



# Module - Building Autonomous Agents

Built by: Power CAT Intelligent Application Solution Architecture Team

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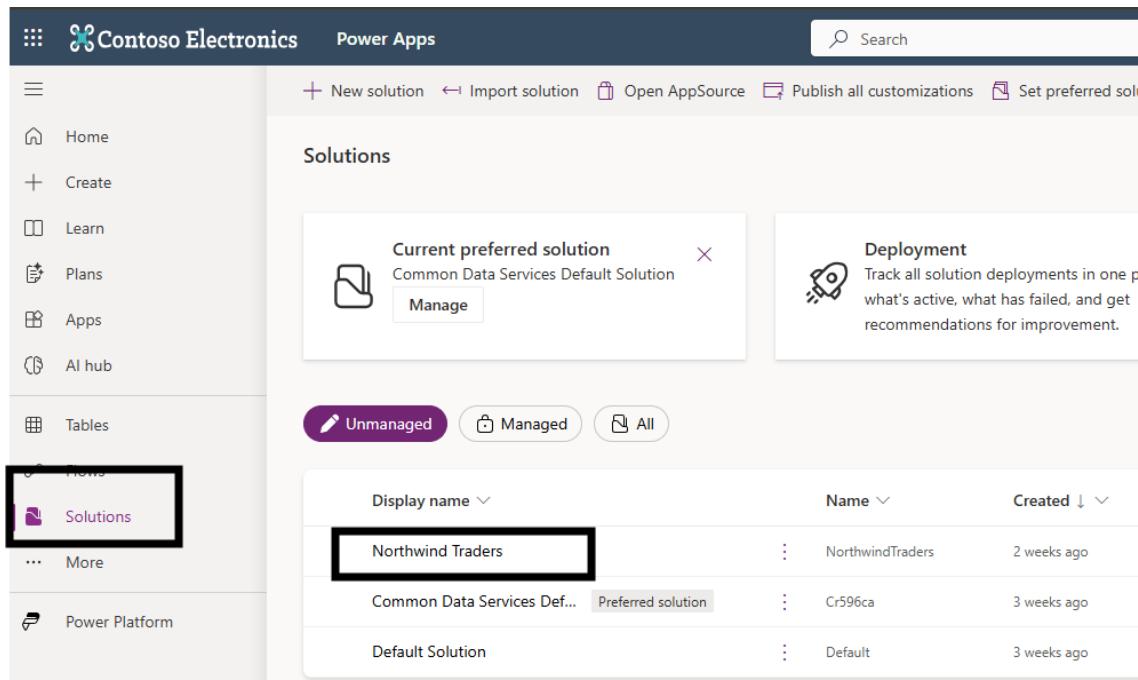
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# Autonomous Agents

**Copilot Autonomous Agents** are AI-powered systems built within Microsoft Copilot Studio that independently reason, plan, and act to complete tasks on behalf of individuals, teams, or entire organizations. These agents go beyond traditional automation by dynamically responding to business signals—such as data changes, system alerts, or scheduled events—without requiring human intervention. Designed to handle complex, multi-step workflows, they integrate seamlessly with Microsoft 365, Dataverse, Power Platform, and external APIs. With capabilities like deep reasoning, orchestration of other agents, and transparent activity tracking, Copilot Autonomous Agents are transforming how businesses operate—boosting efficiency, accelerating decision-making, and enabling scalable, intelligent automation across industries.

## Pre-requisites

1. To create Autonomous agents, you need to use Northwind traders solution (already installed) in your environment.



The screenshot shows the Microsoft Power Apps interface for the 'Contoso Electronics' organization. The left sidebar includes options for Home, Create, Learn, Plans, Apps, AI hub, Tables, News, Solutions (which is selected and highlighted with a black box), and More. The main content area is titled 'Solutions' and displays a list of solutions. The 'Northwind Traders' solution is listed at the top, marked as the 'Current preferred solution' and a 'Preferred solution'. Other solutions listed are 'Common Data Services Def...' and 'Default Solution'. The interface includes filters for 'Unmanaged', 'Managed', and 'All' solutions, and columns for 'Display name', 'Name', and 'Created'. A 'Deployment' section on the right provides information on tracking solution deployments.

Display name	Name	Created
Northwind Traders	NorthwindTraders	2 weeks ago
Common Data Services Def...	Cr596ca	3 weeks ago
Default Solution	Default	3 weeks ago

2. Lab Module 3 must be completed.

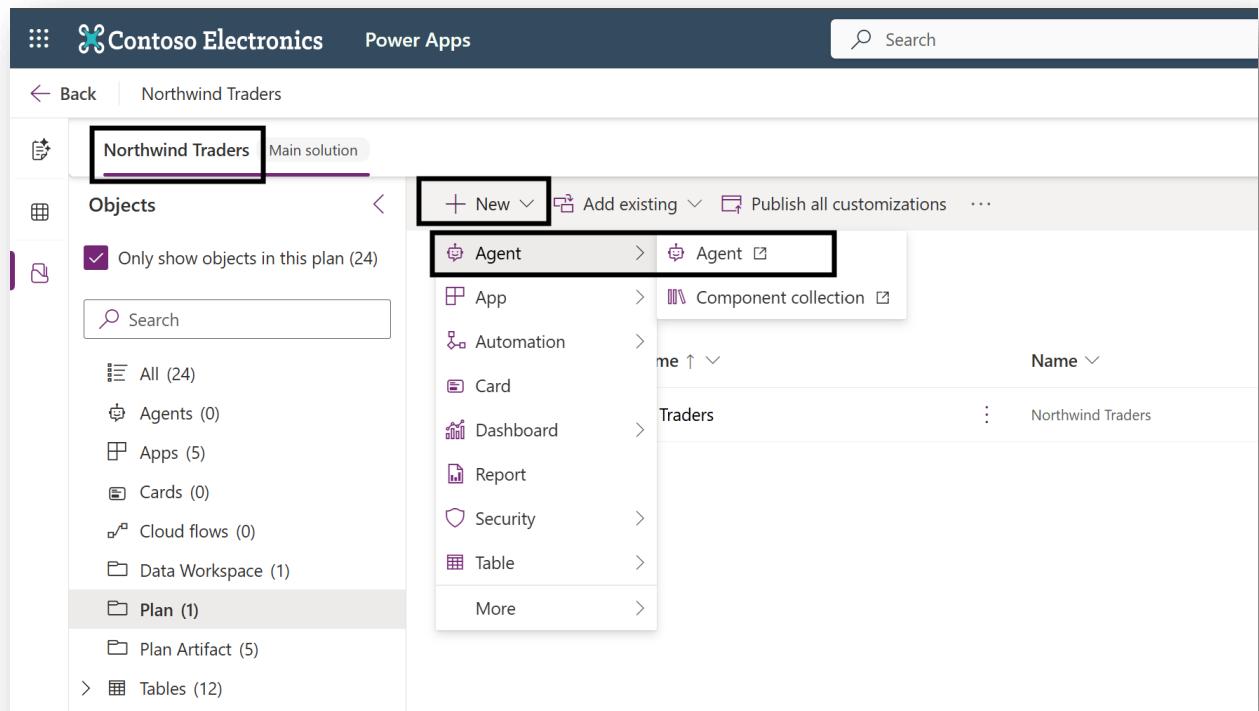
# Business Scenario

Northwind Traders organization has created Power Apps solution to manage purchase orders, products and related business operations within an organization. They want to create an autonomous agent for their sales team to automatically create purchase orders based on purchase order requests coming over email. The Agent should also be able to help track the purchase order, share status updates for purchase orders without involving human in the loop.

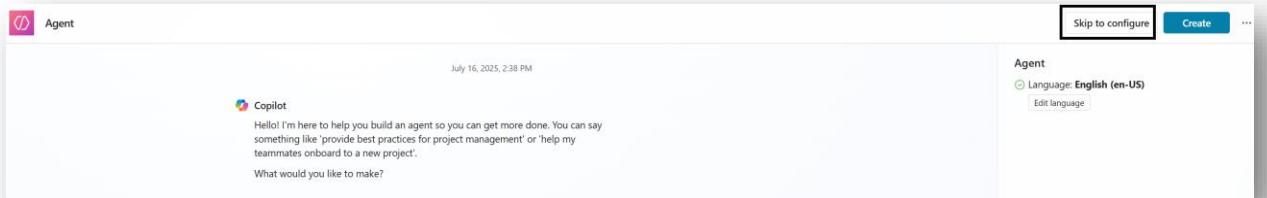
## Lets Begin.. !!

### Module – Create an Autonomous Agent

1. Login to <https://make.preview.powerapps.com> in the demo tenant and navigate to your personal environment.
2. Navigate to Northwind traders solution and click on New -> Agent .



3. After getting redirected to Copilot studio, click on Skip to configure.

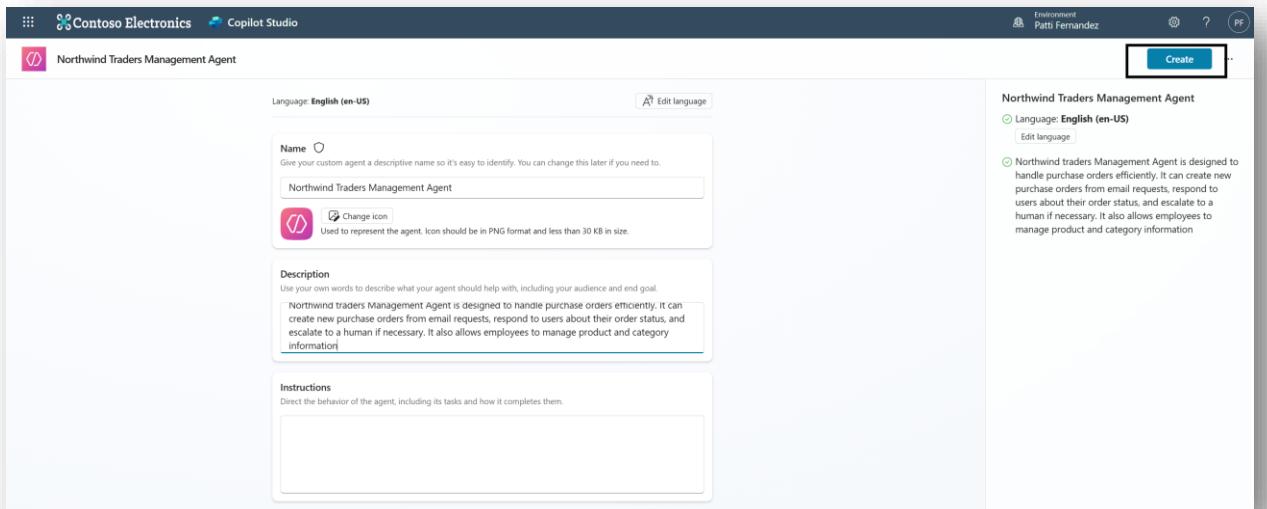


4. Configure the Agent as follows:

**Name :** Northwind Traders Management Agent

**Description:** Northwind traders Management Agent is designed to handle purchase orders efficiently. It can create new purchase orders from email requests, respond to users about their order status, and escalate to a human if necessary. It also allows employees to manage product and category information.

Click on Create.



Now that the basic Agent is created, in the next steps, we will start adding Agent triggers and tools and add guidance on how it can act autonomously.

 Note: Make sure Use Generative AI orchestration is **Enabled**

**Details** Edit

 **Name**  
Northwind Traders Management Agent

**Description**  
Northwind traders Management Agent is designed to handle purchase orders efficiently. It can create new purchase orders from email requests, respond to users about their order status, and escalate to a human if necessary. It also allows employees to manage product and category information.

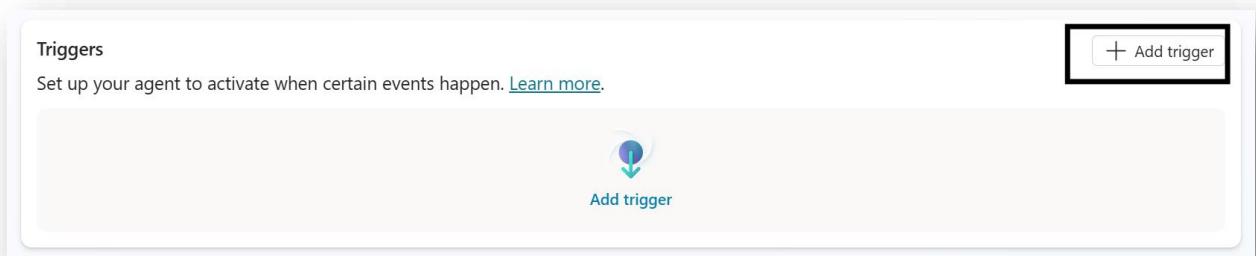
**Orchestration**  
Use generative AI to determine how best to respond to users and events. [Learn more](#) Enabled

**Response model**  
GPT-4o (default) ...

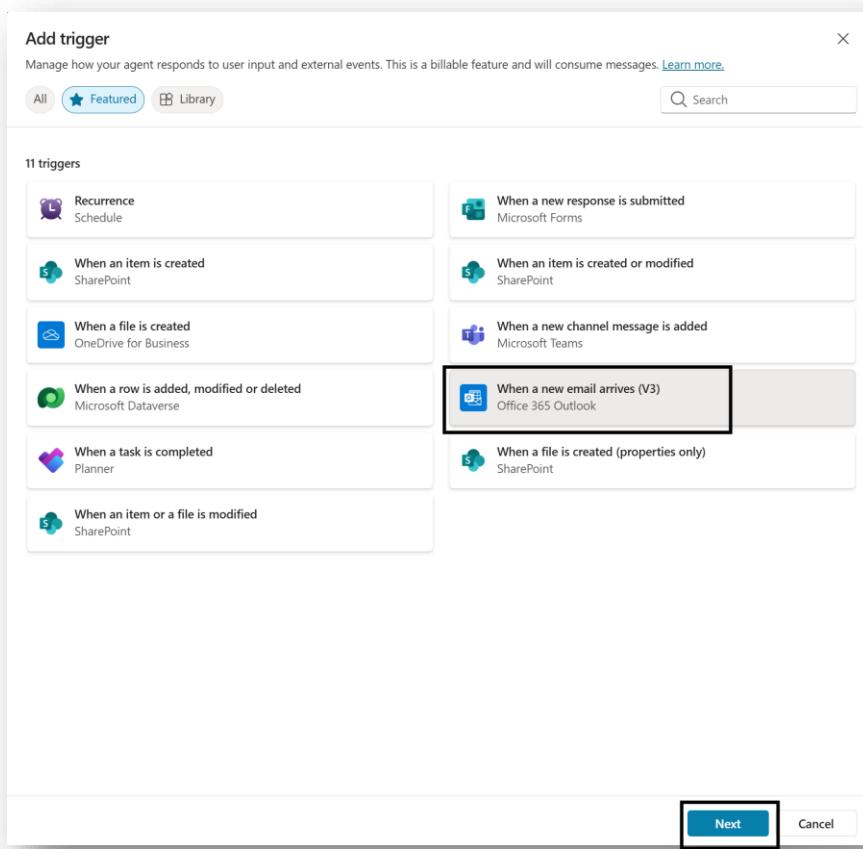
## Step 1: Add Agent Triggers

1.1 Scroll down in the Agent Overview Section.

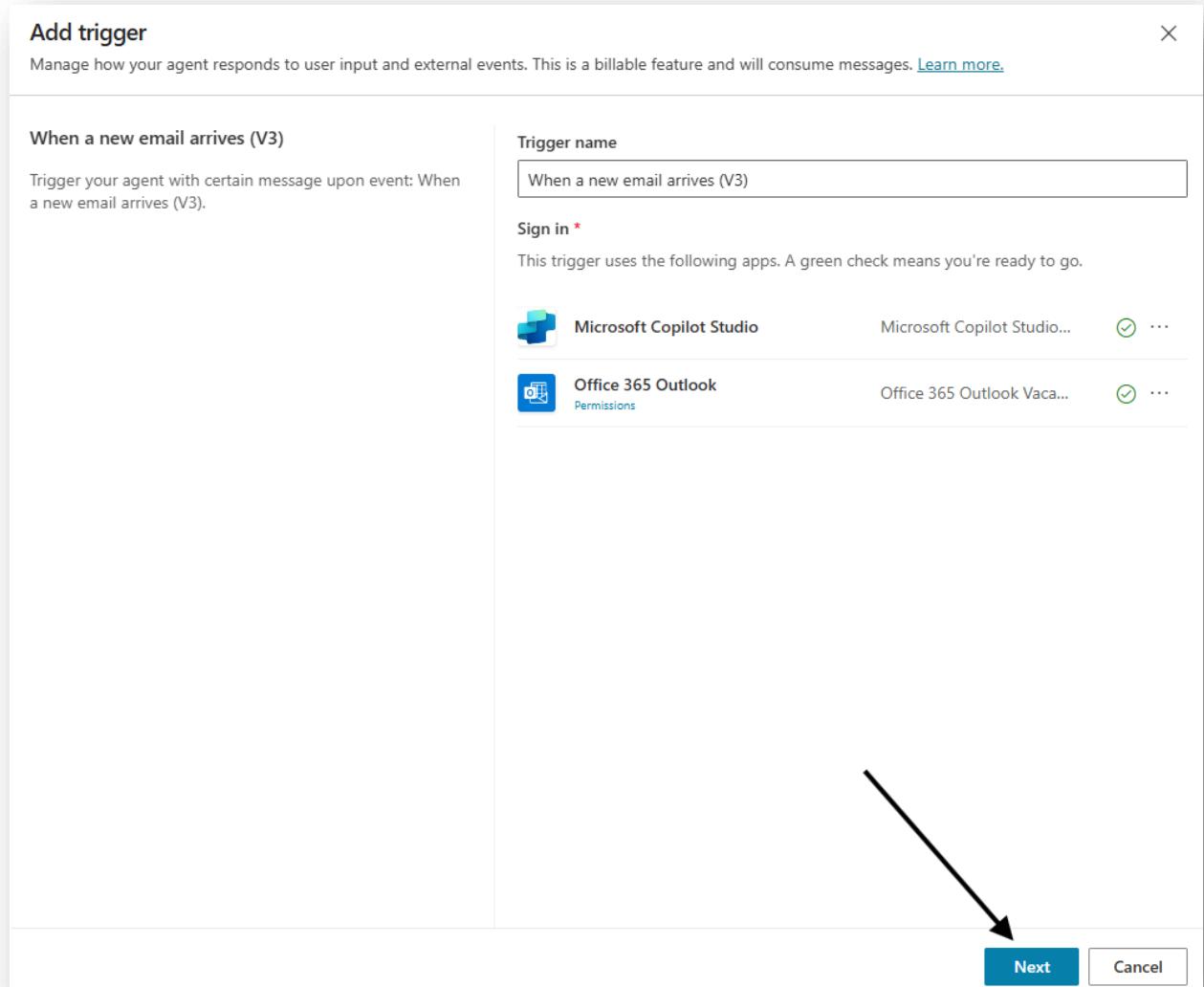
Under Triggers -> Click on **+ Add Trigger**.



1.2 In Add trigger, Select When a new email arrives (V3) and then click **Next**.



### 1.3 The connections will be setup – then Click on **Next**



#### 1.4 Configure the Trigger as follows:

**Folder – Inbox** (click on the Folder icon to select the Inbox folder)

**Subject Filter – Northwind Traders** (Subject filter will help define that agent doesn't trigger for every email).

**Additional Instructions:** Use content from Trigger Body. (This should be auto populated).

Click on **Create Trigger**.

**Add trigger**

Manage how your agent responds to user input and external events. This is a billable feature and will consume messages. [Learn more](#).

**When a new email arrives (V3)**

Trigger your agent with certain message upon event: When a new email arrives (V3).

**Folder**  
Inbox

**To (Optional)**  
Recipient email addresses separated by semicolons (If any match, the trigger will run).

**CC (Optional)**  
CC recipient email addresses separated by semicolons (If any match, the trigger will run).

**To or CC (Optional)**  
To or CC recipient email addresses separated by semicolons (If any match, the trigger wi...

**From (Optional)**  
Sender email addresses separated by semicolons (If any match, the trigger will run).

**Include Attachments (Optional)**  
Should the response of the trigger include the attachments content.

**Subject Filter (Optional)**  
Northwind Traders

**Importance (Optional)**  
Select an item

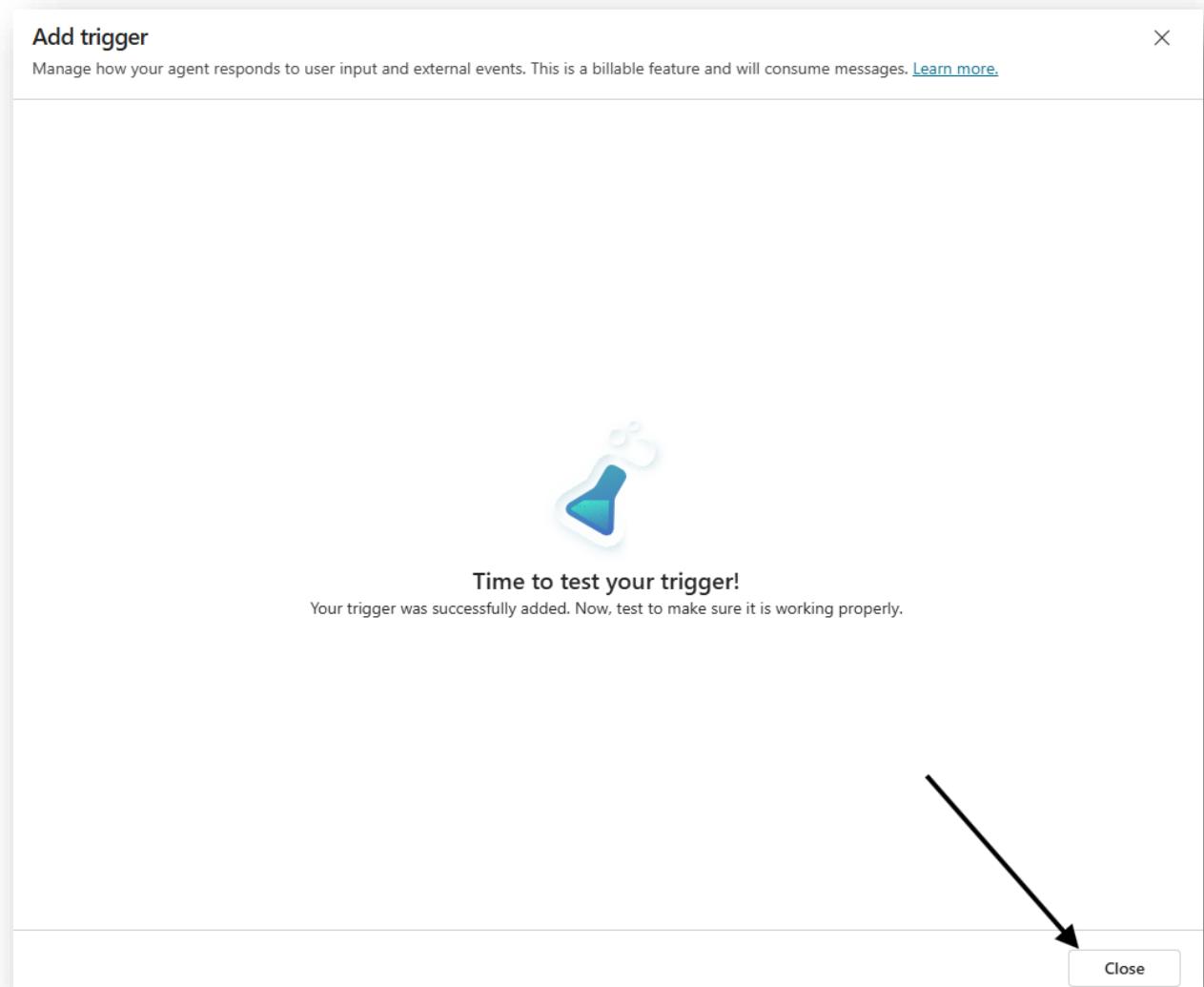
**Only with Attachments (Optional)**  
If set to true, only emails with an attachment will be retrieved. Emails without any attachments wil

**Additional instructions to the agent when it's invoked by this trigger**

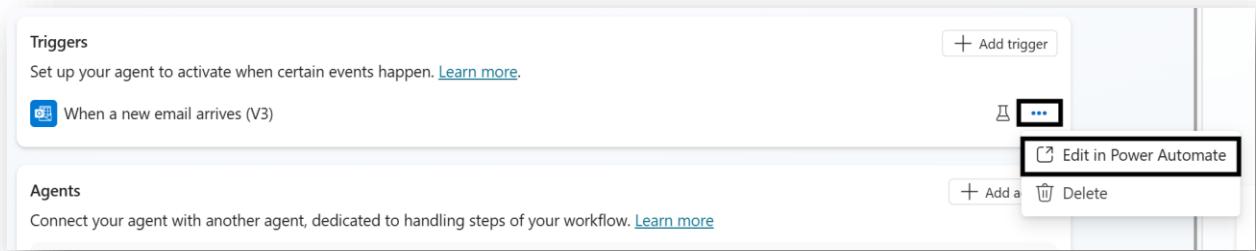
Use content from  Body

[Back](#) [Create trigger](#) [Cancel](#)

1.5 Once the trigger is created successfully – You can close the dialog.

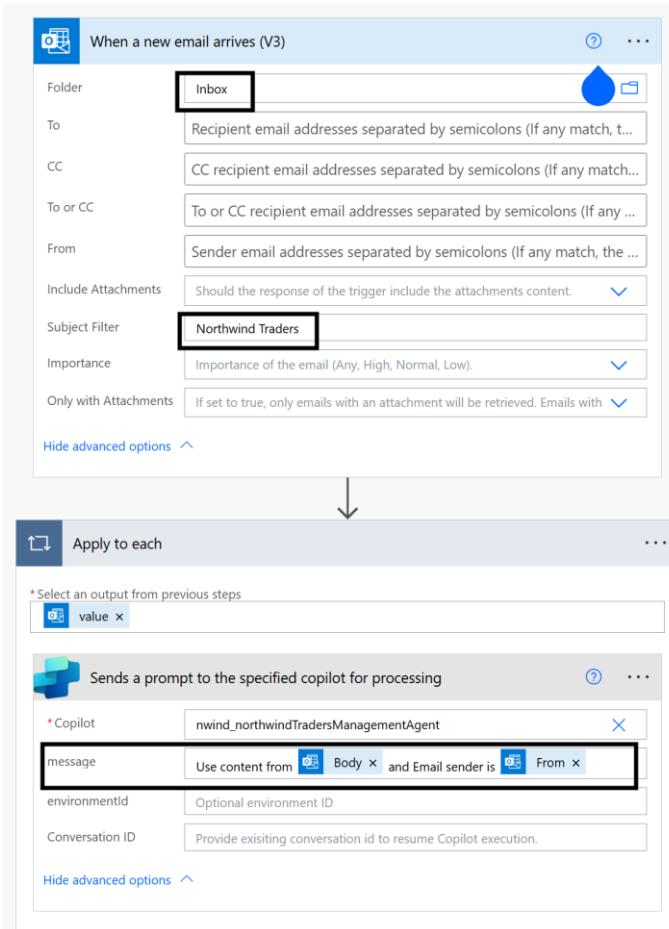


1.6 Once the trigger is created, you can click on the 3 dots in the Trigger section to view and Edit the Power Automate Flow



1.7 In the Power Automate flow, Expand “**Sends a prompt to the specified copilot for processing**”. This flow will help pass on the context of the incoming email to the autonomous agent. In this flow, we will also pass the context of the sender who is sending the email along with the email body.

**Add “and Email sender is <Select From in the dynamic content>” in the message**



1.8 Click on **Publish**.

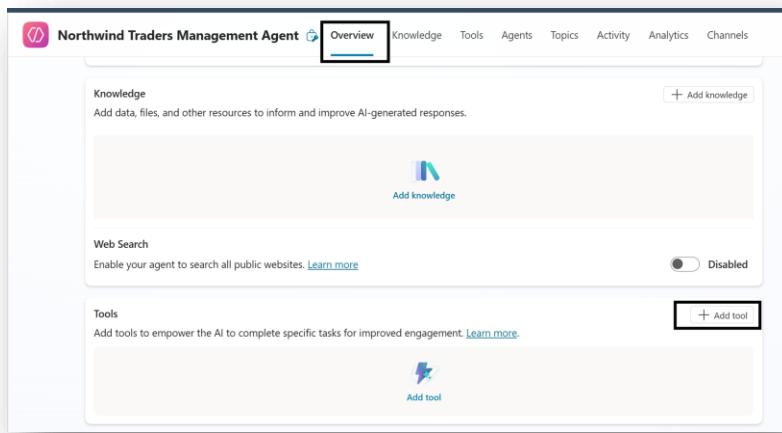
## Step 2: Add Agent Tools, Knowledge and Instructions

Now that the agent is ready to trigger on incoming email requests, we need to define actions to teach agent on what steps to take when the email comes.

Let's add an action to the autonomous agent to send replies back to sender based on their queries.

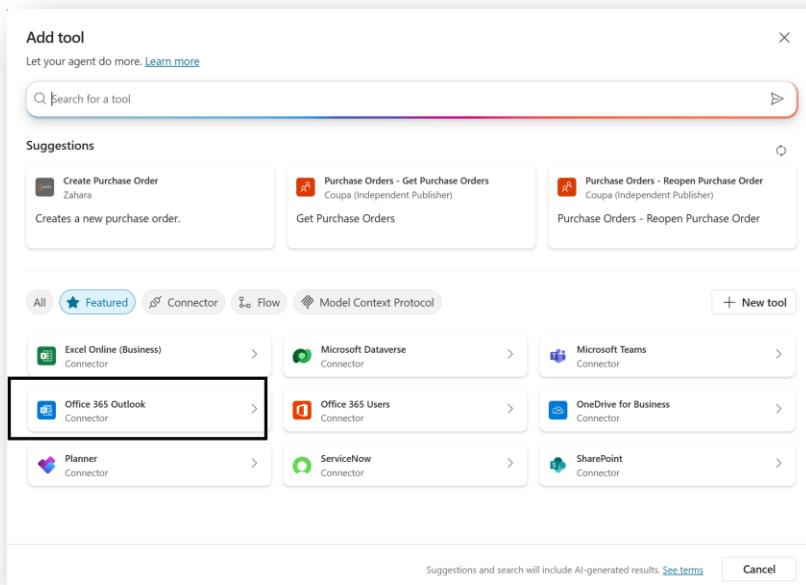
### Scenario 1 – Reply with the Purchase Order status

#### 2.1.1 Add a new tool to the Agent. In Overview section , go to Tools, click on **+ Add Tool**.



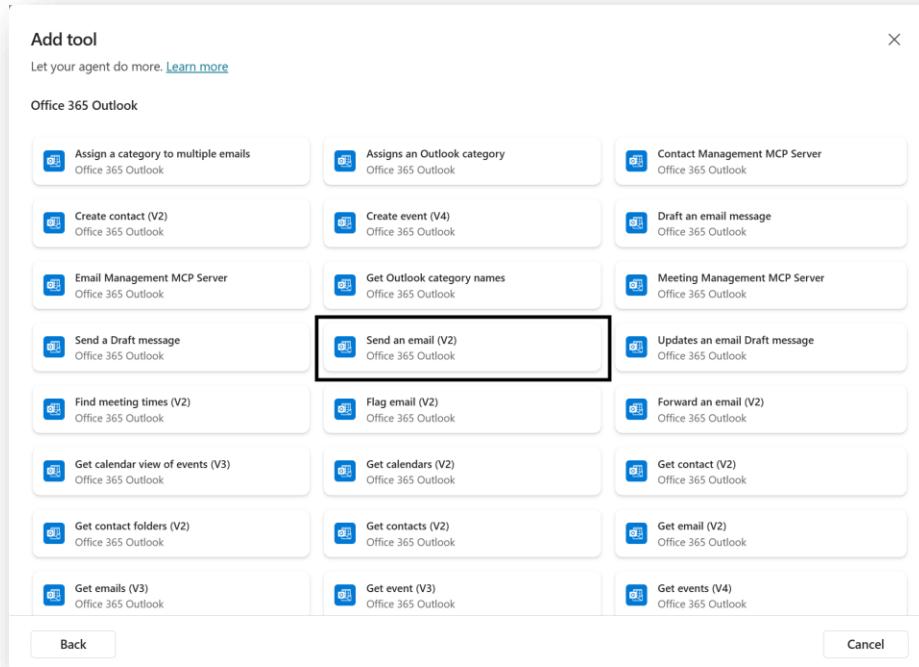
The screenshot shows the 'Northwind Traders Management Agent' interface. The 'Overview' tab is selected. In the 'Tools' section, there is a 'Web Search' section with a 'Disabled' toggle switch and a 'Tools' section with a '+ Add tool' button highlighted with a red box. The 'Knowledge' section is also visible.

#### 2.1.2 In Add tool, Select Office 365 Outlook connector.



The screenshot shows the 'Add tool' dialog box. At the top, there is a search bar and a 'Suggestions' section with three items: 'Create Purchase Order', 'Purchase Orders - Get Purchase Orders', and 'Purchase Orders - Reopen Purchase Order'. Below this, there are several categories: 'All', 'Featured', 'Connector', 'Flow', and 'Model Context Protocol'. Under the 'Connector' category, the 'Office 365 Outlook Connector' is highlighted with a red box. Other connectors listed include 'Excel Online (Business) Connector', 'Microsoft Dataverse Connector', 'Microsoft Teams Connector', 'Office 365 Users Connector', 'OneDrive for Business Connector', 'Planner Connector', 'ServiceNow Connector', and 'SharePoint Connector'. At the bottom of the dialog, there is a note about AI-generated results and a 'Cancel' button.

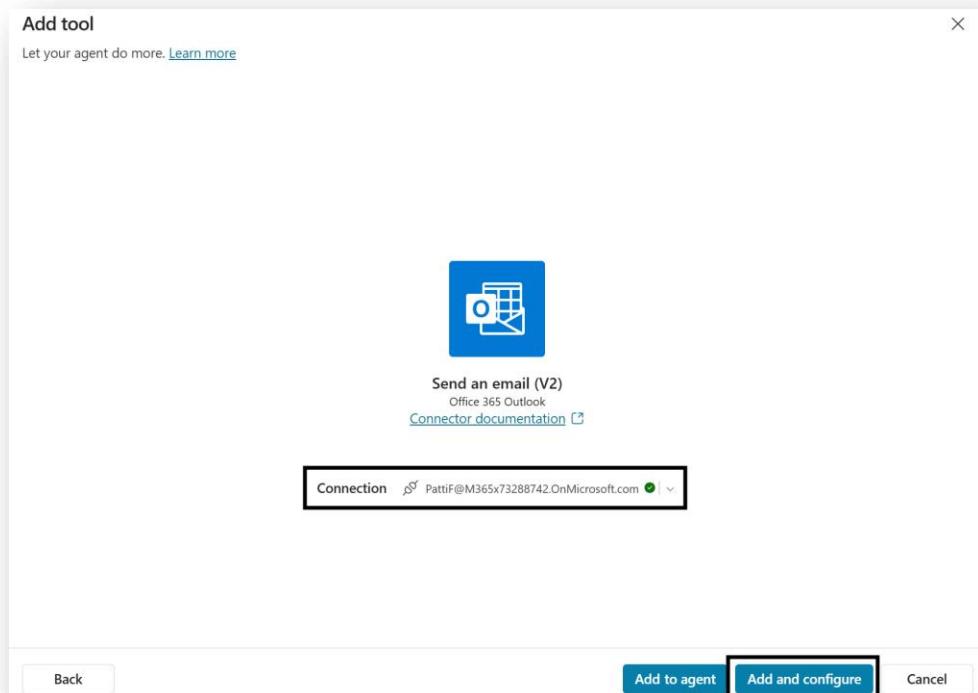
### 2.1.3 Select **Send an email (V2)** action.



The screenshot shows the 'Add tool' dialog for Office 365 Outlook. The title bar says 'Add tool' and 'Office 365 Outlook'. Below the title, a sub-header says 'Let your agent do more. [Learn more](#)'. The main area is a grid of 18 action cards, each with an icon, name, and 'Office 365 Outlook' text. The card for 'Send an email (V2)' is highlighted with a black border. At the bottom are 'Back' and 'Cancel' buttons.

Icon	Name	Office 365 Outlook
Assign a category to multiple emails	Assigns an Outlook category	Office 365 Outlook
Contact Management MCP Server	Contact Management MCP Server	Office 365 Outlook
Create contact (V2)	Create event (V4)	Office 365 Outlook
Draft an email message	Draft an email message	Office 365 Outlook
Email Management MCP Server	Get Outlook category names	Office 365 Outlook
Meeting Management MCP Server	Meeting Management MCP Server	Office 365 Outlook
Send a Draft message	Send an email (V2)	Office 365 Outlook
Updates an email Draft message	Updates an email Draft message	Office 365 Outlook
Find meeting times (V2)	Flag email (V2)	Office 365 Outlook
Forward an email (V2)	Forward an email (V2)	Office 365 Outlook
Get calendar view of events (V3)	Get calendars (V2)	Office 365 Outlook
Get contact (V2)	Get contact (V2)	Office 365 Outlook
Get contact folders (V2)	Get contacts (V2)	Office 365 Outlook
Get email (V2)	Get email (V2)	Office 365 Outlook
Get emails (V3)	Get event (V3)	Office 365 Outlook
Get events (V4)	Get events (V4)	Office 365 Outlook

### 2.1.4 Validate the connection and click on Add and Configure.



The screenshot shows the 'Add tool' dialog for the 'Send an email (V2)' action. The title bar says 'Add tool'. Below the title, a sub-header says 'Let your agent do more. [Learn more](#)'. The main area shows the action icon, name ('Send an email (V2)'), description ('Office 365 Outlook'), and a 'Connector documentation' link. At the bottom, there is a 'Connection' dropdown set to 'PattiF@M365x73288742.OnMicrosoft.com' with a green status indicator, and a row of buttons: 'Back', 'Add to agent', 'Add and configure' (which is highlighted with a black border), and 'Cancel'.

## 2.1.5 Configure this tool as follows:

### Name – Reply Back to Sender

Details

Inputs

Completion

#### Details

What it is, how it operates, and how the orchestrator identifies it. [Learn more](#)

**Name \*** Reply Back to Sender

**Description \*** ⓘ  
This operation sends an email message.

**Tool**  Office 365 Outlook Send an email (V2)

**Connection**  PradeepG@M365x73288742.OnMicrosoft.com  

**Available to**  Northwind traders demo AG 

› [Additional details](#)

#### Inputs

What the tool accepts in order to run. Inputs will be filled in the order shown.

Input name	Fill using ⓘ	Value	⋮
To *	Dynamically fill with AI ⏺	 Customize	⋮
Subject *	Dynamically fill with AI ⏺	 Customize	⋮
Body *	Dynamically fill with AI ⏺	 Customize	⋮

#### Completion

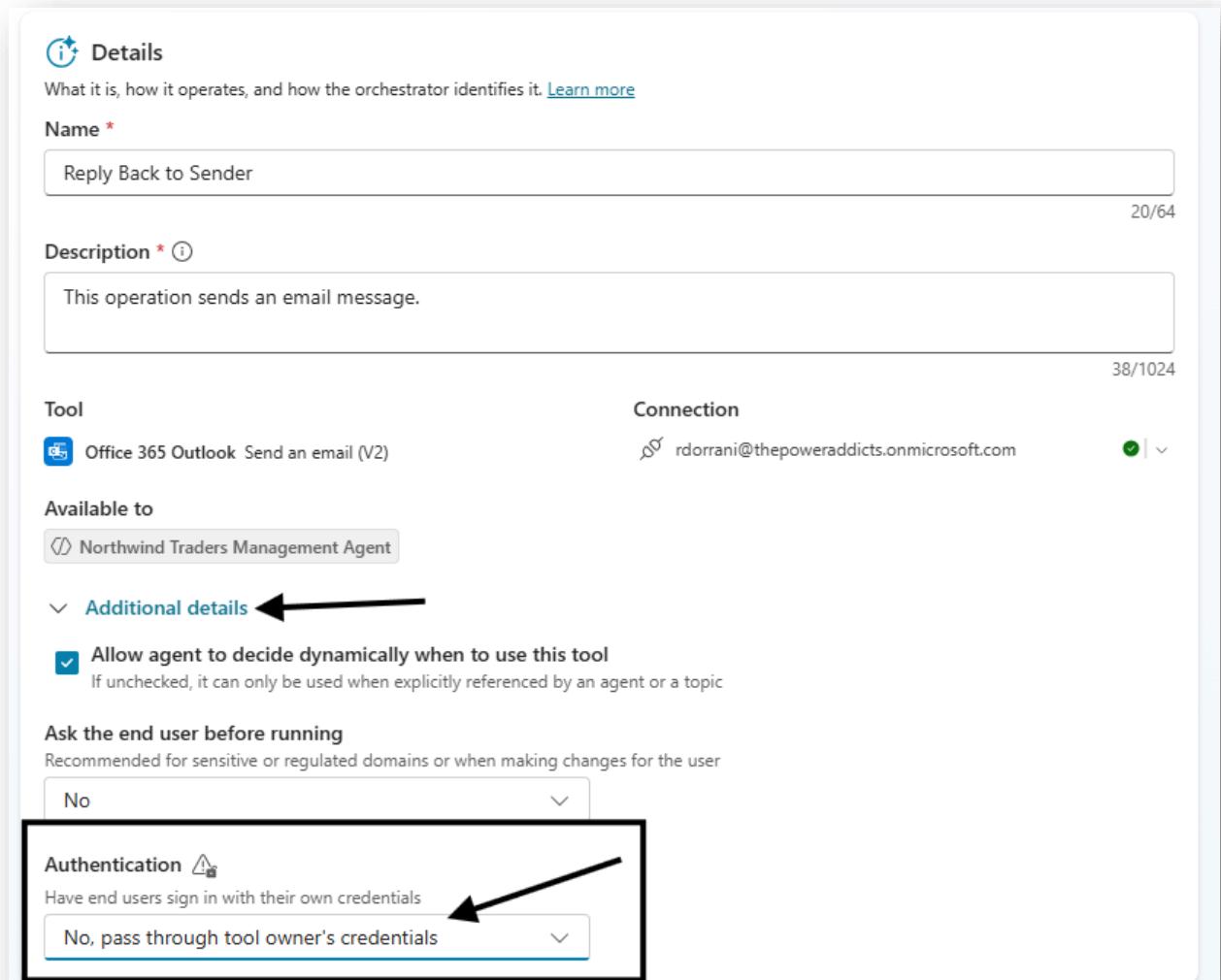
Specify what your agent does when it finishes using this tool.

**After running:**

Don't respond (default) 

› [Advanced](#)

In additional Details, ensure that Authentication is set to pass owner's credentials.



**Details**  
What it is, how it operates, and how the orchestrator identifies it. [Learn more](#)

**Name \***  
Reply Back to Sender 20/64

**Description \*** ⓘ  
This operation sends an email message. 38/1024

**Tool**  
Office 365 Outlook Send an email (V2)

**Connection**  
rdorrani@thepoweraddicts.onmicrosoft.com ✓

**Available to**  
Northwind Traders Management Agent

▼ **Additional details** ←

**Allow agent to decide dynamically when to use this tool**  
If unchecked, it can only be used when explicitly referenced by an agent or a topic

**Ask the end user before running**  
Recommended for sensitive or regulated domains or when making changes for the user

No

**Authentication** ⓘ  
Have end users sign in with their own credentials

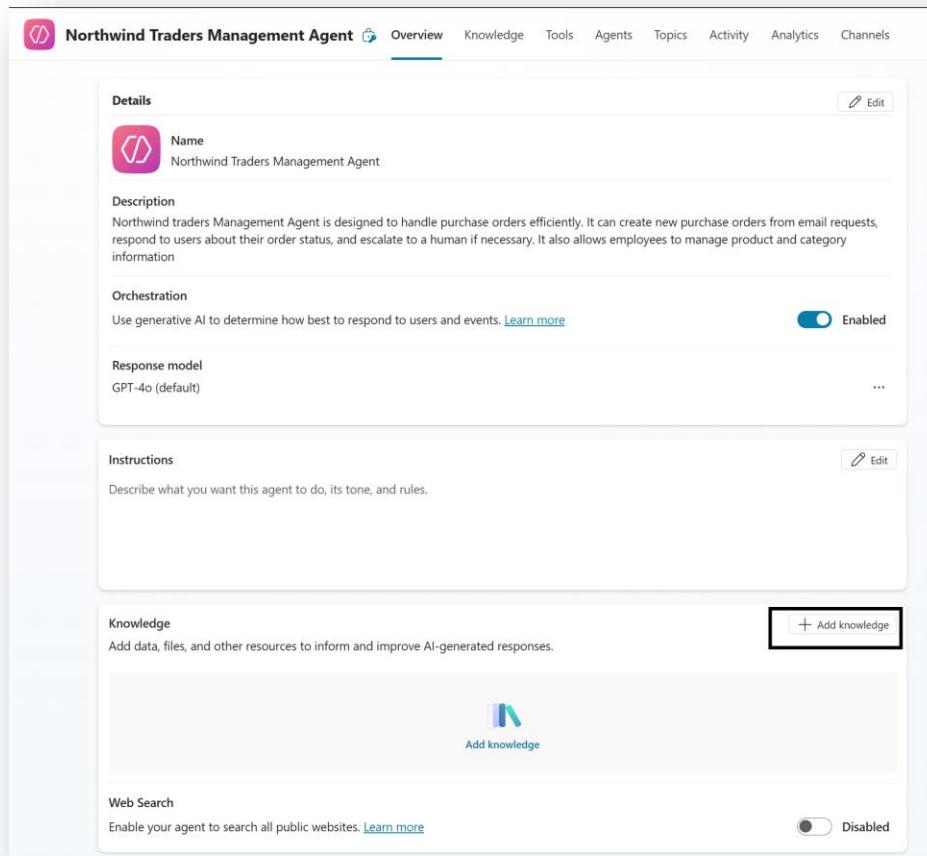
No, pass through tool owner's credentials

### 2.1.6 Click on **Save**.

2.1.7 Next, we need to add knowledge source for the agent to search for Purchase Order details and reply back to the sender with the Purchase Order status.

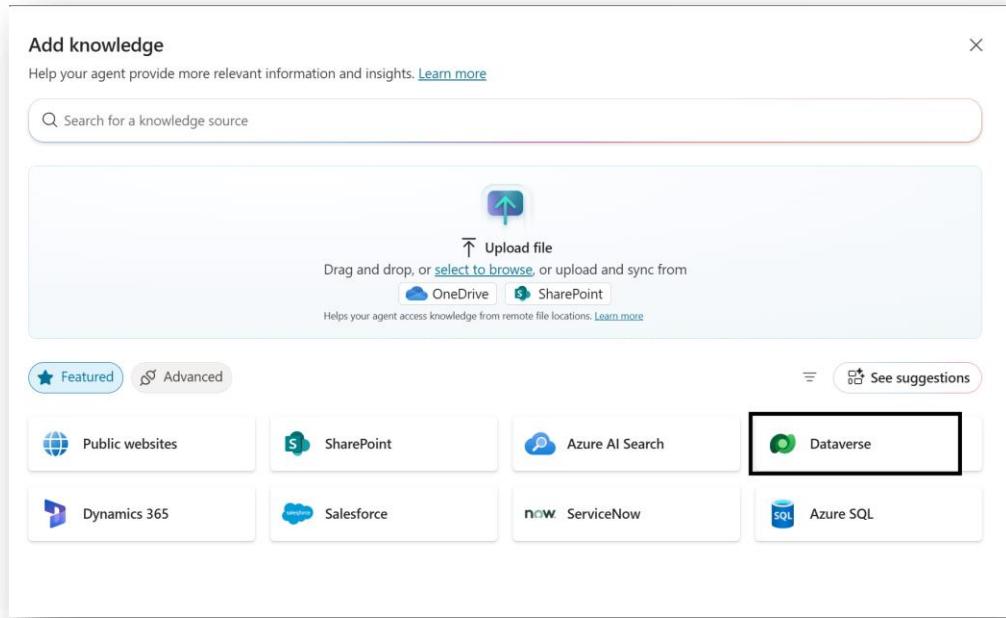
Go back to Agent Overview Tab.

In the knowledge section, click on **+ Add knowledge**

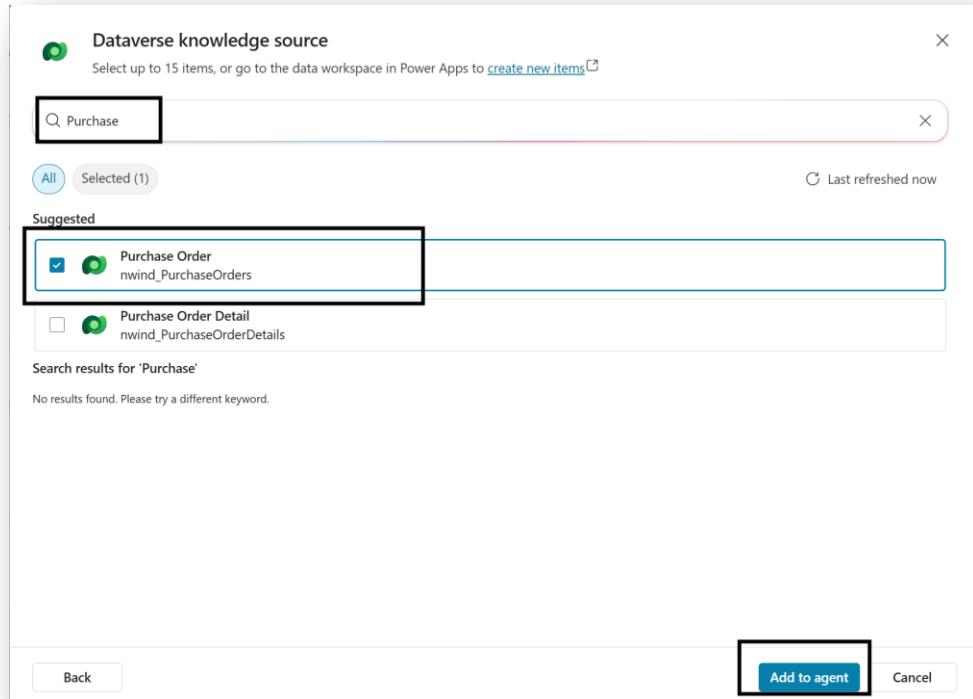


The screenshot shows the 'Northwind Traders Management Agent' overview page. The 'Knowledge' tab is selected. The 'Details' section includes fields for Name (Northwind Traders Management Agent), Description (a brief text about the agent's purpose), Orchestration (set to 'Enabled'), and Response model (GPT-4o (default)). The 'Instructions' section is empty. The 'Knowledge' section contains a sub-section for 'Add knowledge' with a 'Add knowledge' button. The 'Web Search' section is disabled, indicated by a 'Disabled' button.

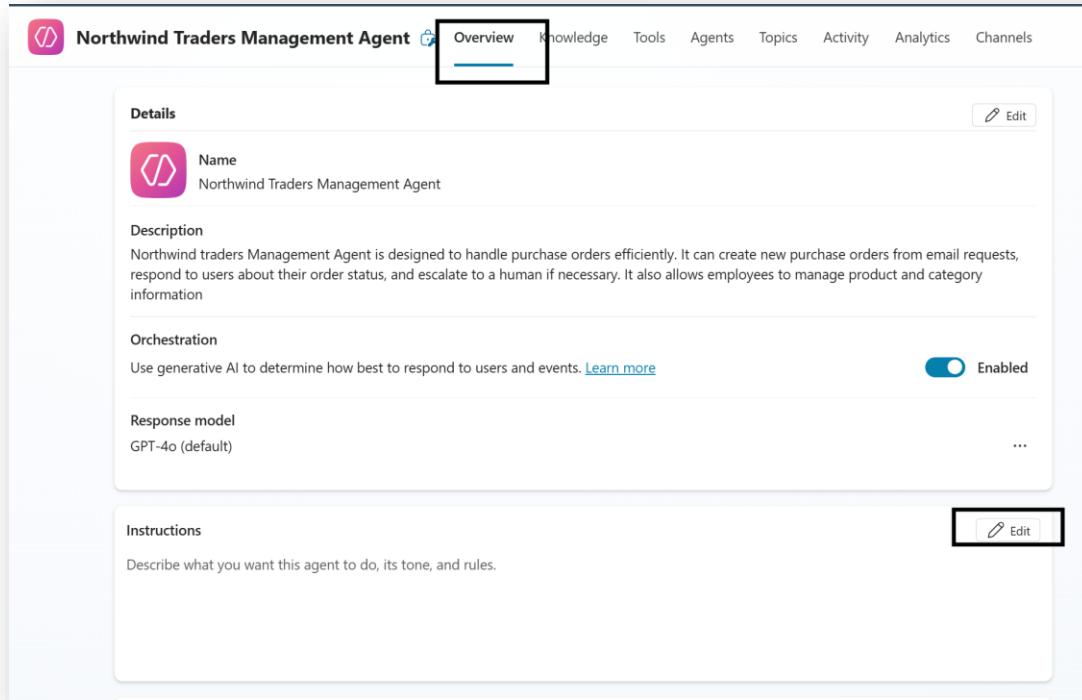
### 2.1.8 In Add Knowledge section, select Dataverse.



### 2.1.9 Search for **Purchase Order Table**. Select the table and Click **Add to Agent**.



2.1.10 Now we need to add Instruction to the agent to guide it on how to respond to the incoming email. In the Agent Overview, click on **Edit** in the **Instruction** section.



The screenshot shows the 'Overview' tab selected in the Northwind Traders Management Agent interface. The 'Instructions' section is expanded, revealing a text area for defining the agent's behavior. An 'Edit' button is located next to this section.

2.1.11 Add the following **instruction** –

- If the email is asking for Purchase Order Status, use the Purchase Order Number from email, Check the Purchase Order Details table and share the status of the Purchase Order along with the Purchase Order summary, in the reply email.

- Reply to the main email thread using <ActionName> action . Always use HTML format and all emails should be professional tone and well formatted. Emphasize any important information. Do not use citations in the outgoing email. Don't use the same subject as incoming email. Do not include Northwind Traders in the Subject line in your reply.

**Note:** Use ‘/’ sign to dynamically select the Reply Back to Sender’ action name.

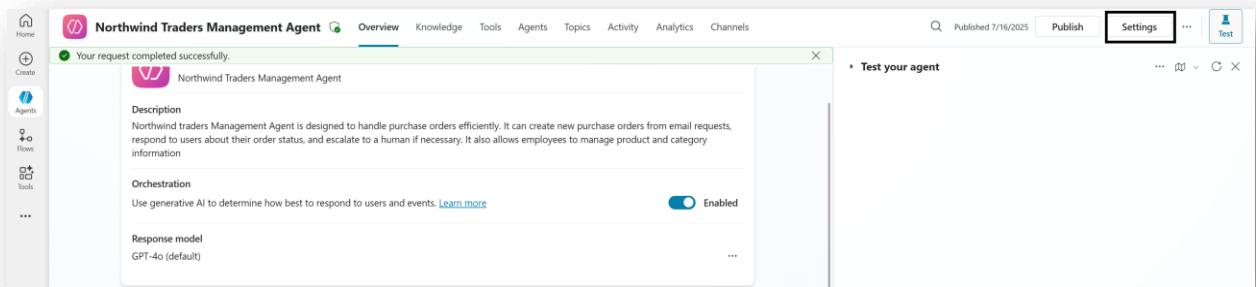
#### Instructions

 Edit

- If the email is asking for Purchase Order Status, use the Purchase Order Number from email, Check the Purchase Order Details table and share the status of the Purchase Order along with the Purchase Order summary in the reply email.
- Reply to the main email thread using  Reply Back to Sender action. Always use HTML format and all emails should be professional tone and well formatted. Emphasize any important information. Do not use citations in the outgoing email.

### 2.1.12 Click on **Save**

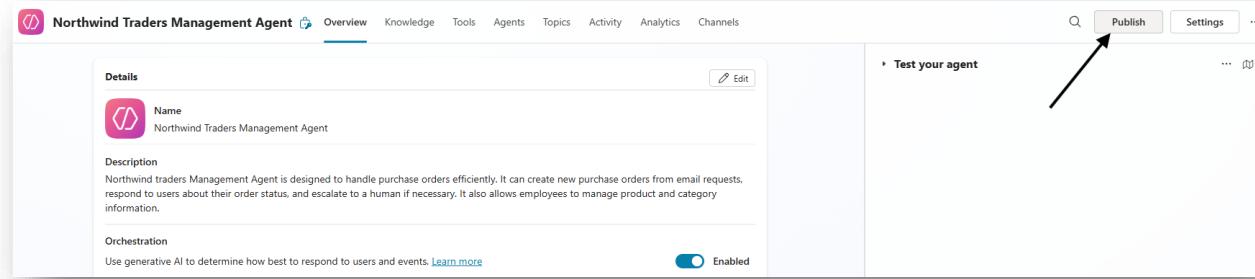
### 2.1.13 Next, Lets click on the Settings of the Agent.



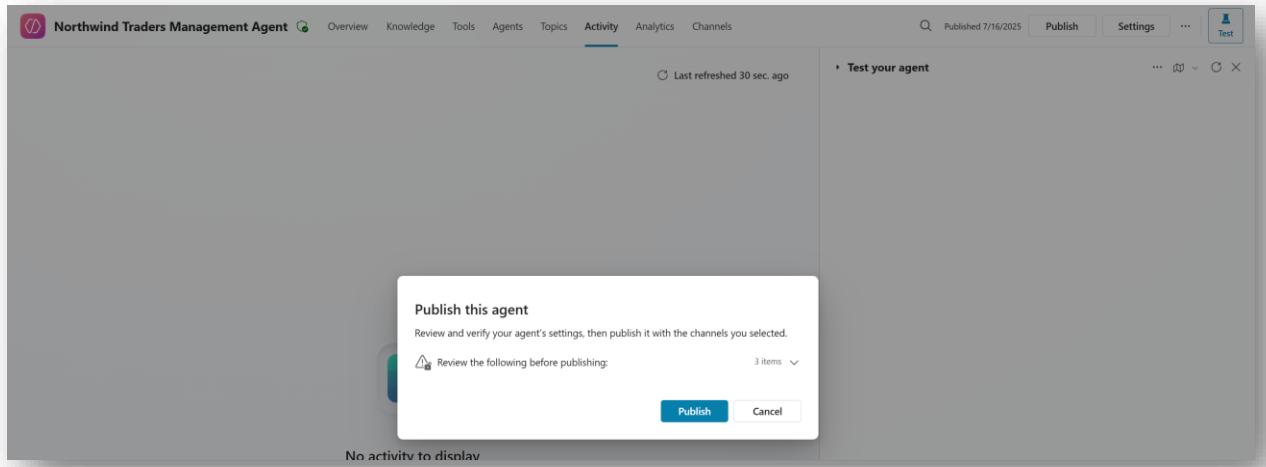
## 2.1.14 Under Generative AI, make sure that **Use Generative AI** is turned on and **Deep Reasoning** is Enabled. Click **Save**.

## 2.1.15 Close the settings page

## 2.1.16 Now Publish the Agent.



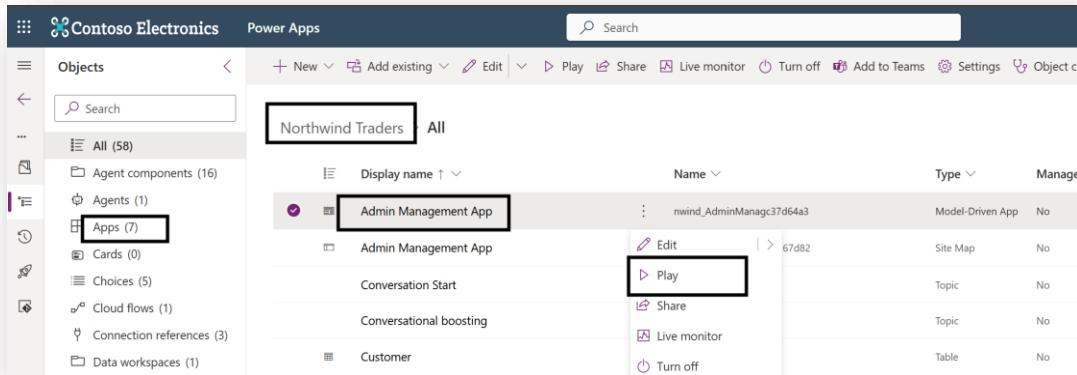
The screenshot shows the 'Overview' tab of the Northwind Traders Management Agent. The 'Publish' button is highlighted with a red arrow. The page includes sections for Details, Description, and Orchestration.



The screenshot shows the 'Overview' tab of the Northwind Traders Management Agent. A 'Publish' modal dialog is open, containing a 'Publish this agent' section with a 'Publish' button highlighted with a red arrow.

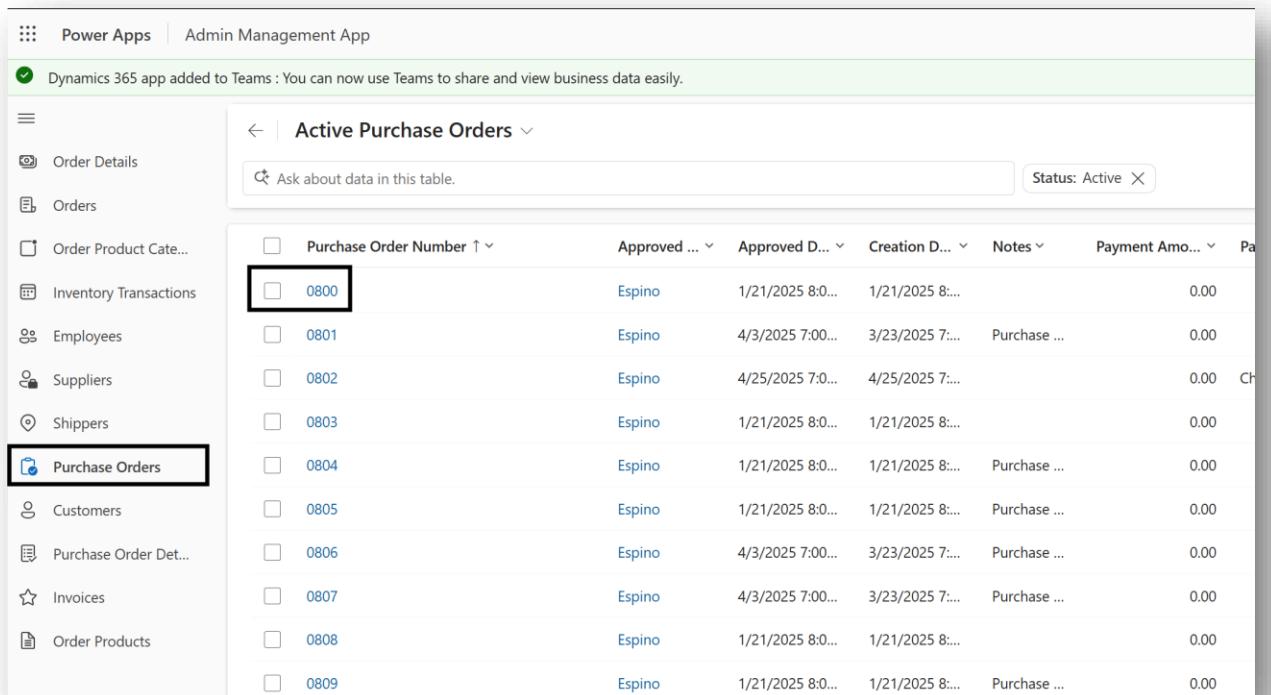
## Let's Test Scenario 1

### 2.1.17 Open the Northwind Traders – Admin Management App. Play the App.



The screenshot shows the Power Apps Admin Management App in the Contoso Electronics environment. The 'Admin Management App' is selected in the list, and the 'Play' button is highlighted.

### 2.1.18 Navigate to Purchase Order Page. Select any Purchase order. Lets check the Status of Order **0800**.

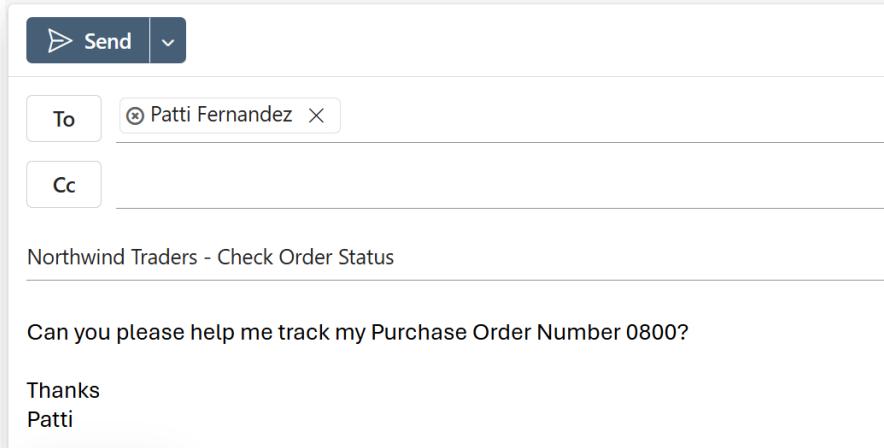


The screenshot shows the Active Purchase Orders page in the Admin Management App. Order 0800 is selected.

Purchase Order Number	Approved By	Approved Date	Creation Date	Notes	Payment Amount	PA
0800	Espino	1/21/2025 8:00:00 AM	1/21/2025 8:00:00 AM		0.00	
0801	Espino	4/3/2025 7:00:00 AM	3/23/2025 7:00:00 AM	Purchase ...	0.00	
0802	Espino	4/25/2025 7:00:00 AM	4/25/2025 7:00:00 AM		0.00	Ch
0803	Espino	1/21/2025 8:00:00 AM	1/21/2025 8:00:00 AM		0.00	
0804	Espino	1/21/2025 8:00:00 AM	1/21/2025 8:00:00 AM	Purchase ...	0.00	
0805	Espino	1/21/2025 8:00:00 AM	1/21/2025 8:00:00 AM	Purchase ...	0.00	
0806	Espino	4/3/2025 7:00:00 AM	3/23/2025 7:00:00 AM	Purchase ...	0.00	
0807	Espino	4/3/2025 7:00:00 AM	3/23/2025 7:00:00 AM	Purchase ...	0.00	
0808	Espino	1/21/2025 8:00:00 AM	1/21/2025 8:00:00 AM		0.00	
0809	Espino	1/21/2025 8:00:00 AM	1/21/2025 8:00:00 AM	Purchase ...	0.00	

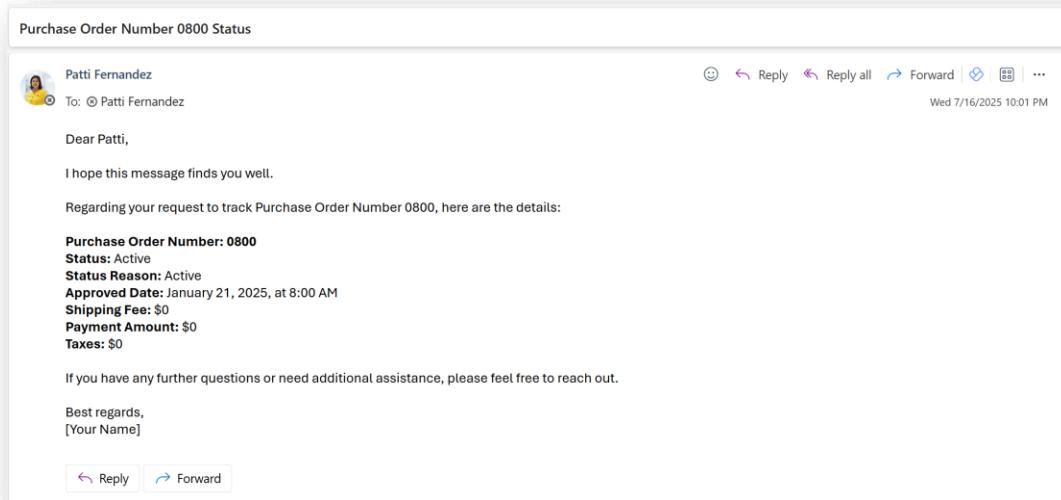
2.1.19 Go to Outlook mailbox for the current account assigned to you and send a mail to yourself as follows:

**To:** <youruseraccount>  
**Subject:** Northwind Traders – Check Order Status  
**Email Body:** Can you please help me track my Purchase Order Number 0800?



**Note:** Make sure to add Northwind Traders in the Subject Line as the Agent will trigger when the subject contains this keyword.

2.1.20 Once the email is received, the Power Automate Flow should trigger and return the email response with the Order Status.

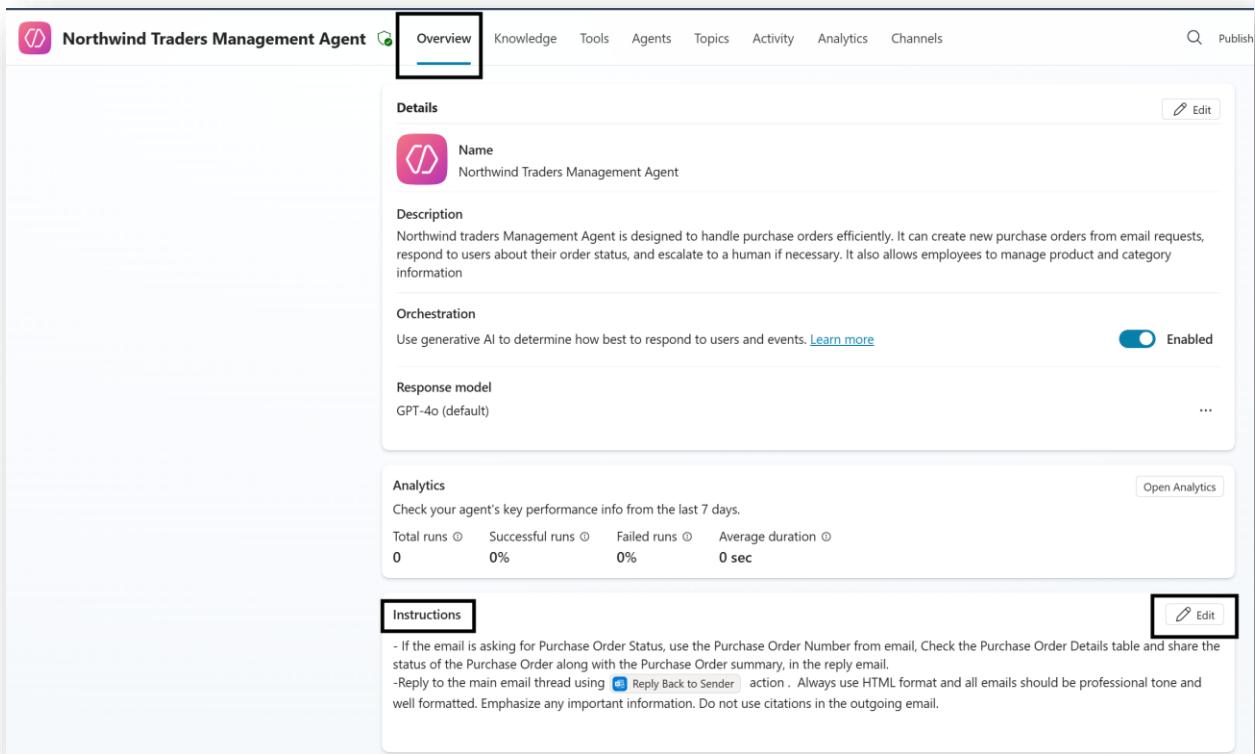


## Scenario 2 – Respond to an escalation email

In this scenario, let's assume when the customer receives the Purchase Order Status and they are not Happy with the status and sends a frustrating email. We want our Autonomous Agent to understand the customer tone and reply to them professionally.

To enable this, we need to tweak the Instructions in overview section.

### 2.2.1 Click on Edit in Instruction section of the Agent.



The screenshot shows the 'Overview' tab selected for the 'Northwind Traders Management Agent'. The 'Instructions' section is highlighted with a black box, and an 'Edit' button within that section is also highlighted with a black box. The 'Instructions' section contains the following text:

- If the email is asking for Purchase Order Status, use the Purchase Order Number from email, Check the Purchase Order Details table and share the status of the Purchase Order along with the Purchase Order summary, in the reply email.  
- Reply to the main email thread using  [Reply Back to Sender](#) action. Always use HTML format and all emails should be professional tone and well formatted. Emphasize any important information. Do not use citations in the outgoing email.

**2.2.2 Add the following statement in the instructions section **before Reply to the email thread instruction.****

**-If the customer sends an email which is in frustrating, angry tone, acknowledge their email. be empathetic and suggest that Northwind traders Support team will be calling them shortly. Or they can contact + 180080080000. Make sure to not use System Topic Escalate. Reply directly to sender of the email.**

Then Click **Save**.

Instructions Edit

- If the email is asking for Purchase Order Status, use the Purchase Order Number from email, Check the Purchase Order Details table and share the status of the Purchase Order along with the Purchase Order summary, in the reply email.

-If the customer sends an email which is in frustrating, angry tone, acknowledge their email. be empathetic and suggest that Northwind traders Support team will be calling them shortly. Or they can contact + 180080080000. Make sure to not use System Topic Escalate. Reply directly to sender of the email.

-Reply to the main email thread using  **Reply Back to Sender** action . Always use HTML format and all emails should be professional tone and well formatted. Emphasize any important information. Do not use citations in the outgoing email. Don't use the same subject as incoming email.

**2.2.3 Publish the Agent once again.**

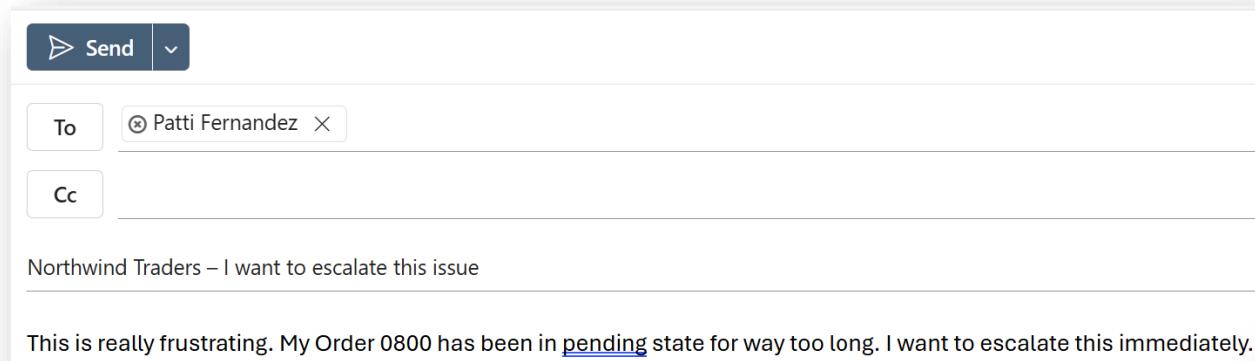
## Lets Test Scenario 2

2.2.4 From your assigned account mailbox, send another email with the following details –

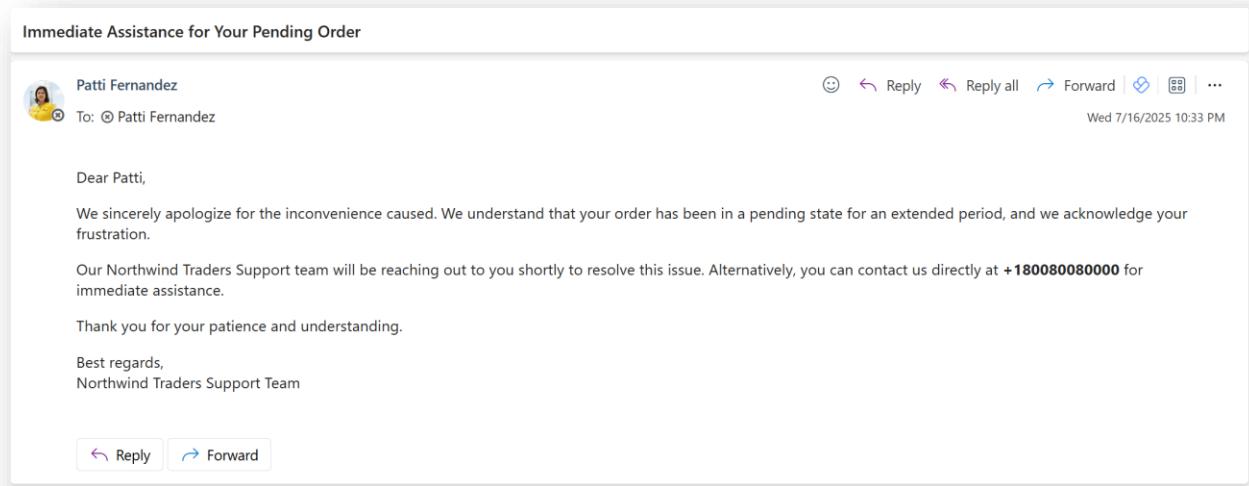
**To:** <Your account>

**Subject** – Northwind Traders – I want to escalate this issue

**Body** - This is really frustrating. My Order has been in pending state for way too long. I want to escalate this immediately.



Agent should be able to send an autonomous response similar to the image shown below –



**Note: AI generated response may vary.**

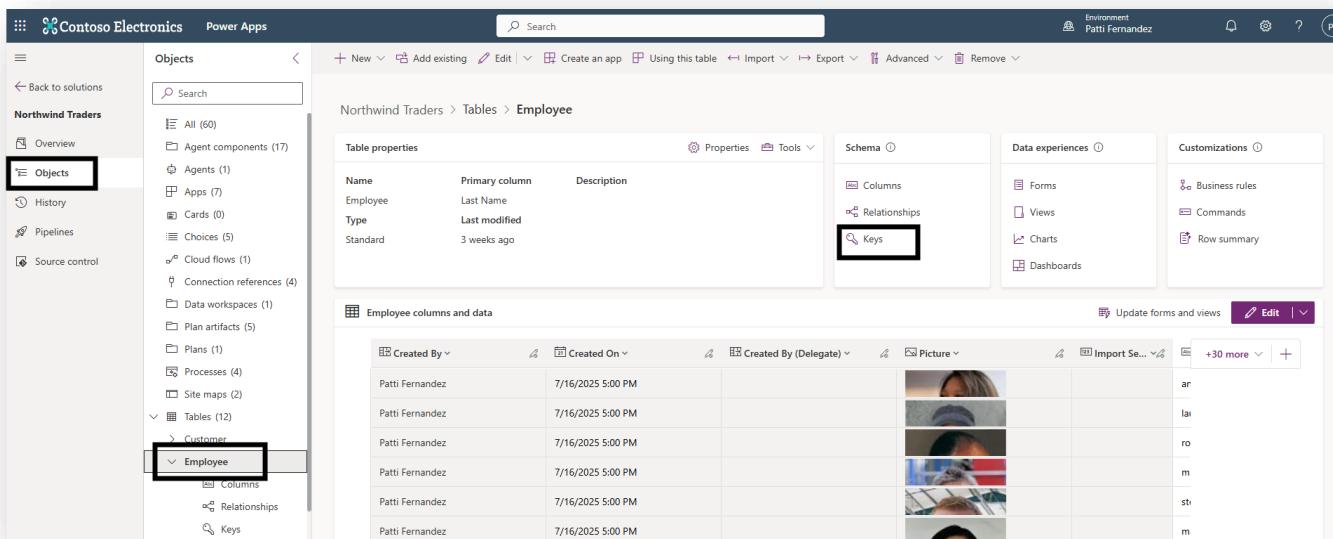
## Scenario 3 – Create Purchase Orders in Dataverse

Our next business scenario is to create a purchase order based on the incoming email and reply back to the sender with the newly created purchase order number for future tracking.

Before integrating the tool into our autonomous agent to create records in the **Purchase Order** table, it's important to ensure that **lookup columns** function correctly—especially when working with **relational data in Dataverse**.

In this lab, we'll use the "**Submitted by**" column in the Purchase Order table to reference the **Employees** table. To enable the autonomous agent to perform this lookup successfully, we need to define a new **alternate key** in the Employees table, specifying that the **email ID** is unique. This setup ensures accurate and efficient data creation by the agent

1. Go to the Northwind traders' solution, **Tables -> Employee and click on Keys**.



The screenshot shows the Microsoft Power Apps Data verse interface. The left sidebar shows the 'Objects' section with 'Employee' selected. The main area shows the 'Employee' table details. The 'Keys' tab is selected in the top navigation bar. The table properties show the primary column as 'Last Name' and the type as 'Standard'. The 'Employee columns and data' section shows a list of employees with their names, creation date, and a small image. The data is as follows:

Created By	Created On	Created By (Delegate)	Picture	Import Se...
Patti Fernandez	7/16/2025 5:00 PM			an
Patti Fernandez	7/16/2025 5:00 PM			lai
Patti Fernandez	7/16/2025 5:00 PM			ro
Patti Fernandez	7/16/2025 5:00 PM			m
Patti Fernandez	7/16/2025 5:00 PM			sti
Patti Fernandez	7/16/2025 5:00 PM			m

2. Click on **+ New Key** and configure as follows and then click on **Save**

**Key** X

**Display name \***  
AltEmailKey

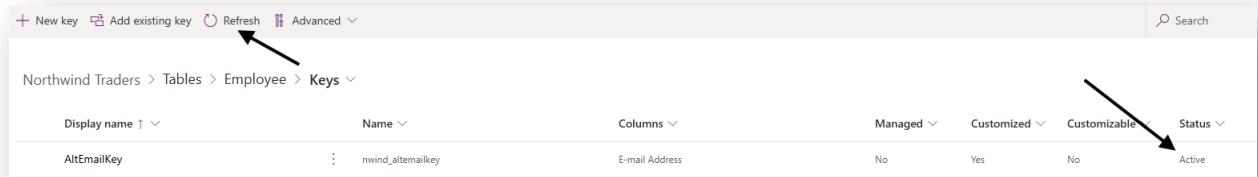
**Name \***  
nwind\_ AltEmailKey

**Columns \***

- Business Phone
- City
- Company
- Country\_Region
- E-mail Address
- Fax Number
- First Name
- Home Phone
- Import Sequence Number
- Job Title
- Last Name
- Mobile Phone
- Record Created On
- Sample Data Original ID
- State\_Province
- Time Zone Rule Version Number
- UTC Conversion Time Zone Code
- Web Page
- ZIP\_Postal Code

Save Cancel

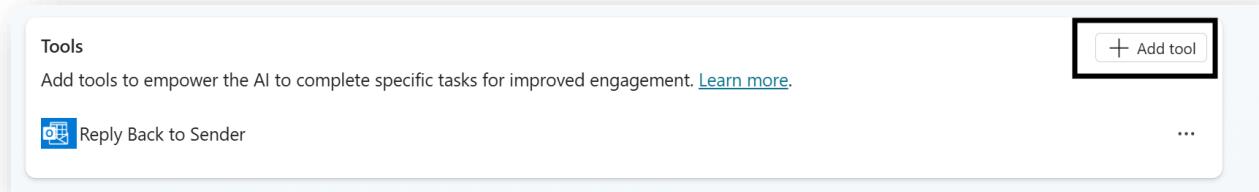
3. The key will show as Pending Status for a few minutes and then it should turn as **Active**.



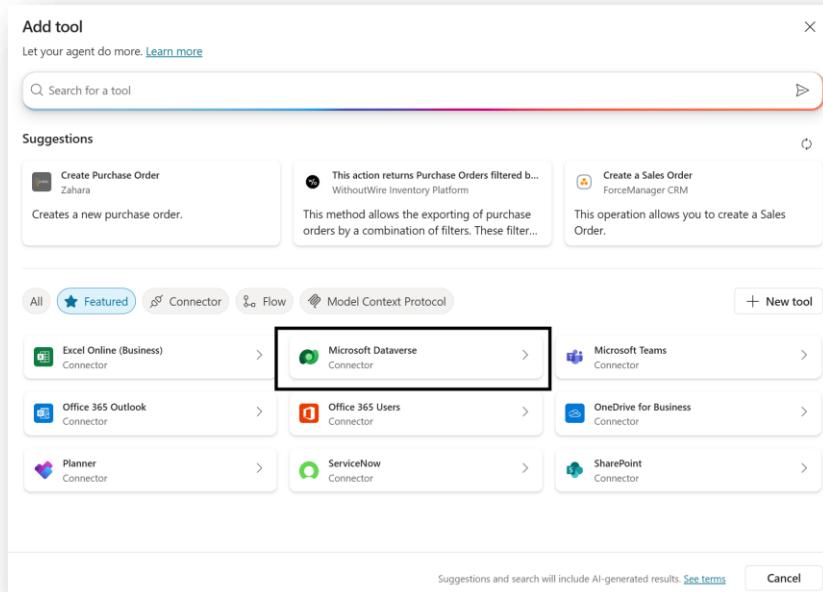
Northwind Traders > Tables > Employee > Keys					
Display name	Name	Columns	Managed	Customized	Status
AltEmailKey	nwind_altemailkey	E-mail Address	No	Yes	No

### Back to the Agent:

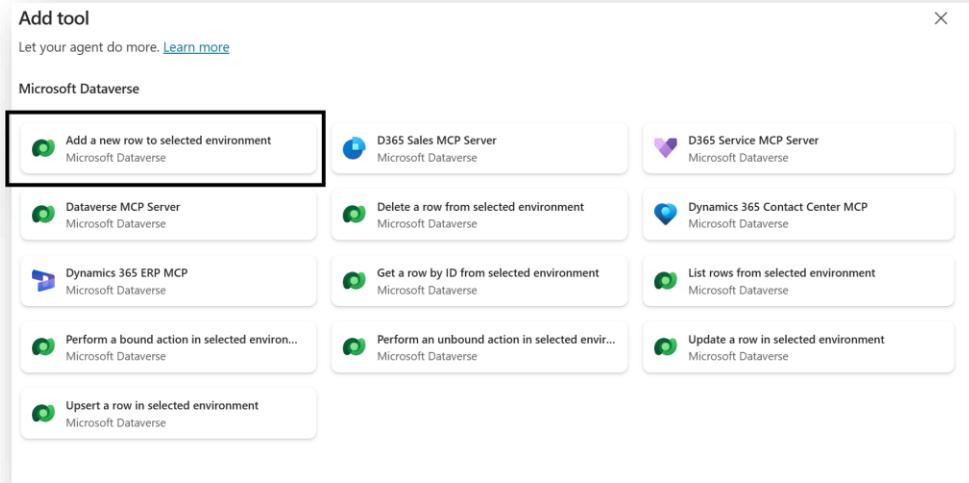
2.3.1 Now, Lets add another tool to create a new row in Dataverse. Go to Tools in Overview section and click on + Add Tool



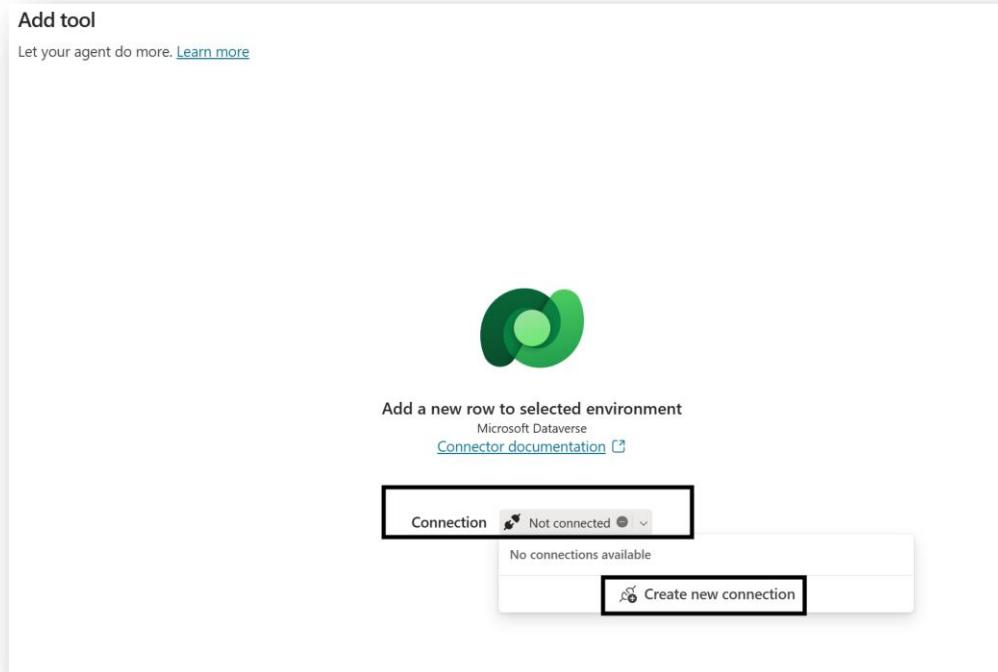
### 2.3.2 Select Microsoft Dataverse



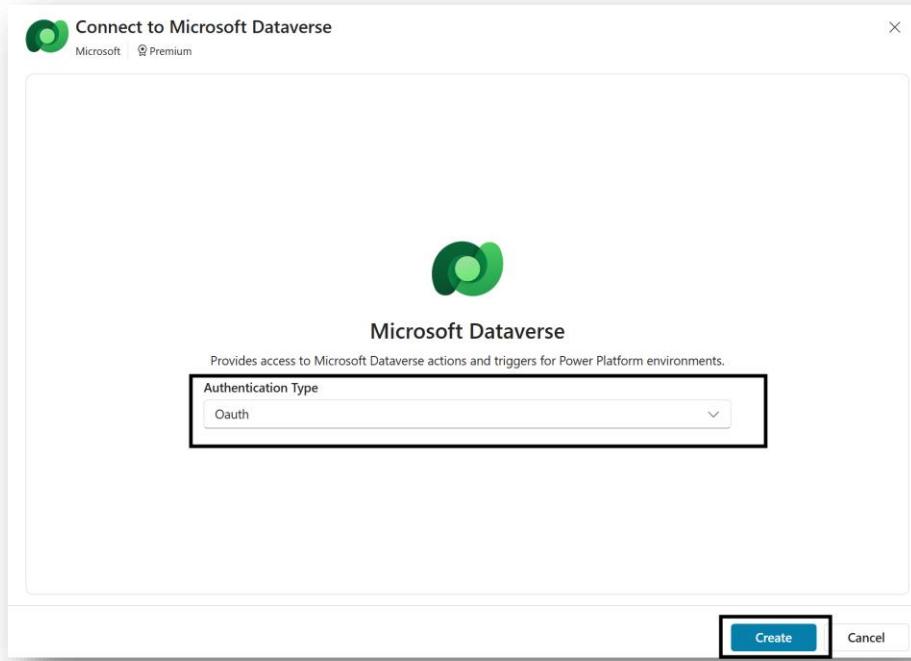
### 2.3.3 Select Add a new row to selected environment



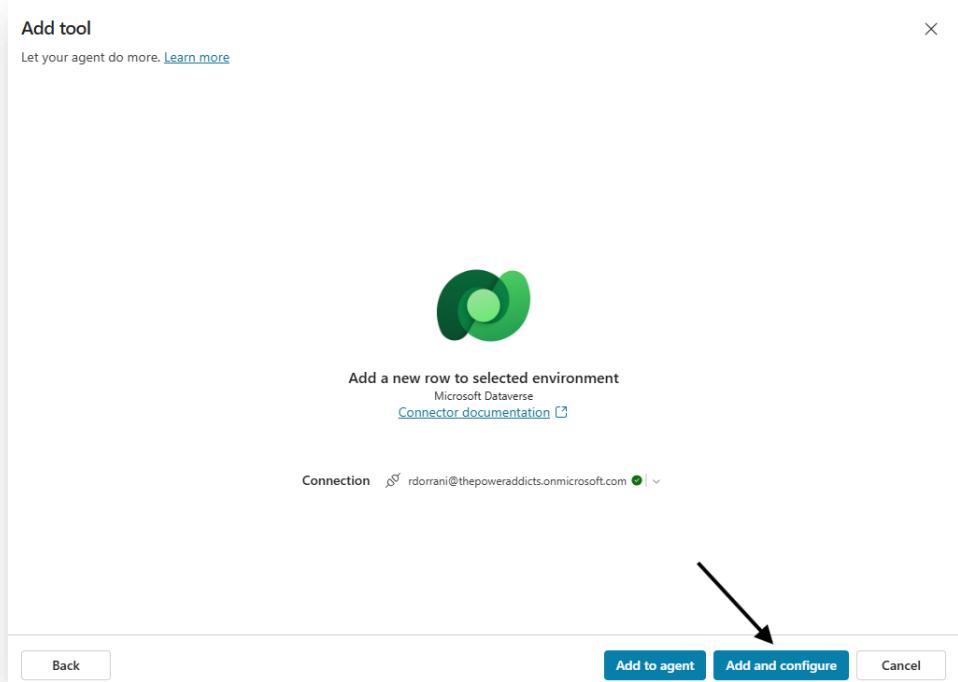
### 2.3.4 In case if the Connection for Dataverse is not present, Create a new connection for Dataverse.



### 2.3.5 Select Authentication type as OAuth and click on **Create**

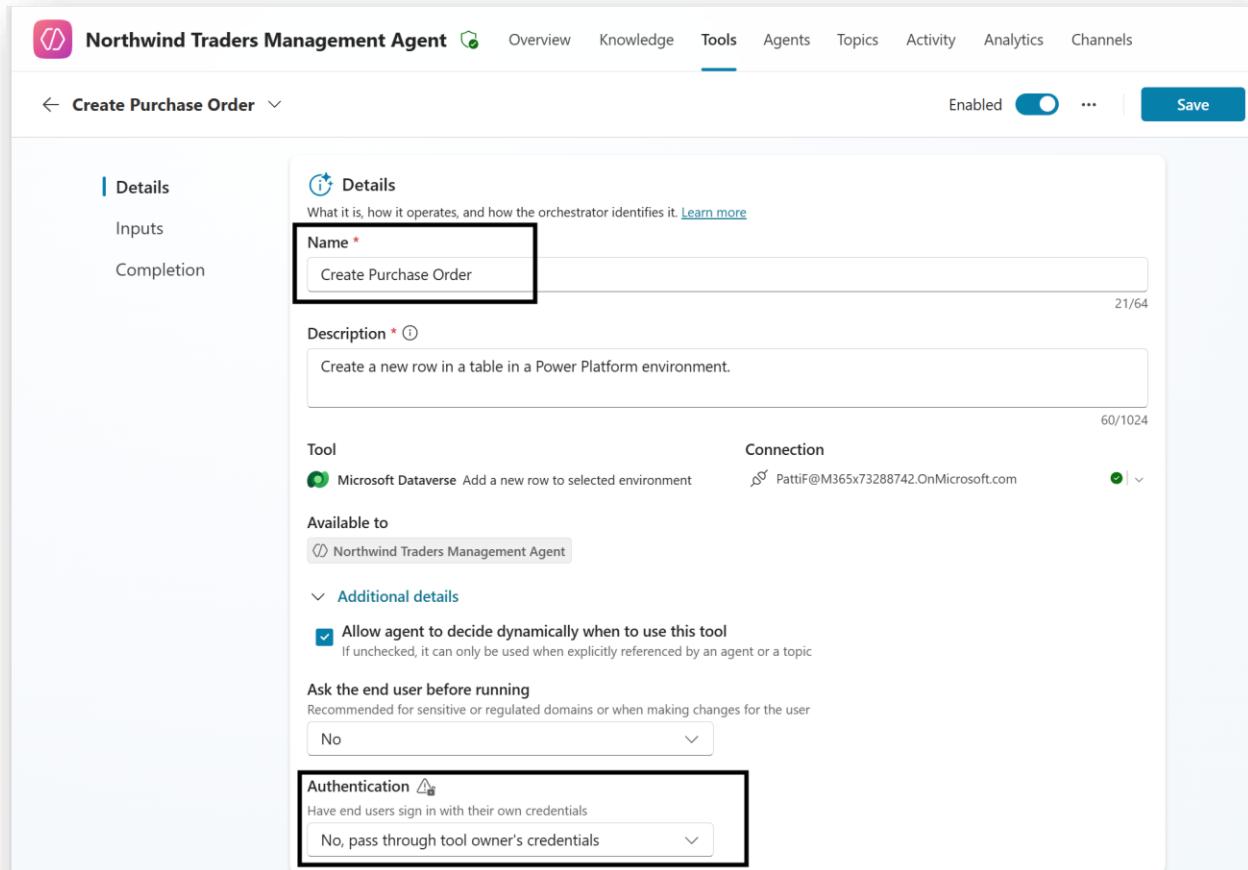


### 2.3.6 Click on Add and Configure.



2.3.7 Next, we will configure this action. Set Name of this action as “**Create Purchase Order**”.

In Additional Details, change Authentication setting to “**No, pass through tool owner’s credentials**”.



The screenshot shows the configuration page for a tool named 'Create Purchase Order' within the 'Northwind Traders Management Agent' workspace. The 'Details' tab is selected. The 'Name' field is set to 'Create Purchase Order'. The 'Description' field contains the text 'Create a new row in a table in a Power Platform environment.' The 'Tool' section shows 'Microsoft Dataverse' selected with the sub-option 'Add a new row to selected environment'. The 'Connection' section shows a connection named 'PattiF@M365x73288742.OnMicrosoft.com'. The 'Available to' section lists 'Northwind Traders Management Agent'. The 'Additional details' section has a checked checkbox for 'Allow agent to decide dynamically when to use this tool'. The 'Ask the end user before running' section has a dropdown set to 'No'. The 'Authentication' section is highlighted with a black box and shows the setting 'No, pass through tool owner’s credentials'.

2.3.8 For Environment and Table Name, change “Dynamic Fill with AI” to Custom Value. Select the Environment Name as **(Current)** and Table Name as **Purchase Orders** as shown below:

 **Inputs**

What the tool accepts in order to run. Inputs will be filled in the order shown.

Input name	Fill using <i>i</i>	Value	⋮
Environment * organization	Custom value	(Current)	⋮
Table name * entityName	Custom value	Purchase Orders	⋮

2.3.9 Next, You can click on Add Input to Add the columns that you would like to update as a part of Purchase Order Creation.

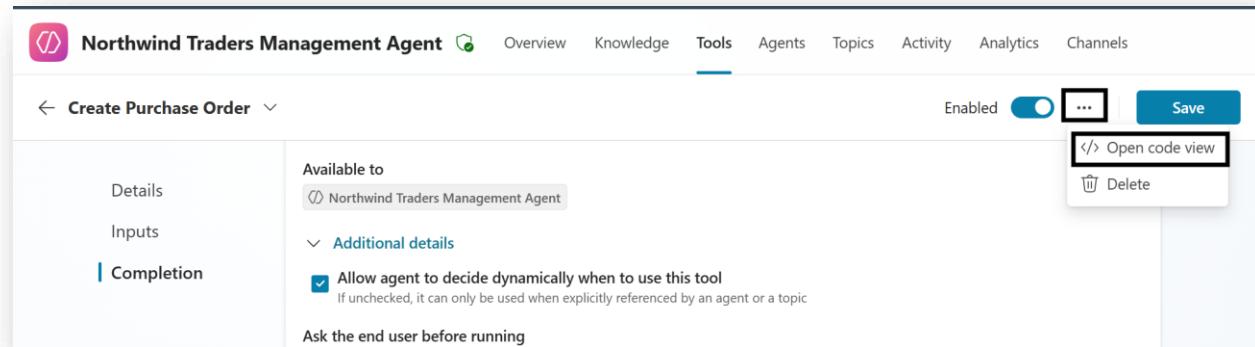
 **Inputs**

What the tool accepts in order to run. Inputs will be filled in the order shown.

→ **+ Add input**

Input name	Fill using <i>i</i>	Value	⋮
Environment * organization	Custom value	Dev Training	⋮
Table name * entityName	Custom value	Purchase Orders	⋮
Purchase Order Name * item.cr199_purchaseordername	Dynamically fill with AI	Customize	⋮

2.3.10 For the ease of creation of this Tool, click on the ... and Select “</> Open Code View”.



2.3.11 Copy and Paste the below mentioned code in the Code view before **modelDisplayName** (You need to replace the code in the section highlighted in image below with the code shared in yellow)

```

<- Create Purchase Order <-
1 kind: TaskDialog
2 inputs:
3   - kind: ManualTaskInput
4     propertyName: organization
5     value: current
6
7   - kind: ManualTaskInput
8     propertyName: entityName
9     value: nwind_purchaseorders
10
11 modelDisplayName: Create Purchase Order
12 modelDescription: Create a new row in a table in a Power Platform environment.
13 outputs:
14   - propertyName: _createdby_value
15     name: Created By (Value)
16     description: Unique identifier of the user who created the record.
17
18   - propertyName: _createdby_value@Microsoft.Dynamics.CRM.lookuplogicalname
19     name: Created By (Type)
20     description: Unique identifier of the user who created the record.
21
22   - propertyName: _createdonbehalfby_value
23     name: Created By (Delegate) (Value)
24     description: Unique identifier of the delegate user who created the record.
25
26   - propertyName: _createdonbehalfby_value@Microsoft.Dynamics.CRM.lookuplogicalname
27     name: Created By (Delegate) (Type)
28     description: Unique identifier of the delegate user who created the record.
29
30   - propertyName: _modifiedby_value
31     name: Modified By (Value)
32     description: Unique identifier of the user who modified the record.
-->

```

```
kind: TaskDialog
inputs:
  - kind: ManualTaskInput
    propertyName: organization
    value: current

  - kind: ManualTaskInput
    propertyName: entityName
    value: nwind_purchaseorderses

  - kind: AutomaticTaskInput
    propertyName: item.'nwind_paymentamount'
    name: Payment Amount
    description: From email body extract Payment Amount

  - kind: AutomaticTaskInput
    propertyName: item.'nwind_paymentmethod'
    name: Payment Method
    description: From email body extract Payment Method

  - kind: AutomaticTaskInput
    propertyName: item.'nwind_shippingfee'
    name: Shipping Fee
    description: From email body extract Shipping Fee

  - kind: AutomaticTaskInput
    propertyName: item.'nwind_notes'
    name: Notes
    description: Entire email body

  - kind: ManualTaskInput
    propertyName: item.'nwind_purchaseorderstatusid'
    value: 0

  - kind: AutomaticTaskInput
    propertyName: item.'nwind_SubmittedBy@odata.bind'
    description: "Use this format nwind_employeeses(nwind_emailaddress='emailID') where emailID is coming from Incoming email. "

  - kind: AutomaticTaskInput
    propertyName: item.'nwind_submitteddate'
    name: Submitted Date
    description: |
      Generate an Submitted Date by adding the duration to the current date and time, formatted as in this example: 2025-01-06T14:57:51.2948938Z
```

### 2.3.12 Let's understand the code above.

For columns - **Payment amount, Payment method, Shipping fee and notes**, the data will be extracted from the incoming email and will be dynamically filled by AI.

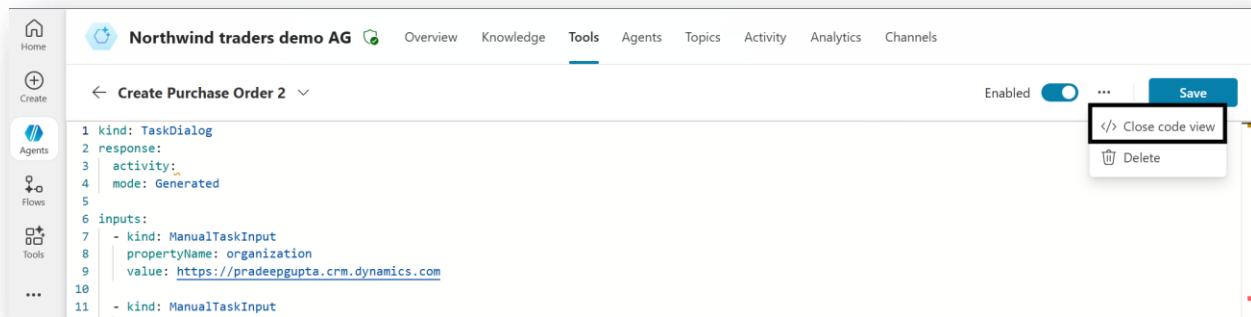
For column – **Purchase Order Status**, is a choice column. We are setting it to 0 (which is “New”).

For column – **Submitted by**, we need to specify the format -

`nwind_employees(nwind_emailaddress='emailID')` where emailID is coming from the incoming email.

For column – Submitted Date, we need to specify the date format example.

### 2.3.13 Click on ... and close the code view.



```
1 kind: TaskDialog
2 response:
3   activity:
4     mode: Generated
5
6 inputs:
7   - kind: ManualTaskInput
8     propertyName: organization
9     value: https://pradeepgupta.crm.dynamics.com
10
11 - kind: ManualTaskInput
```

This is how the Inputs section should look like:

 **Inputs**

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	Pradeep Gupta	⋮
Table name * entityName	Custom value	nwind_purchaseorderses	⋮
Payment Amount item.nwind_paymentamount	Dynamically fill with AI ⓘ	Customize	⋮
Payment Method item.nwind_paymentmethod	Dynamically fill with AI ⓘ	Customize	⋮
Shipping Fee item.nwind_shippingfee	Dynamically fill with AI ⓘ	Customize	⋮
Notes item.nwind_notes	Dynamically fill with AI ⓘ	Customize	⋮
Purchase Order Status item.nwind_purchaseorderstatusid	Custom value	0	⋮
Submitted By (Employees) item.nwind_SubmittedBy@odata.bing	Dynamically fill with AI ⓘ	Customize	⋮
Submitted Date item.nwind_submitteddate	Dynamically fill with AI ⓘ	Customize	⋮

2.3.14 Under completion section, Set After running as **Write the response with generative AI.**

 **Completion**

Specify what your agent does when it finishes using this tool.

After running:

Write the response with generative AI ⓘ

> [Advanced](#)

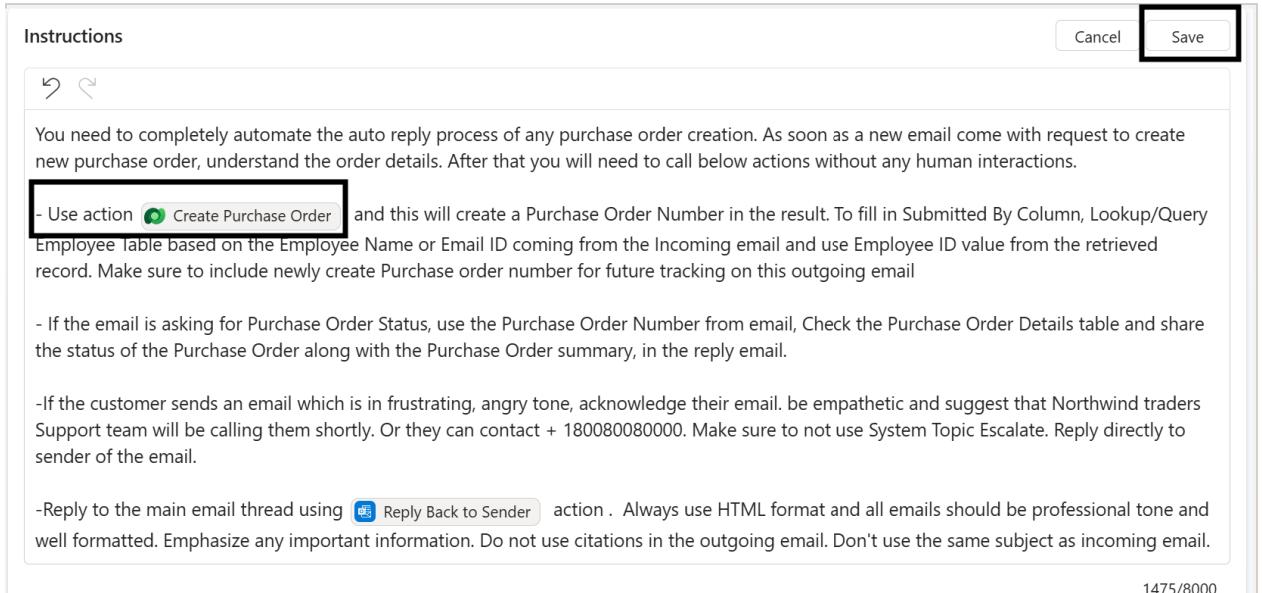
2.3.15 Click on **Save**.

2.3.16 Navigate back to the overview section and add the following note in the beginning of Instructions.

You need to completely automate the auto reply process of any purchase order creation. As soon as a new email come with request to create new purchase order, understand the order details. After that you will need to call below actions without any human interactions.

- Use action <actionName> and this will create a Purchase Order Number in the result. To fill in Submitted By Column, Lookup/Query Employee Table based on the Employee Name or Email ID coming from the Incoming email and use Employee ID value from the retrieved record. Make sure to include newly create Purchase order number for future tracking on this outgoing email

 **Note:** use / to dynamically select the action name.



You need to completely automate the auto reply process of any purchase order creation. As soon as a new email come with request to create new purchase order, understand the order details. After that you will need to call below actions without any human interactions.

- Use action  Create Purchase Order and this will create a Purchase Order Number in the result. To fill in Submitted By Column, Lookup/Query Employee Table based on the Employee Name or Email ID coming from the Incoming email and use Employee ID value from the retrieved record. Make sure to include newly create Purchase order number for future tracking on this outgoing email

- If the email is asking for Purchase Order Status, use the Purchase Order Number from email, Check the Purchase Order Details table and share the status of the Purchase Order along with the Purchase Order summary, in the reply email.

- If the customer sends an email which is in frustrating, angry tone, acknowledge their email, be empathetic and suggest that Northwind traders Support team will be calling them shortly. Or they can contact + 18008008000. Make sure to not use System Topic Escalate. Reply directly to sender of the email.

- Reply to the main email thread using  Reply Back to Sender action. Always use HTML format and all emails should be professional tone and well formatted. Emphasize any important information. Do not use citations in the outgoing email. Don't use the same subject as incoming email.

1475/8000

2.3.17 Click on **Save** action. And **Publish** the Agent.

### Let's Test Scenario 3

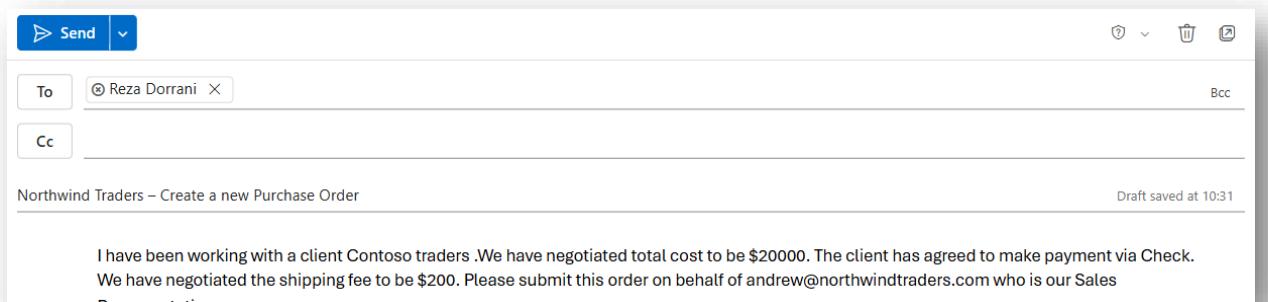
2.3.18 Go to your email mailbox (for account used in lab) and send the following email :

**To:** your account email

**From:** Northwind Traders – Create a new Purchase Order

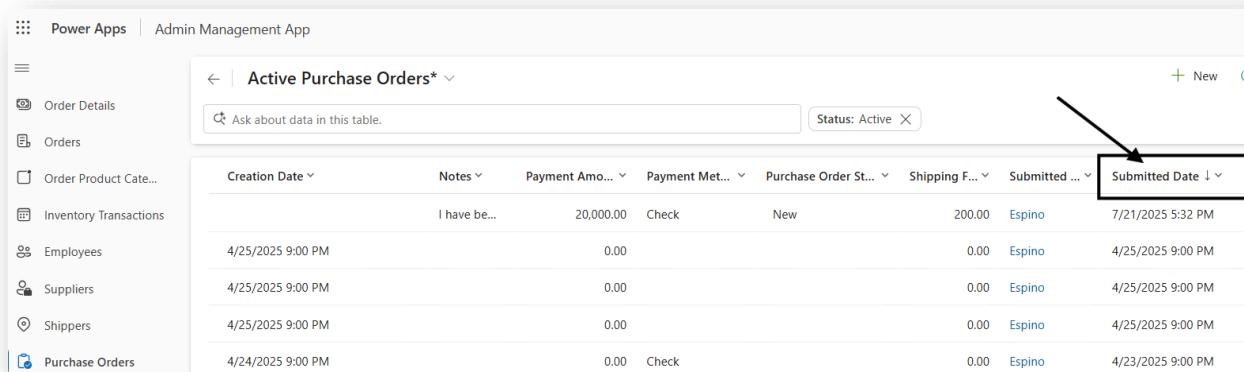
**Body:**

I have been working with a client Contoso traders .We have negotiated total cost to be \$20000. The client has agreed to make payment via Check. We have negotiated the shipping fee to be \$200. Please submit this order on behalf of andrew@northwindtraders.com who is our Sales Representative.



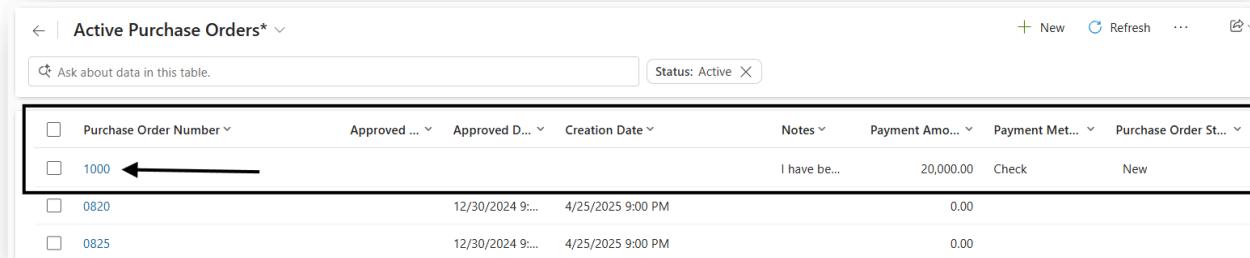
2.3.19 Let's validate and confirm that the Purchase Order is created in the Purchase order table.

Go to Purchase Orders Page and sort by Submitted Date in descending order.



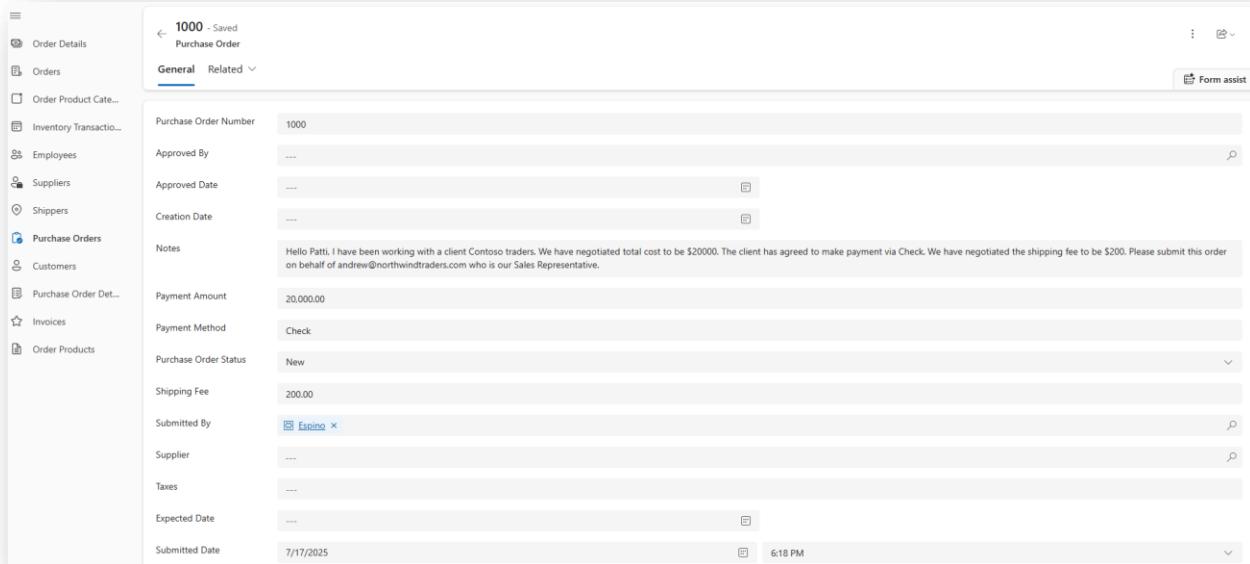
Creation Date	Notes	Payment Amo...	Payment Met...	Purchase Order St...	Shipping F...	Submitted...	Submitted Date
	I have be...	20,000.00	Check	New	200.00	Espino	7/21/2025 5:32 PM
4/25/2025 9:00 PM		0.00			0.00	Espino	4/25/2025 9:00 PM
4/25/2025 9:00 PM		0.00			0.00	Espino	4/25/2025 9:00 PM
4/25/2025 9:00 PM		0.00			0.00	Espino	4/25/2025 9:00 PM
4/24/2025 9:00 PM		0.00	Check		0.00	Espino	4/23/2025 9:00 PM

The first record would be the latest created Purchase Order  
Click on the Purchase Order number for that record.



Purchase Order Number	Approved ...	Approved D...	Creation Date	Notes	Payment Amo...	Payment Met...	Purchase Order St...
1000			12/30/2024 9:...	I have be...	20,000.00	Check	New
0820			12/30/2024 9:...		0.00		
0825			12/30/2024 9:...		0.00		

The Purchase Order form has all the details coming in from the incoming email.

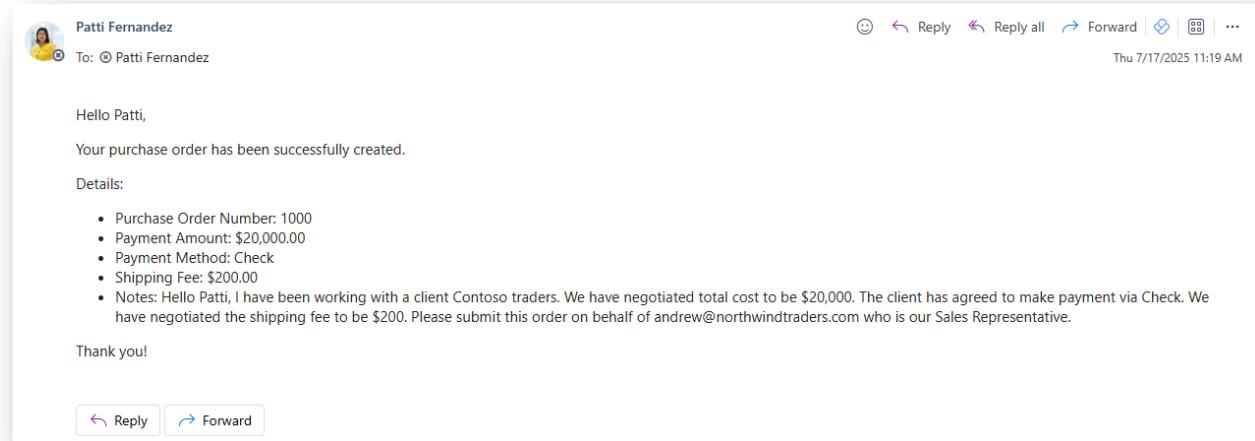


1000 - Saved  
Purchase Order

**General**

Purchase Order Number	1000
Approved By	---
Approved Date	---
Creation Date	---
Notes	Hello Patti, I have been working with a client Contoso traders. We have negotiated total cost to be \$20000. The client has agreed to make payment via Check. We have negotiated the shipping fee to be \$200. Please submit this order on behalf of andrew@northwindtraders.com who is our Sales Representative.
Payment Amount	20,000.00
Payment Method	Check
Purchase Order Status	New
Shipping Fee	200.00
Submitted By	Empty
Supplier	---
Taxes	---
Expected Date	---
Submitted Date	7/17/2025 6:18 PM

2.3.20 You should have also received an email with acknowledgement that the Purchase Order has been placed successfully.  
Email would include the Purchase Order Number and other details.



Patti Fernandez  
To: Patti Fernandez

Thu 7/17/2025 11:19 AM

Hello Patti,

Your purchase order has been successfully created.

Details:

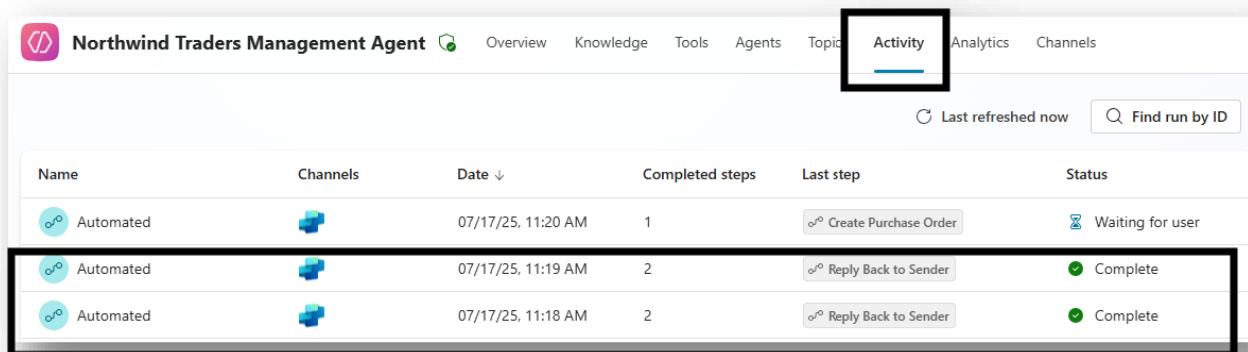
- Purchase Order Number: 1000
- Payment Amount: \$20,000.00
- Payment Method: Check
- Shipping Fee: \$200.00

Notes: Hello Patti, I have been working with a client Contoso traders. We have negotiated total cost to be \$20,000. The client has agreed to make payment via Check. We have negotiated the shipping fee to be \$200. Please submit this order on behalf of andrew@northwindtraders.com who is our Sales Representative.

Thank you!

[Reply](#) [Forward](#)

2.3.21 To view Agent Activity (see what your agent has done autonomously and more), you can go to Activity Section to monitor if agent has been successfully able to perform the actions.

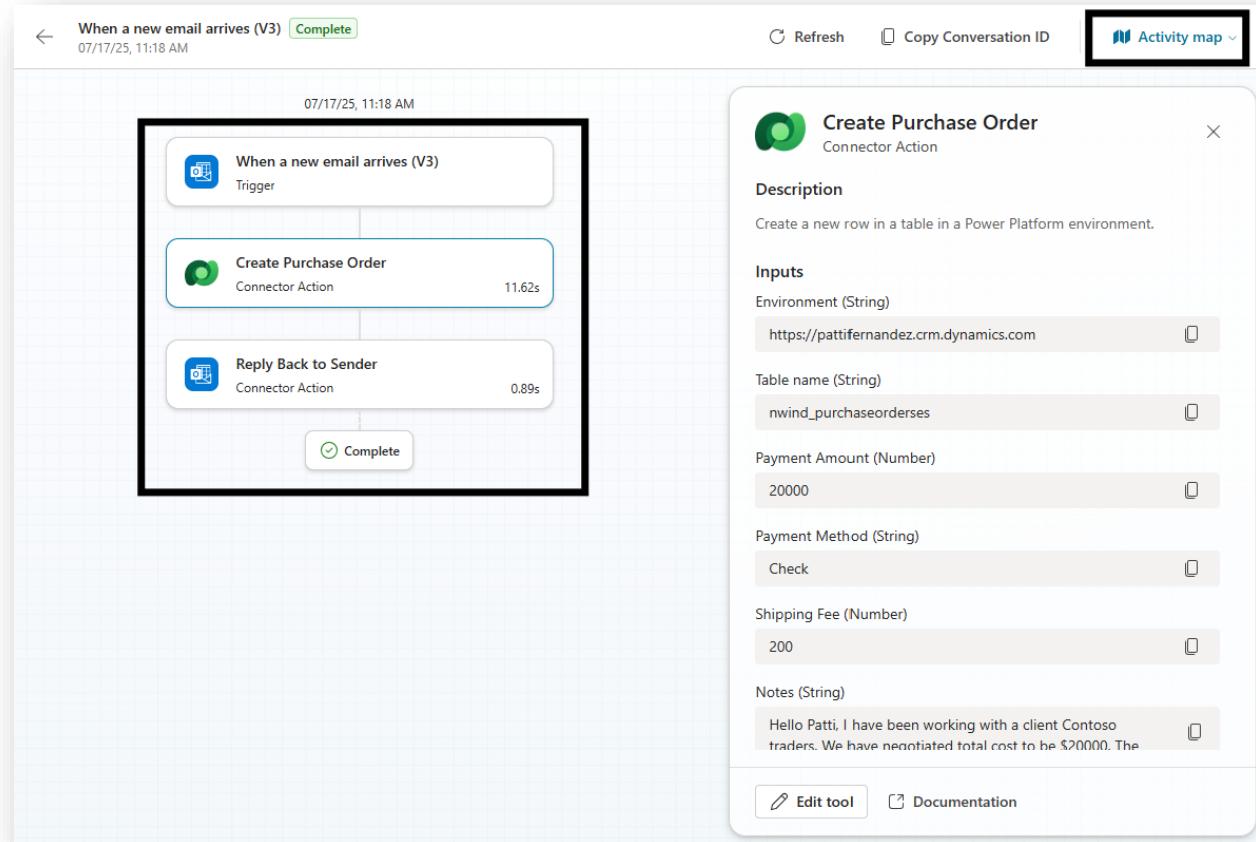


Northwind Traders Management Agent

Activity

Name	Channels	Date	Completed steps	Last step	Status
Automated	Chat	07/17/25, 11:20 AM	1	Create Purchase Order	Waiting for user
Automated	Chat	07/17/25, 11:19 AM	2	Reply Back to Sender	Complete
Automated	Chat	07/17/25, 11:18 AM	2	Reply Back to Sender	Complete

### 2.3.22 Click on any activity further to review the Activity Map.



The screenshot shows the Microsoft Power Automate interface. On the left, a completed flow titled "When a new email arrives (V3)" is displayed. The flow consists of the following steps:

- Trigger: "When a new email arrives (V3)"
- Action: "Create Purchase Order" (Connector Action)
- Action: "Reply Back to Sender" (Connector Action)
- Completion: "Complete"

The "Create Purchase Order" step is highlighted with a black box. On the right, a detailed view of the "Create Purchase Order" step is shown, including its description, inputs, and notes.

**Create Purchase Order**  
Connector Action

**Description**  
Create a new row in a table in a Power Platform environment.

**Inputs**

- Environment (String): `https://pattifernandez.crm.dynamics.com`
- Table name (String): `nwind_purchaseorderes`
- Payment Amount (Number): `20000`
- Payment Method (String): `Check`
- Shipping Fee (Number): `200`

**Notes (String)**  
Hello Patti, I have been working with a client Contoso traders. We have negotiated total cost to be \$20000. The

[Edit tool](#) [Documentation](#)



**Congratulations!!!**

**You have successfully completed this module.**