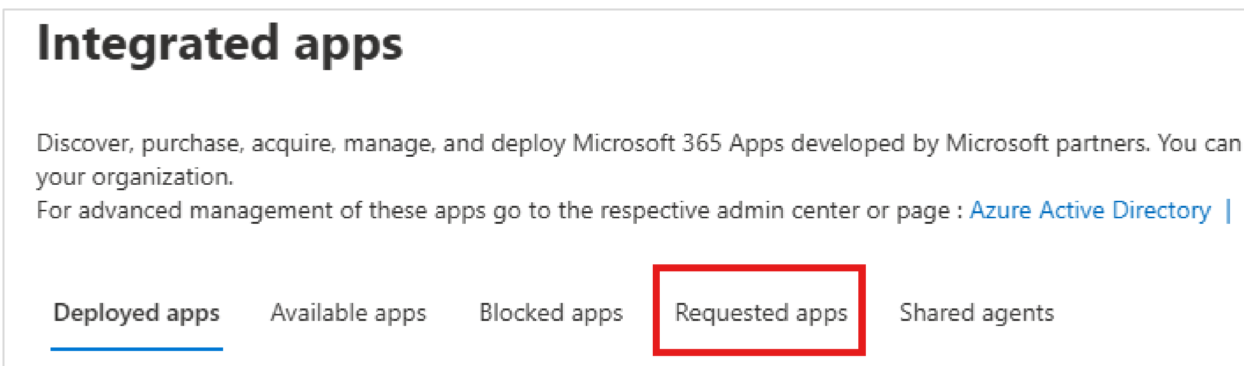


28. To approve the Agent, access https://admin.microsoft.com/ and login as Tenant Admin

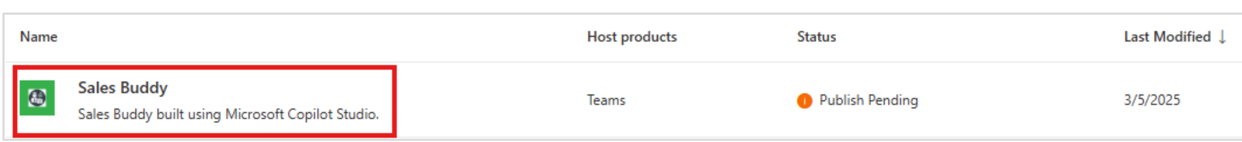
Click on Settings and then Integrated Apps



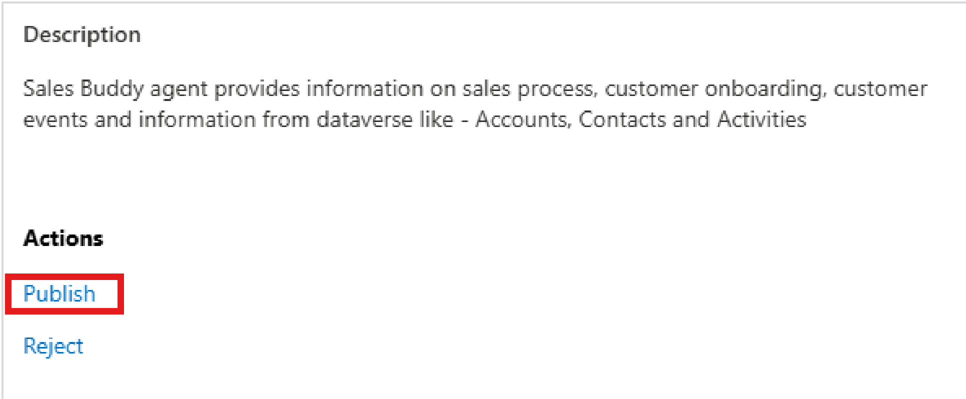
29. Click Requested Apps



30. You will see the Sales Buddy with Publish Pending Status. Click on the Agent name

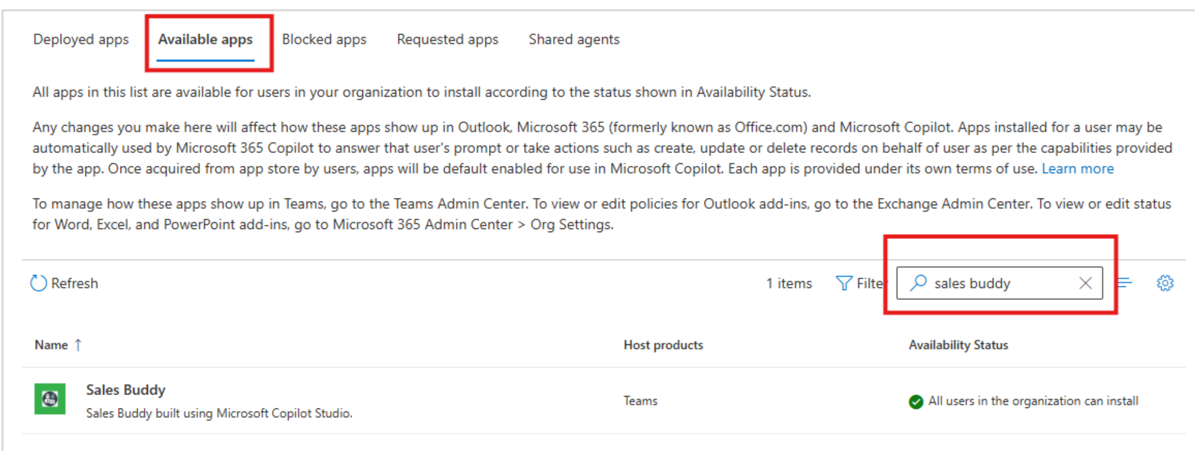


31. Click on Publish

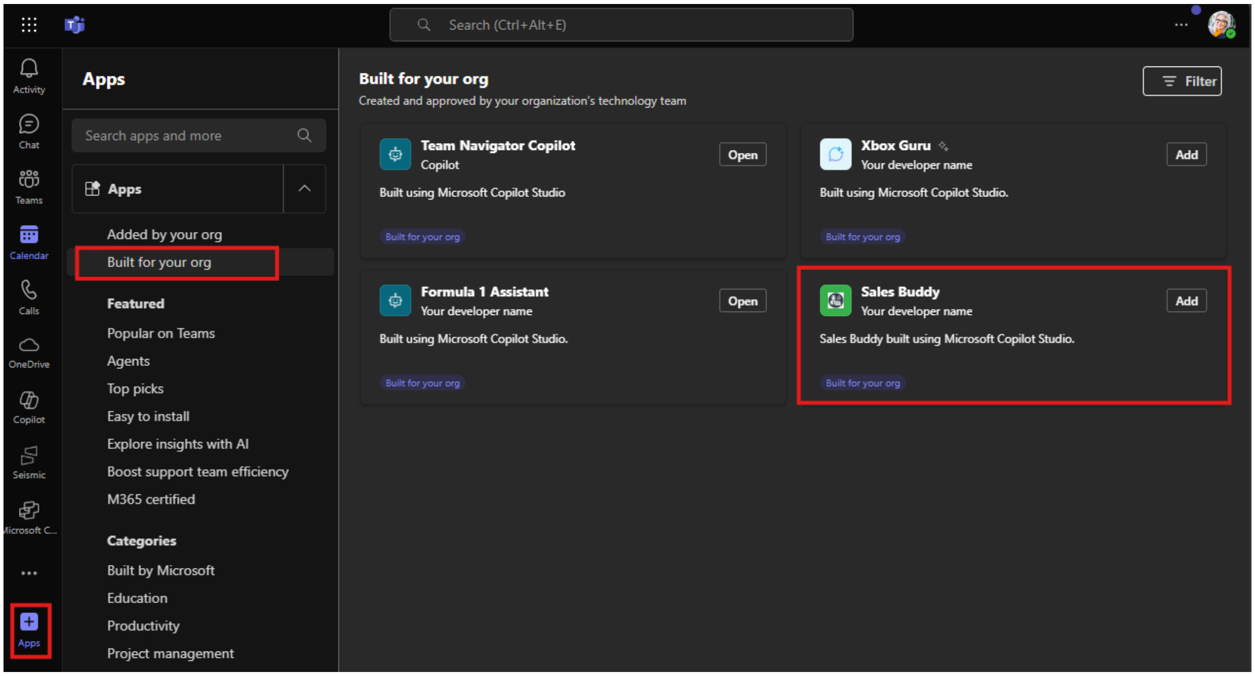


32. And then click on confirm

Now the Agent appears on "Available Apps". You can use the Search Bar to find the Agent and then manage it.



At this point, any user in the organization can access the Apps in Microsoft Teams, click on "Built for your org" and see the agent available

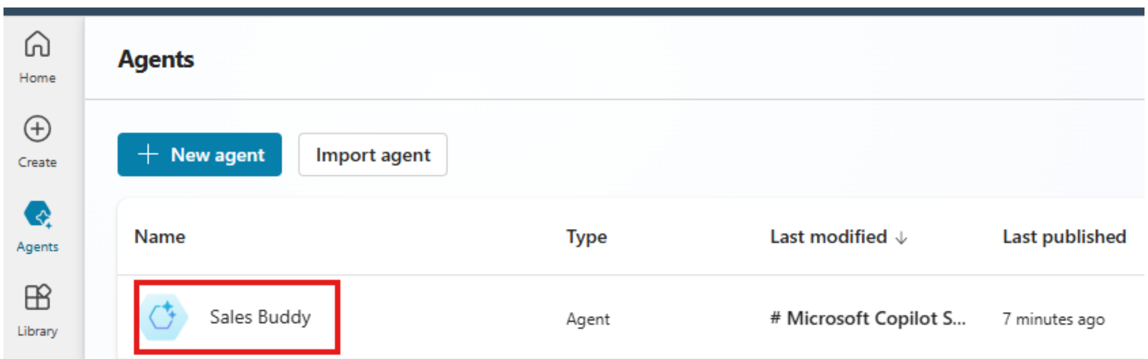

Search (Ctrl+Alt+E)
Activity
Chat
Teams
Calendar
Calls
OneDrive
Copilot
Seismic
Apps
Apps
Search apps and more
Apps
Added by your org
Built for your org
Featured
Popular on Teams
Agents
Top picks
Easy to install
Explore insights with AI
Boost support team efficiency
M365 certified
Categories
Built by Microsoft
Education
Productivity
Project management
Built for your org
Created and approved by your organization's technology team
Filter
Team Navigator Copilot
Copilot
Open
Built using Microsoft Copilot Studio
Built for your org
Xbox Guru
Your developer name
Add
Built using Microsoft Copilot Studio.
Built for your org
Formula 1 Assistant
Your developer name
Open
Built using Microsoft Copilot Studio.
Built for your org
Sales Buddy
Your developer name
Add
Sales Buddy built using Microsoft Copilot Studio.
Built for your org

Testing the Sales Buddy Agent on a Demo Website

Now that the Sales Buddy Agent is successfully deployed to Microsoft Teams, let's test its functionality on a demo website. This will mimic the process of deploying the bot to an external custom website, allowing us to evaluate its interactions in a web-based environment before full integration.

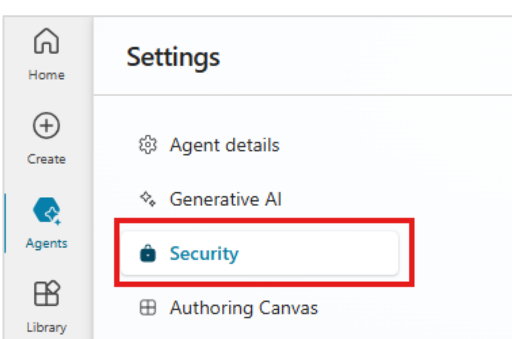
First, let’s make changes to the security configuration so the Agent can be published outside of Teams and/or Copilot. This will allow the agent to access user’s files when published in website by asking for authentication

1. Go back to Copilot Studio and Click on the **Sales Buddy agent**

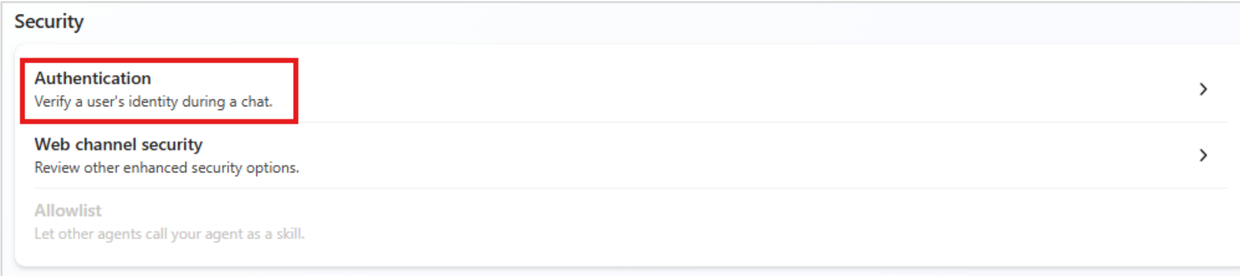


2. Click on **Settings**

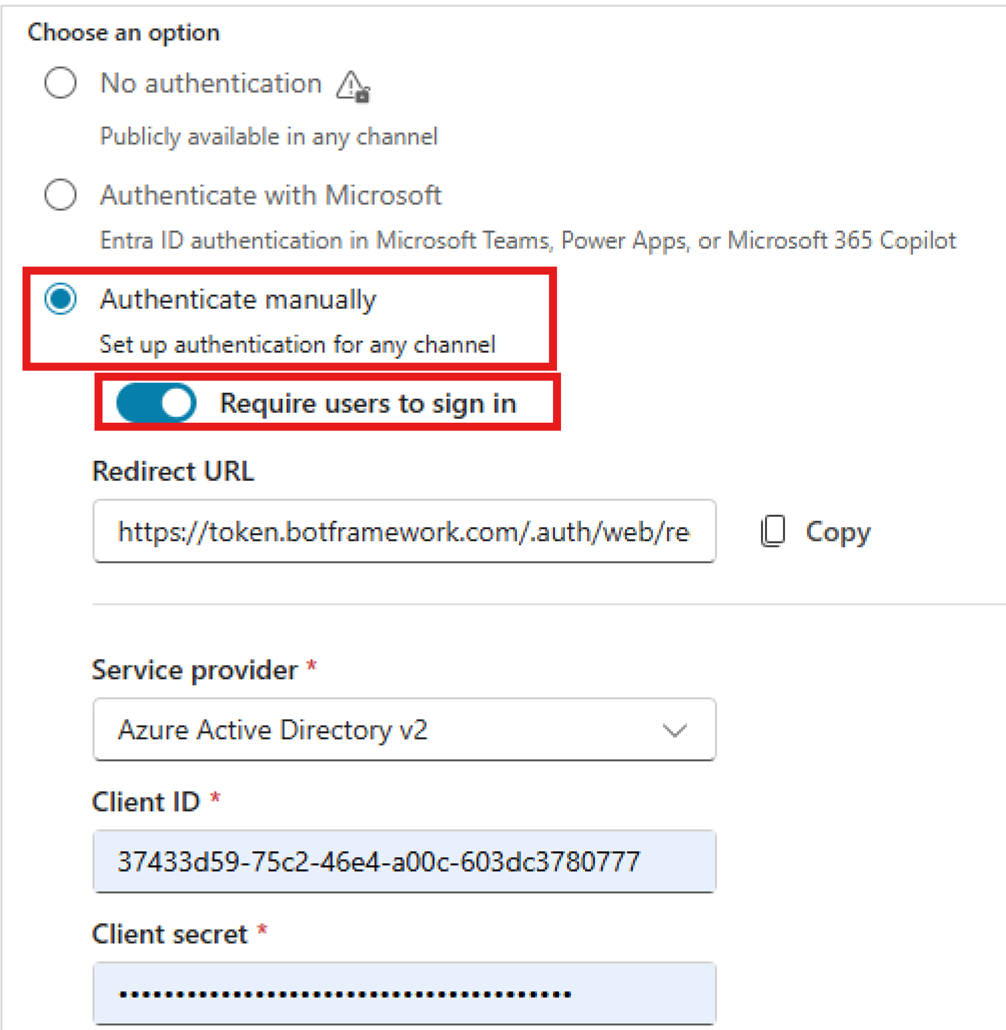
3. Click on **Security**



4. Click on **Authentication**

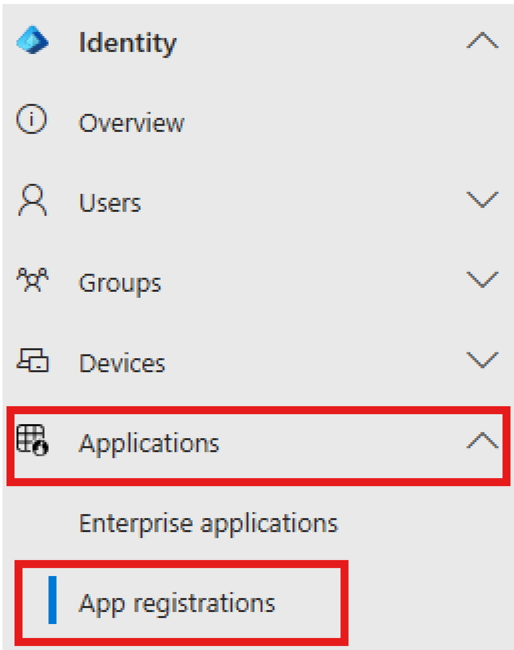


5. Select **Authenticate Manually** and enable **"Require users to sign in"**

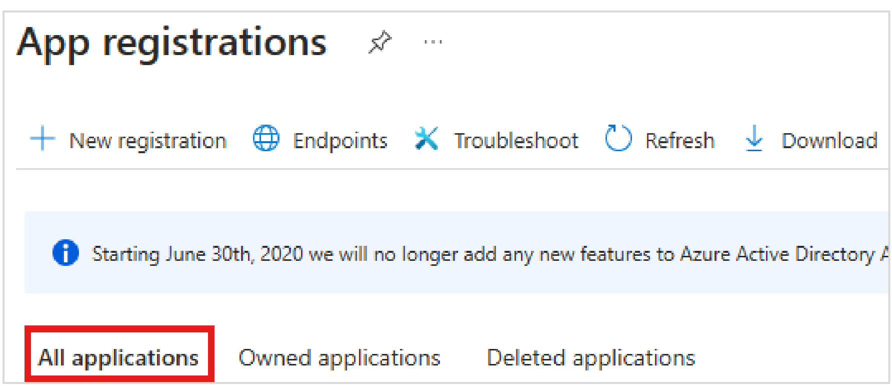


Now, we need to get the Client ID and Client Secret on Entra ID Portal. Access https://entra.microsoft.com/

6. On the left menu, click on Applications and then App Registrations

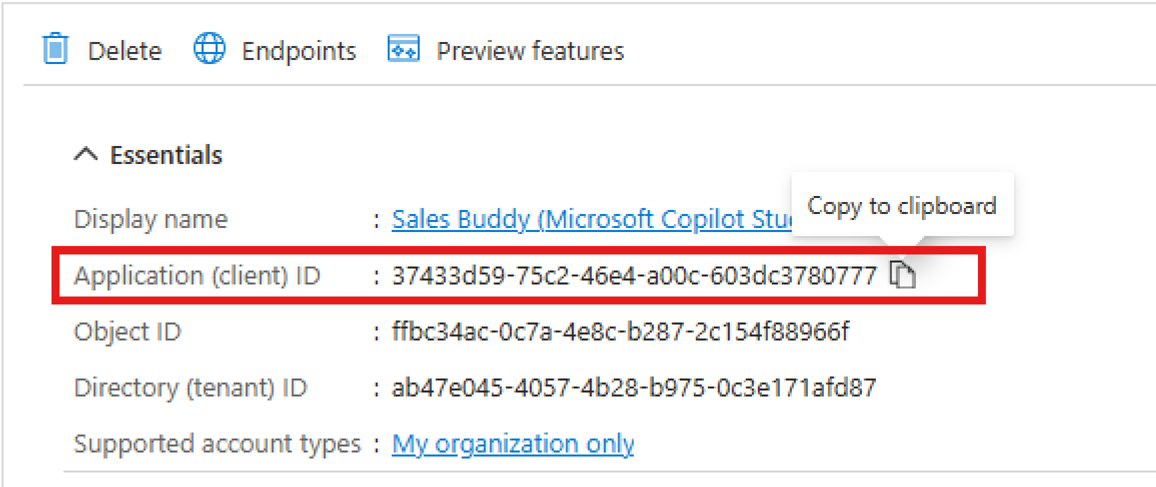


7. Click on All applications

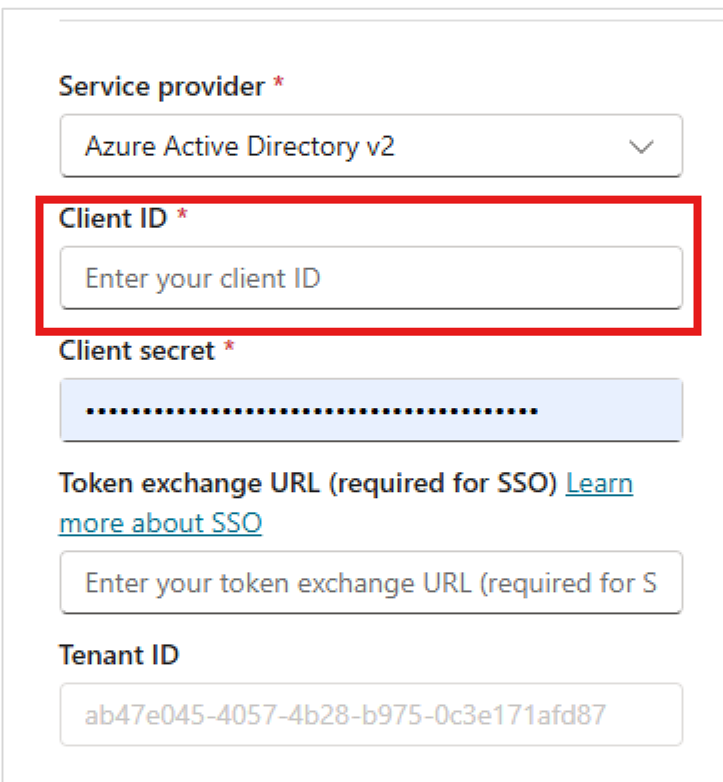


8. Look for your application on the list and click on it

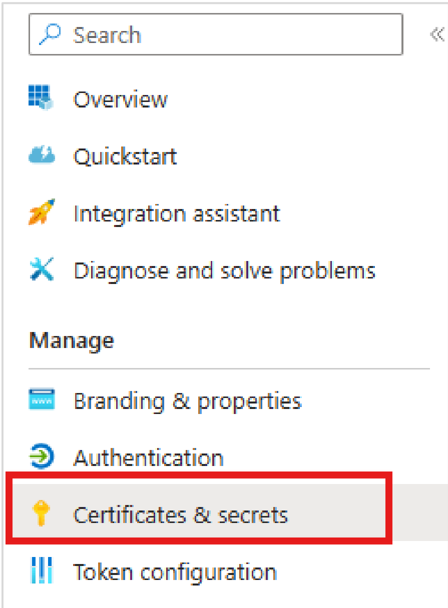
9. Copy the Application (client) ID



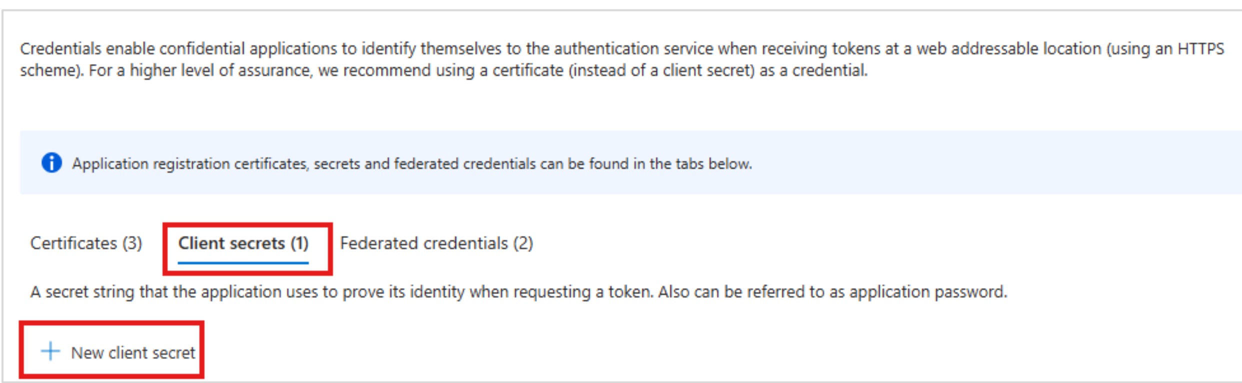
10. Go back to Copilot Studio and paste the ID in the **Client ID** field



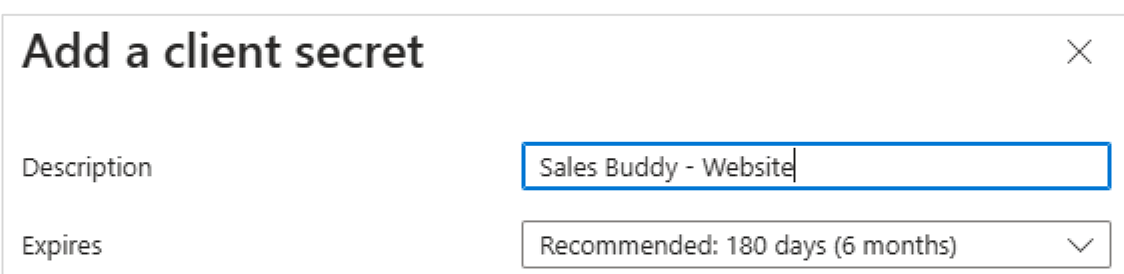
11. Go back to **Entra ID** and click on **Certificates & secrets**



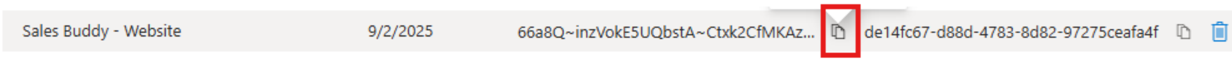
12. Click on **Client Secrets** and then **+ New Client Secret**



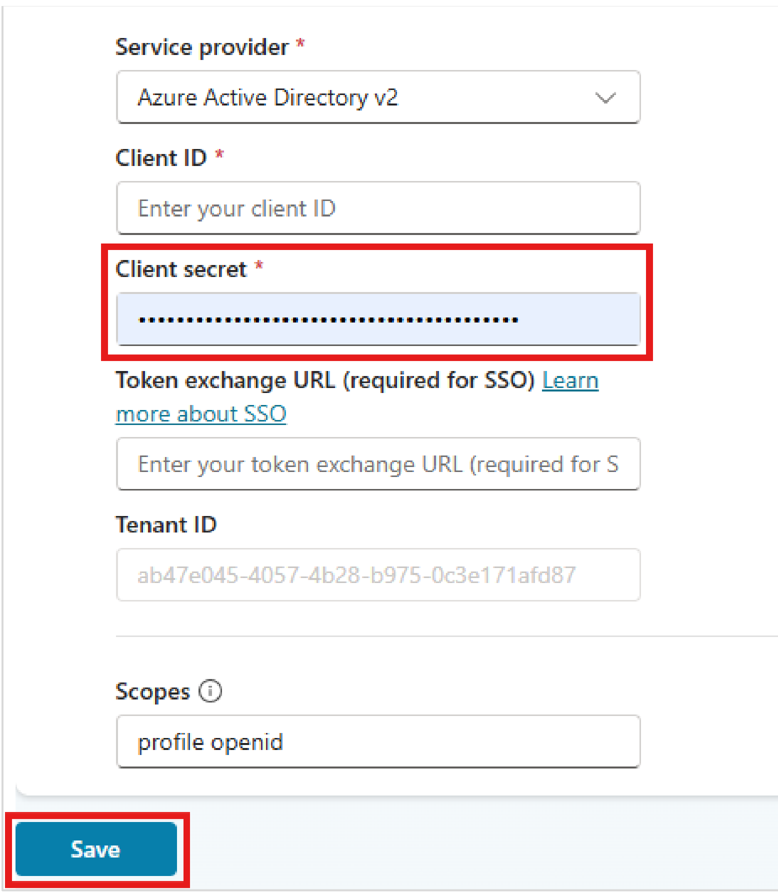
13. Enter a **description** and select **expiration date**



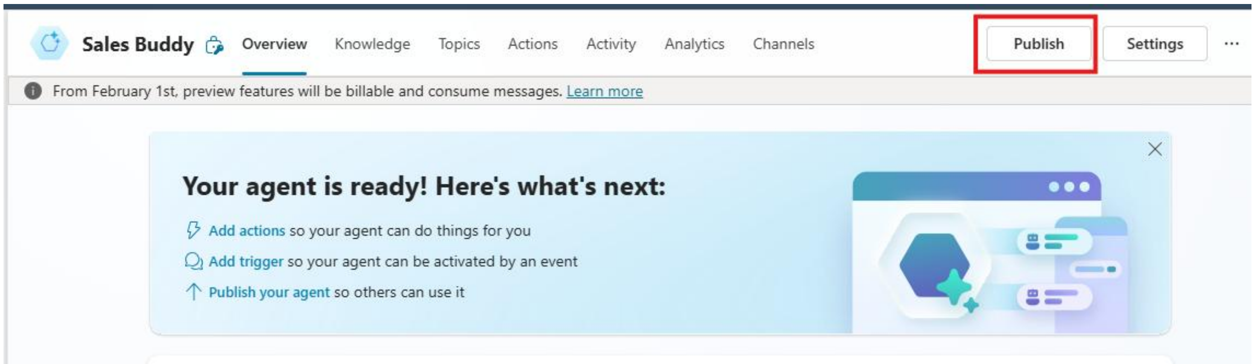
14. Below you will see the new entry created. Copy the **Value** field



15. Go back to **Copilot Studio**, paste the **Value** to **Client Secret field** and **save** it

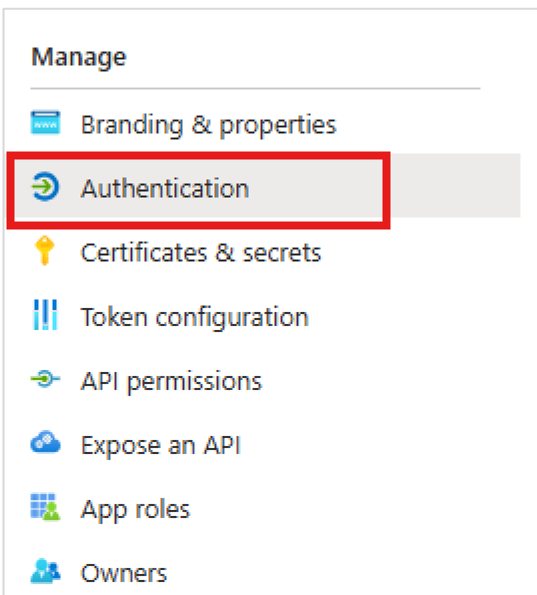


16. **Publish** the agent again

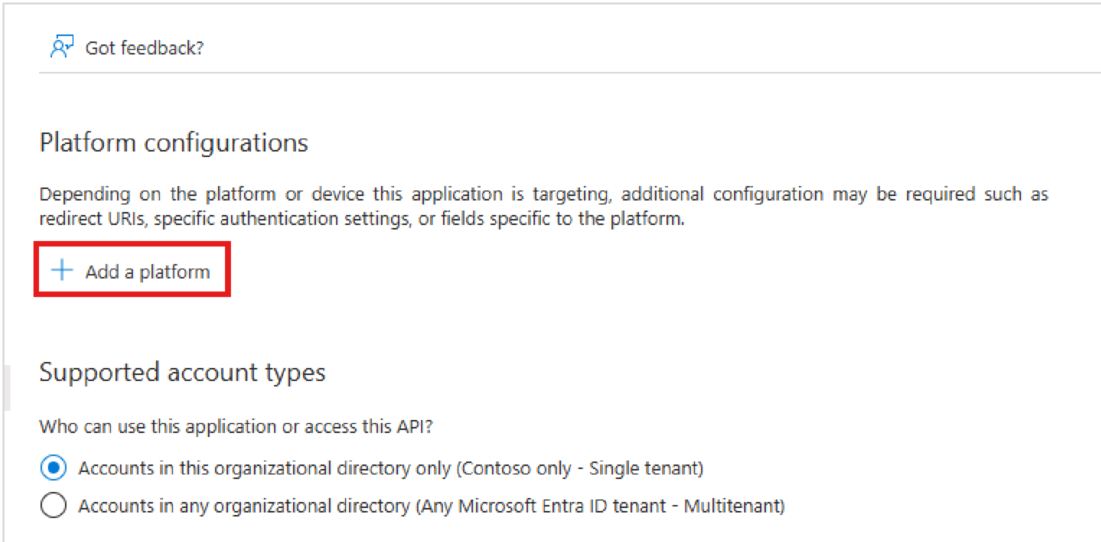


Now the Copilot Studio security configuration is completed. We will need to complete the configuration on the Entra ID portal to allow the agent to access the user's files.

17. Back to **Entra ID Admin Center**, click on **Authentication**

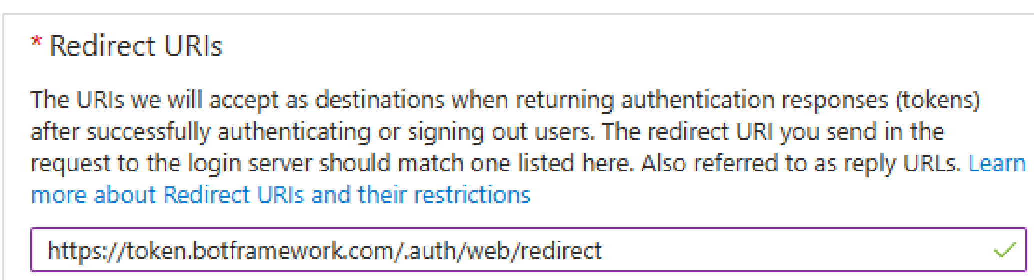


18. Click on **+ Add a platform**

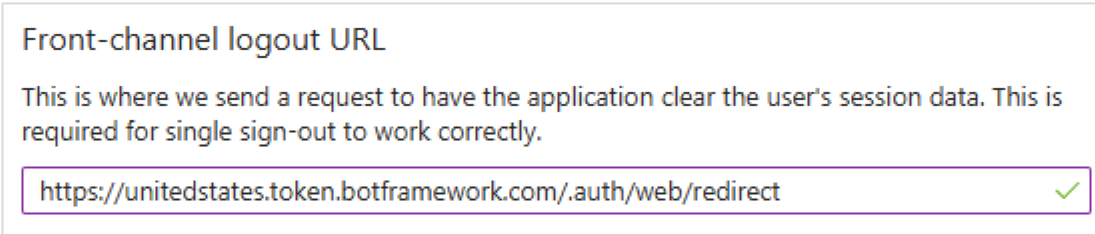


19. Click on Web

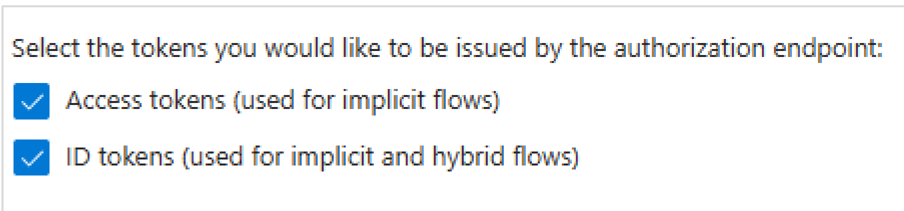
20. On Redirect URIs insert: https://token.botframework.com/.auth/web/redirect



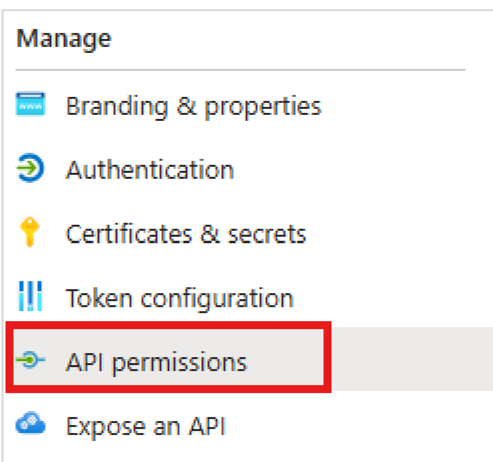
21. On Front-channel logout URL insert: https://unitedstates.token.botframework.com/.auth/web/redirect



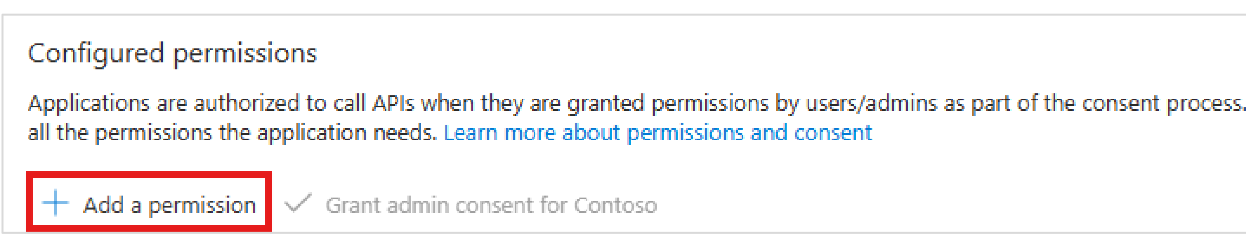
22. Select both options as below and select **Configure.**



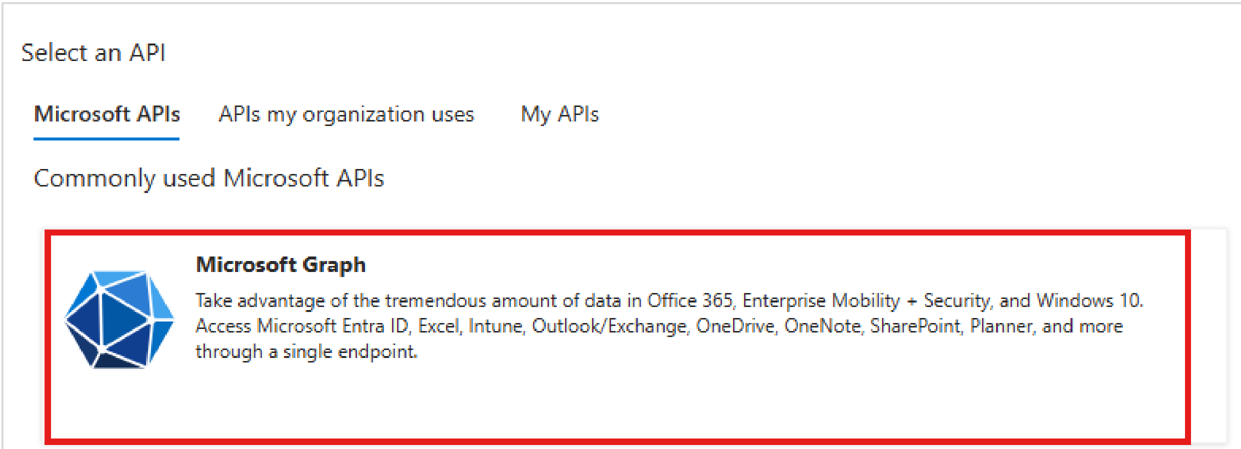
23. Click on **API Permissions**



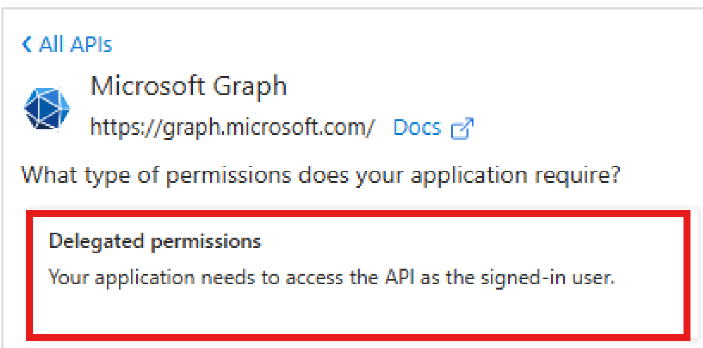
24. And then click on **+ Add a permission**



25. Select **Microsoft Graph**

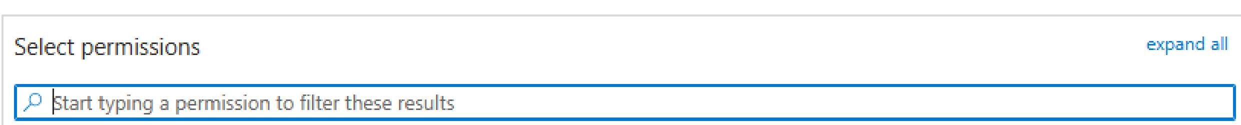


26. And select **Delegated permissions**

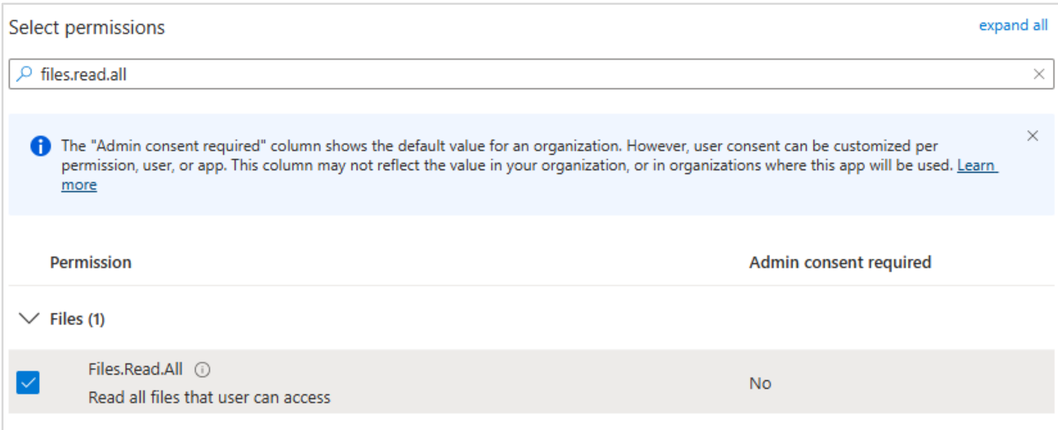


27. Using the search bar, add the following permissions:

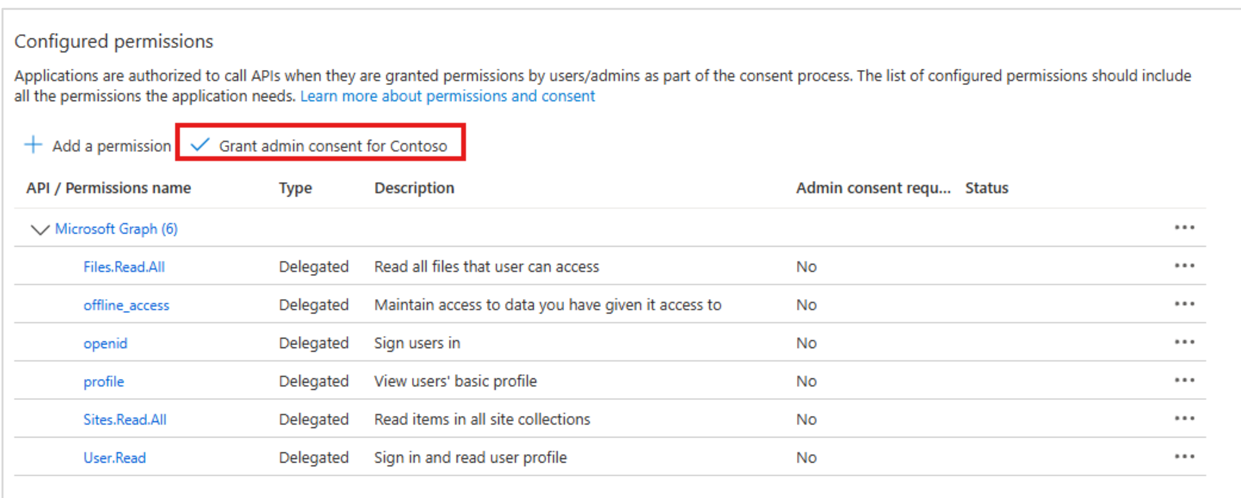
Files.Read.All
offline_access
openid
profile
Sites.Read.All
User.Read



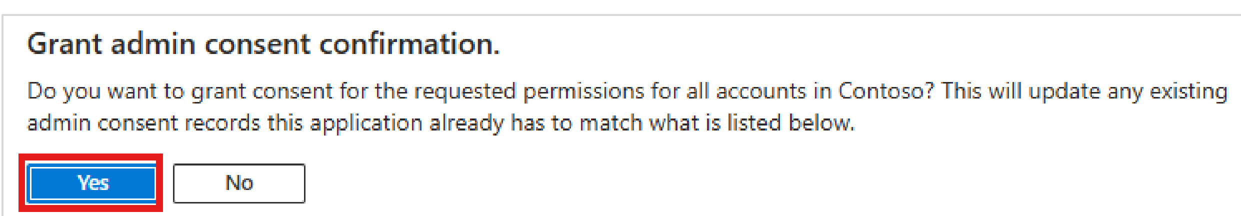
Example (do the same for all permissions above)



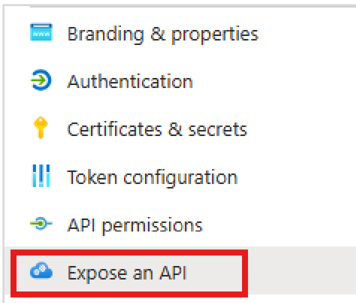
28. Once all permissions are added, click on **Grant admin consent**



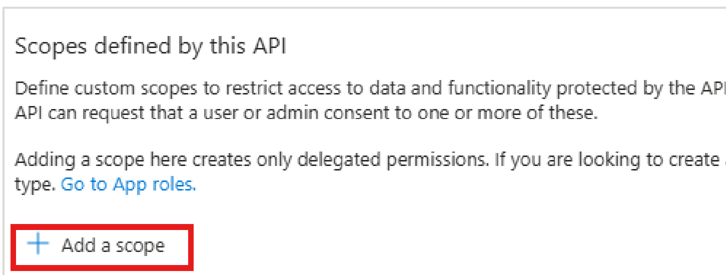
29. Click on **Yes**



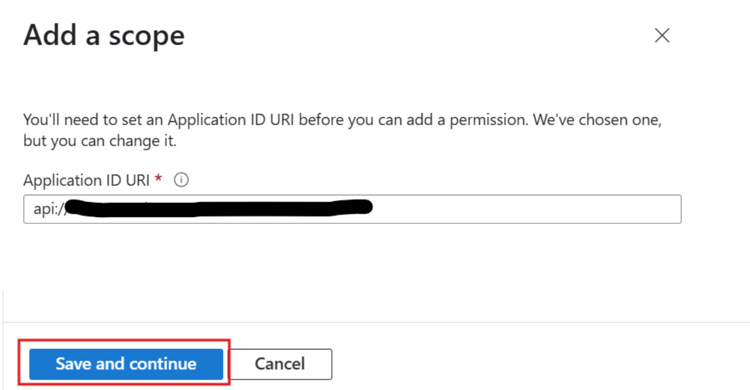
30. Click on **Expose an API**



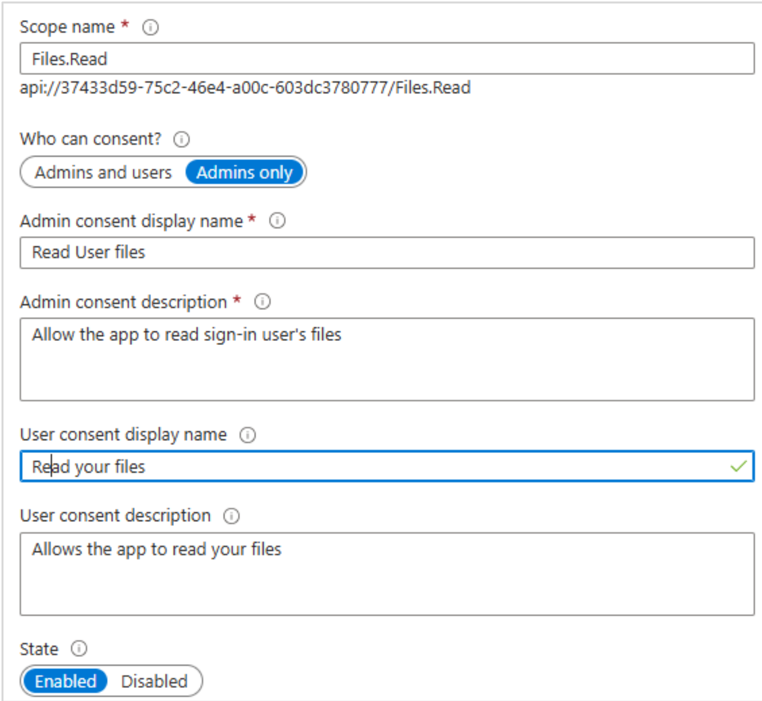
31. Click on **Add a scope**



32. You can modify or accept the Application ID URI. Click **Save and Continue**.

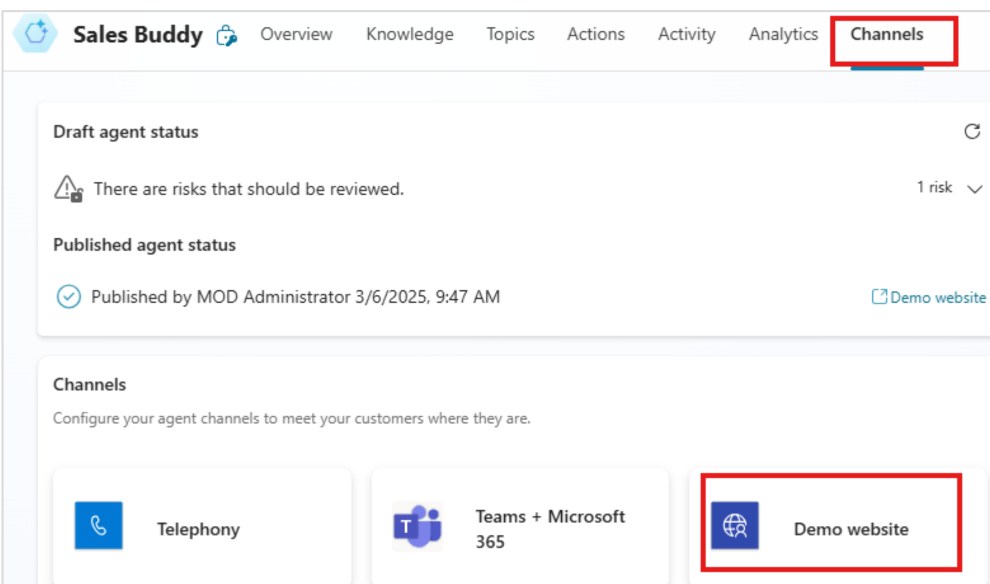


33. Complete the fields as below

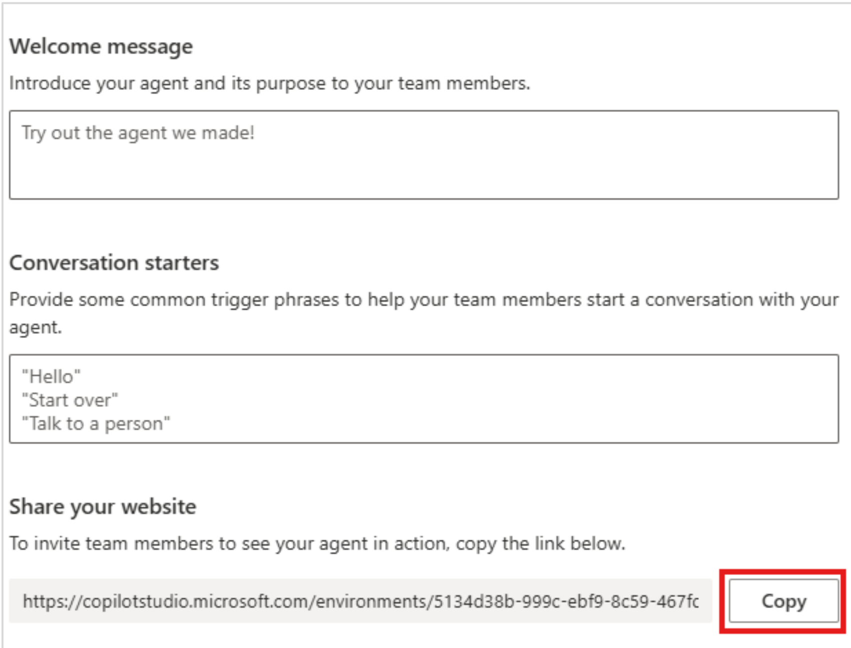


34. Click on **Add scope**

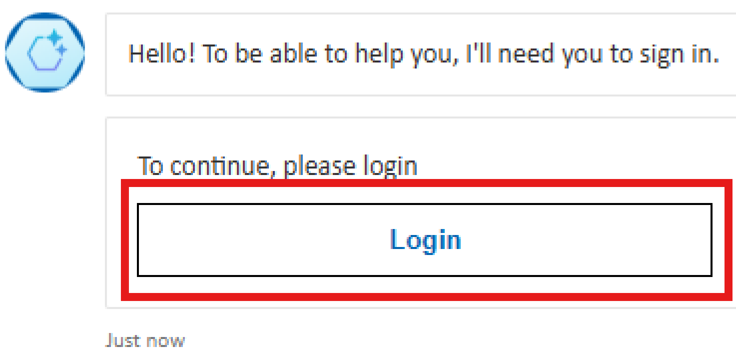
35. Go back to Copilot Studio, click on **Channels** and then **Demo website**



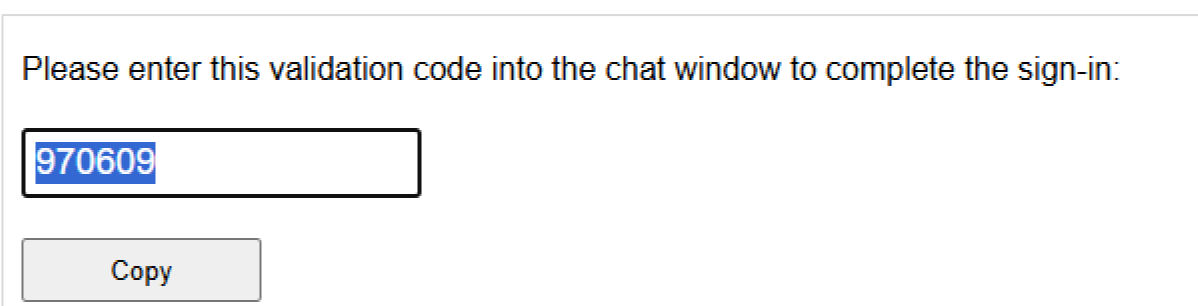
36. Copy the URL and open it in a new window



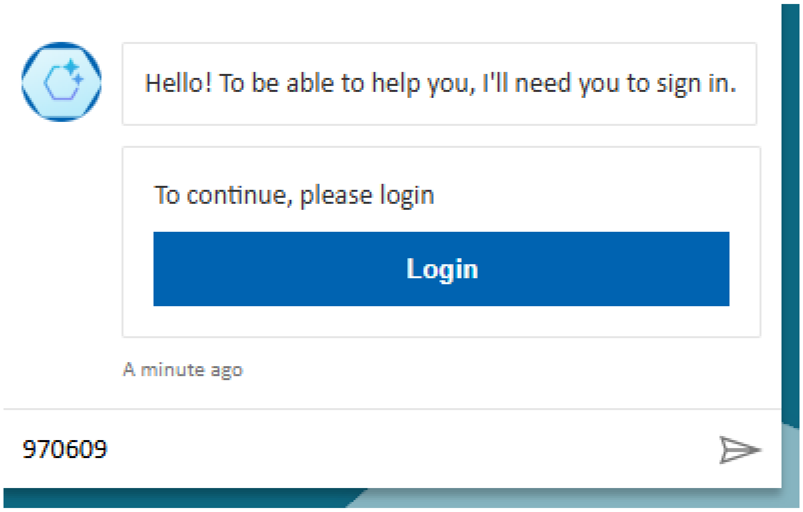
37. Click on **Login** and follow the authentication process (if not done yet)



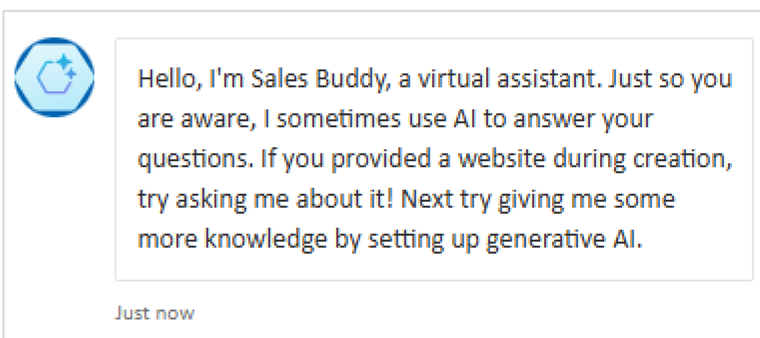
38. A new window will appear. Copy the code



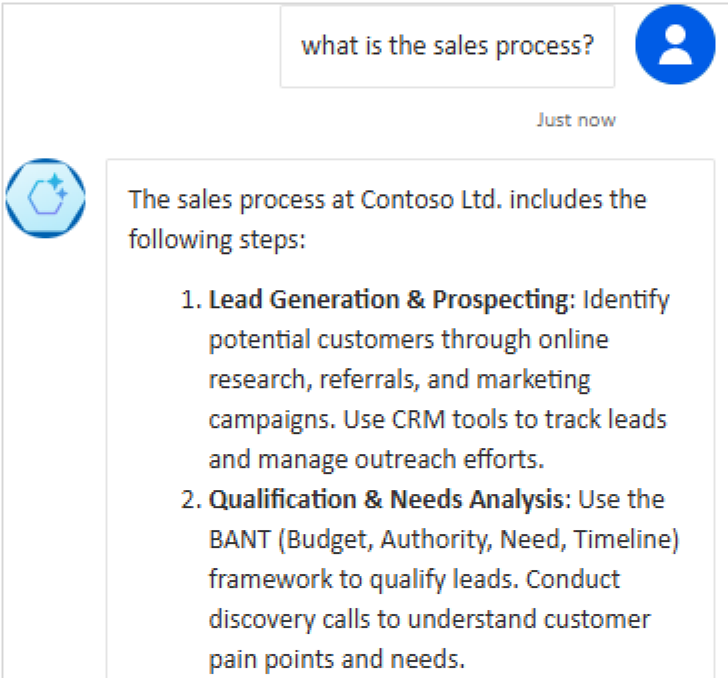
39. Go back to the **Demo website** and paste the code



When you see the greetings, your BOT is ready to answer your questions



Example:

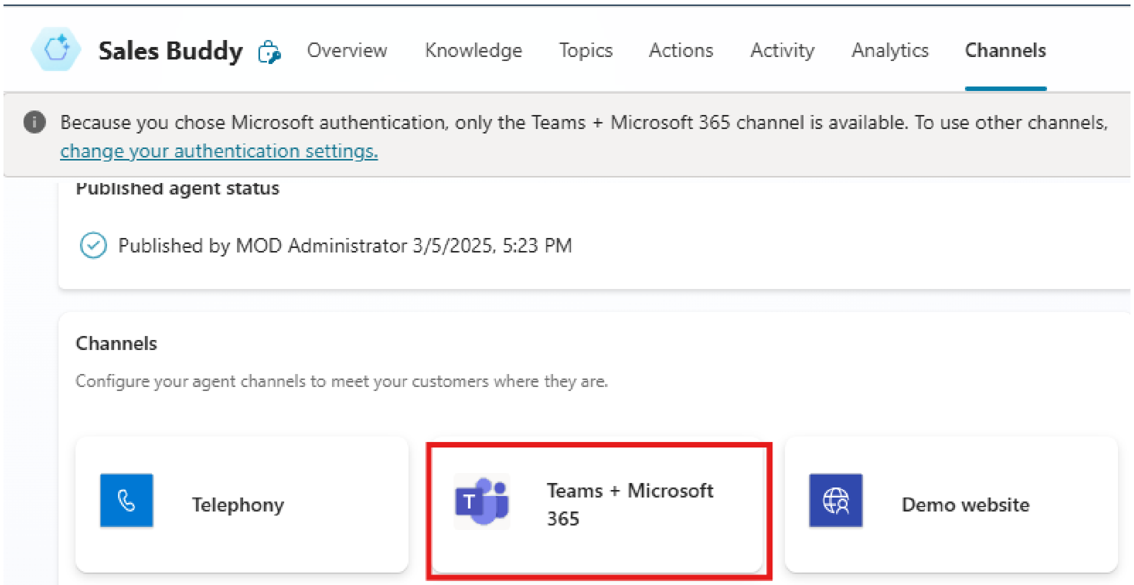


Congratulations! You have completed Lab 4.

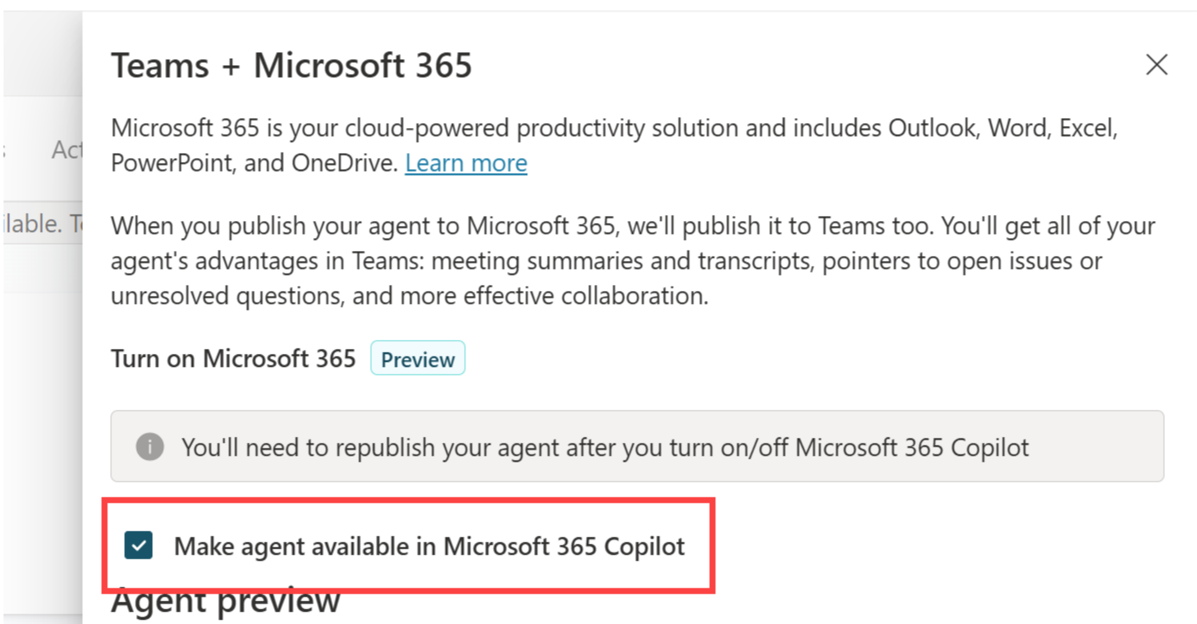
Appendix: Publish the Sales Buddy Agent to Microsoft 365 Copilot Chat

The following instructions demonstrate how to publish the Sales Buddy agent to Microsoft 365 Copilot Chat.

1. Open the Sales Buddy Agent in Copilot Studio and navigate to Channels. Click **Teams + Microsoft 365**.

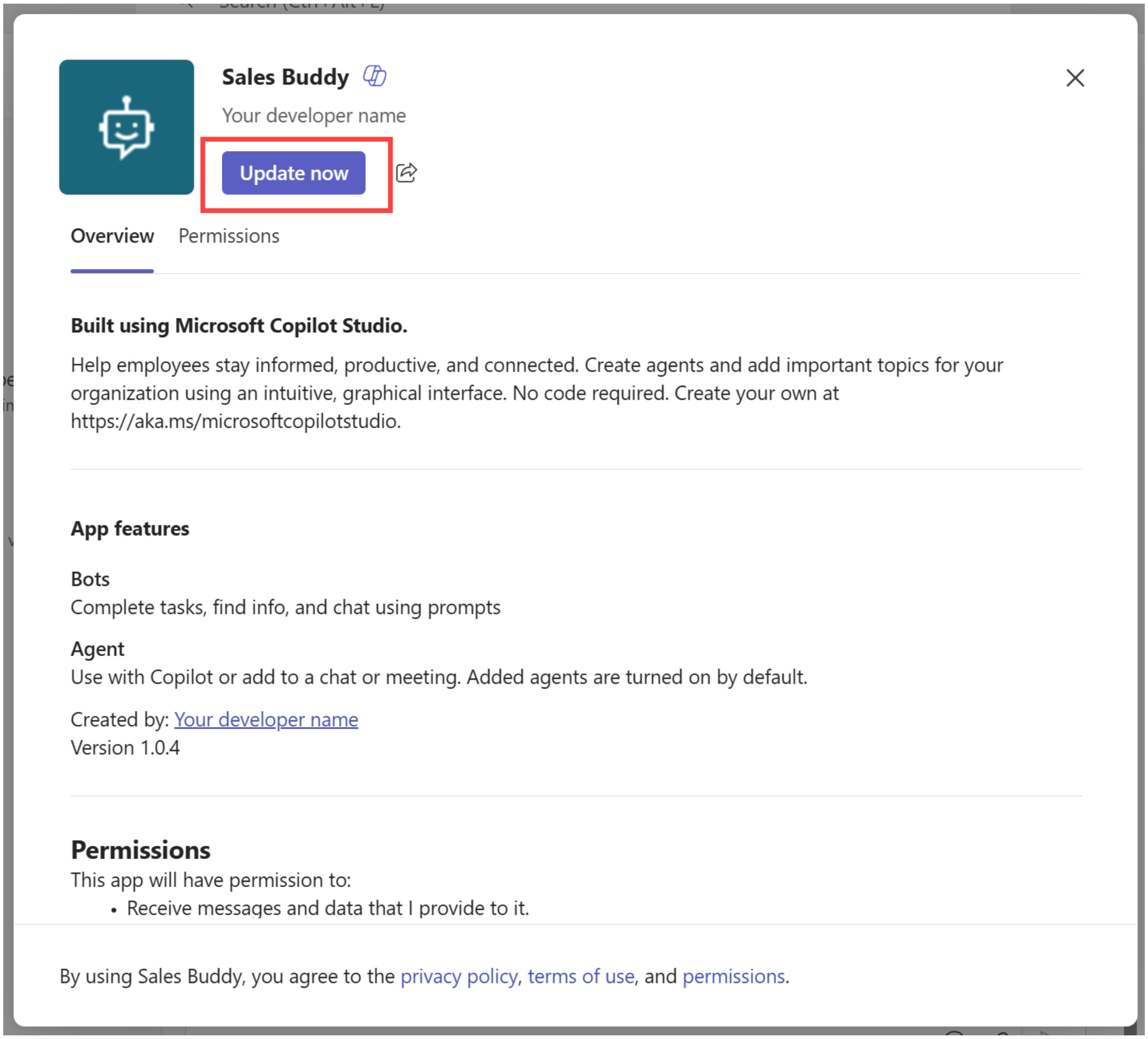


2. Under **Turn on Microsoft 365**, make sure the checkbox beside **Make agent available in Microsoft 365 Copilot** is selected, click **Save**, then close the channel details pane.



3. Republish the agent by clicking the **Publish** button in the top right of Copilot Studio.

4. Open the **Teams + Microsoft 365** channel details pane again, and under **Agent preview**, click **See agent in Teams**.
5. In the agent details window that appears, click **Update now**.



6. Open Microsoft 365 Copilot Chat. The Sales Buddy agent should appear under the **Agents** menu on the right.

