



Microsoft Copilot Studio

Embrace low-code generative AI to revolutionize chatbot development with Microsoft Copilot Studio



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CHATBOT  SUMMIT



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Agenda

Introduction to Copilot Studio

Walkthrough of the studio

Lab 1: Create a smart custom copilot using your website data

Lab 2: Influence answers with custom instructions

Lab 3: Create custom topics by describing them

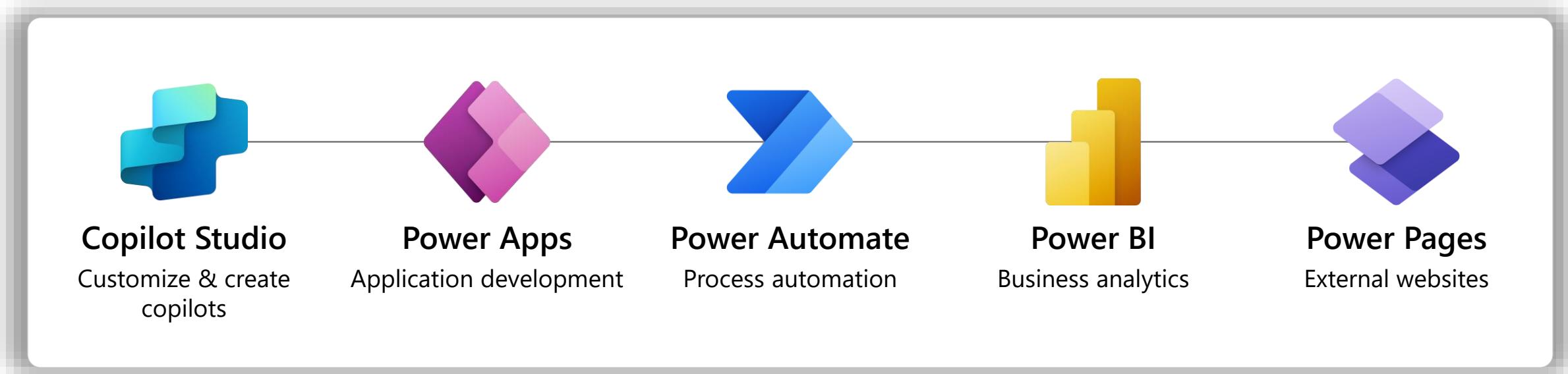
Lab 4: Advanced topic authoring and HTTP requests

Lab 5: Use dynamic chaining to interact with your APIs

Introduction to Copilot Studio

Microsoft Power Platform

Accelerate app development, automate workflows, visualize data, and reduce repetitive tasks with AI-powered tools.



Terms to know



Copilot

Copilot is an intelligent AI assistants that uses generative AI and LLMs to assist humans with complex cognitive tasks. This term can be used in reference to Microsoft Copilot (an umbrella term for AI assistants that sit within Microsoft product experiences) or custom-built copilots external to the Microsoft brand (written with a lowercase 'c').



Generative AI

Generative AI broadly describes AI models that can produce human-like content in the form of text, images, code and other types of media or data in response to a user-entered prompt.



LLM

Large language models (LLM) is a type of AI model that is trained on massive datasets. LLMs are a subset of generative AI. LLMs can be used for understanding natural language and generating content like text (ex: GPT-4).



RAG

Retrieval-Augmented Generation (RAG) is a process that enables AI models to retrieve relevant information from a knowledge source and incorporate it into generated text.



GPTs

Generative Pre-trained Transformers (GPTs) are custom versions of GPT models that can be tailored to specific areas, tasks or personas using specific instructions, knowledge and any combination of skills.



Plugins

Plugins are like skills used to extend copilot experiences. They are reusable building blocks from a central plugin registry that can call connected services and APIs, perform actions, and provide answers for your copilot users. See slide 17 for a list of the different plugin types.



Connectors

- Microsoft Graph Connectors are IT administrator-enabled connectors that allow you to search and surface data from third-party sources in intelligent Microsoft experiences like Microsoft Copilot for M365.
- In the Power Platform, connectors mean the 1200+ prebuild data connectors to LOB to use within Power Platform solutions. These can be used within plugins when being used with Copilot for M365.

What is a copilot?

An experience using generative AI to assist humans with complex cognitive tasks.

Chat using natural language (and code)

You determine, guide, and approve the output

Its value increases with complexity

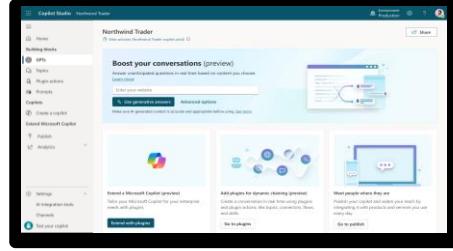


Copilot Studio

Copilot Studio is an end-to-end low code conversational AI platform for **extending Microsoft Copilot or building your own copilot** with generative AI and large language models.

- ◆ SaaS / no infrastructure management
- ◆ Conversational orchestration

What's in Copilot Studio?



Copilot Building Studio

Use the **new studio** to create, test and deploy conversational copilots.

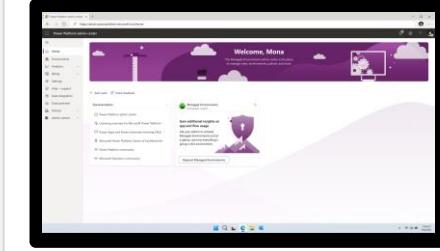
Including **advanced capabilities** of Azure Bot Framework natively in Copilot Studio.

Build Your Own Copilot

The Copilot Studio interface is shown in a large central window. It's divided into several sections:

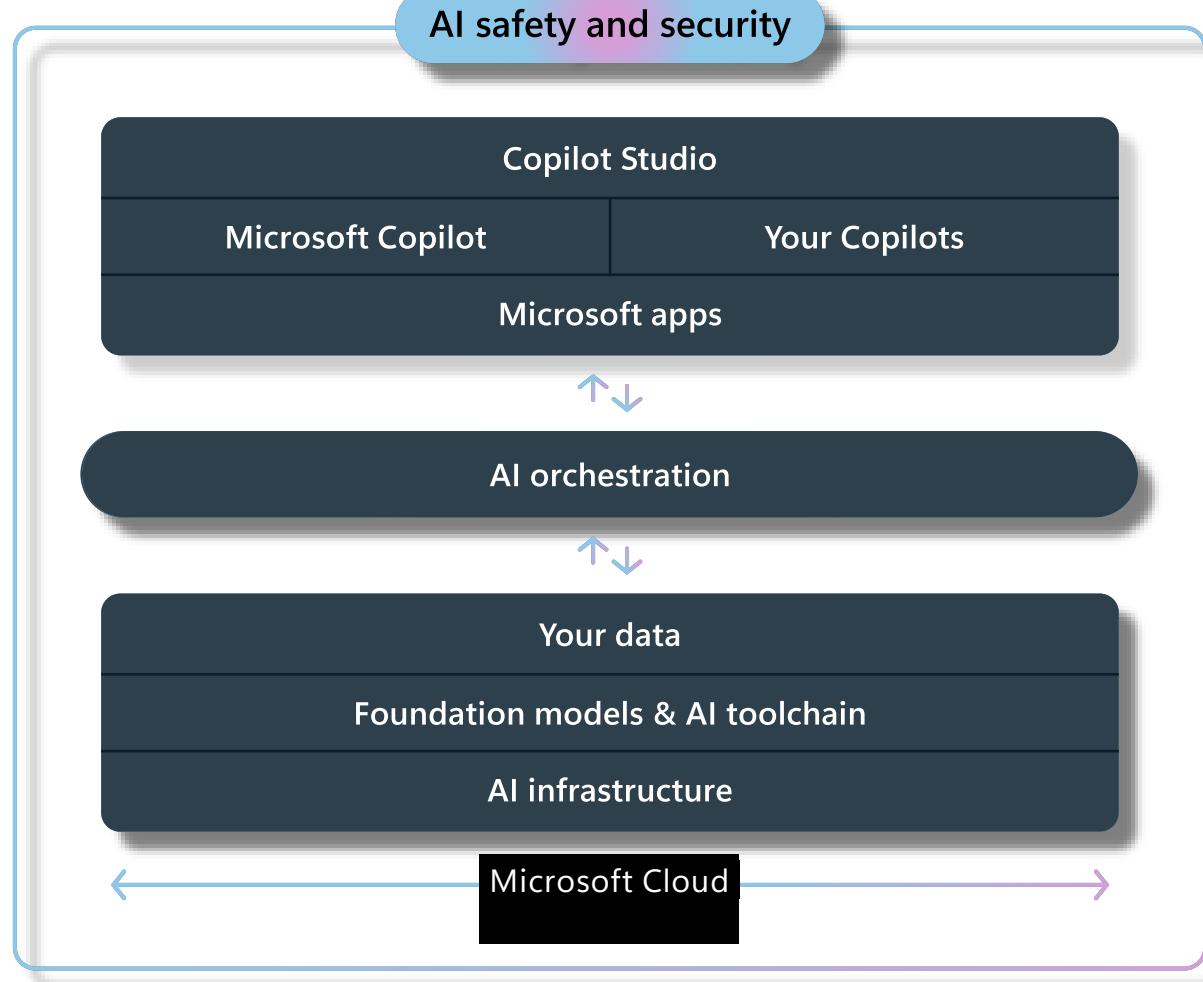
- Workspaces:** Shows a list of workspaces with icons for each.
- Topics, GPTs & Plugins:** Shows a list of topics and AI plugins.
- Generative AI:** Shows a flowchart editor for generating AI.
- Channel Publishing:** Shows a list of channels and their configurations.
- Analytics & Insights:** Shows various performance metrics and charts.
- Conversational Plugins:** Shows a list of conversational plugins.
- AI Plugins:** Shows a list of AI plugins.

Settings: Security, Skills, Language Understanding, Languages, Customer Engagement Hub



Admin Studio

Deploy copilots securely using **central administration**, built-in security roles, and simple management across environments to maintain compliance and governance.





Conversational Orchestration

Rules-based responses are always used before generative responses

Rules-based Authored Topics

"How many miles do I have in my account?"

Rules-based FAQ / Scripted Responses

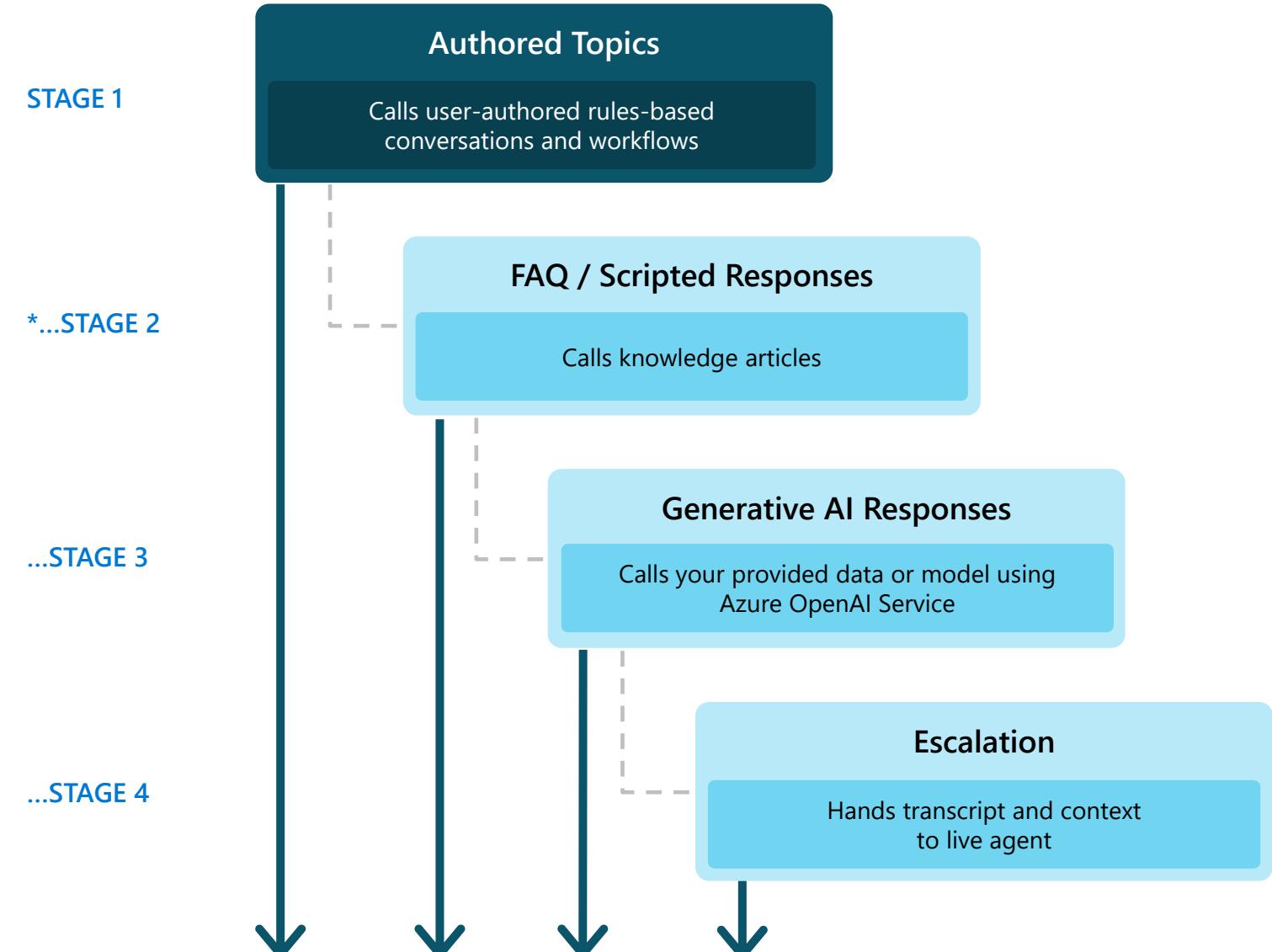
Q: "Why are all flights currently grounded?"

Generative Generated Responses

Q: "What type of snacks are available on your flights?"

Rules-based Escalation

Q: "Can I talk to an agent?"



* Will only move to next stage(s) if necessary



Multi-Channel Platform

Dynamics for Customer Service



Voice



Teams



Custom

SMS

Azure
Communication
Services

TeleSign



Twilio

SOCIAL CHANNELS

Apple Messages
for Business

Facebook

Google's Business
MessagesWhatsApp
through Twilio

Line

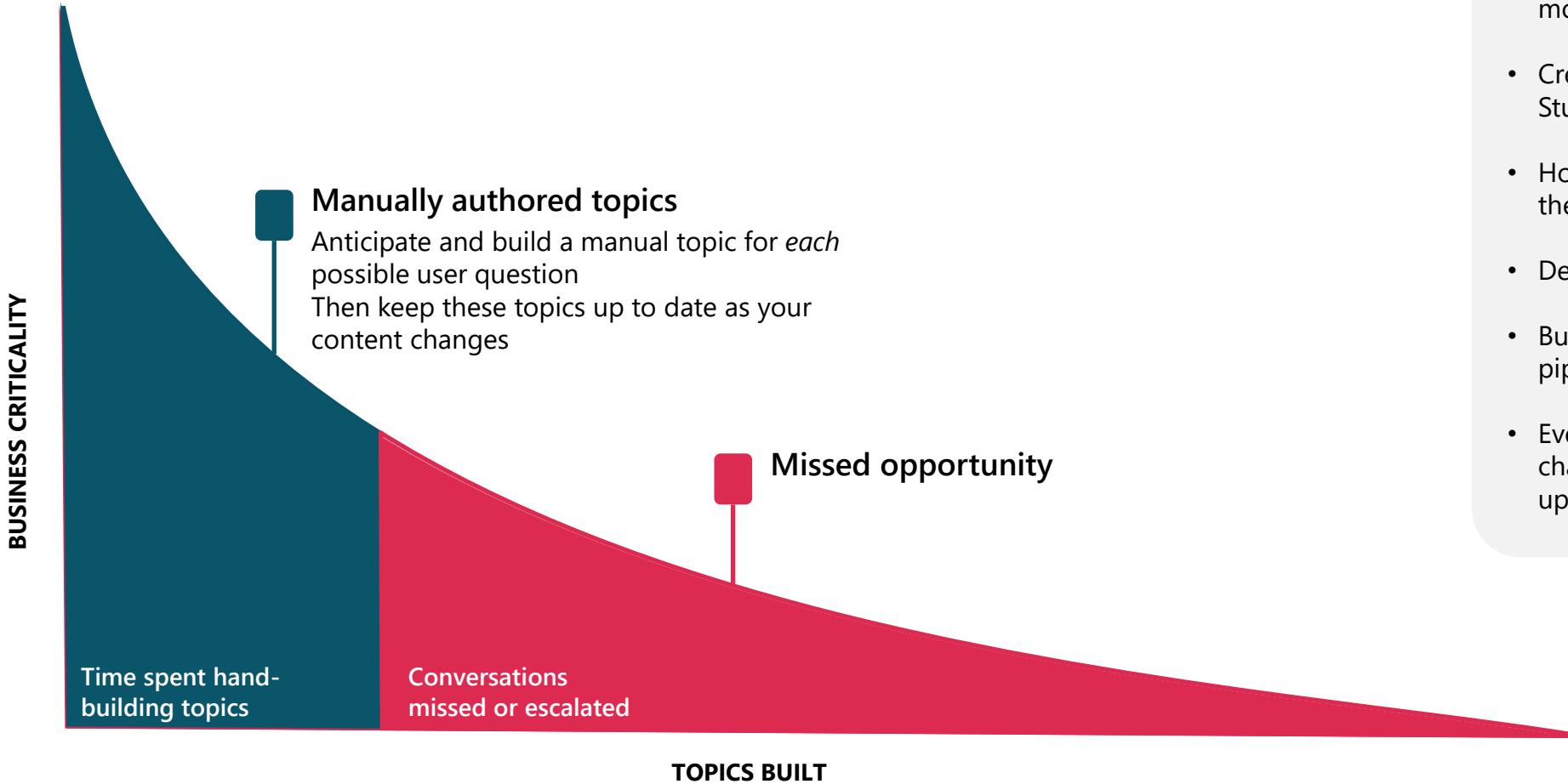


WeChat

Native to Copilot Studio

Microsoft Copilot (preview)
Publish plugins to a Microsoft Copilot for a unified experience.Microsoft Teams
Chat with your bot through a Teams app.Demo website
Try out your bot and invite team members to do the same.Custom website
Activate your bot on your own website.Skype
Expand your bot's reach to customers on Skype.Slack
Expand your bot's reach to customers on Slack.Telegram
Chat with your bot through a Teams app.Twilio
Add your bot to a native or web-based mobile app.DirectLine Speech
Expand your bot's reach to customers on DirectLineSpeech.Mobile app
Add your bot to a native or web-based mobile app.Facebook
Connect with your customers on Messenger.LINE
Add your bot to a native or web-based mobile app.GroupMe
Expand your bot's reach to customers on GroupMe.

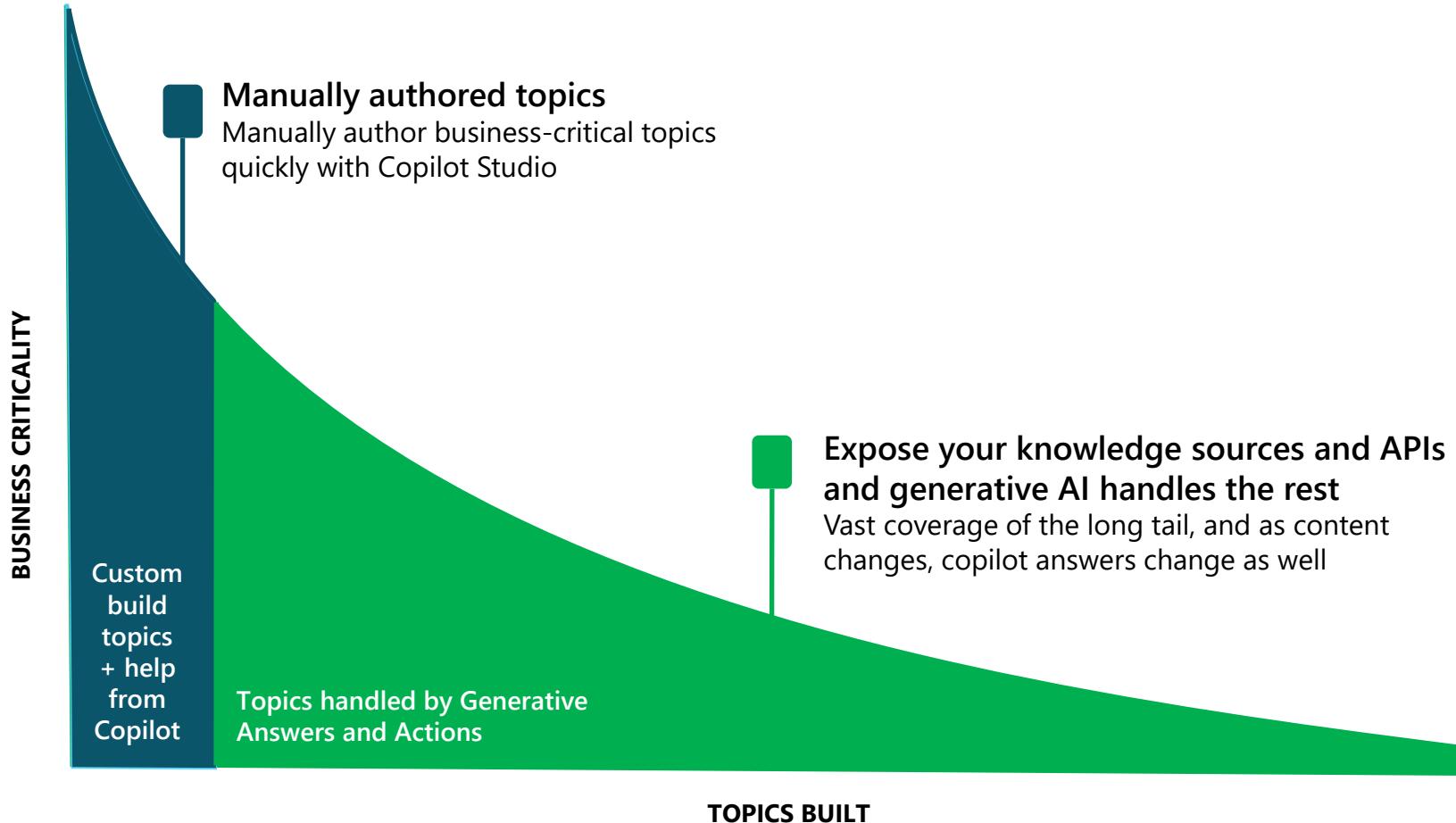
Generative AI is changing building



Traditional (e.g. Azure)

- Create Azure tenant and infra
- Annotate thousands of utterances and conversations to build a custom NL model
- Create topics in code using Visual Studio and BF SDK
- Host Azure Bot Service and instantiate the appropriate channel
- Deploy your copilot to the service
- Build your own custom analytics pipeline
- Every time your knowledge content changes (e.g. different hours) go and update the copilot in code

Generative AI is changing building



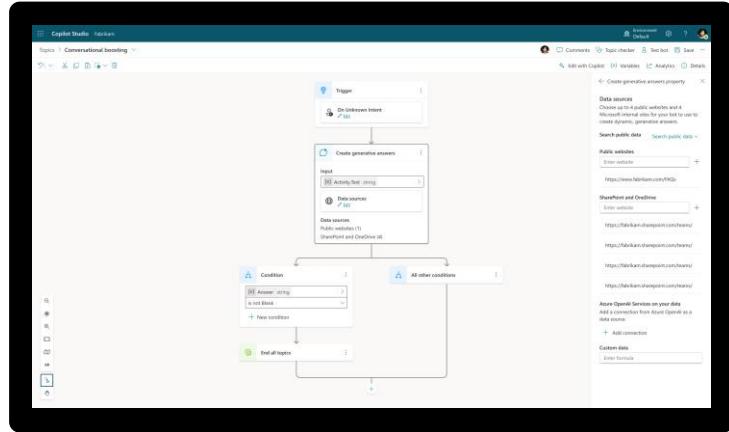
Copilot Studio with Generative AI

- Full E2E SaaS – no infra to host or manage
- No explicit NL training or custom model required, comes with powerful large language model
- Point to a knowledge sources and have a useful bot in minutes with Generative AI
- Customize your copilot with business-critical topics using easy to use graphical interface and 1000s of pre-built connectors, or call custom APIs
- Developers, low-code users can collaborate inside the same canvas with graphical multi-authoring and code side-by-side
- Publish to the channel of your choice in minutes with a few clicks

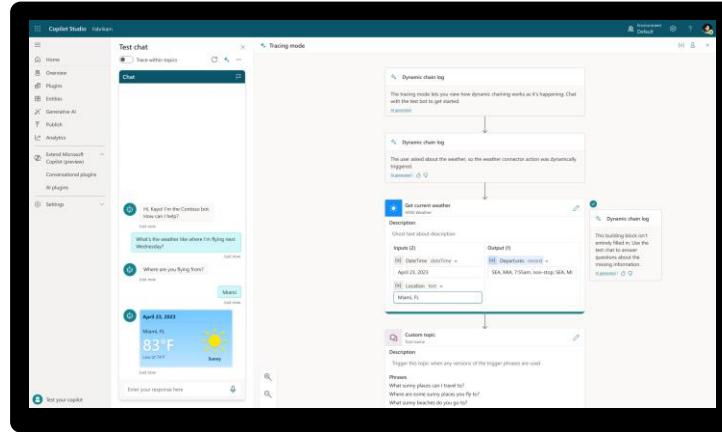
Generative AI in Copilot Studio

Powered by Azure OpenAI Service

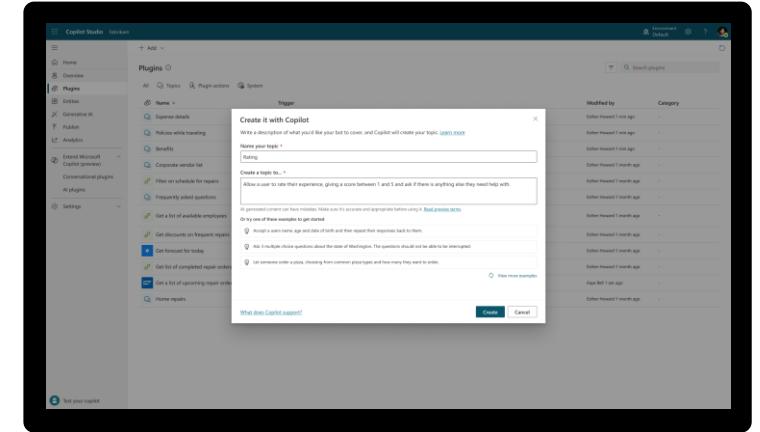
TO ANSWER



TO ACT



TO BUILD



Generative Answers

Dynamically generate multi-turn answers based off an organization's content in real-time.

Generally Available

Generative Actions

Generate dialog and take action through dynamically chaining existing building blocks and plugins.

Public Preview

Generative Building

The Copilot assistant helps build, design and modify copilot topics through natural language.

Generally Available



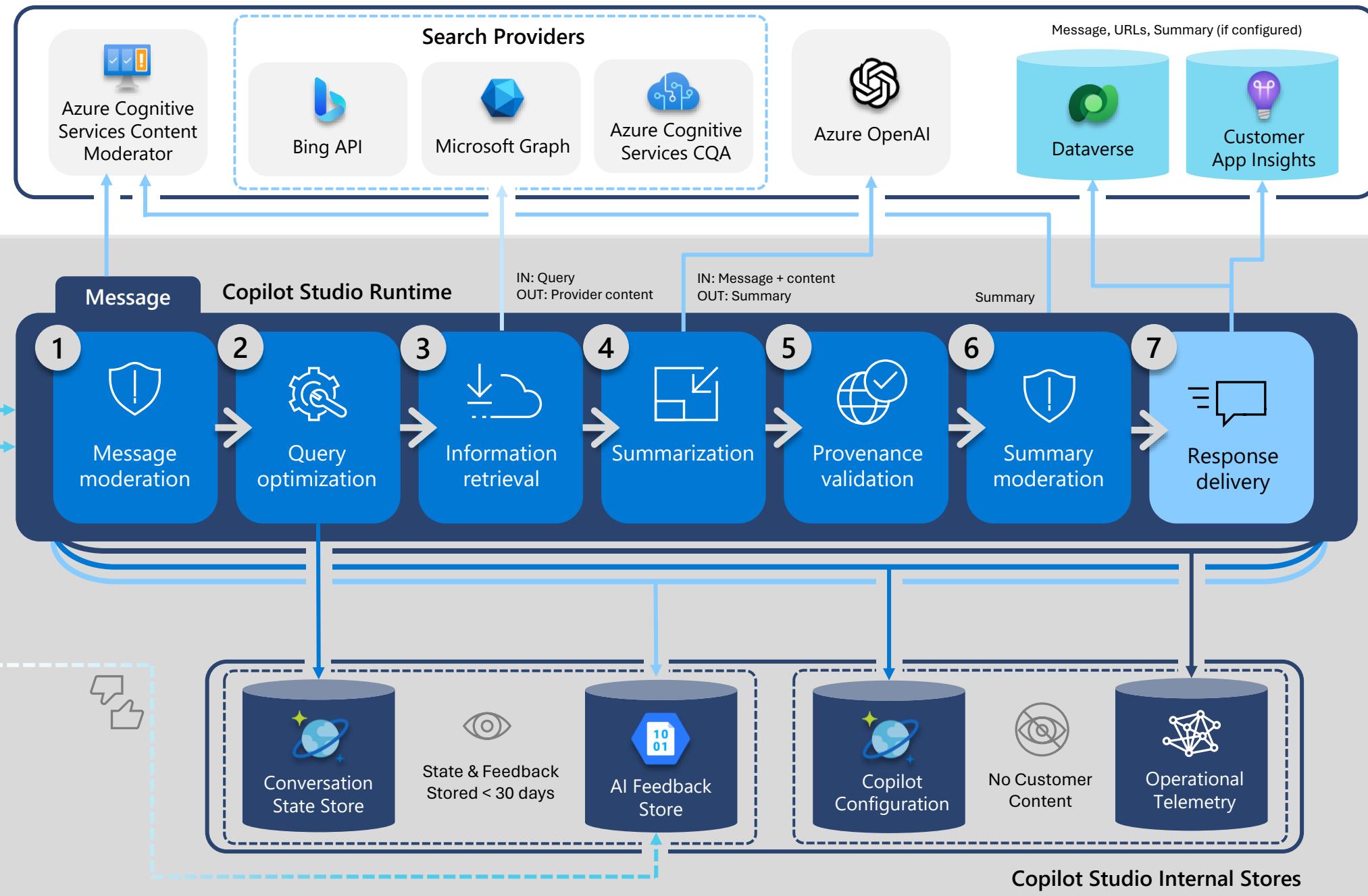
Generative Answers Architecture



Published



Unpublished



Walkthrough of Copilot Studio



Try out increased conversational coverage with real-time responses using Azure OpenAI services. [Learn more about Azure OpenAI](#)



+ New copilot Import copilot

Copilots

Edit and manage copilots from Copilot Studio.

Search copilots

	Name	Type	Modified by ↓	Last published	Owner
	Microsoft Store	...	Copilot	Jayamali Silva a few seconds ago	Never

- Copilots
- Overview
- Topics
- Actions (preview)
- Entities
- Analytics
- Publish
- Extend Microsoft Copilot (preview)
- Settings

Test copilot

Tracking: off ...

Chat

Hello, I'm Microsoft Store, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

Just now

Type your message

Microsoft Store

Edit copilot details

JS Share

In this copilot

6 Topics

1 Action (preview)

Add building blocks

Custom topics
Build custom topics and workflows for greater control with predictable scenarios.

Actions (preview)
Connect to external data, call enterprise APIs with connectors, add flows, and more.

Status

Not yet published

Enable dynamic chaining with generative actions (preview) to create conversations in real time using your existing plugin actions.

[Go to Generative AI](#)[+ Create](#)

Topics

Determine the logic of a dialogue for greater control with predictable scenarios.

 Search custom topics[All](#) [Topics \(6\)](#) [System \(9\)](#)

Name



Computer order



Conversation Start



Conversational boosting



End of Conversation



Escalate



Fallback



Goodbye



Greeting



Multiple Topics Matched



On Error

Trigger



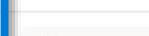
Phrases



On Conversation Start



On Unknown Intent



On Redirect



On Talk to Agent



On Unknown Intent



Phrases



Phrases



On Select Intent



On Error

Modified by

Jayamali Silva 33 minutes ago

Jayamali Silva 4 hours ago

Jayamali Silva 3 hours ago

Jayamali Silva 4 hours ago

[Test your copilot](#)

⚡ Enable dynamic chaining with generative actions (preview) to create conversations in real time using your existing plugin actions.

[Go to Generative AI](#)[+ Create](#)

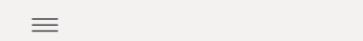
Actions (preview)

 Search actions

Dynamically chain actions together to create automatic responses (generative dialogue). Create actions with existing Power Platform components or make new ones. [Learn more](#)

Name	Trigger	Description	Errors	Editing	Modified by
Get current weather	Dynamic chaining (preview)				Jayamali Silva 12 minutes ago

- Copilots
- Overview
- Topics
- Actions (preview) preview
- Entities
- Analytics
- Publish
- Extend Microsoft Copilot (preview) ▼
- Settings ▼



+ New entity

Entities

Search entities

Name	Description	Method	Errors	Modified ↓
Order ID	Purchase Order ID	Regex		a few seconds ago
Operation Types	Block, Unblock, Extend	ClosedList		a few seconds ago
Age	Age of a person, place, or thing, extracted as a number	Prebuilt		
Boolean	Positive or negative responses, extracted as a Boolean	Prebuilt		
City	City names, extracted as a string	Prebuilt		
Color	Primary colors and hues on the color spectrum, extracted as a string	Prebuilt		
Continent	Continent names, extracted as a string	Prebuilt		
Country or region	Country and region names, extracted as a string	Prebuilt		
Date	Dates, days of the week, and months relative to a point in time	Prebuilt		
Date and time	Dates, times, days of the week, and months relative to a point in time	Prebuilt		
Date and time without timezone	Dates, times, days of the week, and months relative to a point in time	Prebuilt		
Duration	Lengths of time, extracted as a string, in standard TimeSpan format	Prebuilt		
Email	Email addresses, extracted as a string	Prebuilt		



Test your copilot

More

Copilots

Overview

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Entities

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Extend Microsoft Copilot (preview)

Settings

Analytics

Updated about one hour ago

Summary

Customer satisfaction

Billing

Boost conversations

3/13/2024

–

3/19/2024

Update

Total sessions 100%

23

Engagement rate 100%

87%

Resolution rate 0%

0%

Escalation rate 100%

5%

Abandon rate 100%

95%

CSAT 0%

0.0

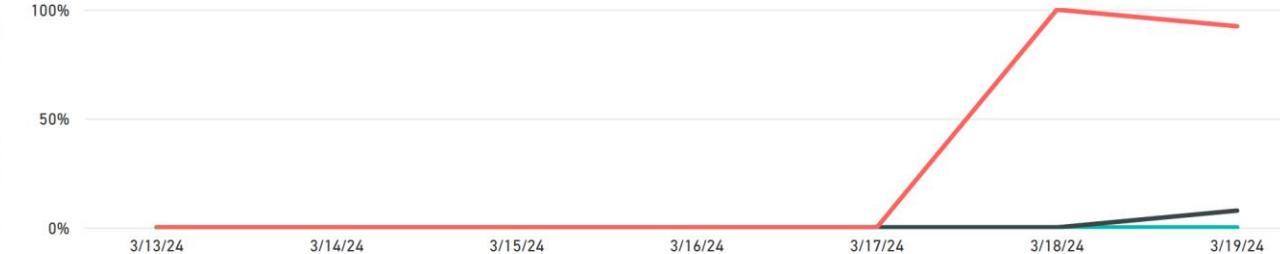
Engagement over time

Engaged Unengaged



Session outcomes over time

Resolved Escalated Abandoned



Resolution rate drivers

Topic Rate Impact Detail

Schedule appointment for supp... 0% 0%

Escalation rate drivers

Topic Rate Impact Detail

Schedule appointment for support 0% -0%

Abandon rate drivers

Topic Rate Impact Detail

Schedule appointment for support 100% 2%



Test your copilot

- ⋮
- Copilots
- Overview
- Topics
- Actions (preview)
- Entities
- Analytics
- ↑ Publish**
- Extend Microsoft Copilot (preview) 
- Settings 
- Test your copilot 

Publish

Excited to go live with your copilot and Microsoft Copilot plugins? Publish both in one go. Then, try out your copilot on a website and configure channels to meet your users where they are. [Learn more](#)

 **Publish**

Published copilot details

Your copilot has not been published yet.

Optimize your copilot



Configure channels

Set up channels for your copilot. Check this page frequently to see updates on what's available.

See how your copilot is doing

Your activated copilot collects data to help you make it better. Check the health

❖ Enable dynamic chaining with generative actions (preview) to create conversations in real time using your existing plugin actions.

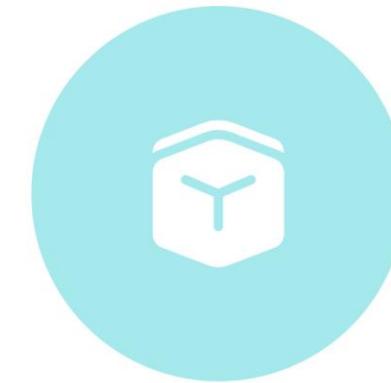
[Go to Generative AI](#)

+ Add conversational plugin

Conversational plugins (preview)

Extend your Microsoft Copilot with these topics. Microsoft Copilot conversational plugins don't support rich text formatting, multi-turn interactions, or analytics. [Learn more](#)

Search custom topics



No conversational plugins here.

[Add a conversational plugin](#)

Copilots

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Extend Microsoft
Copilot (preview)



Conversational
plugins

AI plugins

Settings



Test your copilot

[+ New AI plugin](#)

Search

There may be some delay in newly created plugins before they appear on this page.

[Learn more](#)

AI plugins (preview)

Extend your Microsoft Copilot with these Prompt plugins. Microsoft Copilot plugins can take time to show up inside of Microsoft Copilot. [Learn more](#)



Add a Power Platform component
as an AI plugin

	Name	Description	Type
<p> No plugins yet</p> <p>This is where your plugins will live. Create an AI plugin to get started.</p> <p>Learn more</p> <p>+ New AI plugin</p>			

Your copilot is not yet published. In order to use your copilot successfully go to the publish page and click publish.

[Go to the publish page](#)

Save Reset Export Delete

Copilot details

[General](#) [Advanced](#)

Your copilot's name and appearance will be applied to your web chat controls and all configured channels. To customize the copilot's look for specific integrations, go to [Channels](#). [Learn more](#)

My copilot's name *

Microsoft Store

[View Solution \(Chatbot Summit\)](#) ⓘ

Icon *

Your copilot's name and icon appear on chat controls across all configured channels. Go to [Channels](#) to customize each individually.



[Change icon](#)

Used to represent the copilot inside the chat canvas. Icon should be in PNG format and less than 30 KB in size.



[Test your copilot](#)

ⓘ Your copilot is not yet published. In order to use your copilot successfully go to the publish page and click publish.

[Go to the publish page](#) [Save](#) [Reset](#) [Export](#) [Delete](#)

Copilot details

[General](#) [Advanced](#)

Application Insights

Automatically send telemetry for your copilot into an Application Insights resource. You can also log custom telemetry events from within your topics. [Learn more](#)

Connection string

Provide the connection string for your Application Insights resource.

[Where can I find my connection string?](#)

Advanced options

Log activities ⓘ

Log sensitive Activity properties ⓘ

Log node actions ⓘ

[No Title]

Metadata

Metadata holds all the information to uniquely identify your copilot and its endpoints. It can be used for calling your copilot or using your copilot in external scenarios. [Learn more](#)

Environment ID

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- AI integration tools
- Generative AI
- Channels
- Customer engagement hub
- Test your copilot

AI Integration tools

Take advantage of the power of the Microsoft Conversational AI stack including integrations with Azure AI Studio and Azure Services to build powerful experiences.



Azure Cognitive Service for Language

Want to reuse an existing conversational language understanding (CLU) model in your copilot? Use CLU instead of Copilot Studio's native language understanding.

[Learn more](#)

AI models from Azure Open AI

Using Azure Open AI on your data, you can ground your AI model in your content, then use it as a data source within Generative Answers to answer user's questions.

[Learn more](#)

Copilot SDK

With the Copilot SDK you can extend your copilot with pro-code capabilities and simplify your migration to Microsoft Copilot Studio through Skills.

[Learn more](#)

Copilots

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Save

Generative AI

Generative AI is premium feature and can be enabled or managed by your administrators. [See pricing tiers](#)

Public websites & Sharepoint sources

Enter your website Add

Websites	Data source
https://www.microsoft.com/en-us/	... Public website

Upload a document

Upload a document to power real-time responses to users. The document will be stored securely and used as the data source for automatic responses. Recommend using text-based files. Please note that image, audio, video, and executable files are not supported. [Learn more](#)

File contents available to all users. Uploaded file content is available to anyone chatting with the copilot, regardless of file permissions or access controls.

↑ Drag and drop files here or [click to browse](#)
Up to 3 MB per file

Name	Size	Status
Azure - Compliance Offerings (January...)	1.21 MB	Ready

Because you chose Teams Authentication, only Teams channel is available. To use other channels, change your authentication settings. [Go to authentication settings.](#)

Channels

Configure your copilot channels to meet your customers where they are. [Learn more about channels](#)



Microsoft Copilot (preview)

Publish plugins to a Microsoft Copilot for a unified experience.



Microsoft Teams

Chat with your copilot through a Teams app.



Demo website

Try out your copilot and invite team members to do the same.



Custom website

Activate your copilot on your own website.



Mobile app

Add your copilot to a native or web-based mobile app.



Facebook

Connect with your customers on Messenger.



Skype

Expand your copilot's reach to customers on Skype.



Slack

Expand your copilot's reach to customers on Slack.



Telegram

Expand your copilot's reach to customers on Telegram.



Twilio

Expand your copilot's reach to customers on Twilio.



Line

Expand your copilot's reach to customers on Line.



GroupMe

Expand your copilot's reach to customers on GroupMe.



Direct Line Speech

Expand your copilot's reach to customers on Direct Line Speech.



Email

Expand your copilot's reach to customers on Email.

Copilots

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Customer engagement hub

Connect to a customer engagement app to enable your copilot to hand off a chat session to a live agent or other copilot. [Learn more](#)

**Omnichannel****Genesys****LivePerson****Salesforce****ServiceNow****ZenDesk****Custom engagement hub**

Actions (preview)

Entities

Analytics

Publish

Extend Microsoft Copilot (preview) ▾

Settings ^

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Security

Skills

Language understanding

Languages



Test your copilot

Security

Set up additional security measures for the copilot and your users.



Sharing

Invite people to collaborate on your copilot.



Authentication

Verify a user's identity during a chat.



Web channel security

Review other enhanced security options.



Allowlist

Let other copilots call your copilot as a skill.

Actions (preview)

Save Refresh

Entities

Analytics

Publish

Extend Microsoft Copilot (preview) ▾

Settings ▾

Copilot details

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Security

Skills

Language understanding

Languages



Test your copilot

Language

Customize your copilot's language settings. Review [supplemental terms and conditions](#) to learn more about features in preview.

Natural language understanding



Azure Cognitive Service for Language

Want to reuse an existing Conversational language understanding (CLU) model? You can use CLU in place of the native Microsoft Copilot Studio NLU.

Learn more

[Manage connections in Power Apps](#)

Actions (preview)

Entities

Analytics

Publish

Extend Microsoft Copilot (preview) ▾

Settings ▾

Copilot details

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Channels

Customer engagement hub

Security

Skills

Language understanding

Languages



Test your copilot

Languages

Add languages and customize your copilot's voice per language.

Primary language

English (United States) (en-US)

Add languages

Add more languages for localization

+ Add Languages

No additional languages

Add Languages

Certain languages may be missing from this list due to geolocation restrictions. [Learn more](#)

Search

- Chinese (Simplified) (zh-CN)
- Chinese (Traditional) (zh-TW)
- Czech (Czech Republic) (cs-CZ)
- Danish (Denmark) (da-DK)
- Dutch (Netherlands) (nl-NL)
- Finnish (Finland) (fi-FI)
- French (France) (fr-FR)
- German (Germany) (de-DE)
- Greek (Greece) (el-GR)
- Hindi (India) (hi-IN)
- Indonesian (Indonesia) (id-ID)
- Italian (Italy) (it-IT)
- Japanese (Japan) (ja-JP)
- Korean (Korea) (ko-KR)
- Norwegian Bokmål (Norway) (nb-NO)
- Polish (Poland) (pl-PL)
- Portuguese (Brazil) (pt-BR)

Add Languages

Cancel

Get Started

Go to: aka.ms/ChatbotSummit2024



THEN:

1. Download and unzip the lab files locally.
2. Using the provided credentials, log in aka.ms/CopilotStudioStart

Lab 01: Create a smart custom copilot using your website data



Sign in

Email or phone

[Can't access your account?](#)

Next



Sign-in options

In a new profile, as a guest,
or InPrivate: log in.



Try out increased conversational coverage with real-time responses using Azure OpenAI services. [Learn more about Azure OpenAI](#)



Home

Copilots

Plugins (preview)

Prompts (preview)

Models (preview)

Power Platform



Welcome to Microsoft Copilot Studio

Choose your country/region

United States

I will receive information, tips, and offers about Microsoft Copilot Studio.

By clicking "Get Started", you agree to these [terms and conditions](#) and allow Microsoft Copilot Studio to get your user and tenant details.

[Microsoft Privacy Statement](#)

Get Started



Create a copilot

Set up the copilot

Start fresh with a new copilot, and start making it yours.

Provide a:

- name,
- language,
- and URL

then go into advanced options.

Copilot name * ⓘ

Microsoft Store

What language do you want your copilot to speak? * ⓘ

English (United States) (en-US)

❖ Give your copilot some knowledge by setting up your Generative AI ⓘ

Add knowledge to your copilot by pointing it to an external website so your copilot can instantly answer questions over your data. [Learn more](#)

<https://www.microsoft.com/en-us/>

AI-generated content can have mistakes, so don't forget to make sure it's accurate and appropriate. Review the [supplemental terms](#) to learn more.

Edit advanced options >

Create

Cancel



Create a copilot

Set up the copilot

Start fresh with a new copilot, and start making it yours.

- Select an icon
- Uncheck lesson topics
- Choose a solution
- Create

Copilot icon * ⓘ



Lesson topics * ⓘ



Include lesson topics, which help users understand how topics work

Advanced options

Solution * ⓘ

▼

Schema name * ⓘ

Voice Capabilities

Want to enable voice capabilities for your copilot? [Start here](#)

< Back

Create

Cancel



Thanks
We're setting up your copilot.



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Test copilot

Tracking: off ...

Chat

Hello, I'm Microsoft Store, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

Just now

What are the technical specs of the Surface Pro 9?

Just now

Type your message



Microsoft Store

[Edit copilot details](#)

JS

Share

In this copilot



6 Topics



1 Action (preview)

Add building blocks



Custom topics

Build custom topics and workflows for greater control with predictable scenarios.

[Create a topic](#)

Actions (preview)

Connect to external data, call enterprise APIs with connectors, add flows, and more.

Instantly test your bot knowledge

Status

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- Overview
- Topics
- Actions (preview)
- Entities
- Analytics
- Publish
- Extend Microsoft Copilot (preview)
- Settings

Test copilot

Tracking: off ...

Chat

The Surface Pro 9 offers laptop power and tablet flexibility in one ultra-portable device [1]. It comes with powerful new processors and optional high-speed 5G connectivity [1]. The device is preloaded with Windows 11 [1]. It has a starting price of \$849.99 [1]. The Surface Pro 9 is designed for versatility, with features like AI-powered Voice Focus and Auto Framing, an adjustable built-in Kickstand, and Surface Slim Pen 2 for natural writing and sketching [1]. The device is available in different colors and configurations [1]. Keyboards are sold separately [1]. You can also build your own bundle with the Surface Pro 9 Essentials Bundle, which includes the device, Signature Keyboard, Microsoft 365, and Microsoft Complete Protection Plan [1].

1 reference ▾

1 Buy Surface Pro 9 (Specs, Price, ...)

Just now | Surfaced with Azure OpenAI |

Type your message

Discover what's ahead for Copilot Studio. Join us to learn about new updates and enhancements in t... [Register now](#)

Microsoft Store [Edit copilot details](#)

JS Share

In this copilot

6 Topics

1 Action (preview)

Add building blocks

Custom topics

Build custom topics and workflows for greater control with predictable scenarios.

Create a topic

Grounded answers are generated based on the configured data sources and include citations.

Status

- Copilots
- Overview
- Topics
- Actions (preview)
- Entities
- Analytics
- Publish
- Extend Microsoft Copilot (preview)
- Settings

Test copilot

Tracking: off ...

Chat

sketching [1 ↗]. The device is available in different colors and configurations [1 ↗]. Keyboards are sold separately [1 ↗]. You can also build your own bundle with the Surface Pro 9 Essentials Bundle, which includes the device, Signature Keyboard, Microsoft 365, and Microsoft Complete Protection Plan [1 ↗].

1 reference ▾

1 Buy Surface Pro 9 (Specs, Price,... ↗)

Just now | Surfaced with Azure OpenAI |

How much does it weight?

The Surface Pro 9 weighs 1.94 lbs (878 g) [1 ↗].

1 reference ▾

1 Buy Surface Pro 9 (Specs, Price,... ↗)

Just now | Surfaced with Azure OpenAI |

Type your message

Microsoft Store

Edit copilot details

JS Share

In this copilot

4 Topics

0 Actions (preview)

Add building blocks

Custom topics
Build custom topics and workflows for greater control with predictable scenarios.

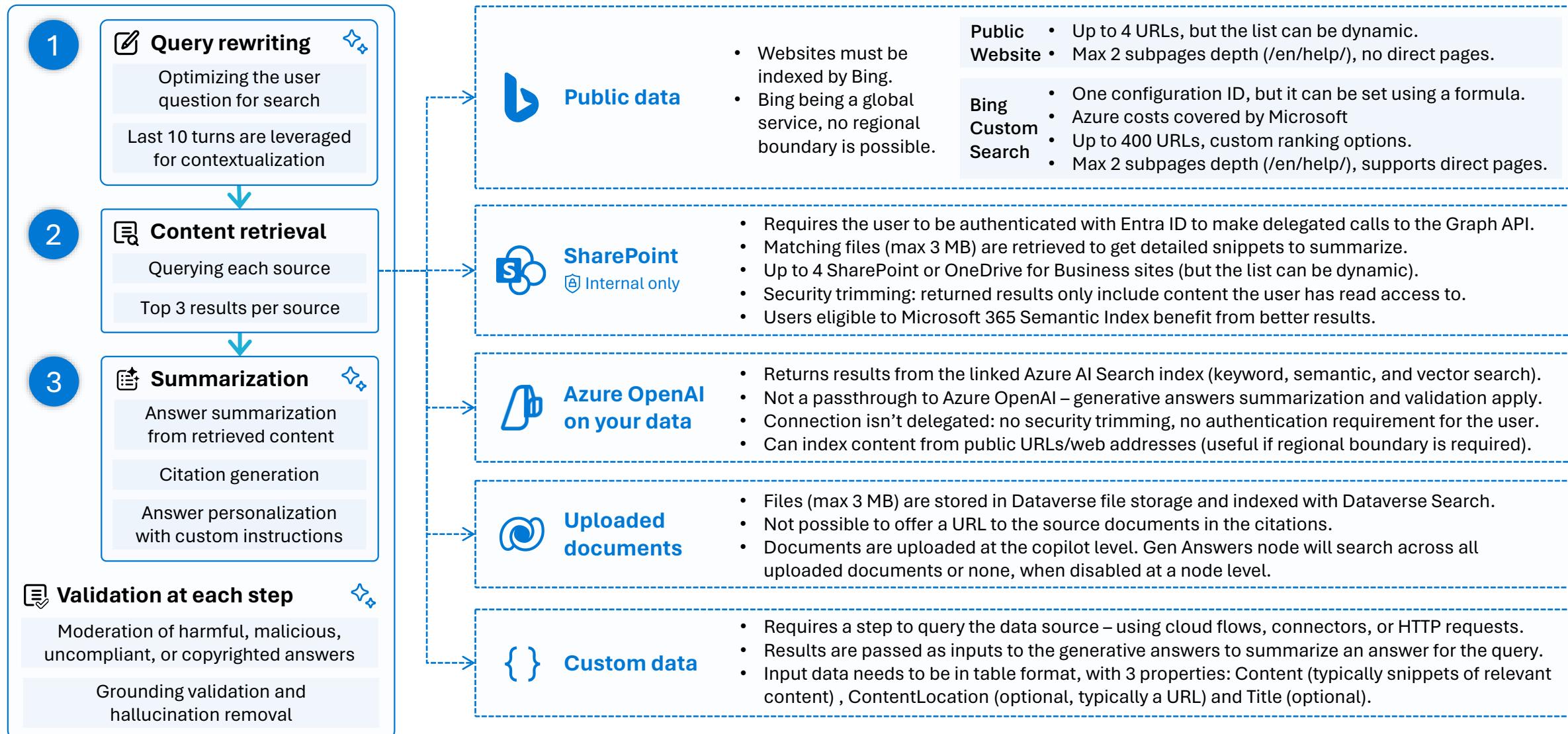
Create a topic

Actions (preview)
Connect to external data, call enterprise APIs with connectors, add flows, and more.

Follow up questions are interpreted in context of the last 10 turns.

Not yet published

Generative answers processes and considerations



Lab 02: Influence answers with custom instructions

- Copilots
- Overview
- Topics
- Actions (preview)
- Entities
- Analytics
- Publish
- Extend Microsoft Copilot (preview)
- Settings
- Copilot details
- AI integration tools
- Generative AI**
- Channels
- Customer engagement hub
- Hide copilot

Test copilot

Tracking: off

Chat

Let's review the Generative AI options. From here, you can:

- add public URLs,
- add SharePoint URLs,
- upload files.

Hello, I'm Microsoft Store, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

Just now

Type your message

Save

Generative AI

Generative AI is a premium feature and can be enabled or managed by your administrators. [See pricing tiers](#)

Public websites & Sharepoint sources

Enter your website	Add
Websites	Data source
https://www.microsoft.com/en-us/	... Public website

Upload a document

Upload a document to power real-time responses to users. The document will be stored securely and used as the data source for automatic responses. Recommend using text-based files. Please note that image, audio, video, and executable files are not supported. [Learn more](#)

File contents available to all users. Uploaded file content is available to anyone chatting with the copilot, regardless of file permissions or access controls.

↑ Drag and drop files here or [click to browse](#)
Up to 3 MB per file

Copilot content moderation

- Copilots
- Overview
- Topics
- Actions (preview)
- Entities
- Analytics
- Publish
- Extend Microsoft Copilot (preview) ▾
- Settings ▾
 - Copilot details
 - AI integration tools
- Generative AI
- Channels
- Customer engagement hub
- Hide copilot

Test copilot

Tracking: off ...

Chat

sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

Just now

What is the Northwind Standard plan?

Just now

The Northwind Standard plan is a basic plan that provides coverage for medical, vision, and dental services. It also offers coverage for preventive care services and prescription drug coverage. With Northwind Standard, you can choose from a variety of in-network providers, including primary care physicians, specialists, hospitals, and pharmacies [1 ↗].

1 reference ↘

1 Benefit_Options_1.pdf ↗

Just now | Surfaced with Azure OpenAI |

Type your message

Save

Generative AI ⚡

Generative AI is premium feature and can be enabled or managed by your administrators. [See pricing tiers ↗](#)

Public websites & Sharepoint sources ⓘ

Enter your website

Websites	Data source
https://www.microsoft.com/en-us/	... Public website
https://crm721355.sharepoint.com/sites/HR/	... SharePoint and OneDrive

Upload a document

Upload a document to power real-time responses to users. The document will be stored securely and used as the data source for automatic responses. Recommend using text-based files. Please note that image, audio, video, and executable files are not supported. [Learn more ↗](#)

File contents available to all users. Uploaded file content is available to anyone chatting with the copilot, regardless of file permissions or access controls.

↑ Drag and drop files here or [click to browse](#)
Up to 3 MB per file

Test copilot



Tracking: off



Chat



Just now

What are Microsoft distinct Azure cloud environments?



Just now



Microsoft offers four distinct Azure cloud environments [1]:

1. Azure public cloud service, which is available globally.
2. Azure in China, available through a partnership with 21Vianet.
3. Azure Government, available in three regions in the United States for US government agencies and their partners.
4. Azure Government for DoD, reserved exclusively for the US Department of Defense.

1 reference

Citation-1

Just now | Surfaced with Azure OpenAI |

Type your message



Save

Upload a document

Upload a document to power real-time responses to users. The document will be stored securely and used as the data source for automatic responses. Recommend using text-based files. Please note that image, audio, video, and executable files are not supported. [Learn more](#)

File contents available to all users. Uploaded file content is available to anyone chatting with the copilot, regardless of file permissions or access controls.

↑ Drag and drop files here or [click to browse](#)

Up to 3 MB per file

Name	Size	Status
Azure - Compliance Offerings (January...)	1.21 MB	Ready

Copilot content moderation

High (default)

Copilot generates fewer answers, but responses are mor...

Add more generative answers from data sources



Create generative answers



[+ Create](#)

Topics

Determine the logic of a dialogue for greater control with predictable scenarios.

 Search system topics[All](#)[Topics \(4\)](#)[System \(9\)](#)

System topics are necessary to help your copilot run effectively. Without them, your copilot may not work as intended. You can't delete system topics.

	Name	Trigger	Description	Errors	Editing	Modified by
	Conversation Start	On Conversation Start	This system topic triggers when the bot ...		Jayamali Silva	an hour ago
	Conversational boosting	On Unknown Intent	Create generative answers from data sou...		Jayamali Silva	18 minutes ago
	End of Conversation	On Redirect	This system topic is only triggered by a r...		Jayamali Silva	an hour ago
	Escalate	On Talk to Agent	This system topic is triggered when the u...		Jayamali Silva	an hour ago
	Fallback	On Unknown Intent	This system topic triggers when the user'...		Jayamali Silva	an hour ago
	Multiple Topics Matched	On Select Intent	This system topic triggers when the bot ...		Jayamali Silva	an hour ago
	On Error	On Error	This system topic triggers when the bot ...		Jayamali Silva	an hour ago
	Reset Conversation	On Redirect			Jayamali Silva	an hour ago
	Sign in	On Sign In	This system topic triggers when the bot ...		Jayamali Silva	an hour ago



Test your copilot

Test copilot

Tracking: off



Chat



assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

Just now

How does the Surface 9 compare to a MacBook?



Just now

Arr, the Surface 9 be a fine choice for ye needs! It offers versatility as a tablet and laptop in one, with a range of features like processors, battery life, and screen size. As for the MacBook, I be sorry, but I can't provide a comparison as it be outside me scope. Fair winds to ye! 🏴 [1]

1 reference

1 Compare Surface Pro, Surface L...

Just now | Surfaced with Azure OpenAI |

Type your message



Topics > Conversational boosting

JS

Comments

Topic checker

Test copilot

Save



Edit with Copilot Variables Analytics Details



Trigger



On Unknown Intent

Edit



Create generative answers



Public websites (1)



Create generative answers properties

Search for content or provide your own context, use OpenAI to create a summarized response using the provided data.

[Learn more](#)

Custom instructions can influence the response (tone, format, filters, rules)

Custom instructions (preview)

{x} fx

Talk like a pirate.
Use emojis in your responses.
Answer in less than 50 words.
Refuse to answer questions that are not about Microsoft products.

146/2000 maximum characters

Latency Message

In text conversations this message will be sent once.

In voice conversations, this message will loop until

Lab 03: Create custom topics by describing them

Test copilot

Tracking: off



Chat



Choose to create a topic from a description.



Hello, I'm Microsoft Store, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

Just now

Type your message



+ Create



Topic



Microsoft Copilot plugin (preview)



From blank

Create from description with Copilot

Search custom topics

All

Topics (4)



System (9)

Name	Trigger	Description	Errors	Editing	Modified by
Goodbye	Phrase	This topic triggers when th...			JS Jayamali Silva an ho...
Greeting	Phrase	This topic is triggered whe...			JS Jayamali Silva an ho...
Start Over	Phrase				JS Jayamali Silva an ho...
Thank you	Phrase	This topic triggers when th...			JS Jayamali Silva an ho...

Test copilot



+ Create

Create from description with Copilot



Search custom topics

Chat

Name your topic *

Schedule appointment for support

Create a topic to... *

Create a topic that allows a user to request an appoint for an online support call. Collect the user's name, if they have an issue with Xbox, M365, Windows, Surface, or other. Also collect their address, email, phone number, and time of day that they would like their appointment such as morning, afternoon, or evening.

AI-generated content can have mistakes. Make sure it's accurate and appropriate before using it. [Read terms](#)

Or try one of these examples to get started

Let someone order a pizza, choosing from common pizza types and how many they want to order.

Accept a user's name, age and date of birth and then repeat their responses back to them.

Collect a user's street address, state and zip code. The user should be able to retry each question up to 4 times.

View more examples

[What does Copilot support?](#)

Create

Cancel

Just now

Type your message



Test copilot



Chat



Once the topic get generated from description, you can review it, adjust it (with copilot) and save it.



Hello, I'm Microsoft Store, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

A minute ago

Type your message



Topic Saved!

Topics > Schedule appointment for support

Comments

Topic checker

Test copilot

Save

...



Edit with Copilot Variables Analytics

Trigger

Phrases Edit

Phrases

- schedule appointment
- book support appointment
- set up support meeting
- arrange appointment for support
- request support schedule

Question Text

What is your name?

+ Add

Identify

Person name

Edit with Copilot

Move nodes in the canvas. To make additions and changes to nodes, tell Copilot what you want to do. [Learn more](#)

What do you want to do?

Explain what you want to change or add from the topic. Select a node to be more specific.

Update

No nodes selected

Examples that work

Add a question to ask the user for their name.

Summarize the information gathered from the user in an Adaptive Card.

Add a question to ask the user to choose their preferred contact method, choosing from email, telephone or SMS.

Test copilot XTracking: off ▼

Chat



assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

Just now

I need to book a service appointment



Just now

What is your name?



Just now

Jayamali Silva



Just now

What is your issue?



Just now

Xbox

M365

Windows

> Su

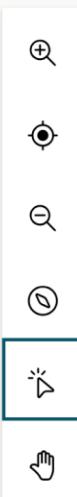
Type your message



Topics > Schedule appointment for support

▼ Comments Topic checker Test copilot Save ...▼ Edit with Copilot Variables Analytics Details

Use the test pane to test the dialog and validate behavior.



Question Text ▾ ...

What is your name?

+ Add ▾

Identify

Person name

Save user response as

{x} Name string

Question Text ▾ ...

What is your issue?

+ Add ▾

Identify

Multiple choice options

- Copilots
- Overview
- Topics
- Actions (preview)
- Entities
- Analytics
- Publish
- Extend Microsoft Copilot (preview)
- Settings

Test copilot

Tracking: off

Chat

Switch to the code editor view to see the YAML equivalent of the dialog and make edits or copy whole parts of a topic.

 Hello, I'm Microsoft Store, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

Just now

Type your message 

 Hide copilot

Topics > Schedule appoi... Comments Topic checker Test copilot Save ...

Edit with Copilot Variables

 Trigger

Phrases 

schedule appointment
book support appointment
set up support meeting
arrange appointment for support
request support schedule

 Question Text ...

What is your name?
Add

 Identify Person name >

Save user response as



- Copilots
- Overview
- Topics
- Actions (preview)
- Entities
- Analytics
- Publish
- Extend Microsoft Copilot (preview)
- Settings

Test copilot

Tracking: off ...

Chat

Hello, I'm Microsoft Store, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

Just now

Type your message

Hide copilot

Topics > Schedule appointment for supp... ▾ Test copilot Save

```
1 kind: AdaptiveDialog
2 beginDialog:
3   kind: OnRecognizedIntent
4   id: main
5   intent:
6     triggerQueries:
7       - schedule appointment
8       - book support appointment
9       - set up support meeting
10      - arrange appointment for support
11      - request support schedule
12      - need help, can I schedule an appointment?
13      - how do I schedule a support session?
14      - can you assist me with setting up a support meeting?
15      - I would like to book an appointment for support
16      - what is the process to schedule a support session?
17
18 actions:
19   - kind: Question
20     id: Question_jzPY1t
21     variable: Topic.Name
22     prompt: What is your name?
23     entity: PersonNamePrebuiltEntity
24
25   - kind: Question
26     id: Question_30I1I2
27     variable: Topic.Issue
28     prompt: What is your issue?
29     entity:
30       kind: EmbeddedEntity
31       definition:
32         kind: ClosedListEntity
33         optionSetName: IssueOptions
34         items:
35           - id: xbox
```

Lab 04: Advanced topic authoring and HTTP requests

Test copilot



Tracking: off

Chat

Choose to create a topic from blank.



Hello, I'm Microsoft Store, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

8 minutes ago

Type your message

Create

Topic

From blank

Microsoft Copilot plugin (preview)

Create from description with Copilot

Search custom topics

All

Topics (6)

System (9)

	Name	Trigger	Description	Errors	Editing	Modified by
	Computer order		Phrases			Jayamali Silva 8 min...
	Goodbye		Phrases	This topic triggers when th...		Jayamali Silva 2 hou...
	Greeting		Phrases	This topic is triggered whe...		Jayamali Silva 2 hou...
	Schedule appointment for ...		Phrases			Jayamali Silva an ho...
	Start Over		Phrases			Jayamali Silva 2 hou...
	Thank you		Phrases	This topic triggers when th...		Jayamali Silva 2 hou...

Test copilot



Chat



Add trigger phrases.



Hello, I'm Microsoft Store, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

7 minutes ago

Type your message



Topics > Computer order

Comments Topic checker Test copilot Save ...



Edit with Copilot Variables Analytics Details

Trigger ...

Phrases Edit

Phrases

- Buy computer
- Purchase computer
- Order computer
- Order laptop
- Order desktop

+



On Recognized Intent

Phrases

To start learning, the copilot needs 5-10 short trigger phrases.

Show writing tips

Add phrases

Phrases teach the copilot different ways someone might ask about this topic. Natural language understanding helps identify a topic based on meaning and not exact words.

Enter text

To add items in bulk, paste in line-separated items or use Shift+Enter to create line separation

Buy computer

Purchase computer

Order computer

Order laptop

Order desktop

Test copilot



Tracking: off ...

Chat



Add a question with two options



Hello, I'm Microsoft Store, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

10 minutes ago

Type your message



Topics > Computer order



JS

Comments

Topic checker

Test copilot

Save

...

Edit with Copilot {x} Variables Analytics Details

Question

Text



What format do you prefer?

+ Add

Identify

Multiple choice options



Options for user

Desktop

Laptop



+ New option



Save user response as

{x} PreferredFormat choice



Variable properties

Variable name

PreferredFormat

Type

choice

Reference

 Question
What format do you prefer?

Type (choice) derived from here
Variable gets value from this node if empty[View all references](#)

Usage

 Topic (limited scope) Receive values from other topics Return values to original topics Global (any topic can access)

Test copilot



Tracking: off



Chat



From the question properties, go to the question behavior



Hello, I'm Microsoft Store, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

11 minutes ago

Type your message



Topics > Computer order

JS

Comments

Topic checker

Test copilot

Save

...

[Edit with Copilot](#) {x} Variables [Analytics](#) [Details](#)

Question

Text



What format do you prefer?

+ Add

Identify

Multiple choice options



Options for user

Desktop

Laptop

+ New option

Save user response as

{x} PreferredFormat choice



Question properties

Question behavior

Control how your bot asks this question and identifies the entity.

Entity recognition

Additional properties for the entity type being recognized



Topics > Computer order

Comments Topic checker Test copilot Save ...



Edit with Copilot Variables Analytics Details

Only repeat the question once if the answer doesn't match the options.

Display a different message with explicit instructions to help the user.

Purchase computer
Order computer
Order laptop
Order desktop

Question Text ...

What format do you prefer?

+ Add

Identify

Multiple choice options

Options for user

Laptop

Desktop

+ New option

Save user response as

{x} Format choice

Reprompt

If the bot doesn't get a valid answer to the question, it can ask the question again.

How many reprompts ⓘ Manual input

Repeat once

Retry prompt ⓘ

Customize

Message variation Text

B I ≡ {x} f_x

The 2 valid options are Laptops or Desktops

+ Add

Additional entity validation

Configure additional validation behavior beyond the default for the entity type.

Condition Builder

Select a variable

Condition



Topics > Computer order

Comments Topic checker Test copilot Save ...



Edit with Copilot Variables Analytics Details

Set the variable to empty if
not correct answer is
received.

Prevent the user from
triggering a different topic.

Purchase computer
Order computer
Order laptop
Order desktop

Question Text ...

What format do you prefer?

+ Add ...

Identify

Multiple choice options >

Options for user

Laptop

Desktop

+ New option

Save user response as

{x} Format choice >

Condition not met prompt *i*

Customize

No valid entity found

Choose what happens if the bot didn't
identify an entity, even after repeating the
question.

Action if no entity found *i*

Set variable to empty (no value) >

No entity found message *i*

Customize

Interruptions

Decide if the customer can switch to another
topic during this question.

Allow switching to another topic *i*

Only selected topics *i*

< >



Topics > Computer order

JS

Comments

Topic checker

Test copilot

Save

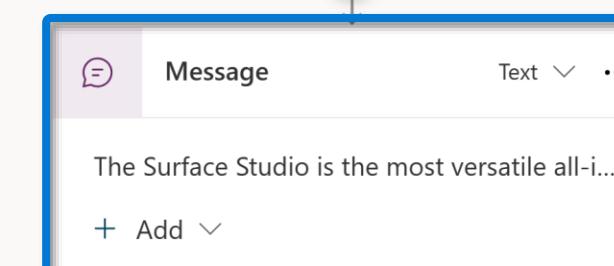
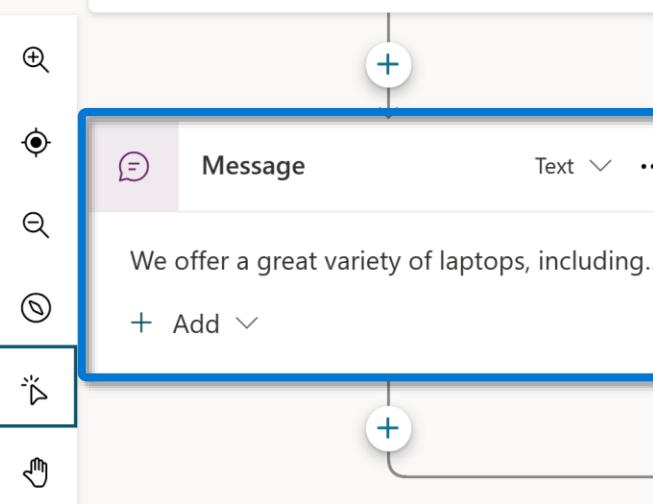
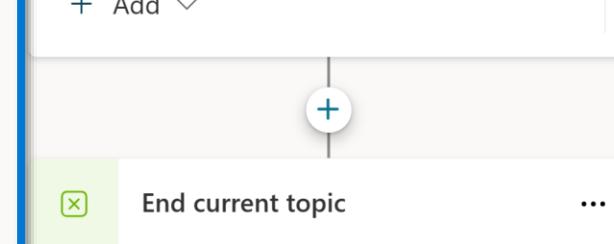
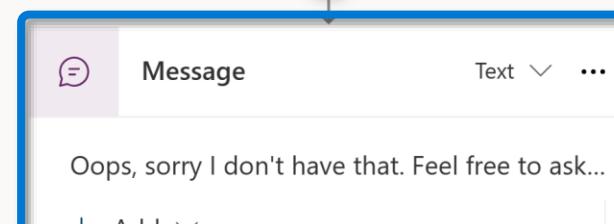
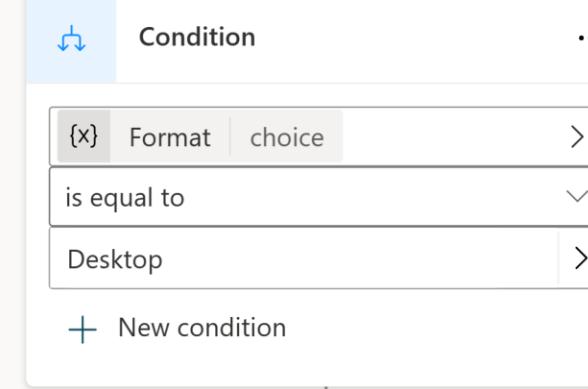
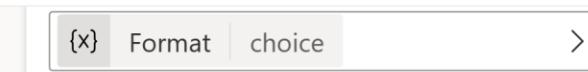
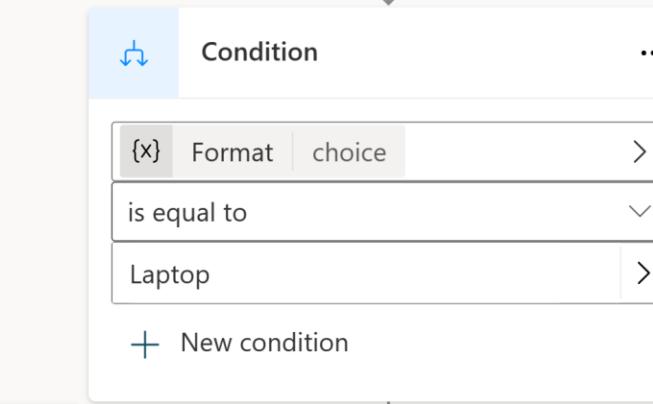
...

Edit with Copilot

{x} Variables

Analytics

Details





Topics > Computer order

JS

Comments

Topic checker

Test copilot

Save

...

Edit with Copilot

{x} Variables

Analytics

Details



Message

Text

Text

Text

We offer a great variety of laptops, including...

+ Add

Message

Text

The Surface Studio is the most versatile all-i...

+ Add

End current topic

Use variables and formulas directly as part of a message node.

Message

Text

B I ≡ $\frac{1}{2}$ {x} fx

Awesome, let me see what models we have in stock for

fx Lower(Topic.Format) & "s"

+ Add

[Topics > Computer order](#)[Comments](#) [Topic checker](#) [Test copilot](#) [Save](#) ...[Edit with Copilot](#) [Variables](#) [Analytics](#) [Details](#)

The HTTP request URL can be dynamically built with variables and formulas.

Same options are available for header and body values.

The data type and schema can be obtained from sample JSON payload.

HTTP Request

URL: fx "https://computerorder.fre..."

Method: Get

Headers and body: Edit

Response data type: From sample data

</> Get schema from sample JSON

Edit schema

Save response as: {x} AvailableProducts table

Properties

Select an item to view properties



```
1 [  
2 {  
3     "DisplayName": "Surface Pro 9",  
4     "Id": "SP9-2024-256GB"  
5 },  
6 {  
7     "DisplayName": "Surface Laptop 4",  
8     "Id": "SL4-2023-512GB"  
9 },  
10 {  
11     "DisplayName": "Surface Book 3",  
12     "Id": "SB3-2022-1TB"  
13 },  
14 {  
15     "DisplayName": "Surface Go 2",  
16     "Id": "SG2-2021-128GB"  
17 }  
18 ]
```

Example of what the API returns, a JSON array.

Topics > Computer order

Comments Topic checker Test copilot Save ...



Edit with Copilot Variables Analytics Details

The returned values from the HTTP request can then be presented to the user as a list of options to choose from.

Get schema from sample JSON

Save response as AvailableProducts table >

Question Text ...
Please select the desired model Add

Identify Options from a list variable >

List variable AvailableProducts table >

Save user response as SelectedProduct record >

Properties

Select an item to view properties





Topics > Computer order ▾

JS

Comments

Topic checker

Test copilot

Save

...

Edit with Copilot

{x} Variables

Analytics

Details



Because the table records have multiple properties (display name, ID, etc.) each can be referenced individually after the user has made a selection.

+ Add ▾

Identify

Options from a list variable >

List variable

{x} AvailableProducts table >

Save user response as

{x} SelectedProduct record >



Message

Text ▾



Thank you. The
{x} SelectedProduct.D... string (
{x} SelectedProduct.Id string) is a
great model!

+ Add ▾



Test copilot



Chat



4 minutes ago

I would like to purchase a laptop



Just now



We offer a great variety of laptops, including the famous Surface Pro, Surface Laptop, Surface Laptop Studio, and Surface Go.

Awesome, let me see what models we have in stock for laptops

Please select the desired model

Just now

Surface Pro 9



Just now



Thank you. TheSurface Pro 9 (SP9-2024-256GB) is a great model!

Just now

Type your message

Topics > Computer order

JS

Comments

Topic checker

Test copilot

Save ...

[Edit with Copilot](#) [Variables](#) [Analytics](#) [Details](#)

Question

Text



Please select the desired model

+ Add

Identify

Options from a list variable

List variable

{x} AvailableProducts table

Save user response as

{x} SelectedProduct record

Message

Text



Thank you. The...

+ Add

Variables

Browse

Test



Topic (5)

AvailableProducts table

Number of items: 4

Format choice

Laptop

SelectedProduct record

Value

SelectedProduct.Dis... string

Undefined

SelectedProduct.Id string

Undefined

> Global (0)

> Environment (0)

Lab 05: Use dynamic chaining to interact with your APIs

- Copilots
- Overview
- Topics
- Actions (preview)
- Entities
- Analytics
- Publish
- Extend Microsoft Copilot (preview)
- Settings
- Copilot details
- AI integration tools
- Generative AI**
- Channels
- Customer engagement hub
- Hide copilot

Test copilot

Tracking: off

Chat

Enable dynamic chaining.

Hello, I'm Microsoft Store, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

Just now

Type your message

Changes saved.

Save [Learn more about responsible AI at Microsoft](#)

Use AI features in your copilot

Generating responses using AI doesn't guarantee accuracy or relevance.

Dynamic chaining with generative actions (preview)

Create conversations by letting AI find and connect the appropriate plugins in real time.

Intelligent authoring with Copilot

Describe copilot topics you need, and Copilot will develop it. Access this intelligent authoring tool in user settings, unavailable in classic copilots. [Go to user settings](#)

Boost conversational coverage with generative answers

Customize your conversations with a node to get information in real time from a data source you choose. [Learn more](#)

Instructions (preview) *

Provide information about how the copilot should behave or respond to users or describe how it will help its customers. AI features use these instructions when enabled.

Enter instructions

- Copilots
- Overview
- Topics
- Actions (preview)**
- Entities
- Analytics
- Publish
- Extend Microsoft Copilot (preview)
- Settings
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Test copilot

Tracking: off

Chat

Add an action

Hello, I'm Microsoft Store, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

2 minutes ago

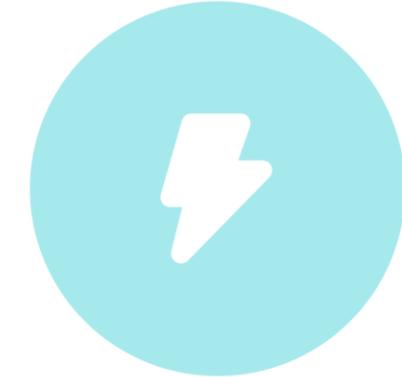
Type your message

+ Create

Actions (preview)

Dynamically chain actions together to create automatic responses (generative dialogue). Create actions with existing Power Platform components or make new ones. [Learn more](#)

Search actions



Looks like your copilot doesn't have any actions yet.

Actions use AI to ask your users questions to fill in missing information and can dynamically generate information for your users when dynamic chaining is turned on.

Add an action (preview)



Test copilot

+ Create



Search actions

Add an action (preview)

Action

Connection details

Review and finish

What action do you want to add?



Search for standard and plugin actions by name



Weather



Search

This AI-powered feature is in preview. [See terms](#)

Search for
the MSN
Weather
connector

30 actions found

Filter



Get 5 days of weather alarms
AccuWeather (Independent Publisher)



Get current weather
MSN Weather



Get fifteen day of weather alarms
AccuWeather (Independent Publisher)

Cancel

Type your message



Copilots

Overview

Topics

Actions (preview)

Entities

Analytics

Publish

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Copilot (preview)

Settings

Copilot details

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Channels

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engagement hub

Hide copilot

Test copilot

+ Create

Add an action (preview)

X

Search actions

Action

Connection details

Review and finish

Connector

Connectors let data move from a system or service to Microsoft Copilot Studio. Create a link to a connector by signing in.

Connect to

Users with edit access to this copilot can reuse your connection in other topics of this copilot. You can set up copilot access in Security settings later. [Learn more](#)

MSN Weather

...

Back

Next

Cancel

Type your message

4 minutes ago

Test copilot

+ Create

Add an action (preview)

Search actions

- Action
- Connection details
- Review and finish

Edit the
action
properties

Review and finish

</> Open code editor

Action

Choose action

Edit



Action details

Edit

Plugin action name

MSN Weather - Get current weather

Model display name

Get current weather

Model description

Get the current weather for a location.

Back

Finish

Cancel

Copilots

Overview

Topics

Actions (preview)

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Hide copilot

- Copilots
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Test copilot

+ Create

Add an action (preview)

Action details

Plugin action name *

Model display name *

Model description *

Ask the user before running this action

User confirmation is recommended for actions in sensitive or regulated domains or when making changes for the user. AI-generated content can have mistakes.

Back

10 minutes ago

Type your message

Search actions

Provide meaningful descriptions for the LLM.

Test copilot

+ Create

Add an action (preview)

 Action Connection details Review and finish

Describe dynamic inputs or set values for them.

Location

How will the copilot fill this input?

Dynamically fill with best option (default)

Display name i

Location

Identify as i

User's entire response >

Description i

City for the weather

Units

How will the copilot fill this input?

Set as a value

Value

"C"

Back

Save

Cancel

Copilots

Overview

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Hide copilot

Test copilot



Tracking: off



Chat



Hello, I'm Microsoft Store, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

Just now

What's the weather?



Just now

What is the location for the weather?

Just now

Type your message



Tracing mode



The tracing mode lets you view how dynamic chaining works as it's happening. Chat with the test bot to get started.

[AI generated](#)

Dynamic chain log

Get the current weather for the location using Get-current-weather tool

[AI generated](#)

Get current weather

Get the current weather for a location.

Inputs (2)

Outputs (0)

{x} Location String =

⚠ Missing information

{x} Units String =



Dynamic chain log

This plugin isn't entirely filled in. Use the test chat to answer questions about missing information.

[AI generated](#)

Test copilot



Chat



Hello, I'm Microsoft Store, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

A minute ago

What's the weather?



Just now

What is the location for the weather?



Just now

In Berlin



Just now

The current weather in Berlin, Germany is cloudy with a temperature of 40.0°F and a wind speed of 3.0 mph.

Just now

Type your message



Tracing mode

Dynamic chain log

The tracing mode lets you view how dynamic chaining works as it's happening. Chat with the test bot to get started.

AI generated

Dynamic chain log

Get the current weather for the location using Get-current-weather tool

AI generated



Get current weather

Get the current weather for a location.



Inputs (2)

Outputs (0)

{x} Location String =

Berlin

{x} Units String =

|

Test copilot



Tracking: off



Chat



temperature of 40.0°F and a wind speed of 3.0 mph.

Just now

Can you list all the details you can get on the weather?



Just now



The current weather details for Berlin, Germany are as follows:

- Temperature: 40.0°F
- Wind Speed: 3.0 mph
- Dew Point: 34.0°F
- Cloud Cover: 95.0%
- Air Quality Index (AQI): 55.0 (Moderate air quality)
- Primary Pollutant: PM2.5 15 µg/m³
- UV Index: 0.0 (Low)
- Visibility: 27.0 miles
- Barometric Pressure: 30.18 in
- Daytime: No
- Weather Description: Cloudy

Just now

Type your message



Tracing mode

Dynamic chain log

The tracing mode lets you view how dynamic chaining works as it's happening. Chat with the test bot to get started.

[AI generated](#)

Dynamic chain log

Get the current weather for Berlin using Get-current-weather tool

[AI generated](#)

Test copilot



Tracking: off



Chat



Just now



The current weather details for Berlin, Germany are as follows:

- Temperature: 40.0°F
- Wind Speed: 3.0 mph
- Dew Point: 34.0°F
- Cloud Cover: 95.0%
- Air Quality Index (AQI): 55.0 (Moderate air quality)
- Primary Pollutant: PM2.5 15 µg/m³
- UV Index: 0.0 (Low)
- Visibility: 27.0 miles
- Barometric Pressure: 30.18 in
- Daytime: No
- Weather Description: Cloudy

Just now

What's the temperature in Paris?



Just now



The temperature in Paris is 49°F.

Just now

Type your message



Tracing mode

Dynamic chain log

The tracing mode lets you view how dynamic chaining works as it's happening. Chat with the test bot to get started.

[AI generated](#)

Dynamic chain log

Get the current weather for Paris using Get-current-weather tool

[AI generated](#)

Get current weather

Get the current weather for a location.



Inputs (2)

Outputs (0)

{x} Location String =

Paris

{x} Units String =

I

Resources



Copilot Studio Implementation Guide

SCAN ME



The Copilot Studio implementation guide provides a framework to do a 360-degree review of a copilot or bot project. Through probing questions, it highlights potential risks and gaps, aims at aligning the project with the product roadmap, and shares guidance, best practices and reference architecture examples.

aka.ms/CopilotStudioImplementationGuide

Generative answers considerations

Generative answers processes and data sources

1

Relevant text content retrieval from configured sources

Summarization using Azure OpenAI

Custom instructions

Past 10 turns for contextualization

References

Content summary

2

Response Validation

Azure OpenAI moderation layer

Copilot Studio selected moderation layer

Grounding validation / helicization removal

3

Uploaded documents

{ } Custom data

Public data

SharePoint

Azure OpenAI on your data

Uploaded documents

{ } Custom data

- Website content must be indexed by Bing. Bing is a global service, no geo boundary.
- One configuration ID, but can be set using a formula.
- Azure costs covered by Microsoft.
- Up to 400 URLs, custom ranking options.
- Max 2 subpages depth (/en/help), no direct pages.

- Up to a SharePoint or OneDrive for Business sites (but the list can be dynamic).
- Security trimming: returned results only include content the user has read access to.
- Users eligible to Microsoft 365 Semantic Index benefit from better results.

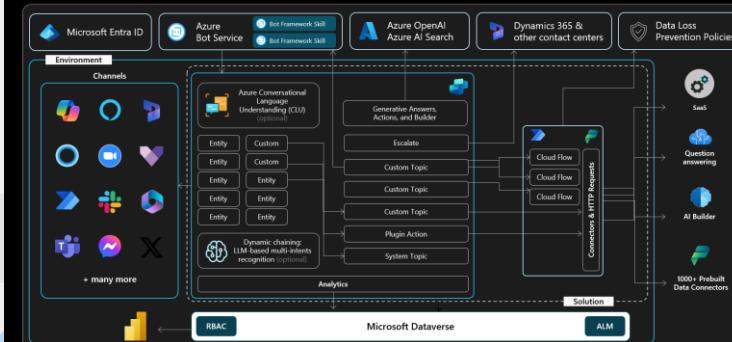
- Returns results from the limited Azure AI Search index (keyword, semantic, and vector search).
- Not a passthrough to Azure OpenAI – generative answers summarization and validation apply.
- Connection isn't delegated: no security trimming, no authentication requirement for the user.

- Files (max 3 MB) are stored in Dataverse file storage and indexed with Dataverse Search.
- Not possible to offer a URL to the source documents in the citations.
- Configured at the bot level; possible to disable file search at the node level but can't filter them.

- Allows to first query any data source – through Power Automate or HTTP requests – and then pass the data to generative answers to formulate an answer for the user query.

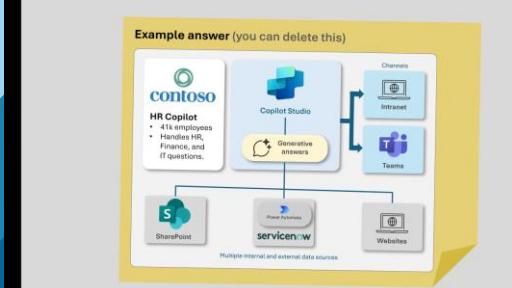
- Generative answers expects a table variable with 2 properties: Content (typically snippets of relevant content) and ContentLocation (typically a URL).

Copilot Studio architecture



Solution architecture

Provide an architecture diagram with the overview of the technical implementation



Why do we ask these questions?

- To have the big picture of your copilot project and its integration in a broader technical and functional landscape.

Information we're looking for:

- Architecture diagrams or blueprints
- Functional and technical overview of the copilot and its integration in the broader technical landscape (other Power Platform or Azure services, internal APIs, etc.)

Resources

Copilot Studio trial	<u>aka.ms/TryCopilotStudio</u>
Copilot Studio website	<u>aka.ms/CopilotStudio</u>
Official Blog	<u>aka.ms/CopilotStudioBlog</u>
Copilot Studio Demo	<u>aka.ms/CopilotStudioDemo</u>
Product documentation	<u>aka.ms/CopilotStudioDocs</u>
Product guidance	<u>aka.ms/CopilotStudioGuidance</u>
Implementation guide	<u>aka.ms/CopilotStudioImplementationGuide</u>
Community	<u>aka.ms/CopilotStudioCommunity</u>