

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.





Environments > CRM693916 > Settings > **Features**

Learn more about [Features](#) 

Copilot 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' configuration page in Microsoft Copilot Studio. The top navigation bar includes 'Overview', 'Knowledge', 'Tools', 'Agents', 'Topics', 'Activity', and 'Evaluation'. The 'Details' section on the left shows the agent's name 'Email Monitoring Agent' and its description: 'Monitors a mailbox for incoming emails requesting order details, retrieves order information from Dataverse, and replies to the customer with the details.' Below this, the 'Select your agent's model' section shows 'GPT-4.1 (Default)' selected from a dropdown menu. The right side of the page is partially visible, showing a 'Triggers' section with a '+ Add trigger' button and a list of triggers, including 'When a new email arrives (V3)'.

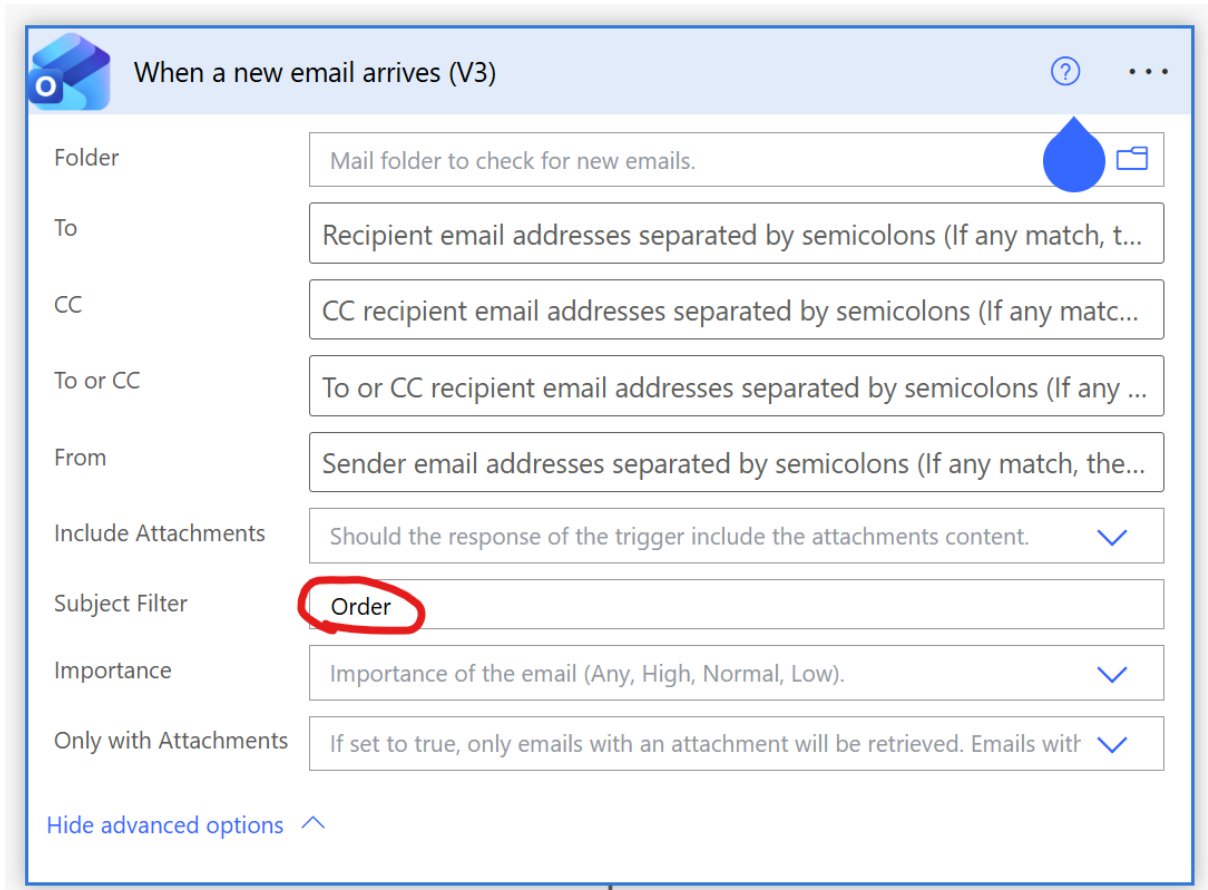
4. Select an appropriate model such as GPT-4.1 for optimal extraction and response capabilities.

Step 2: Set Up the Trigger




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


The screenshot shows the 'Triggers' section in Microsoft Copilot Studio. It includes a '+ Add trigger' button and a list of triggers. The first trigger is 'When a new email arrives (V3)', which is highlighted. The right side of the page is partially visible, showing a 'Knowledge' section with a '+ Add knowledge' button and a list of knowledge sources, including 'When a new email arrives (V3)'.

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



When a new email arrives (V3)

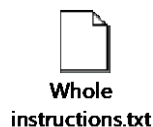
Folder	Mail folder to check for new emails.
To	Recipient email addresses separated by semicolons (If any match, t...
CC	CC recipient email addresses separated by semicolons (If any matc...
To or CC	To or CC recipient email addresses separated by semicolons (If any ...
From	Sender email addresses separated by semicolons (If any match, the...
Include Attachments	Should the response of the trigger include the attachments content. 
Subject Filter	Order
Importance	Importance of the email (Any, High, Normal, Low). 
Only with Attachments	If set to true, only emails with an attachment will be retrieved. Emails with 

[Hide advanced options](#) 

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.









+ Add a tool

Search tools

All

Connector (2)

Last refreshed now

Name	Type	Available to	Trigger	Last modified	Errors	Enabled
 List orders from...	 Connec...	 Email Moni	 By agent	System Administrator 5...		<input checked="" type="checkbox"/> On
 Reply to email ...	 Connec...	 Email Moni	 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).

←

List orders from current Dataverse Environment

▼

Enabled

☒


...

Save

Details

Inputs


Completion




Microsoft Dataverse

List rows from selected environment

admin@CRM693916.onmicrosoft.com




Available to



Email Monitoring Agent

>


Additional details



Inputs

+ Add input

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		⋮

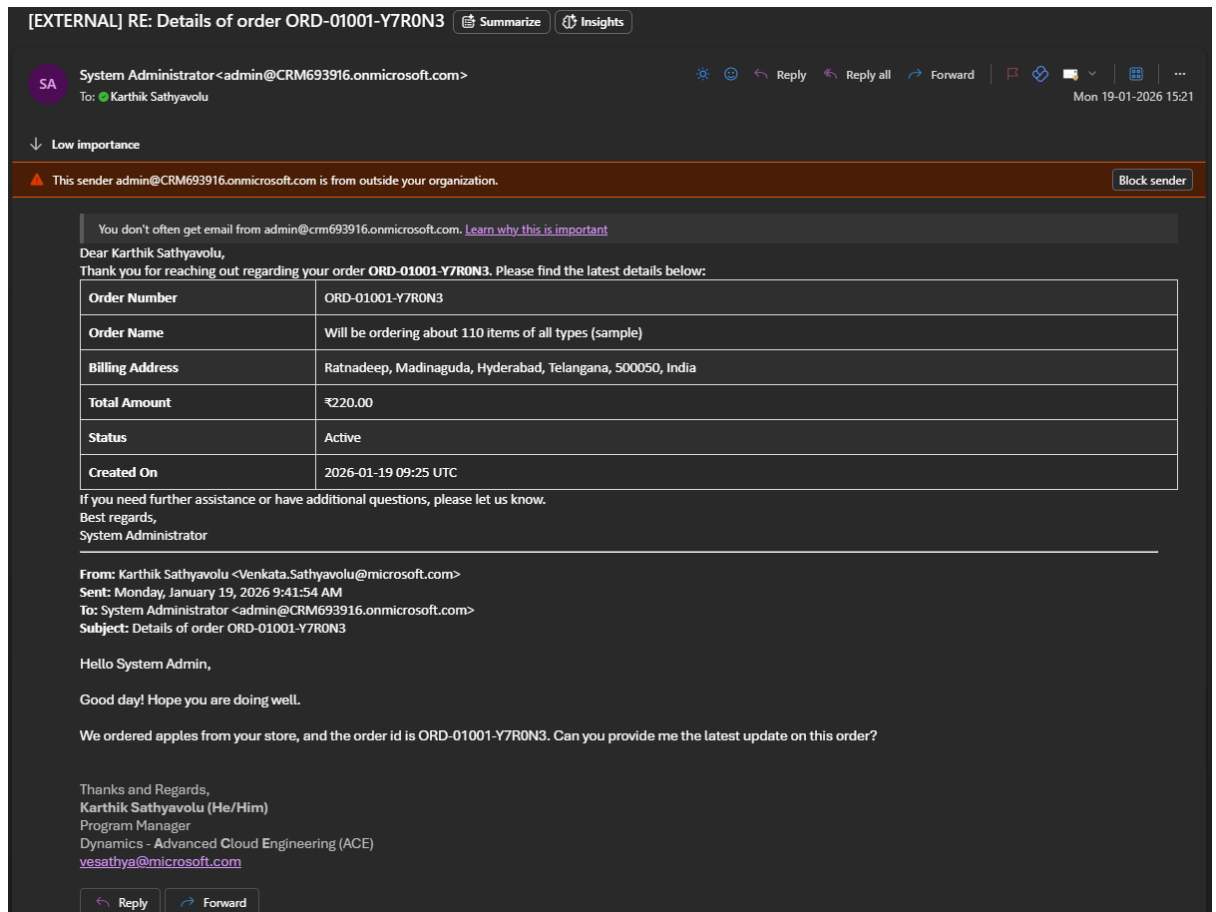
- Apply a filter: *Order number equals the extracted order ID*. This will dynamically fetch the corresponding record.

Step 5: Compose the Reply

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

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.



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.