



Import Copilot Bot to your organization's tenant

Prerequisites

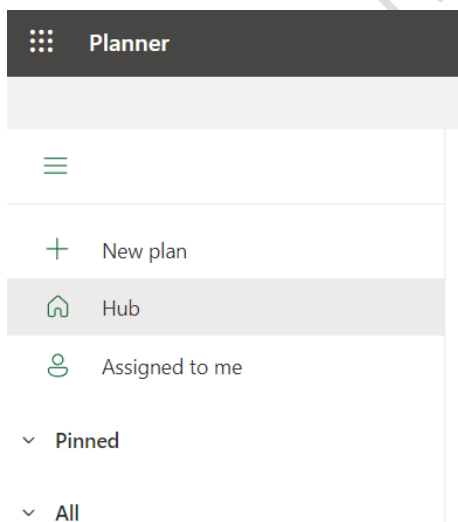
- Co-pilot trial license enabled
- Power Automate Premium license
- Power Apps Per User plan
- Account that will own Co-pilot (used to import solution) should have read and write permissions for Dataverse
- Permissions to create, manage and publish co-pilots
- All the users added to one group which will help organize the task created
 - Only add user that are allowed to create tickets using the bot

Note this:

- There are 2 sample documents included in the package for test purposes
- You can add your own documents to knowledge base (refer how to section)
- Make sure to keep count of the AI Builder credits being used by your bot

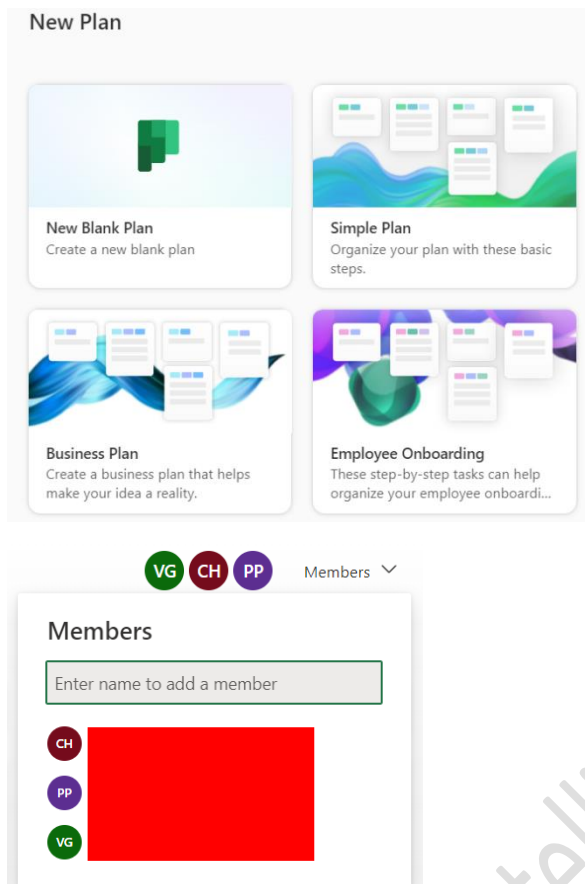
Step 1: Create a Plan in Planner and Knowledge base in One Drive

Go to <https://tasks.office.com/> >> New Plan >> Name your Plan 'Tasks by Virtual Bot' >> After plan is created add team members to Plan

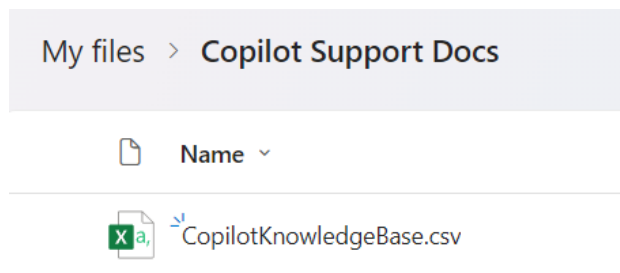
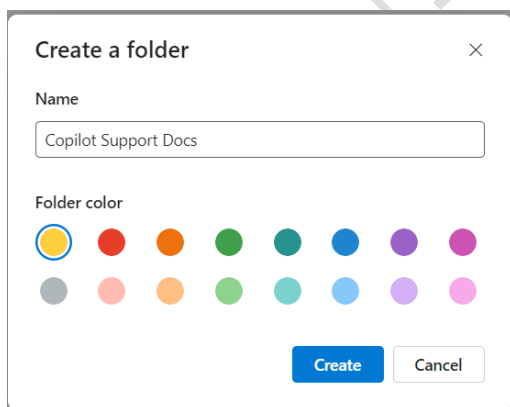




Copilot Support Bot to create Tasks in Planner



Go to <https://www.office.com/onedrive> >> Create a folder >> Upload **CopilotKnowledgeBase** to folder created.

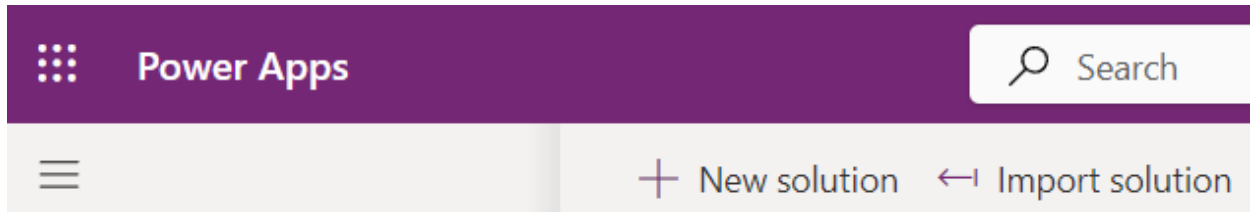




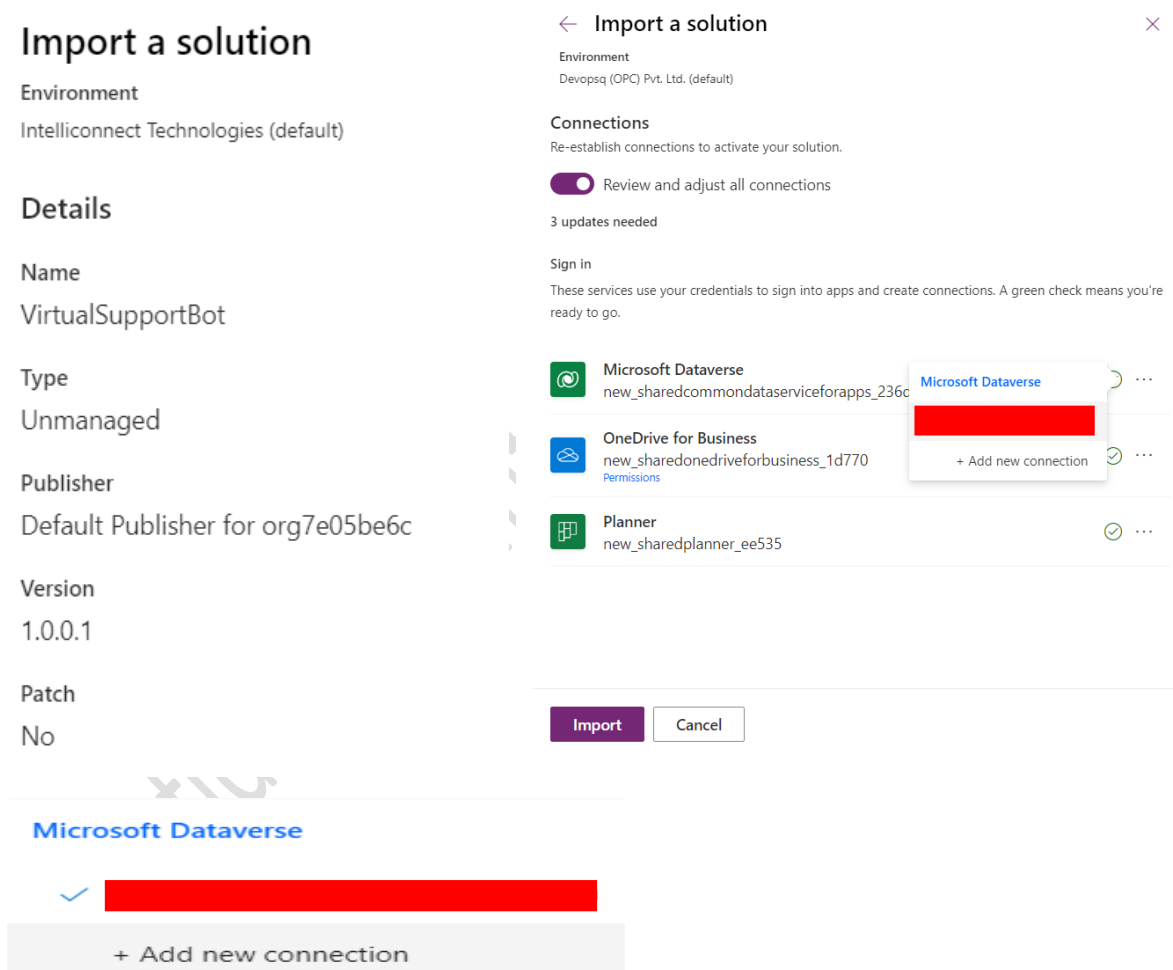
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Step 2: Import Solution

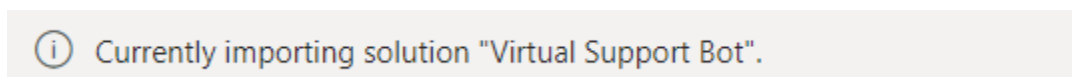
Go to <https://make.powerapps.com> >> Import solution



Once solution is ready import click on Next >> Make sure you add your connection references >> Click on Import



You will see the following message





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After a while, you'll see a successful message that your import is done. You will also find 'Virtual Support Bot' solution listed

✓ Solution "Virtual Support Bot" imported successfully.

Solutions

Unmanaged

Managed

All

Display name ▾	Name ▾	Created ↓ ▾	Version ▾	Publisher ▾	Solution check
Virtual Support Bot	VirtualSupportBot	1 minute ago	1.0.0.1	Default Publisher...	Hasn't been run



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Step 3: Change Plan ID in Automate

Go to <https://make.powerautomate.com> >> Click on Edit for 'CreateATask' flow >> Change folder for One Drive to we have created in the start.

The screenshot displays a Power Automate flow with the following steps: 'Get file content', 'Initialize variable - Data', 'Create text with GPT using a prompt', 'Initialize variable - Result', and 'Create a task'. The 'Create a task' step is selected, and its configuration pane on the right is visible. Under 'Connection references', 'OneDrive for Business' is selected with a red box highlighting the connection name. The 'Group Id' field is set to 'Tasks by Virtual Bot', 'Plan Id' is 'Tasks by Virtual Bot', 'Title' is '[AskedBy x] - Title x', and 'Bucket Id' is 'Up next'.

Change Group to the one we created in the start >> Change Plan ID and Bucket ID

This screenshot shows the configuration for the 'Create a task' step. The fields are: 'Group Id' (Tasks by Virtual Bot), 'Plan Id' (Tasks by Virtual Bot), 'Title' ([AskedBy x] - Title x), and 'Bucket Id' (Up next).

Change Assigned User Ids to someone from your organization >> Click on Save >> Once flow is saved check Status is On. And similarly change the Plan and Assignee for 'Run a flow from Copilot'



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Add assignees to a task

* Task Id

Id x

* Assigned User Ids

Run a flow from Copilot

Undo Redo Comments Save

Your flow is ready to go. We recommend you test it.

Details

Edit

Flow

Run a flow from Copilot

Status

On



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Step 4: Turn on Teams in Copilot Channels & Get sharing link

Go to <https://web.powerva.microsoft.com/> >> You will see 'Virtual Support Bot' listed as one of the Copilots

Recent

Name	Type	Last modified
Virtual Support Bot	Copilot	# Microsoft Copilot Studio

Open the Copilot >> Click on Channels >> Click on Turn on Teams >>

Virtual Support Bot Overview Knowledge **Topics** Actions Analytics Channels

Create a Task **Save**

Virtual Support Bot

Microsoft Teams

Nothing can stop a team, and now your copilot can help you achieve more together. To open the lines of communication, select **Turn on Teams**. After a quick installation, your users and copilot can start chatting. [Learn more](#)

Published copilot status
Verify or modify the availability of y

Published by Vrutika Gaikwad

Channels
Configure your copilot channels to

Microsoft Teams

Turn on Teams **Cancel**

Click on Availability Options >> Click on Manage sharing >> Select User – can use the copilot



Copilot Support Bot to create Tasks in Planner

Microsoft Teams

Excited to make your copilot available for others to use in Microsoft Teams? Review how your copilot will appear. Select **Edit details** to modify. Once you are ready, select **Availability options** to continue. [Learn more](#)

Copilot preview



Virtual Support Bot
Built using Microsoft Copilot Studio.



Edit details



Open copilot



Settings (coming soon)

[Disconnect from Teams](#)

[Availability options](#)

← Microsoft Teams

Make your copilot available to users in Microsoft Teams so they can find and use it. [Learn more](#)

Share link

Shared users can open the copilot in Microsoft Teams with this link. [Manage sharing](#)

[Copy link](#)

Show in Teams app store

Make your copilot appear in the Teams app store.

Show to my teammates and shared users

Appear under the Copilot extensions section.

Show to everyone in my org

Submit to your admin for approval to appear under Built by your org section.

← Everyone in TechnoClusters IT Services

Copilot permissions

The user's permissions for this copilot.



User - can use the copilot



None

Data permissions ⓘ

Make sure your users have access to the data used in Power Automate flows included in the copilot. [Learn more](#)

Go back and Copy link to share with your teammates



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Step 5: Installing in Teams and Test Run

After click on shared link the dialog box shown in image below will be shown >> Click on Add

Virtual Support Bot

Powered by Power Virtual Agents

[Add](#)

Overview Permissions

Built by Power Virtual Agents. Create your own at aka.ms/pvaforteams.

Help employees stay informed, productive, and connected. Create bots and add important topics for your organization using an intuitive, graphical interface. No code required.

App features

Bots
Chat with the app to ask questions and find info

Copilot extension Preview
Use with Copilot or add to a chat or meeting. Some plugins will be turned on automatically.

Created by: [Powered by Power Virtual Agents](#)
Version 1.0.0

Permissions

This app will have permission to:

- Receive messages and data that I provide to it.
- Send me messages and notifications.
- Access my profile information such as my name, email address, company name and preferred language.

By using Virtual Support Bot, you agree to the [privacy policy](#), [terms of use](#), and [permissions](#).

After adding Type in trigger phrase in chat **‘Create a support bot’**



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Create a support ticket

Last read

Virtual Support Bot 3:56 PM

Please choose a task title:

Custom

Build Failure Cases

Appsmith docker installation

3:57 PM

Appsmith docker installation

Virtual Support Bot 3:57 PM

Please type any notes or additional information, if you would like to add:

3:57 PM

Please notify when done installing

Virtual Support Bot 3:57 PM

Additional permissions are required to run this action. To proceed, please select 'Connect', and review any missing connections.
Once you have made these updates, please select 'Retry'. You can also ask me anything else to go to a different topic.

Connect

Retry

① Your response was sent to the app

Task has been created for Support team

Please use any one of the following trigger phrases again to create a task :

- Create a support task
- Create a support ticket

If you did not receive a successful acknowledgement message. Please escalate the issue with the Developer

Type a message

You will see a message to ask you to connect for permissions to create a task on your behalf

Click on Connect >> You will be redirected to a web page to connect >> Click on Connect >> Click on Submit



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Virtual Support Bot

Manage connections Refresh

All Connected Expired Not Connected Stale

<input type="checkbox"/>	Name	Actions	Status
<input type="checkbox"/>	CreateATask	1 action	Not Connected Connect
<input type="checkbox"/>	Run a flow from Copilot Run a flow from Copilot and send back a response.	1 action	Not Connected Connect

Virtual Support Bot

Manage connections Refresh

All Connected Expired Not Connected Stale

<input type="checkbox"/>	Name	Actions	Status
<input type="checkbox"/>	CreateATask	1 action	Connected Manage
<input type="checkbox"/>	Run a flow from Copilot Run a flow from Copilot and send back a response.	1 action	Connected Manage

Once connected go back to chat and click on Retry >> You can find your task created in **‘Tasks by Virtual Bot’**

Task title & description will include requestors name



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Tasks by Virtual Bot

☐ [Redacted] - Appsmith docker installation

VG [Redacted]

Add label

Bucket	Progress	Priority
Backlog	<input type="radio"/> Not started	Medium
Start date	Due date	Repeat
Start anytime	Due anytime	Does not repeat

Notes ☐ Show on card

Title: Appsmith docker installation
Summary: Steps for Appsmith docker installation
Additional Notes: Notes:Please notify when done installing
Gen AI Answer:Sure, please provide the notes or additional information you would like to add for the "Appsmith docker installation" task.
Asked By: [Redacted]

Checklist

☐ Add an item



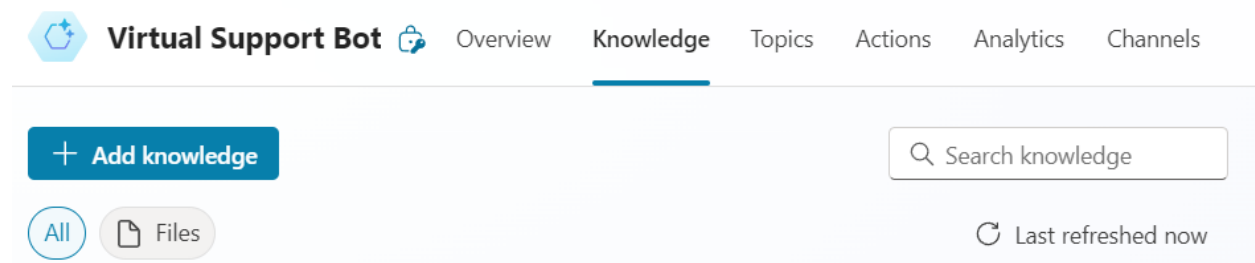
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How to

Add documents to the copilot knowledge base

Open your Copilot >> Click on Add Knowledge >> Upload your document

Wait for indexing to be finished or else your copilot may not be able to give proper answers



Add Links to CopilotKnowledgeBase.csv

Go to One Drive folder where the CSV is stored and add your line of document there. Make sure to maintain .csv format

```
Topic,Summary,Link
Appsmith docker installation,Steps for Appsmith docker installation,https://github.com/intelliconnect/genai-pm-assistant-smart-reminder
Build Failure Cases,Solutions of different cases of build fails,https://github.com/intelliconnect/genai-pm-assistant-smart-reminder
```

Add a title to Quick Reply

Open Virtual Support Bot Copilot Studio >> Topics >> Create a task >> Question node >> Type your title and press enter >> You have added a new quick reply to you copilot

Make sure that task title has a clickable link in the **CopilotKnowlegdeBase.csv**



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Virtual Support Bot

OverviewKnowledgeTopicsActionsAnalyticsChannels

Create a Task

Copilot Comments Variables Topic checker Details More

Question Text

Add

Message variations
Please choose a task title:

Quick replies

Custom

Build Failure Cases

Appsmith docker installation

Add Quick reply text and press enter

Identify

User's entire response

Save user response as

TaskTitle string



Copilot Support Bot to create Tasks in Planner

Additional Features:

These features are in works and can be added based on customization requests

- Adding questions to get additional details about task, e.g., Priority, Due date, Assignee, etc.
- Custom identifiers – Task Titles could be identified and in user's open chat and asked to be created into a task
- Automating solutions for repetitive tasks