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

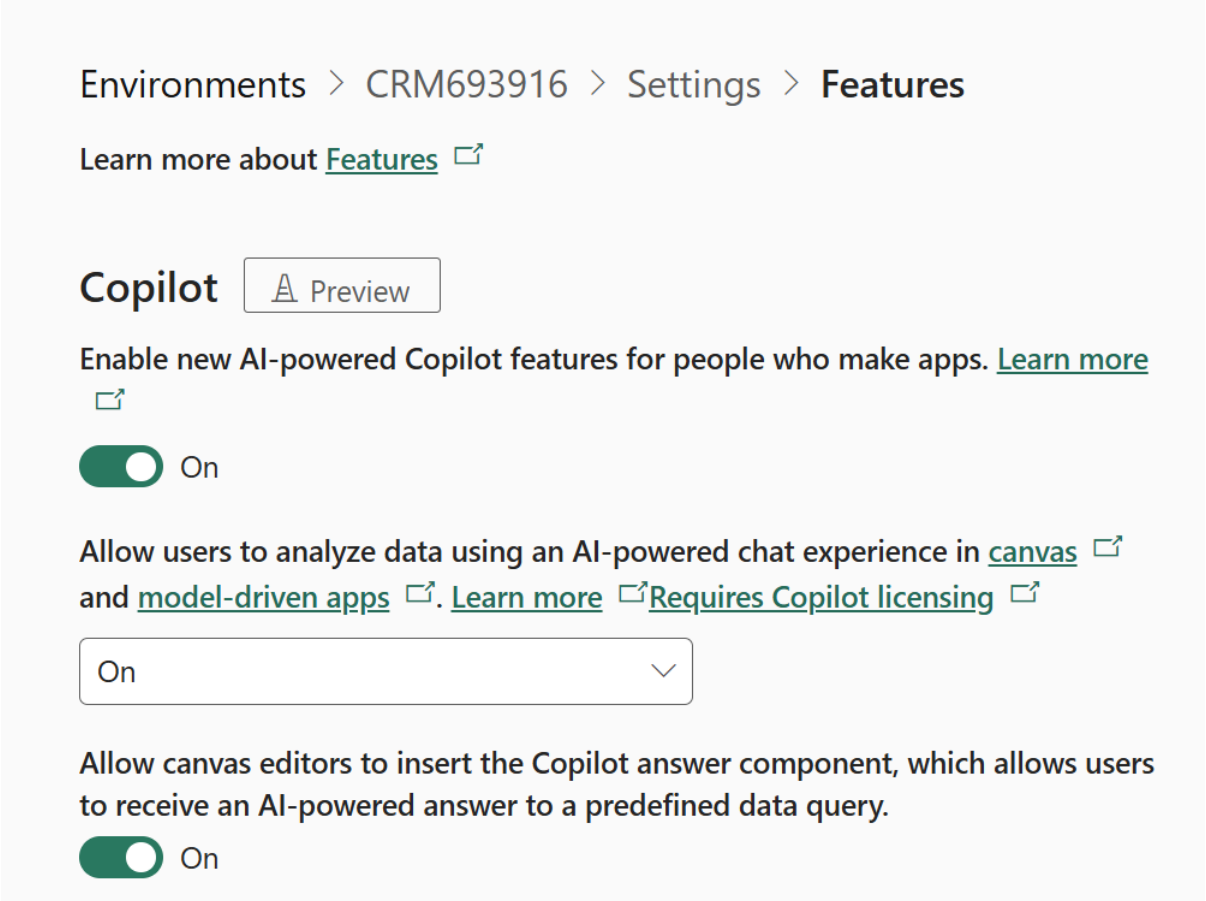
Automate Order Processing with Copilot Studio and Dataverse Integration

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.

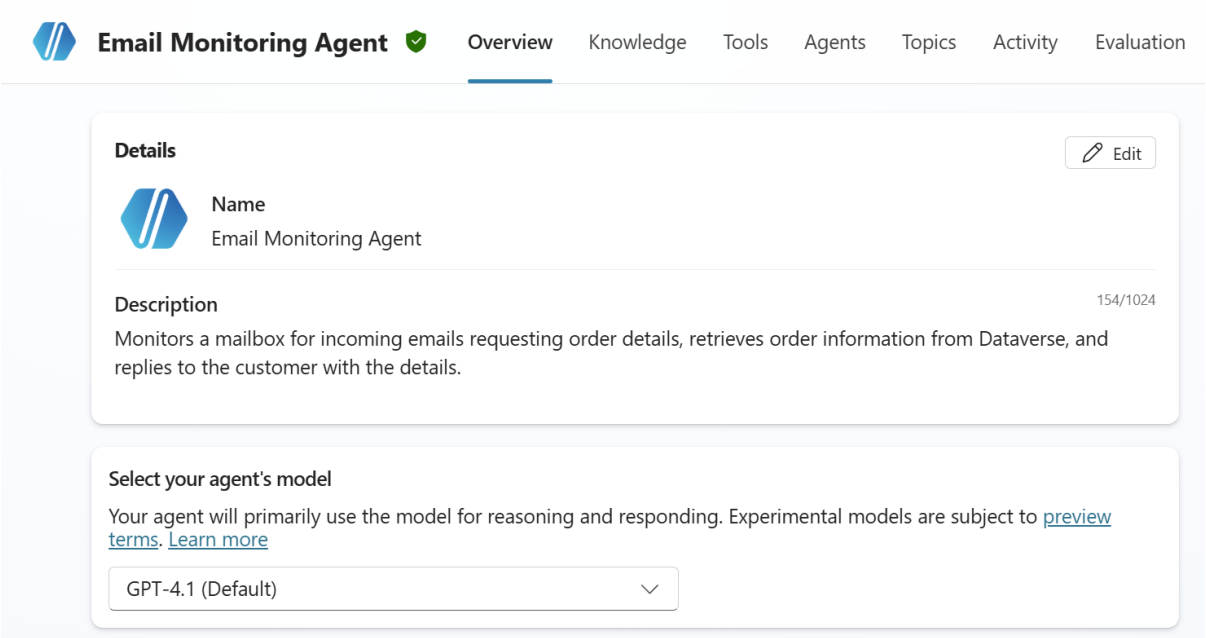


- Access to both the monitored mailbox and the Dataverse environment containing the Orders table.

Step-by-Step Guide

Step 1: Create the Agent

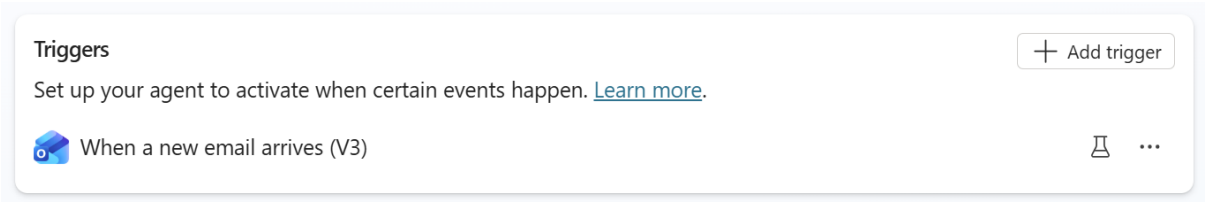
1. Log in to Microsoft Copilot Studio.
2. Create a new agent and name it **“Email Monitoring Agent”**.
3. In the description, mention that the agent’s role is to monitor a mailbox for incoming order-related emails, extract order IDs, query Dataverse, and respond with order details. For example: *This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



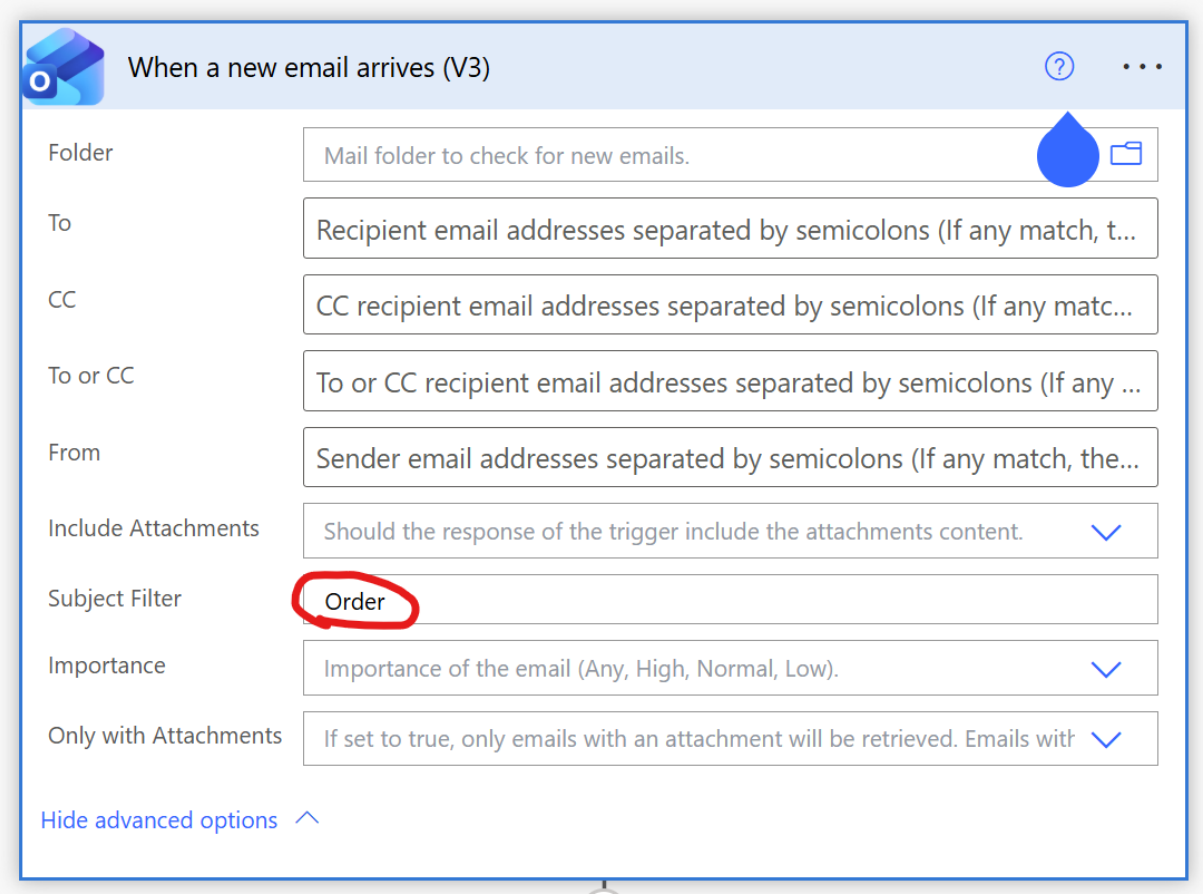
4. Select an appropriate model such as GPT-4.1 for optimal extraction and response capabilities.

Step 2: Set Up the Trigger

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



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



Step 3: Extract the Order ID

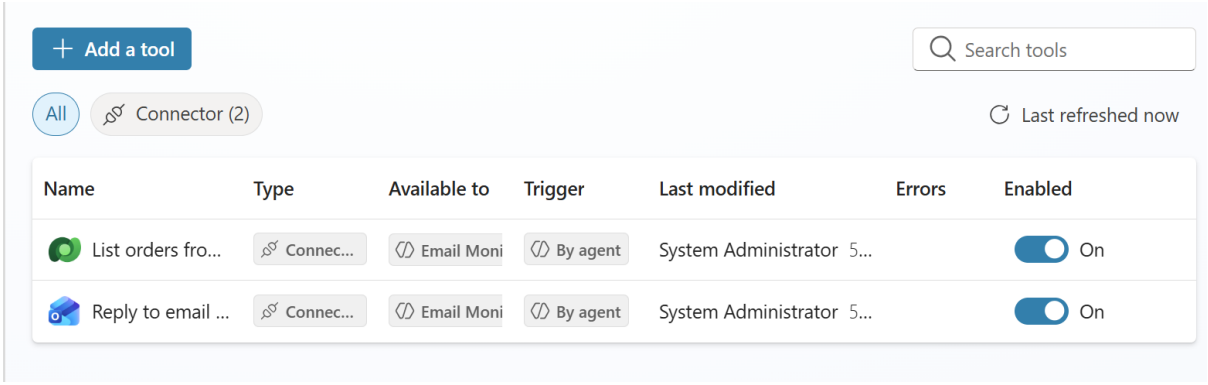
1. Instruct the agent to extract the order ID using a predefined pattern—e.g., **ORD** followed by five digits and then six alphanumeric characters (e.g., ORD12345ABC123).
2. Specify that the agent should look for this pattern in both the email subject and body.

   The whole instructions:

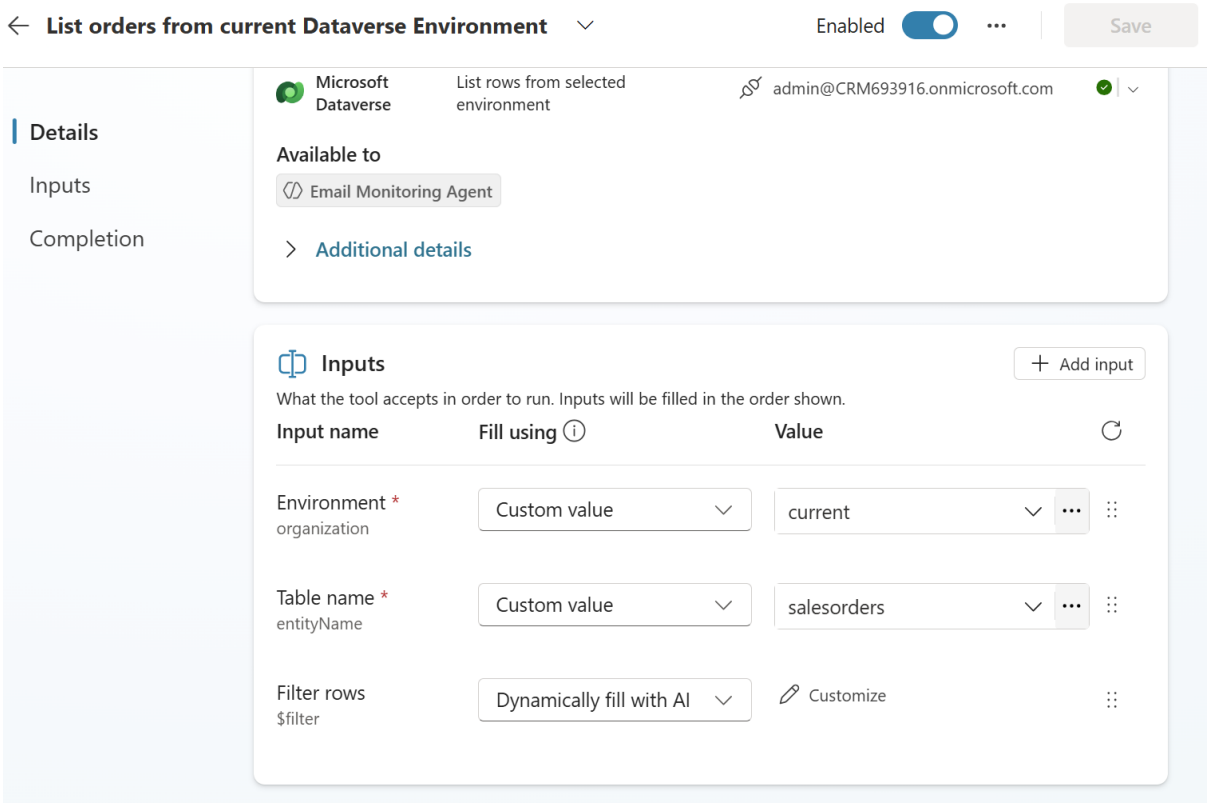
   Whole instructions.txt

Step 4: Query Dataverse

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



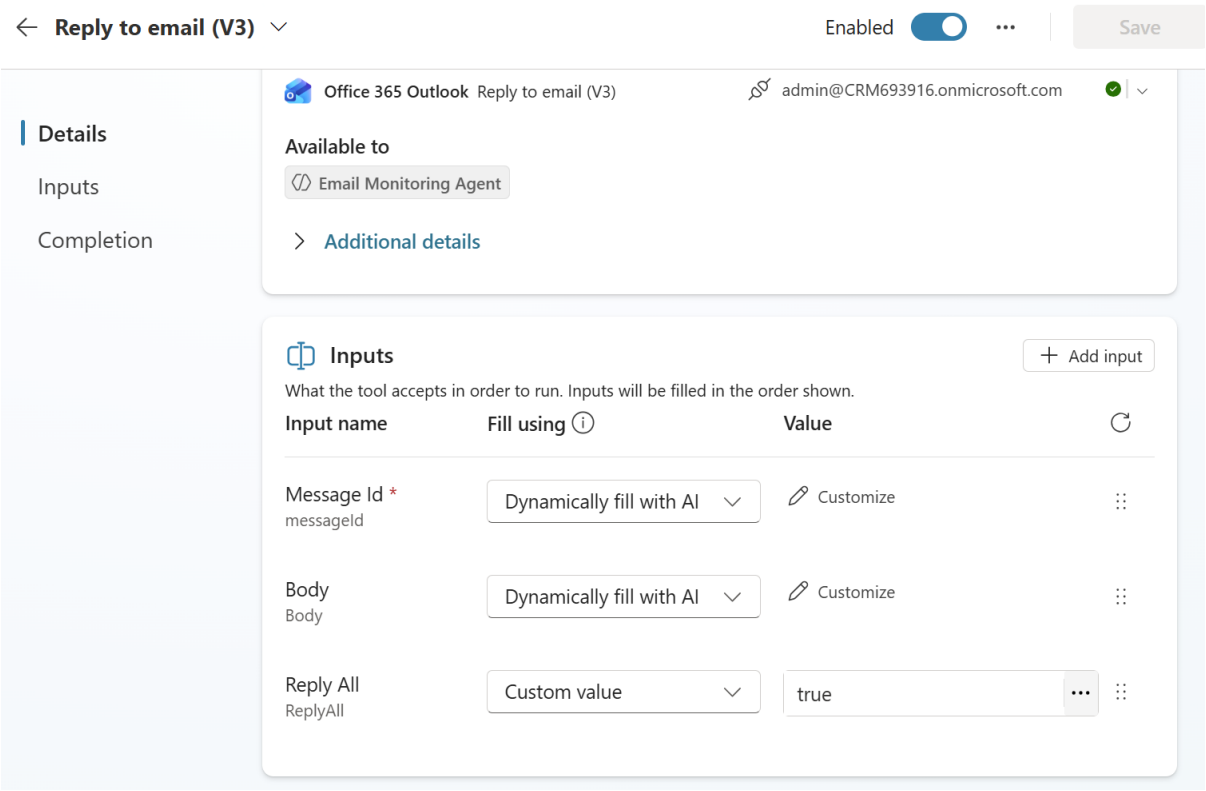
2. Point it to the Orders table in your current environment (e.g., Dynamics 365 Sales Orders).



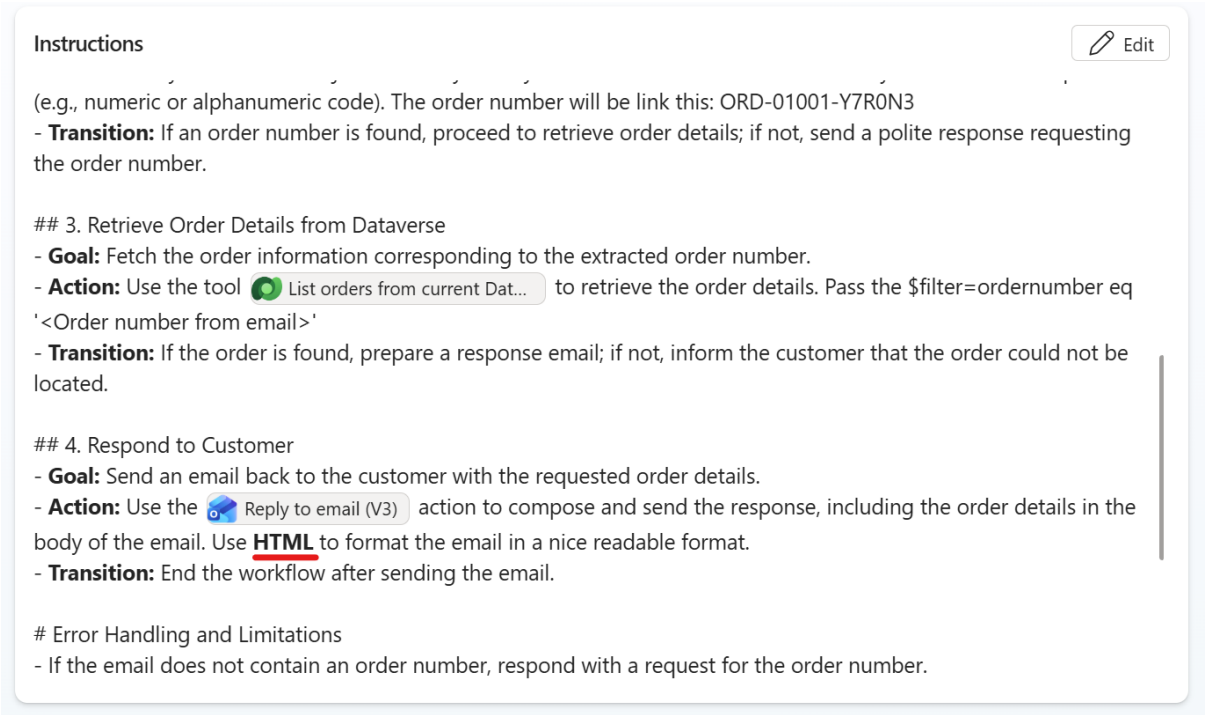
3. Apply a filter: *Order number equals the extracted order ID*. This will dynamically fetch the corresponding record.

Step 5: Compose the Reply

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



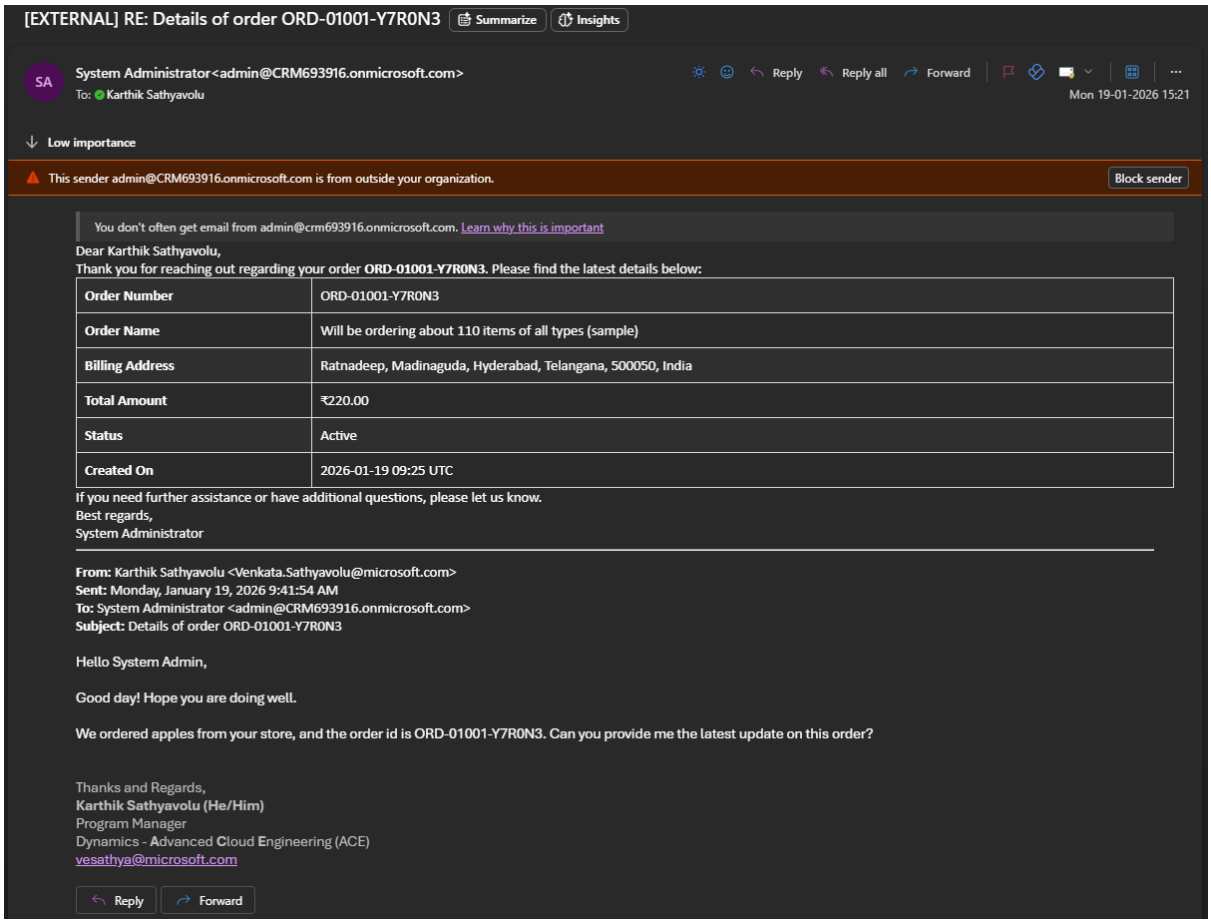
3. Structure the reply body in HTML—for example, present order details in a table or a cleanly formatted list for easy readability.



4. 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.



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.