



Hands-On Lab: Fabric Data Agent

Overview:

Data agent in Microsoft Fabric is a feature that enables conversational Q&A using generative AI. With it, anyone in your organization can ask questions in plain English about data in Fabric OneLake and get relevant insights, even without technical or data expertise. Fabric Data agents can be added to Copilot studio and Azure AI Foundry to enable autonomous and conversational Agentic capabilities.

Objective:

Objective of this Lab to create Fabric Data Agent on Dynamics 365 data that is available in Fabric with Fabric Link feature.

Agent creation prerequisites

Before creating Fabric Data Agents, we need to make sure that we have data prepared in the right shape for the Agents to easily understand schema and able to query and reason over it to provide best output. Usually, this step is done by Data platform and BI team to build report and analytical solutions.

Lab 1: Sales Pipeline Agent

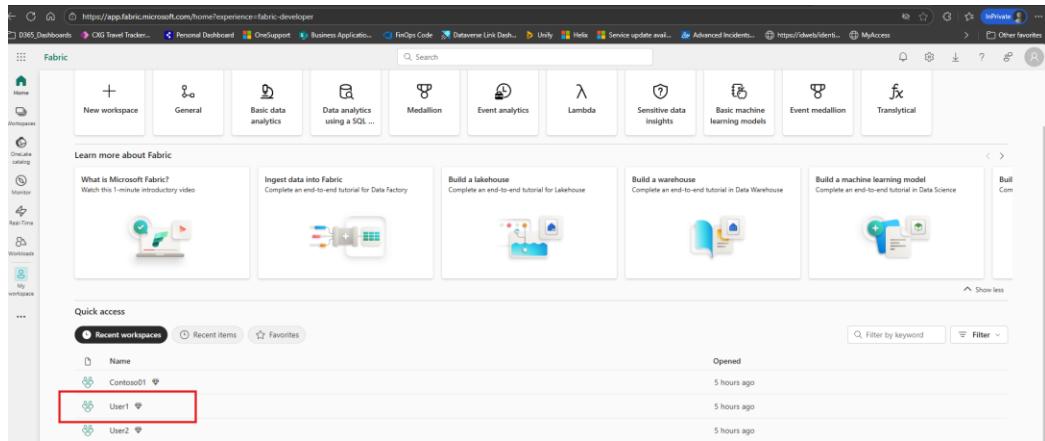
Sales pipeline agent to helps get insight into accounts, prospective leads and potential customer.

The scenarios such agent can be applicable

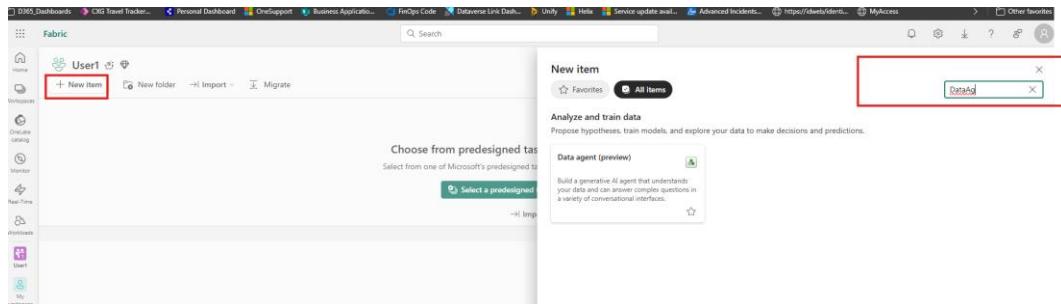
1. Helping to get insight into potential review forecast
2. Helping to get insight about top leads

Follow the steps below to create Fabric Data for Product Inquiry Agent

1. Login to <https://app.fabric.microsoft.com/> using your credentials.

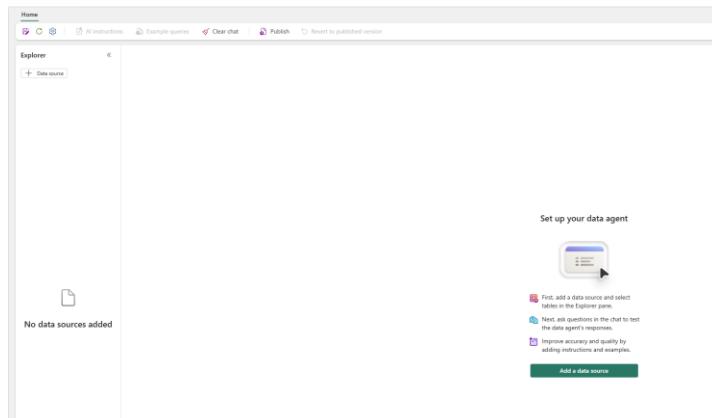


2. Open workspace created during Fabric link lab. Inside the workspace click new item > All items > Search “Data Agent” and select Data Agents



3. Give a name to your Agent – Example: SalesPipelineAgent and click Create

4. When the agent is added, there is no datasource added to it. The next step is to add the datasource so that the agent can use that data.



5. Click on “Add a data source”.
6. Add Lakehouse as datasource for the Agent. Select the Lakehouse and click Add

OneLake catalog

Add a data source

Explorer

Name	Type	Owner	Refreshed	Endorsement	Sensitivity
dataverse_apacagenttec_cds2_workspace...	Lakehouse	Anand Singh	—	—	—
Getting Started in Power BI	Semantic model	Anand Singh	2/9/26, 9:25:49 AM	—	—
Content Sharing	Semantic model	Admin Monitoring	2/4/26, 3:05:01 AM	—	—
Feature Usage and Adoption	Semantic model	Admin Monitoring	2/18/26, 3:13:57 AM	—	—
OneLake Catalog - Governance for...	Semantic model	Admin Monitoring	2/17/26, 10:47:19 A...	—	—
Purview Hub	Semantic model	Admin Monitoring	2/11/26, 3:05:09 AM	—	—

Add Cancel

7. Expand schema and select account, lead and opportunities tables

Home

Add data | Agent instructions | Publish | Revert to published version

Explorer

Data Setup

+ Add Data

dataverse_apacagenttec_cds2_workspace...

- dbo
 - account
 - accountleads
 - actioncard
 - activityfileattachment
 - activityparty

SalesPipelineAgentDemo

Test the agent's responses

Ask a question about this data, using your own words. For example:

What are the historical trends across all my data? | Analyze recent data

8. Provide Instructions: Click on the Agent Instruction button and provide the prompt.

Use the sample prompt



SalePipelineData Agent Instruction.txt

Home

Add data | Agent instructions | Publish | Revert to published version

Explorer

Data Setup

+ Add Data

dataverse_apacagenttec_cds2_workspace...

- dbo
 - account
 - accountleads
 - actioncard
 - activityfileattachment
 - activityparty
 - adv_e...
 - adv_i...

Agent instructions

Guide the data agent to the best data sources for different types of questions by writing a detailed system prompt.

Learn more

Format: Markdown

```
## You are sales pipeline agent. You should only respond to the queries related to account, lead and opportunities.

## Restrictions
- Output must be JSON only.
- Do not change field names or structure.
```


9. Add Example queries. You either create it or use the file below to import sample example queries.

The screenshot shows the Power BI Agent setup interface. In the left sidebar, under 'Setup', the 'Example queries' item is highlighted with a red box. In the main content area, there is a 'Import from JSON' button also highlighted with a red box. The title bar says 'Sales Pipeline Agent - examples Queries.json'.

10. Test Agent with questions and review the response and review what queries Agent executed to come up with response.

The screenshot shows the Power BI Agent test interface. A question 'Show revenue forecast for next 6 months' is entered in the 'Question' field. Below it, the corresponding SQL query is shown:

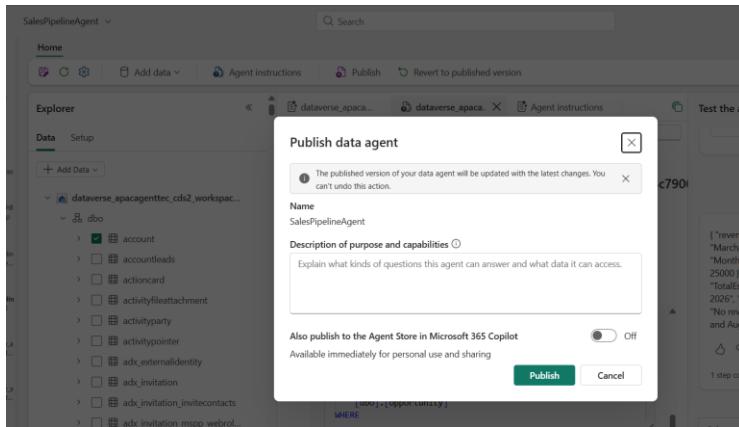
```
SELECT
    DATEFROMPARTS(YEAR(estimatedclosedate), MONTH(estimatedclosedate), 1) AS ForecastMonth,
    SUM(estimatedvalue) AS TotalEstimatedRevenue

```

The right side of the screen displays the response: 'Revenue forecast for next 6 months' followed by a JSON array of monthly forecasts.

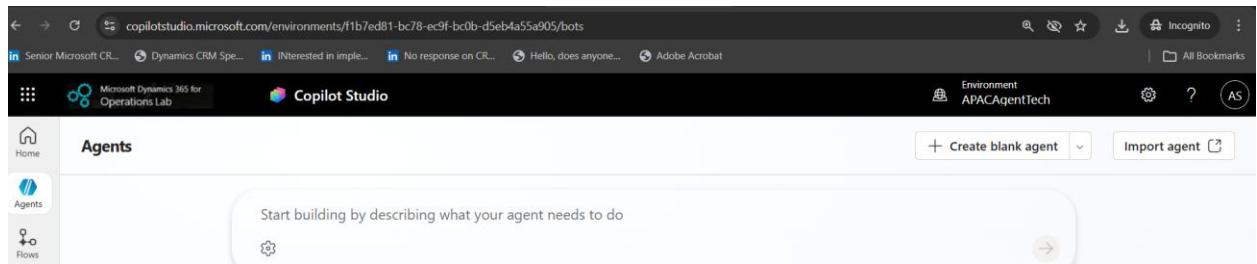
Use following prompt examples to try out the agent and validate the expected response.

11. Publish the Agent. You can describe purpose and capabilities of the agent optionally to that can help other agent to invoke it as needed.



Part 2: Create Agent in Copilot Studio and Add Fabric Data Agent as Agent

1. Login to Copilot studio to create a new agent (copilot.microsoft.com)
2. Ensure you login using your assigned user and ensure that you select the environment in which you want to create the Copilot studio agent.



3. Create Agent with following details

- a. **Agent name:** Sales Manager Assistant
- b. **Description:** Provides insights into the sales pipeline and prospective customers to help sales managers efficiently manage and optimize the sales process.
- c. **Instruction:**



Sales Assistant Agent - Instructions.txt

- d. **Model:** GPT -5 Chat

The screenshot shows the Microsoft Copilot Studio interface. On the left, the 'Sales Manager Assistant' agent is displayed with its name, description, model selection (GPT-5 Chat), instructions, and general guidelines. On the right, a 'Test your agent' window shows a conversation where the agent responds with 'Hello, I'm Sales Manager Assistant. How can I help?'. Below this, there's a message input field and a note about testing real responses. At the bottom, a large green banner indicates 'Successfully published data agent' and provides a link to 'View publishing details'.

4. Navigate to Agent Tabs, in Copilot Studio, and Add Agent and Select Microsoft Fabric

The screenshot shows the 'Agents' tab in Microsoft Copilot Studio. A modal window titled 'Choose how you want to extend your agent' is open. It includes sections for creating a child agent and selecting an existing agent. On the right, a dropdown menu titled 'Connect to an external agent' is expanded, showing options like 'Microsoft Fabric - Preview' (which is highlighted with a red box), 'Microsoft Foundry - Preview', 'Microsoft 365 Agents SDK - Preview', and 'Agent2Agent - Preview'.

5. Create a connection to the Fabric data agent

Connect Microsoft Fabric data agents

The selected agent will work together with your agent, handling specific workflow steps. [Learn more](#)



Microsoft Fabric data agent

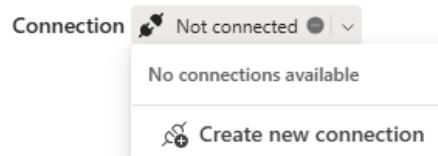
[Connector documentation](#)

Connection Not connected



Microsoft Fabric data agent

[Connector documentation](#)



Connect to Fabric data agent

Microsoft |



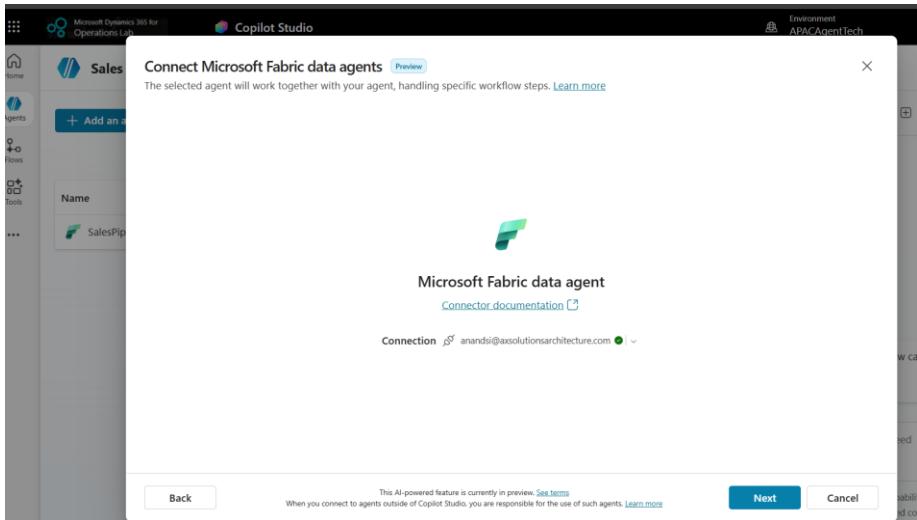
Fabric data agent

Connector to call the data agent.

Create

Cancel

6. Sign in with your assigned user to establish the connection and click Next



7. Select the agent that you just created in the next screen

Select agent to connect [Preview](#)

The selected agent will work together with your agent, handling specific workflow steps. [Learn more](#)

All Endorsed in your org My data Favorites Filter by keyword

Name	Type	Owner	Location
SalesPipelineAgent	Data agent	Anand Singh	AgentTechBootCamp

8. Enter the name and click Add Agent

9. Once the agent is added, update the credential to use as “Maker provided credentials”. you can add the description as well and hit Save

[Microsoft Dynamics 365 for Operations Lab](#) [Copilot Studio](#) Environment APACAgentTech

Sales Manager Assistant Overview Knowledge Tools Agents Topics Activity +3

← SalesPipelineAgent Enabled ... **Save**

Available to
↳ Sales Manager Assistant

Additional details
Ask the end user before running
Recommended for sensitive or regulated domains or when making changes for the user
No

Credentials to use
Control whether this action uses credentials you provide, or those of the end user.
Maker-provided credentials

Inputs
These are inputs that are required to configure the server. They can be pre-configured here.
Inputs are filled in the order they are specified.

Input name **Value**

Test your agent

Hello, I'm Sales Manager Assistant. How can I help you today?

13 minutes ago

Ask a question or describe what you need

10. Go to settings of the agent:

11. Enable code interpreter. This is needed to show response as chart or download out as excel.

12. Test Copilot Studio Agent:

Show revenue forecast for next 6 months

Month	Revenue
March 2026	\$10,000
May 2026	\$25,000
June 2026	\$30,000
July 2026	\$26,000

create a bar chart visualization

Sales Manager Assistant

Code (Preview) Complete

Code

A bar chart visualizing the revenue forecast for the next 6 months has been generated and attached as 'revenue_forecast_chart.png'.

Python

```
import logging
logger = logging.getLogger(__name__)
from abc import ABC, abstractmethod
from typing import Any, Dict
import mediatools.objects as pobj
from mediatools import mediator, connector
from mediator import ConnectorClient, EventContainer
```

revenue_forecast_chart.png

The chart clearly shows:

- March: \$10,000
- May: \$25,000
- June: \$25,000
- July: \$25,000

Would you like me to also provide a cumulative revenue trend line or compare this forecast with the previous 6 months' actual revenue?

Rationale

Show rationale

Ask a question or describe what you need

1 minute ago

3 minutes ago

4 minutes ago

New test session Evaluate

Published 1/10/2020

Settings

Test your agent

Sales Pipeline Agent Model Contact Protocol Submitter

Sales Pipeline Agent Model Contact Protocol 118s

Dataagent_SalesPipelineAgent Tool

Code (Preview) 18.0s

Code

Write a bar chart visualization

revenue_forecast_chart.png

Revenue (\$USD)

\$10,000

\$25,000

\$25,000

\$25,000

March

May

June

July

\$10,000

\$25,000

\$25,000

\$25,000