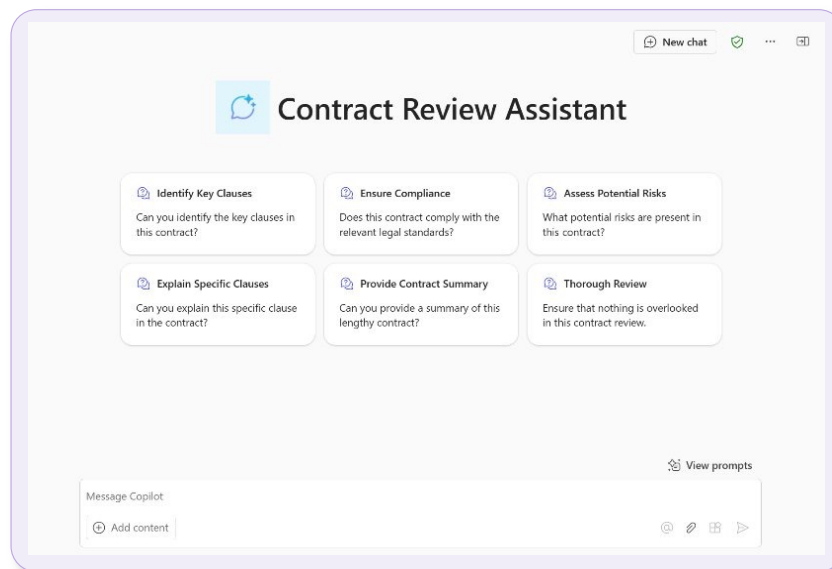




# Automate tasks with agents in Microsoft 365 Copilot Chat

## What are agents?

Agents are AI-powered tools that extend Microsoft 365 Copilot by handling complex processes and tasks for you. For example, they can help you manage projects or perform compliance checks for your documents. You can create agents easily in Copilot Chat and connect them to your organization's shared data to further unlock productivity<sup>1</sup>.



Screenshot of a contract review assistant agent in Copilot Chat with sample prompts.

## Create an agent

1. Select “Create an agent” in the side pane of Copilot Chat to open the agent builder.
2. Select an agent template to start from, or create a custom agent by describing what you want to create using natural language.
3. Select “Configure” to further customize your agent. Connect the agent to relevant data sources like a SharePoint site.
4. Select “Create” to publish your agent.

You can edit or share your agents by selecting “Create an agent” to open the agent builder, expanding the drop-down menu at the top, and selecting “View all agents”.

### Top ways to use custom agents

- Automate contract and legal reviews
- Manage projects and workstreams
- Audit large datasets
- Answer product questions
- Retrieve research insights from company databases
- Assist new hires with onboarding

## Start using your agent

@mention an agent in Copilot Chat to interact with it, or open the agent directly by selecting it from the side pane in Copilot Chat.

Want to learn more about agents and how to get started? Check out the [support article](#).

<sup>1</sup>Agent creation is only available if your organization admin has enabled this capability. Shared data includes SharePoint files and data from your organization's [Microsoft Graph connectors](#).