

Hands-On Lab: Building an Autonomous Email Monitoring Agent in Microsoft Copilot Studio

Automate Order Processing with Copilot Studio and Dataverse Integration

Introduction

In this hands-on lab, you will learn how to create an autonomous agent in Microsoft Copilot Studio that monitors a designated mailbox for order-related emails, extracts order IDs, queries Dataverse for order details, and sends a well-formatted reply to all relevant recipients. By the end of this exercise, you'll have a practical automation solution that streamlines order inquiry processes, making them seamless and efficient.

Prerequisites

- A valid Copilot Studio user licence.
- Copilot enabled in your Copilot Studio environment.

The screenshot shows the Microsoft Dataverse Settings page under the Features section. It displays the 'Copilot' feature, which is currently enabled ('On'). Below this, there is a description of the feature and a toggle switch to enable or disable it. Another section below discusses the 'Copilot answer component'.

Environments > CRM693916 > Settings > **Features**

Learn more about [Features](#) ↗

Copilot A Preview

Enable new AI-powered Copilot features for people who make apps. [Learn more](#) ↗

On

Allow users to analyze data using an AI-powered chat experience in [canvas](#) ↗ and [model-driven apps](#) ↗. [Learn more](#) ↗ [Requires Copilot licensing](#) ↗

On ▼

Allow canvas editors to insert the Copilot answer component, which allows users to receive an AI-powered answer to a predefined data query.

On

- Access to both the monitored mailbox and the Dataverse environment containing the Orders table.

Step-by-Step Guide

Step 1: Create the Agent

1. Log in to Microsoft Copilot Studio.
2. Create a new agent and name it “**Email Monitoring Agent**”.
3. In the description, mention that the agent’s role is to monitor a mailbox for incoming order-related emails, extract order IDs, query Dataverse, and respond with order details. For example: *This agent monitors incoming emails for order requests, fetches details from Dataverse, and replies with the required information.*

The screenshot shows the 'Email Monitoring Agent' details page. At the top, there's a navigation bar with tabs: Overview (which is selected), Knowledge, Tools, Agents, Topics, Activity, and Evaluation. Below the tabs, there's a 'Details' section with a 'Name' field containing 'Email Monitoring Agent' and a 'Description' field with the following text: 'Monitors a mailbox for incoming emails requesting order details, retrieves order information from Dataverse, and replies to the customer with the details.' A note says '154/1024'. There's also a 'Select your agent's model' section with a dropdown set to 'GPT-4.1 (Default)'.

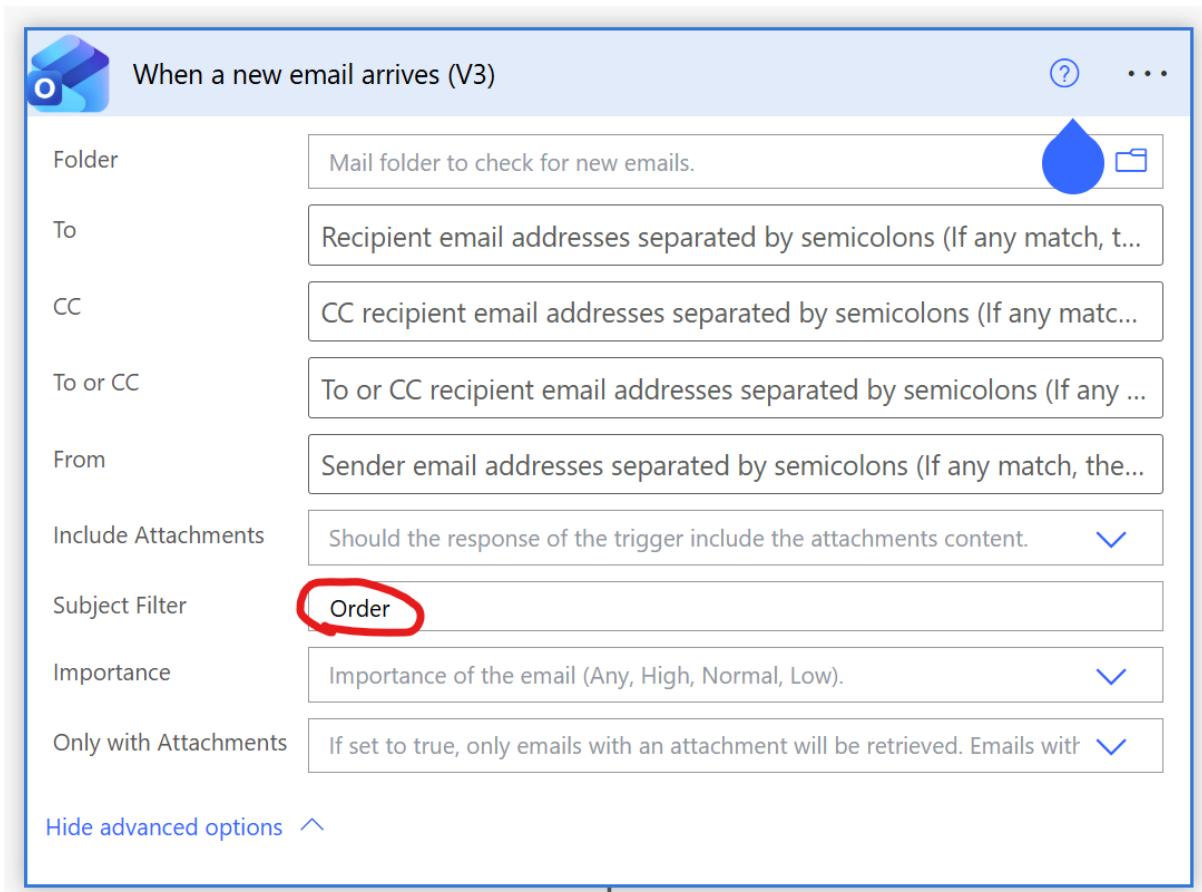
4. Select an appropriate model such as GPT-4.1 for optimal extraction and response capabilities.

Step 2: Set Up the Trigger

1. Add a trigger: **When an email arrives**.

The screenshot shows the 'Triggers' page. It has a 'Triggers' header and a 'Set up your agent to activate when certain events happen. [Learn more](#)' note. A single trigger is listed: 'When a new email arrives (V3)'. There are 'Add trigger' and '...' buttons at the bottom right.

2. Apply a subject filter for the keyword “**order**”. This ensures the agent only processes relevant emails.



Step 3: Extract the Order ID

1. Instruct the agent to extract the order ID using a predefined pattern—e.g., **ORD** followed by five digits and then six alphanumeric characters (e.g., ORD12345ABC123).
2. Specify that the agent should look for this pattern in both the email subject and body.

The whole instructions:



Step 4: Query Dataverse

1. Add a tool using the **List rows** Dataverse connector.

The screenshot shows the Power Automate interface with a search bar at the top right. Below it, a filter bar has 'All' selected and 'Connector (2)' chosen. A timestamp 'Last refreshed now' is shown. The main area lists two connectors:

Name	Type	Available to	Trigger	Last modified	Errors	Enabled
List orders fro...	Microsoft Dataverse	Email Monitoring Agent	By agent	System Administrator 5...		<input checked="" type="checkbox"/> On
Reply to email ...	Microsoft Dataverse	Email Monitoring Agent	By agent	System Administrator 5...		<input checked="" type="checkbox"/> On

- Point it to the Orders table in your current environment (e.g., Dynamics 365 Sales Orders).

The screenshot shows the configuration page for the 'List orders from current Dataverse Environment' connector. At the top, there's a back arrow, the connector name, an 'Enabled' switch (on), and a 'Save' button.

Details

- Available to:** Email Monitoring Agent
- Completion:** Additional details

Inputs

What the tool accepts in order to run. Inputs will be filled in the order shown.

Input name	Fill using ⓘ	Value	⋮
Environment * organization	Custom value	current	⋮
Table name * entityName	Custom value	salesorders	⋮
Filter rows \$filter	Dynamically fill with AI	Customize	⋮

- Apply a filter: *Order number equals the extracted order ID*. This will dynamically fetch the corresponding record.

Step 5: Compose the Reply

- Add the **Reply to email** connector.
- Dynamically set the message ID and body fields.

Office 365 Outlook Reply to email (V3)

Enabled ... Save

Available to

Email Monitoring Agent

Inputs

+ Add input

Input name	Fill using	Value	⋮
Message Id *	Dynamically fill with AI	Customize	⋮
Body	Dynamically fill with AI	Customize	⋮
Reply All	Custom value	true	⋮

- Structure the reply body in HTML—for example, present order details in a table or a cleanly formatted list for easy readability.

Instructions

(e.g., numeric or alphanumeric code). The order number will be link this: ORD-01001-Y7RON3

- Transition:** If an order number is found, proceed to retrieve order details; if not, send a polite response requesting the order number.

3. Retrieve Order Details from Dataverse

- Goal:** Fetch the order information corresponding to the extracted order number.
- Action:** Use the tool List orders from current Dataverse to retrieve the order details. Pass the \$filter=ordernumber eq '<Order number from email>'.
- Transition:** If the order is found, prepare a response email; if not, inform the customer that the order could not be located.

4. Respond to Customer

- Goal:** Send an email back to the customer with the requested order details.
- Action:** Use the Reply to email (V3) action to compose and send the response, including the order details in the body of the email. Use **HTML** to format the email in a nice readable format.
- Transition:** End the workflow after sending the email.

Error Handling and Limitations

- If the email does not contain an order number, respond with a request for the order number.

- Ensure the “Reply all” option is enabled so all original recipients receive the response.

Step 6: Test the Agent

1. Send a sample email to the monitored mailbox with a subject like “**Order Inquiry: ORD12345ABC123**”.
2. Observe as the agent extracts the order ID, queries Dataverse, and replies with a well-formatted email containing all relevant order information.

The screenshot shows an email in the inbox with the following details:

Subject: [EXTERNAL] RE: Details of order ORD-01001-Y7R0N3

To: Karthik Sathyavolu

From: System Administrator <admin@CRM693916.onmicrosoft.com>

Date: Mon 19-01-2026 15:21

Importance: Low importance

Message Preview: This sender admin@CRM693916.onmicrosoft.com is from outside your organization.

Message Content:

You don't often get email from admin@crm693916.onmicrosoft.com. [Learn why this is important](#)

Dear Karthik Sathyavolu,
Thank you for reaching out regarding your order ORD-01001-Y7R0N3. Please find the latest details below:

Order Number	ORD-01001-Y7R0N3
Order Name	Will be ordering about 110 items of all types (sample)
Billing Address	Ratnadeep, Madinaguda, Hyderabad, Telangana, 500050, India
Total Amount	₹220.00
Status	Active
Created On	2026-01-19 09:25 UTC

If you need further assistance or have additional questions, please let us know.
Best regards,
System Administrator

Message Headers:

From: Karthik Sathyavolu <Venkata.Sathyavolu@microsoft.com>
Sent: Monday, January 19, 2026 9:41:54 AM
To: System Administrator <admin@CRM693916.onmicrosoft.com>
Subject: Details of order ORD-01001-Y7R0N3

Message Body (Reply):

Hello System Admin,

Good day! Hope you are doing well.

We ordered apples from your store, and the order id is ORD-01001-Y7R0N3. Can you provide me the latest update on this order?

Signature:

Thanks and Regards,
Karthik Sathyavolu (He/Him)
Program Manager
Dynamics - Advanced Cloud Engineering (ACE)
vesathya@microsoft.com

Buttons:

Reply | Forward

Summary

Congratulations! You have successfully built an autonomous agent in Microsoft Copilot Studio that can monitor emails, extract order details, retrieve information from Dataverse, and send structured responses automatically. This solution not only saves time but also enhances the accuracy and speed of order inquiry management for your organisation.