



In-App Agents

Comprehensive hands-on experience with in-app agents and learn how to use them effectively to enhance productivity and user engagement within Power Platform.

Built by: Power CAT Intelligent Application Solution Architecture Team

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Hands-on Lab: Model Driven App + AI Agents

Introduction

Model-driven apps in Power Platform are evolving rapidly with the integration of **AI-powered agents** that significantly improve user experience, productivity, and data quality. These intelligent features are powered by Microsoft's AI capabilities and are designed to automate routine tasks, extract insights, and support decision-making directly within the app interface.

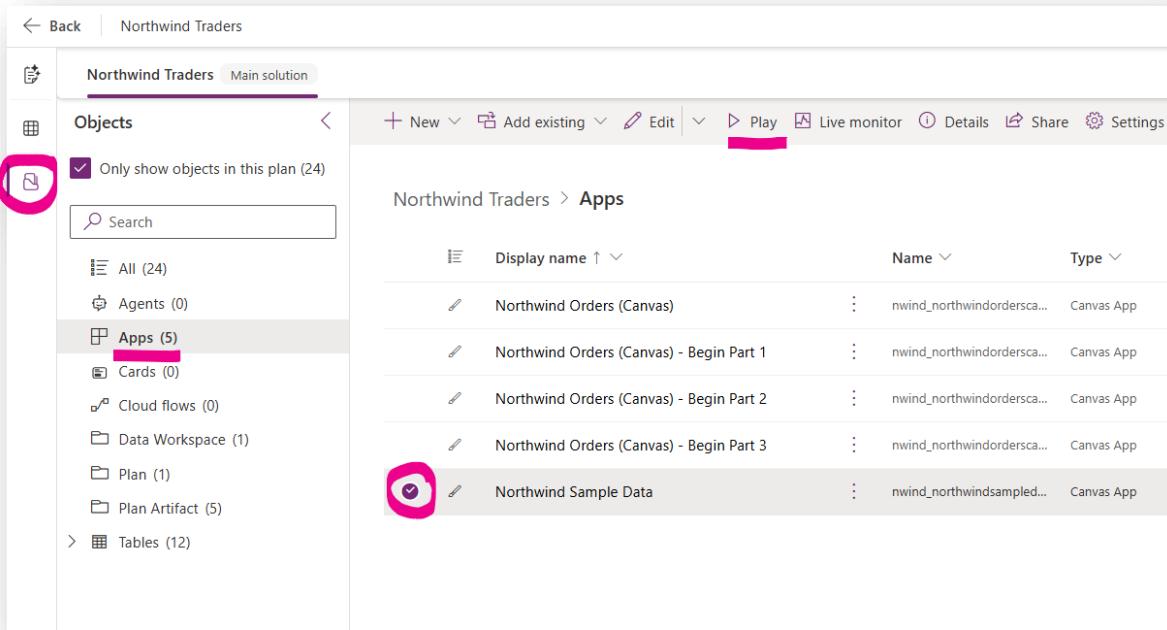
In this workshop, we will discuss how to efficiently use Agentic features such as

- **Data Exploration Agent**
- **Data Visualization Agent**
- **Data Entry Agent**
- **Summarization Agent**
- **Teaching Mode for Data Entry Agent**

Pre-requisites

For this workshop, we will use Northwind Traders Solution.

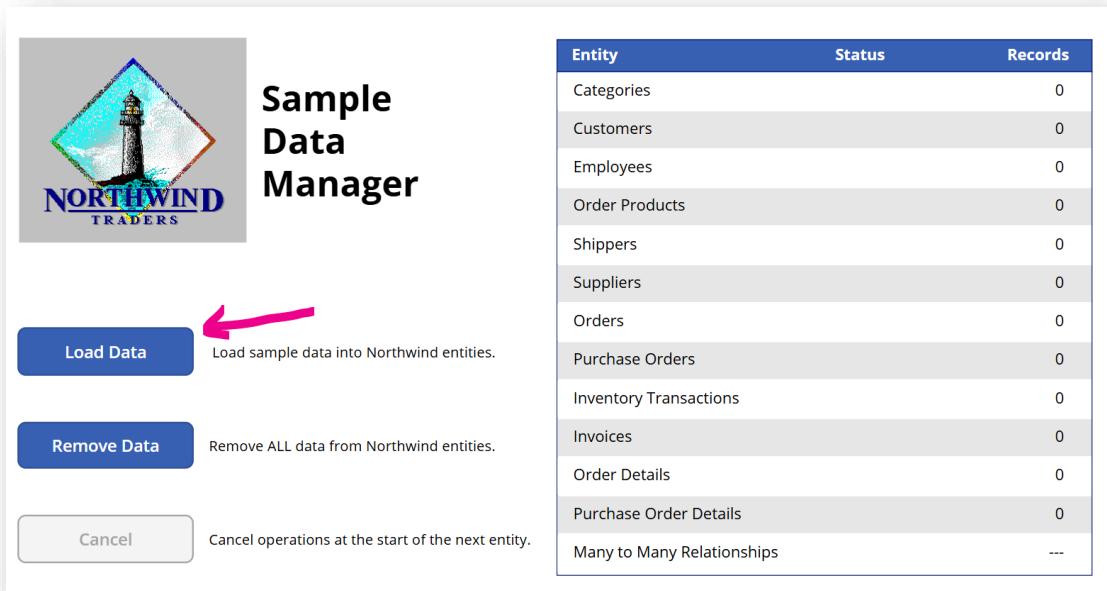
1.1 Go to the Northwind Traders solution -> go and select Apps and **Play** the Canvas App named “Northwind Sample Data” as shown in image below



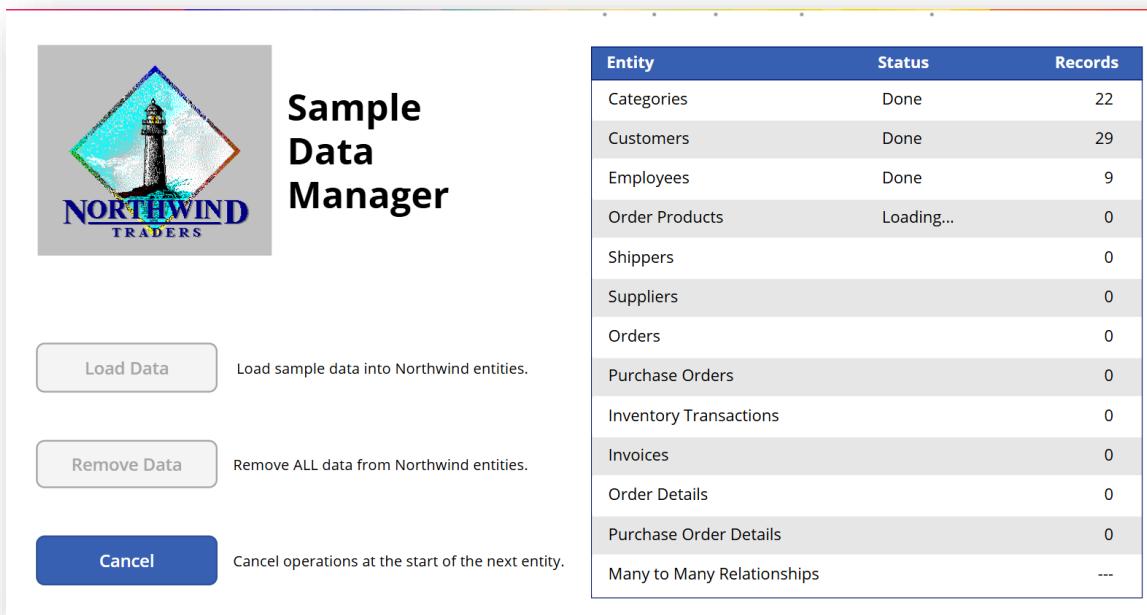
The screenshot shows the Power Platform canvas interface for the Northwind Traders solution. The left sidebar lists various objects: All (24), Agents (0), Apps (5), Cards (0), Cloud flows (0), Data Workspace (1), Plan (1), Plan Artifact (5), and Tables (12). The 'Apps' category is selected and highlighted with a pink circle. The main area displays a table of apps under 'Northwind Traders > Apps'. The table has columns for Display name, Name, and Type. The apps listed are: Northwind Orders (Canvas), Northwind Orders (Canvas) - Begin Part 1, Northwind Orders (Canvas) - Begin Part 2, Northwind Orders (Canvas) - Begin Part 3, and Northwind Sample Data. The 'Northwind Sample Data' row is also circled in pink.

Display name	Name	Type
Northwind Orders (Canvas)	nwind_northwindordersca...	Canvas App
Northwind Orders (Canvas) - Begin Part 1	nwind_northwindordersca...	Canvas App
Northwind Orders (Canvas) - Begin Part 2	nwind_northwindordersca...	Canvas App
Northwind Orders (Canvas) - Begin Part 3	nwind_northwindordersca...	Canvas App
Northwind Sample Data	nwind_northwindsampled...	Canvas App

1.2 Click on “Load Data” on the App Home Screen as shown in image below



1.3 Wait for all the data to load in the Tables (this will take a few minutes)



1.4 Once all the data is loaded (You can check the Status of each Entity – it should be Done), you can close the App (close browser tab)

Entity	Status	Records
Categories	Done	22
Customers	Done	29
Employees	Done	9
Order Products	Done	45
Shippers	Done	3
Suppliers	Done	10
Orders	Done	39
Purchase Orders	Done	28
Inventory Transactions	Done	99
Invoices	Done	35
Order Details	Done	58
Purchase Order Details	Done	55
Many to Many Relationships	Done	152

1.5 Select the “Admin Management App” in Northwind Traders Solution and Publish it as shown in screenshot below

Display name	Name	Type	Managed	Customized	Last Modif...	Owner	Status
Admin Management App	nwind_AdminManag37d...	Model-Driven App	No	Yes	20 minutes ago	-	On
Northwind Orders (Canvas)	nwind_northwindordersca...	Canvas App	No	Yes	21 minutes ago	Reza Dorrani	
Northwind Orders (Canvas) - Begin Part 1	nwind_northwindordersca...	Canvas App	No	Yes	21 minutes ago	Reza Dorrani	
Northwind Orders (Canvas) - Begin Part 2	nwind_northwindordersca...	Canvas App	No	Yes	21 minutes ago	Reza Dorrani	
Northwind Orders (Canvas) - Begin Part 3	nwind_northwindordersca...	Canvas App	No	Yes	21 minutes ago	Reza Dorrani	
Northwind Sample Data	nwind_northwindsampled...	Canvas App	No	Yes	21 minutes ago	Reza Dorrani	

Let's Begin

1. Data Exploration Agent

This agent helps users **interact with data** in a more intuitive and intelligent way.

Capabilities:

- Natural language querying (e.g., “Show me open opportunities by region”)
- Smart filtering and drill-downs
- Pattern and anomaly detection
- Integration with Copilot for conversational insights

Benefits:

- Empowers users to explore data without needing deep technical skills
- Reduces dependency on custom reports or dashboards
- Accelerates decision-making

1.1 Go to the **Northwind traders' solution** -> **Objects** -> **Apps** -> **Admin Management App** -> **Play** the app

The screenshot shows the Power Apps portal interface. On the left, the 'Objects' section is open, with a pink circle highlighting the 'Play' button in the toolbar above the list of objects. The list includes 'Admin Management App', 'Northwind Orders (Canvas)', 'Northwind Orders (Canvas) - Begin Part 1', 'Northwind Orders (Canvas) - Begin Part 2', 'Northwind Orders (Canvas) - Begin Part 3', and 'Northwind Sample Data'. The 'Admin Management App' is the first item in the list.

1.2 Go to Orders and let's provide the agent the following prompt

Give me orders where payment was made via Cash and was made in LA

and press **Enter**.

The screenshot shows the 'Admin Management App' interface. The 'Orders' section is selected in the sidebar. A pink arrow points to the search bar at the top of the main content area, which contains the query 'Give me orders where payment was made via Cash and was made in LA'. Below the search bar is a status filter 'Status: Active' with a close button. The main area displays a table of order details, including columns for Order Number, Customer, Employee, Order Date, Paid Date, Payment Type, Ship Address, Ship City, and Ship Country. The table lists 10 orders, with the first few rows visible.

Note: The data exploration agent interprets natural language input (prompts) and converts it into a valid filter or query against the underlying table. It then applies this filter to retrieve and display the relevant data results in real time. In our example, even though Ship City has values like Los Angeles and we prompted agent to filter the orders placed in LA, agent was able to understand the context and applied the right filter.

Order Number	Customer	Employee	Paid Date	Payment Type	Ship Address	Ship City	Ship Country	Ship Name	Ship State_Province
0906	Company C	Ono	2/22/2025	Cash	123 3rd Street	Los Angeles	USA	Jayson Ma...	CA
0927	Company C	Ono	4/24/2025	Cash	123 3rd Street	Los Angeles	USA	Mollie Cole	CA

1.3 Let's try another prompt

Orders Paid by Cash in last 3 months

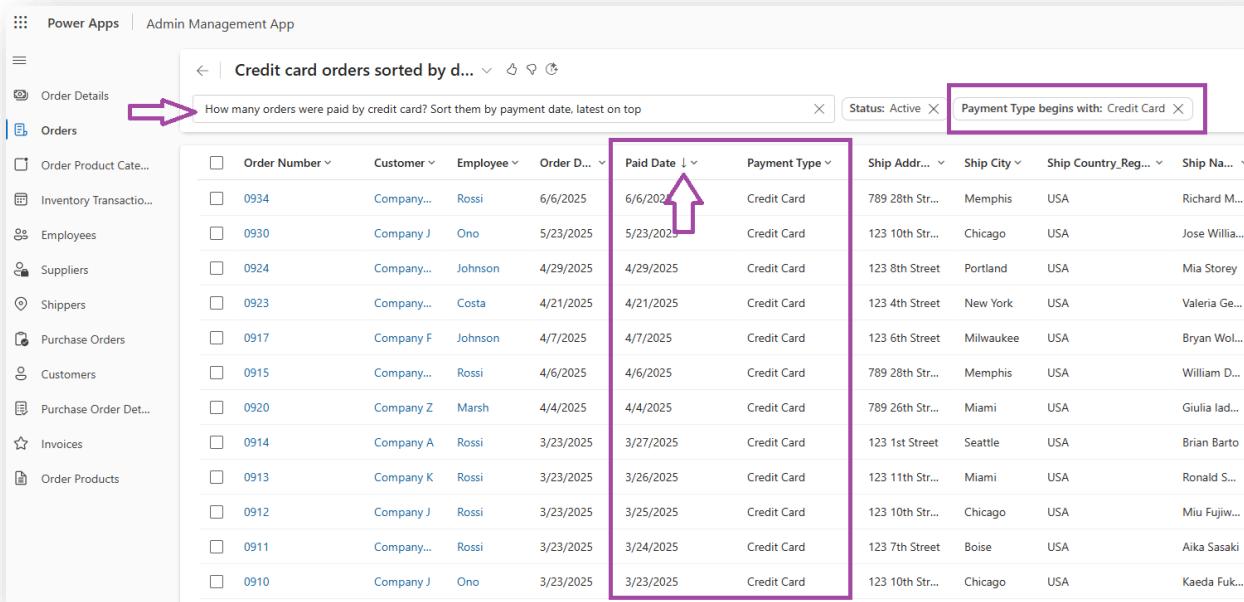
and press **Enter**.

Order Number	Customer	Employee	Order Date	Paid Date	Payment Type	Ship Address	Ship City	Ship Country	Ship Name	Ship State_Province
0919	Company Y	Marsh	4/4/2025	4/4/2025	Cash	789 25th Str...	Chicago	USA	Isabella To...	IL
0927	Company C	Ono	4/24/2025	4/24/2025	Cash	123 3rd Street	Los Angel...	USA	Mollie Cole	CA
0936	Company Y	Marsh	6/4/2025	6/4/2025	Cash	789 25th Str...	Chicago	USA	Tony Laws...	IL

1.4 Let's try another prompt

How many orders were paid by credit card? Sort them by payment date, latest on top

and press **Enter**.



Power Apps | Admin Management App

Order Details

Orders

Order Product Cate...

Inventory Transactio...

Employees

Suppliers

Shippers

Purchase Orders

Customers

Purchase Order Det...

Invoices

Order Products

Credit card orders sorted by d... ▾ 🔍 ⌂ ⌂

How many orders were paid by credit card? Sort them by payment date, latest on top

Status: Active

Payment Type begins with: Credit Card

Paid Date ↓	Payment Type	Ship Addr...	Ship City	Ship Country_Reg...	Ship Na...
6/6/2025	Credit Card	789 28th Str...	Memphis	USA	Richard M...
5/23/2025	Credit Card	123 10th Str...	Chicago	USA	Jose Willia...
4/29/2025	Credit Card	123 8th Street	Portland	USA	Mia Storey
4/21/2025	Credit Card	123 4th Street	New York	USA	Valeria Ge...
4/7/2025	Credit Card	123 6th Street	Milwaukee	USA	Bryan Wol...
4/6/2025	Credit Card	789 28th Str...	Memphis	USA	William D...
4/4/2025	Credit Card	789 26th Str...	Miami	USA	Giulia Iad...
3/27/2025	Credit Card	123 1st Street	Seattle	USA	Brian Barto
3/26/2025	Credit Card	123 11th Str...	Miami	USA	Ronald S...
3/25/2025	Credit Card	123 10th Str...	Chicago	USA	Miu Fujiw...
3/24/2025	Credit Card	123 7th Street	Boise	USA	Aika Sasaki
3/23/2025	Credit Card	123 10th Str...	Chicago	USA	Kaeda Fuk...

2. Data Visualization Agent

This agent focuses on **automatically generating visual representations** of data.

Capabilities:

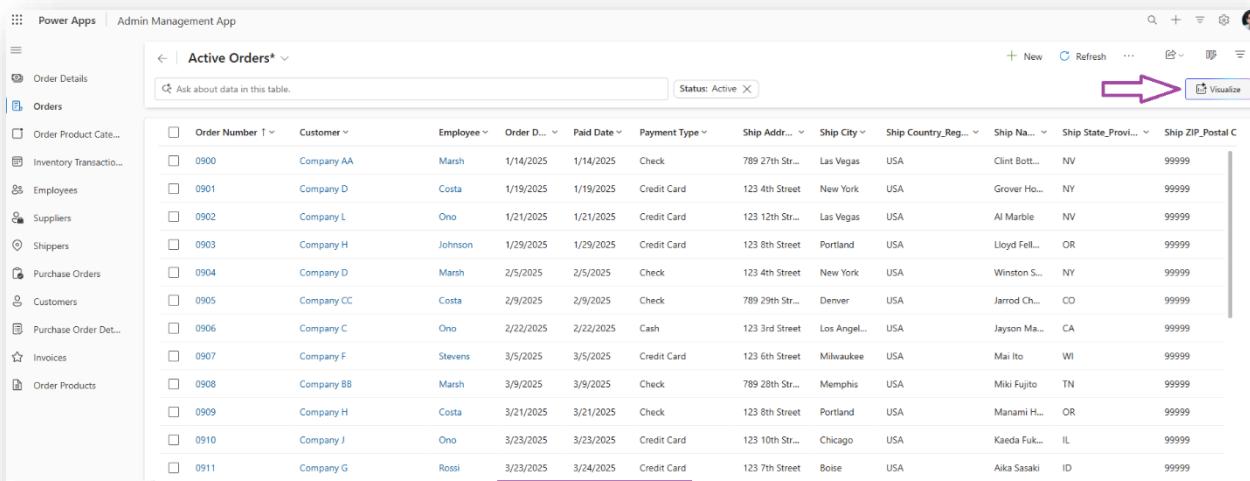
- Suggests the best chart types based on data context
- Auto-generates dashboards and reports
- Embeds visualizations directly into forms or views

Benefits:

- Makes data more digestible and actionable
- Saves time on manual chart creation
- Enhances storytelling with data

2.1 Let's ask the Visualization Agent to help us visualize the Orders data.

Clear the filters and then Click “**Visualize**”



The screenshot shows a Power Apps interface for the "Admin Management App". On the left, a navigation bar lists various entities: Order Product Cate..., Inventory Transaction..., Employees, Suppliers, Shippers, Purchase Orders, Customers, Purchase Order Det..., Invoices, Order Products, and Orders. The "Orders" item is selected. The main area displays a table titled "Active Orders*". The table has a header row with columns: Order Number, Customer, Employee, Order Date, Paid Date, Payment Type, Ship Address, Ship City, Ship Country, Ship Name, Ship State, Ship Postal Code, and Ship ZIP/Postal Code. Below the header are 12 data rows, each containing an Order Number (0900-0911), a Customer name, an Employee name, and various dates and addresses. In the top right corner of the table header, there is a "Visualize" button with a blue icon. A purple arrow points to this button, indicating the next step.

Order Number	Customer	Employee	Order Date	Paid Date	Payment Type	Ship Address	Ship City	Ship Country	Ship Name	Ship State	Ship Postal Code	Ship ZIP/Postal Code
0900	Company AA	Marsh	1/14/2025	1/14/2025	Check	789 27th Street	Las Vegas	USA	Clint Bott...	NV	99999	
0901	Company D	Costa	1/19/2025	1/19/2025	Credit Card	123 4th Street	New York	USA	Grover Ho...	NY	99999	
0902	Company L	Ono	1/21/2025	1/21/2025	Credit Card	123 12th Street	Las Vegas	USA	Al Marble...	NV	99999	
0903	Company H	Johnson	1/29/2025	1/29/2025	Credit Card	123 8th Street	Portland	USA	Lloyd Fell...	OR	99999	
0904	Company D	Marsh	2/5/2025	2/5/2025	Check	123 4th Street	New York	USA	Winston S...	NY	99999	
0905	Company CC	Costa	2/9/2025	2/9/2025	Check	789 29th Street	Denver	USA	Jarrod Ch...	CO	99999	
0906	Company C	Ono	2/22/2025	2/22/2025	Cash	123 3rd Street	Los Angeles	USA	Jayson Ma...	CA	99999	
0907	Company F	Stevens	3/5/2025	3/5/2025	Credit Card	123 6th Street	Milwaukee	USA	Mai Ito...	WI	99999	
0908	Company BB	Marsh	3/9/2025	3/9/2025	Check	789 28th Street	Memphis	USA	Miki Fujito	TN	99999	
0909	Company H	Costa	3/21/2025	3/21/2025	Check	123 8th Street	Portland	USA	Manami H...	OR	99999	
0910	Company J	Ono	3/23/2025	3/23/2025	Credit Card	123 10th Street	Chicago	USA	Kaeda Fuk...	IL	99999	
0911	Company G	Rossi	3/23/2025	3/24/2025	Credit Card	123 7th Street	Boise	USA	Aika Sasaki	ID	99999	

2.2 The Agent creates a Visual as shown below – A column chart showcasing count of Orders by City (Note: AI may generate a different visual and use different columns for chart)

Power Apps | Admin Management App

Order Details

Orders

Order Product Cate...

Inventory Transactio...

Employees

Suppliers

Shippers

Purchase Orders

Customers

Purchase Order Det...

Invoices

Order Products

Active Orders* Status: Active

Orders by City and Payment

Ship City

CountAll (Order)

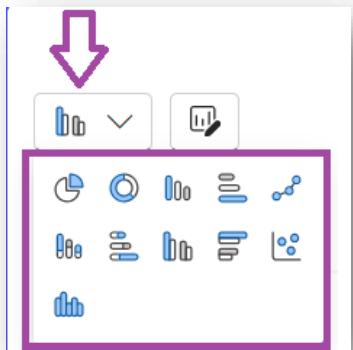
Chicago, Miami, Seattle, Los Angeles, Denver, Las Vegas, Memphis, Milwaukee, New York, Portland, Salt Lake City, Boise

(blank), Cash, Check, Credit Card

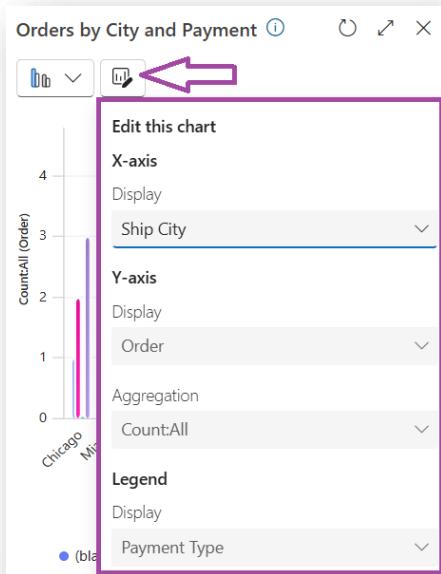
Rows: 39

	Order Number	Customer	Employee
<input type="checkbox"/>	0900	Company AA	Marsh
<input type="checkbox"/>	0901	Company D	Costa
<input type="checkbox"/>	0902	Company L	Ono
<input type="checkbox"/>	0903	Company H	Johnson
<input type="checkbox"/>	0904	Company D	Marsh
<input type="checkbox"/>	0905	Company CC	Costa
<input type="checkbox"/>	0906	Company C	Ono
<input type="checkbox"/>	0907	Company F	Stevens
<input type="checkbox"/>	0908	Company BB	Marsh
<input type="checkbox"/>	0909	Company H	Costa
<input type="checkbox"/>	0910	Company J	Ono
<input type="checkbox"/>	0911	Company G	Rossi
<input type="checkbox"/>	0912	Company J	Rossi
<input type="checkbox"/>	0913	Company K	Rossi
<input type="checkbox"/>	0914	Company A	Rossi
<input type="checkbox"/>	0915	Company BB	Rossi

We have options to update the chart types



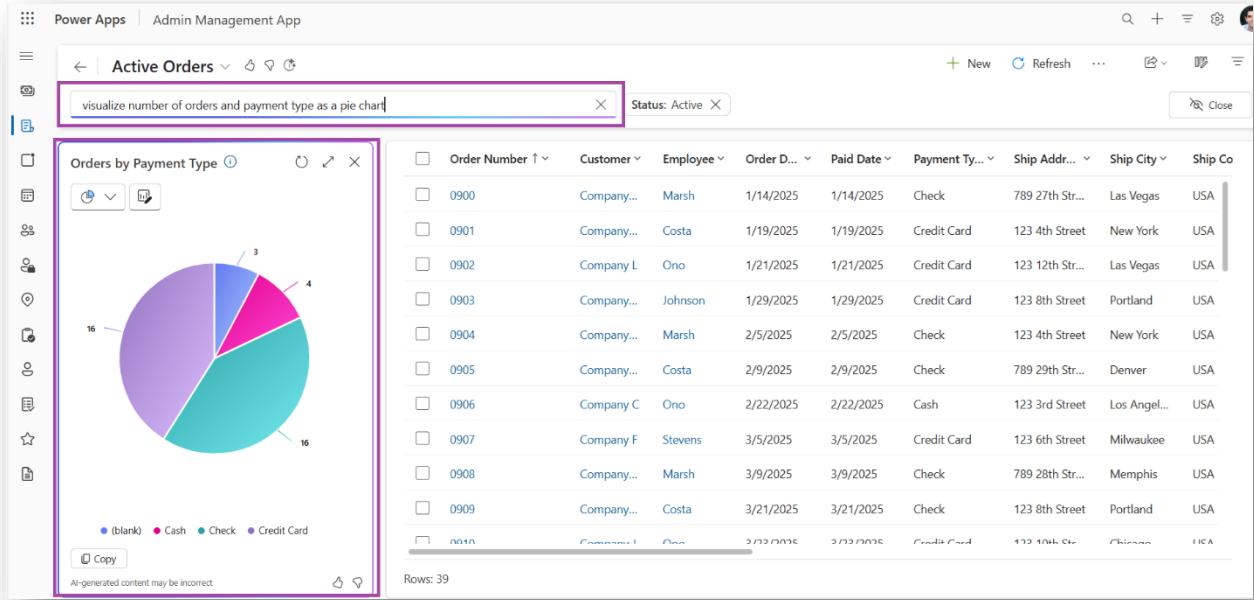
& Edit chart properties – define data points for aggregations, X & Y axis etc.



2.3 We can also ask the data exploration agent to create us a visualization (data exploration agent works with 🤝 the visualization agent)

Let's ask the data exploration agent to perform the following action:

visualize number of orders and payment type as a pie chart



The screenshot shows a Power Apps interface for an 'Admin Management App'. The top navigation bar includes 'Power Apps', 'Admin Management App', and various icons. A search bar at the top right contains the text 'visualize number of orders and payment type as a pie chart'. Below the search bar, a status filter 'Status: Active' is applied. The main content area is divided into two sections: a pie chart visualization on the left and a table of data on the right.

Pie Chart Visualization:

- Legend: (blank) (blue), Cash (pink), Check (teal), Credit Card (purple).
- Segments: Credit Card (purple) is 16, Cash (pink) is 4, Check (teal) is 16, and (blank) (blue) is 3.

Table of Active Orders:

Order Number	Customer	Employee	Order Date	Paid Date	Payment Type	Ship Address	Ship City	Ship Country
0900	Company A	Marsh	1/14/2025	1/14/2025	Check	789 27th Street	Las Vegas	USA
0901	Company B	Costa	1/19/2025	1/19/2025	Credit Card	123 4th Street	New York	USA
0902	Company C	Ono	1/21/2025	1/21/2025	Credit Card	123 12th Street	Las Vegas	USA
0903	Company D	Johnson	1/29/2025	1/29/2025	Credit Card	123 8th Street	Portland	USA
0904	Company E	Marsh	2/5/2025	2/5/2025	Check	123 4th Street	New York	USA
0905	Company F	Costa	2/9/2025	2/9/2025	Check	789 29th Street	Denver	USA
0906	Company G	Ono	2/22/2025	2/22/2025	Cash	123 3rd Street	Los Angeles	USA
0907	Company H	Stevens	3/5/2025	3/5/2025	Credit Card	123 6th Street	Milwaukee	USA
0908	Company I	Marsh	3/9/2025	3/9/2025	Check	789 28th Street	Memphis	USA
0909	Company J	Costa	3/21/2025	3/21/2025	Check	123 8th Street	Portland	USA
0910	Company K	Ono	3/22/2025	3/22/2025	Credit Card	123 10th Street	Chicago	USA

Rows: 39

3. Data Entry Agent (Form Fill Assistance)

This agent streamlines and automates **data input and updates**.

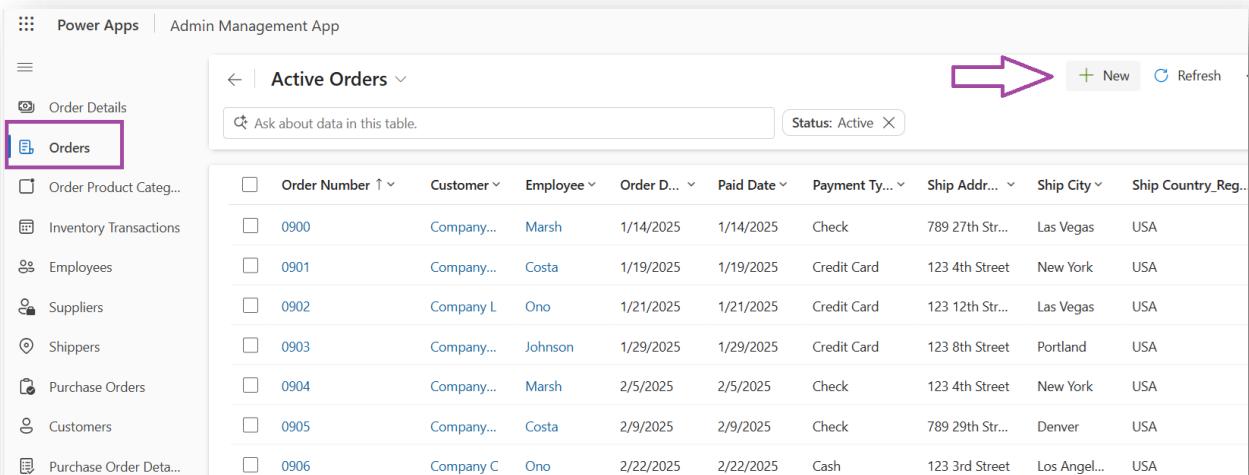
Capabilities:

- Predictive field suggestions based on context
- Auto-fill and validation using AI
- Conversational data entry via Copilot
- Integration with business rules and workflows

Benefits:

- Reduces manual entry errors
- Speeds up form completion
- Improves data quality and consistency

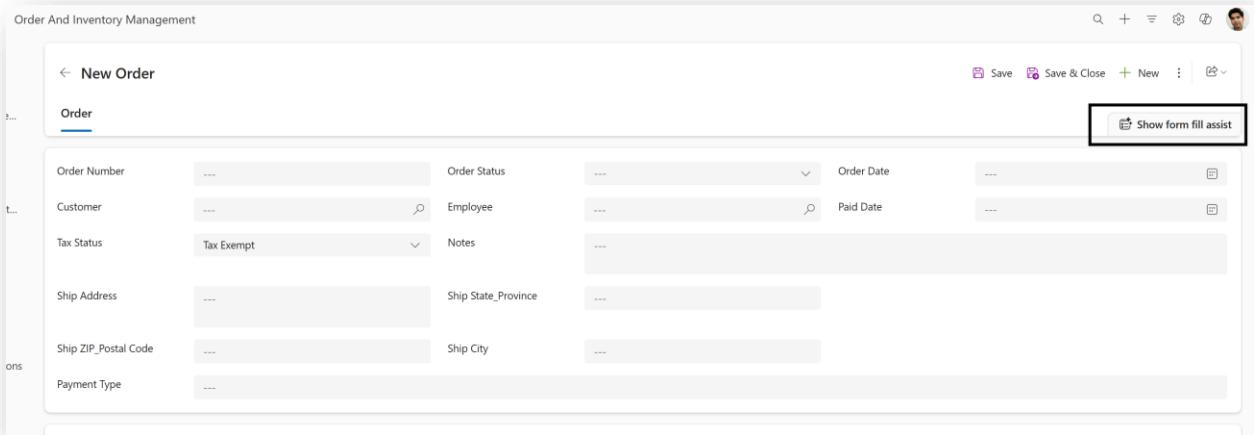
3.1 Click on Orders page and click on **New** to add a new record.



The screenshot shows a Power Apps interface for the Admin Management App. On the left, a sidebar menu lists various entities: Order Details, Orders (which is selected and highlighted with a purple box), Order Product Categ..., Inventory Transactions, Employees, Suppliers, Shippers, Purchase Orders, Customers, and Purchase Order Deta... The main content area is titled "Active Orders" and displays a table of order data. The table has columns: Order Number, Customer, Employee, Order Date, Paid Date, Payment Type, Ship Address, Ship City, and Ship Country/Region. The table contains six rows of data, each with a checkbox in the first column. A purple arrow points to the "New" button in the top right corner of the table header, indicating where to click to add a new record.

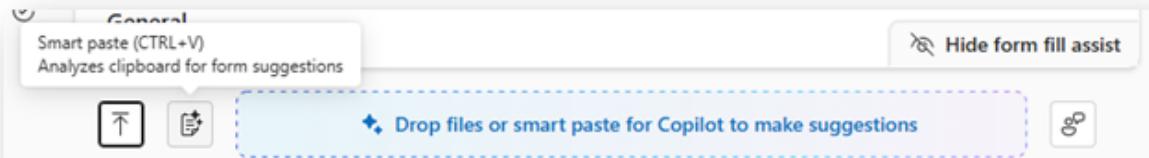
	Order Number ↑	Customer	Employee	Order Date	Paid Date	Payment Type	Ship Address	Ship City	Ship Country, Reg.
<input type="checkbox"/>	0900	Company...	Marsh	1/14/2025	1/14/2025	Check	789 27th Str...	Las Vegas	USA
<input type="checkbox"/>	0901	Company...	Costa	1/19/2025	1/19/2025	Credit Card	123 4th Street	New York	USA
<input type="checkbox"/>	0902	Company L	Ono	1/21/2025	1/21/2025	Credit Card	123 12th Str...	Las Vegas	USA
<input type="checkbox"/>	0903	Company...	Johnson	1/29/2025	1/29/2025	Credit Card	123 8th Street	Portland	USA
<input type="checkbox"/>	0904	Company...	Marsh	2/5/2025	2/5/2025	Check	123 4th Street	New York	USA
<input type="checkbox"/>	0905	Company...	Costa	2/9/2025	2/9/2025	Check	789 29th Str...	Denver	USA
<input type="checkbox"/>	0906	Company C	Ono	2/22/2025	2/22/2025	Cash	123 3rd Street	Los Angel...	USA

3.2 Go to the New Order form experience and click on “**Show form fill assist**” (if form fill is hidden)



The screenshot shows the 'New Order' form in the 'Order And Inventory Management' application. The 'Show form fill assist' button is highlighted with a red box in the top right corner of the header. The form contains fields for Order Number, Order Status, Order Date, Customer, Employee, Paid Date, Tax Status, Notes, Ship Address, Ship State_Province, Ship ZIP_Postal Code, Ship City, and Payment Type.

You can either upload a file or paste data from clipboard and the data entry agent will detect the information to be mapped (auto-filled) in the form experience



Let's take a scenario where we receive an email with details of the new Order.

3.3 Copy the below prompt and paste it to smart paste to see the magic in action.

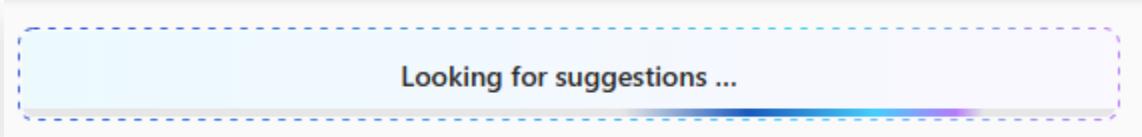
I want to place a new order for customer AA. The Order needs to be placed today and the Paid Date to 2 weeks from now. This order is going to be Taxable. Please ship this order to 1 Microsoft Way, Redmond, WA, 98052.

The Order will be paid via check. Also add a note that this order is for a big private company

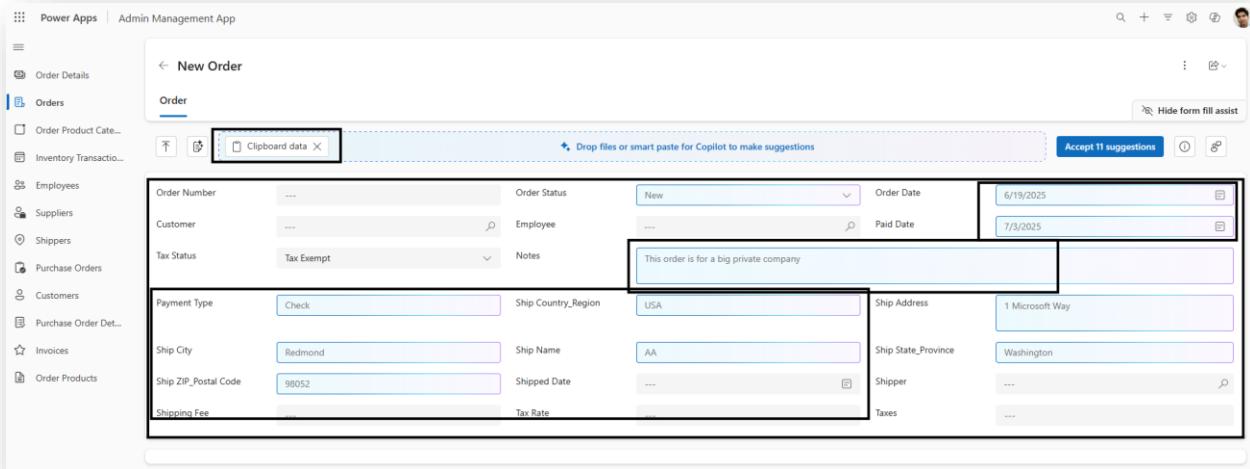
You can also try uploading the below image

<p>To</p> <hr/>
<p>I want to place a new order for customer AA.</p> <p>The Order needs to be placed today and the Paid Date to 2 weeks from now.</p> <p>This order is going to be Taxable.</p> <p>Please ship this order to 1 Microsoft Way, Redmond, WA, 98052</p> <p>The Order will be paid via check.</p> <p>Also add a note that this order is for a big private company.</p>

Data entry agent will start looking for suggestions

Looking for suggestions ...

Copilot will make AI suggestions which you can review and accept



Power Apps | Admin Management App

Order Details

Orders

Order Product Categ...

Inventory Transactions

Employees

Suppliers

Shippers

Purchase Orders

Customers

Purchase Order Det...

Invoices

Order Products

← New Order

Order

Order Number: ... Order Status: New Order Date: 6/19/2025

Customer: ... Employee: ... Paid Date: 7/3/2025

Tax Status: Tax Exempt Notes: This order is for a big private company

Payment Type: Check Ship Country_Region: USA Ship Address: 1 Microsoft Way

Ship City: Redmond Ship Name: AA Ship State_Province: Washington

Ship ZIP_Postal Code: 98052 Shipped Date: ... Shipper: ...

Shipping Fee: ... Tax Rate: ... Taxes: ...

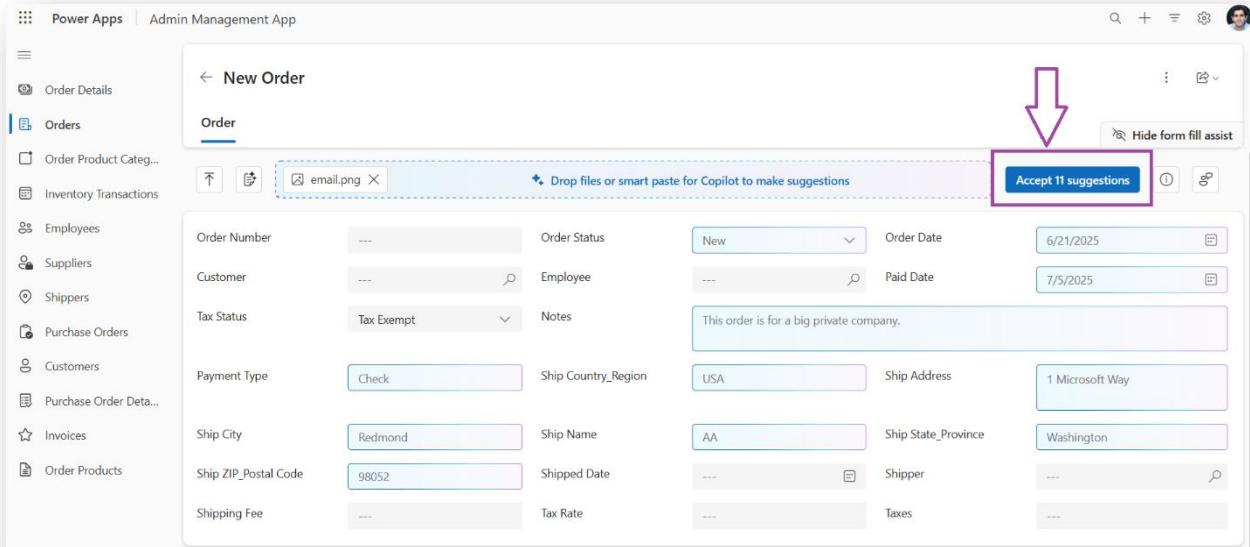
Drop files or smart paste for Copilot to make suggestions

Accept 11 suggestions

Note: Form fill assistance has following limitations-

- Suggestions are generated for fields only in main forms and quick create forms.
- Currently supported field types are text, numeric, choice, and date.
- Fields that have column security aren't currently supported.

3.4 Let's accept the suggestions



Power Apps | Admin Management App

Order Details

Orders

Order Product Categ...

Inventory Transactions

Employees

Suppliers

Shippers

Purchase Orders

Customers

Purchase Order Det...

Invoices

Order Products

← New Order

Order

Order Number: ... Order Status: New Order Date: 6/21/2025

Customer: ... Employee: ... Paid Date: 7/5/2025

Tax Status: Tax Exempt Notes: This order is for a big private company.

Payment Type: Check Ship Country_Region: USA Ship Address: 1 Microsoft Way

Ship City: Redmond Ship Name: AA Ship State_Province: Washington

Ship ZIP_Postal Code: 98052 Shipped Date: ... Shipper: ...

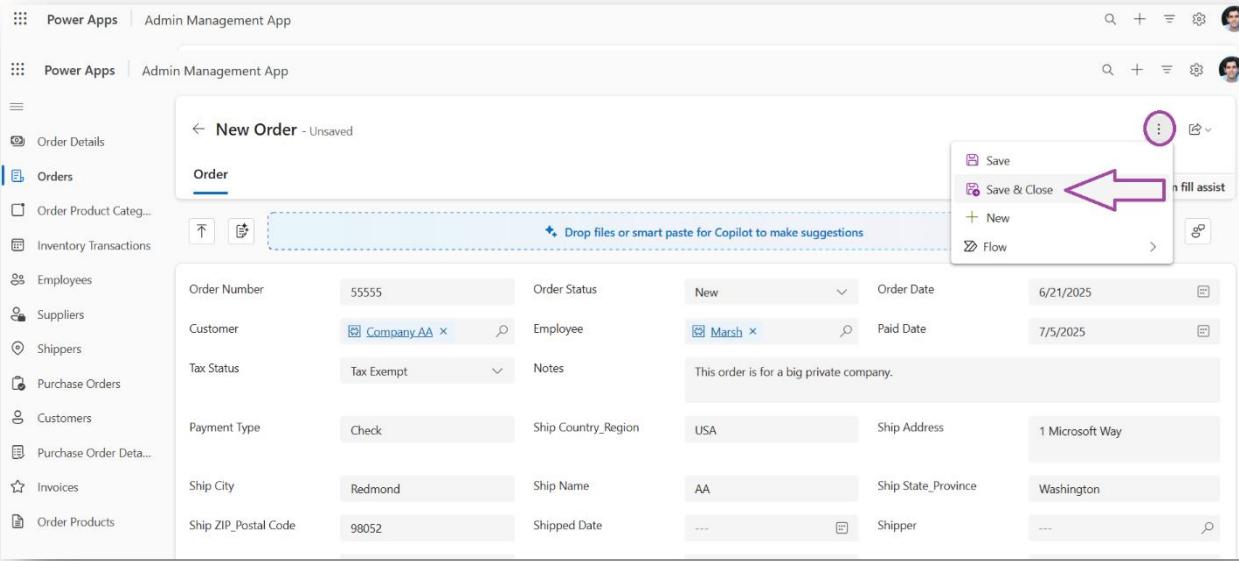
Shipping Fee: ... Tax Rate: ... Taxes: ...

Drop files or smart paste for Copilot to make suggestions

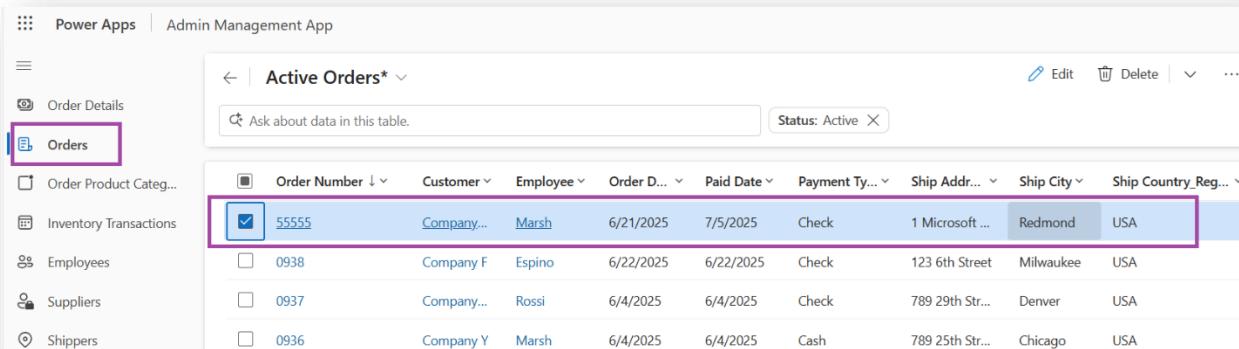
Accept 11 suggestions

3.5 This will automatically fill in the column values based on the unstructured text you pasted. You can update the values and add values for other columns.

Once everything looks good, just click Save and Close to complete the entry.



3.6 The order information is saved



4. Row Summary Agent

Enhance the user experience by summarizing key information at the top of a form using the **Row Summary** feature in model-driven apps.

Capabilities:

- **Highlight Key Fields:** Display a primary field and up to three additional fields at the top of a form.
- **No-Code Configuration:** Easily enabled and customized through the form designer without writing code.
- **Preview Mode:** Makers can preview the summary layout before publishing.
- **Supports Conditional Formatting:** Allows visual emphasis on important values like status or priority.

Benefits:

- **Faster Decision-Making:** Users can quickly assess record context without scrolling through the entire form.
- **Improved Usability:** Enhances the user experience by surfacing the most relevant information upfront.
- **Reduced Cognitive Load:** Helps users focus on what matters most by summarizing key data points.
- **Consistency Across Forms:** Standardizes how important information is presented across different forms.

4.1 Go to Northwind Traders solution, select **Objects** from the control pane, and select the **Order** table under the Tables section and select **Row Summary**

The screenshot shows the Power Apps portal interface for the 'Contoso Electronics' solution. The left sidebar is the 'Objects' navigation pane, with 'Tables (12)' expanded and 'Order' selected. The main content area shows the 'Order' table properties: Name (Order), Primary column (Order Number), Description (Last modified), and Standard (1 week ago). Below this is a table of 'Order columns and data' with several rows of data. In the top right, the 'Customizations' section is open, and the 'Row summary' option is highlighted with a red box.

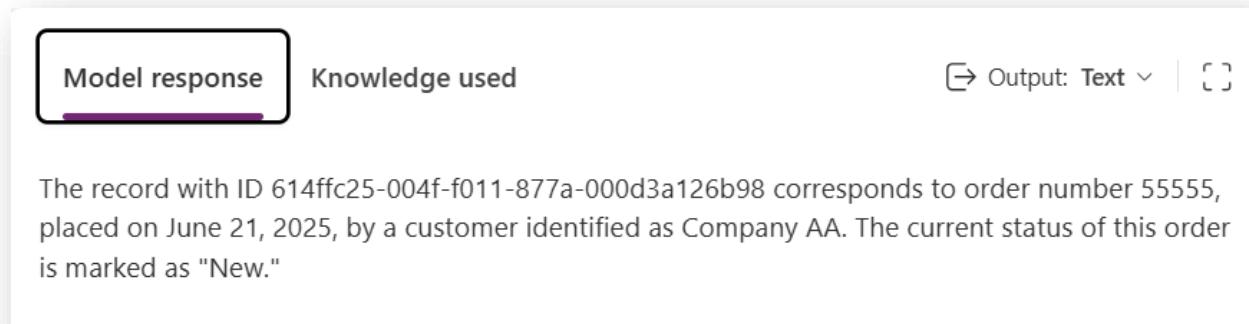
4.2 A new screen will open to configure the Row summary for a table, with a sample summary already provided. Click on the “Test” button.

The screenshot shows the 'Order row summary (preview)' configuration screen. It includes an 'Instructions' section with a 'Test' button, a 'Model response' section with a 'Text' output option, and a central area for entering AI-generated content. A red box highlights the 'Test' button. The central area contains the following AI-generated content:

```
Summarize as a paragraph nwind_orders using the columns nwind_orders.nwind_ordernumber, nwind_orders.nwind_orderdate, nwind_orders.nwind_customeridname, nwind_orders.nwind_orderstatusidname for the record with ID RecordId.
```

4.3 The Model response showcases the row summary details based on the prompt.

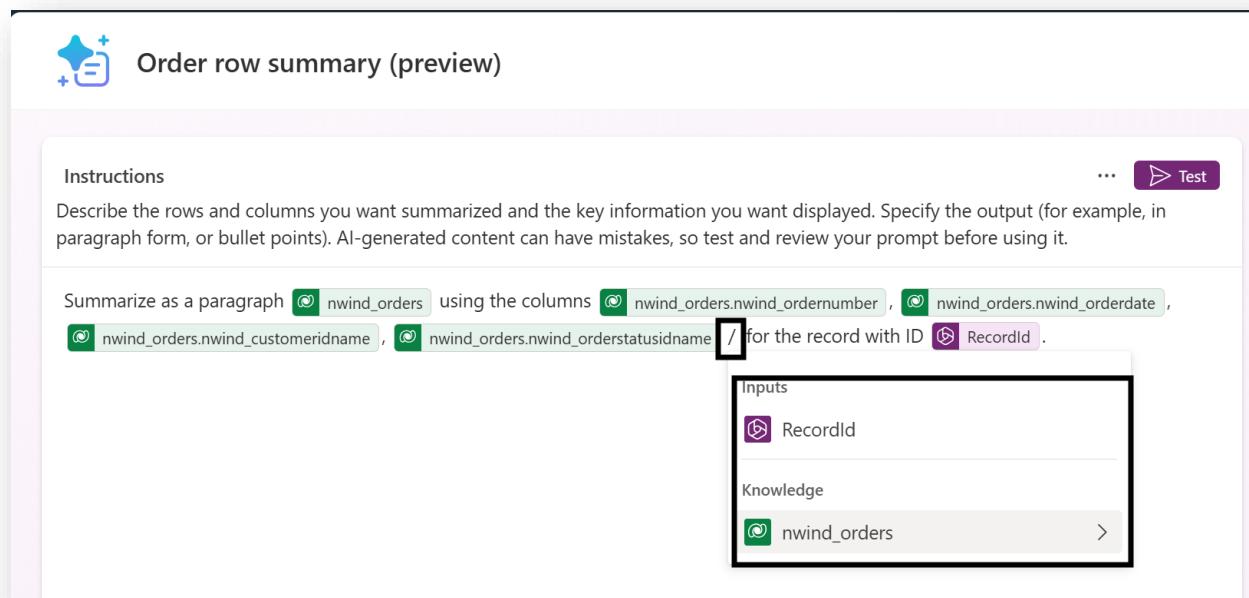
In test mode – it shows row summary for last created/modified record (which is the one we created with the data entry agent)



The screenshot shows a user interface for generating a row summary. At the top, there are three tabs: 'Model response' (which is selected and highlighted with a purple bar), 'Knowledge used', and 'Output: Text' with a dropdown arrow. Below the tabs, the main content area displays the following text:

The record with ID 614ffc25-004f-f011-877a-000d3a126b98 corresponds to order number 55555, placed on June 21, 2025, by a customer identified as Company AA. The current status of this order is marked as "New."

4.4 Next - Let's modify the row summary prompt instructions. We can reference information by adding “/” to trigger the reference dropdown.



The screenshot shows the 'Order row summary (preview)' interface. At the top, there is a blue icon with a plus sign and a document icon, followed by the text 'Order row summary (preview)'. Below this, there are sections for 'Instructions' and 'Inputs'.

Instructions:
Describe the rows and columns you want summarized and the key information you want displayed. Specify the output (for example, in paragraph form, or bullet points). AI-generated content can have mistakes, so test and review your prompt before using it.

Inputs:
... ➤ Test

Summarize as a paragraph `🔗 nwind_orders` using the columns `🔗 nwind_orders.nwind_ordernumber`, `🔗 nwind_orders.nwind_orderdate`, `🔗 nwind_orders.nwind_customeridname`, `🔗 nwind_orders.nwind_orderstatusidname` / for the record with ID `🔗 RecordId`.

The 'Inputs' section is expanded, showing:

- Inputs:
 - `🔗 RecordId`
- Knowledge:
 - `🔗 nwind_orders`

4.5 Add a related column to the row summary.

Let's add the customer name from related table "Customer" by adding **Customer (Customer) -> First Name** to the record summary.

Put "/" -> select Orders table -> Select Customer related table -> Select First Name column

 Order row summary (preview)

Instructions ... Test

Describe the rows and columns you want summarized and the key information you want displayed. Specify the output (for example, in paragraph form, or bullet points). AI-generated content can have mistakes, so test and review your prompt before using it.

Summarize as a paragraph  using the columns , , ,  / for the record with ID .

 Customer (Customer) Add

Time Zone Rule Version Number
UTC Conversion Time Zone Code
 Created By (Delegate) (User) >
 Created By (User) >
 Customer (Customer) > 
 Customer Order (Inventory Transaction) >
 Deleted Object (Deleted Record Reference) >

You will see the column for Customer Name added to the prompt.

 Order row summary (preview)

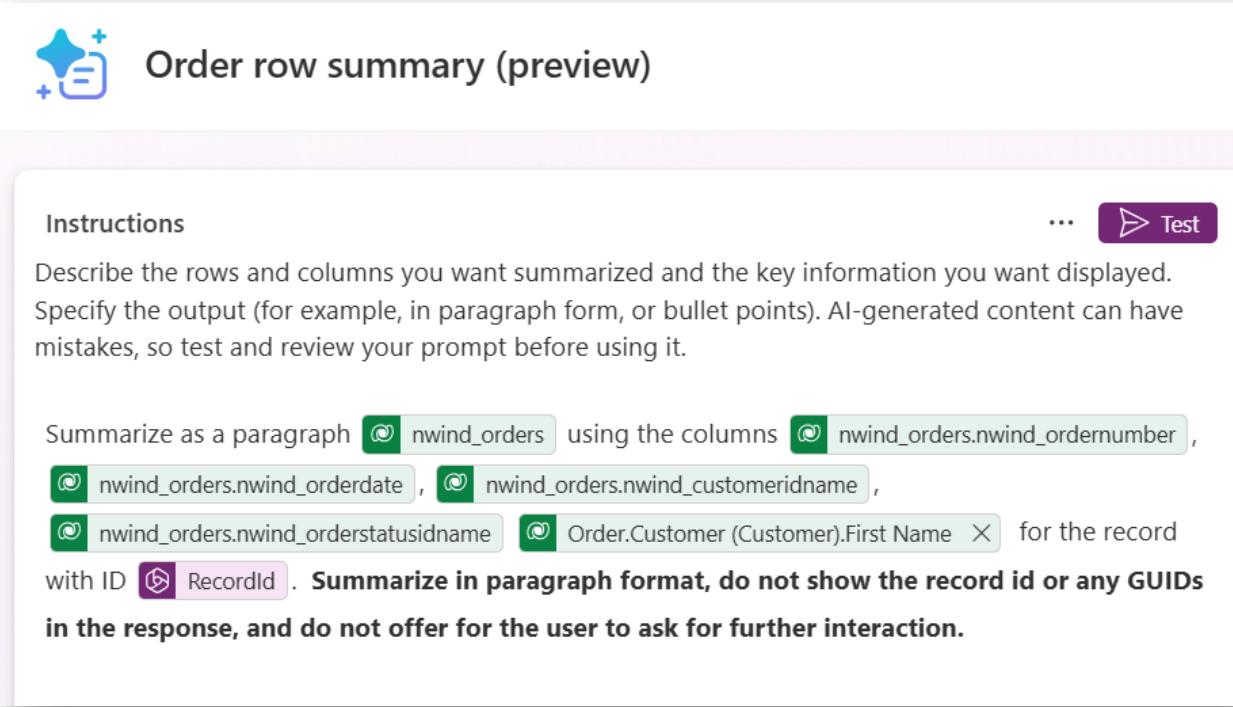
Instructions ... Test

Describe the rows and columns you want summarized and the key information you want displayed. Specify the output (for example, in paragraph form, or bullet points). AI-generated content can have mistakes, so test and review your prompt before using it.

Summarize as a paragraph  using the columns , , ,   for the record with ID .

4.6 At the end of the prompt, add:

Summarize in paragraph format, do not show the record id or any GUIDs in the response, and do not offer for the user to ask for further interaction.



The screenshot shows a user interface for generating AI summaries. At the top, there's a blue icon with a speech bubble and a plus sign, followed by the text "Order row summary (preview)". Below this is a "Instructions" section with a "Test" button. The main area contains a prompt template and a specific example. The template includes placeholder variables like `@` and `#` for column names and record IDs. The example shows a completed prompt for summarizing an order row from the "nwind_orders" table, using columns `nwind_ordernumber`, `nwind_orderdate`, `nwind_customeridname`, and `nwind_orderstatusidname` for a record with ID `RecordId`. The final instruction at the end of the prompt is bolded: "Summarize in paragraph format, do not show the record id or any GUIDs in the response, and do not offer for the user to ask for further interaction."

Order row summary (preview)

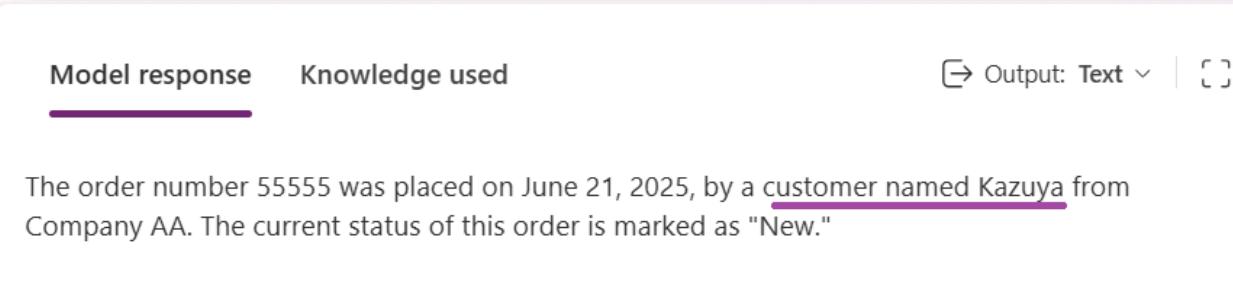
Instructions ... ▶ Test

Describe the rows and columns you want summarized and the key information you want displayed. Specify the output (for example, in paragraph form, or bullet points). AI-generated content can have mistakes, so test and review your prompt before using it.

Summarize as a paragraph `① nwind_orders` using the columns `① nwind_orders.nwind_ordernumber` , `① nwind_orders.nwind_orderdate` , `① nwind_orders.nwind_customeridname` , `① nwind_orders.nwind_orderstatusidname` `① Order.Customer (Customer).First Name X` for the record with ID `① RecordId` . **Summarize in paragraph format, do not show the record id or any GUIDs in the response, and do not offer for the user to ask for further interaction.**

4.7 Now Click **Test** to see the outputs of your prompt.

Notice the customer first name information in the row summary.

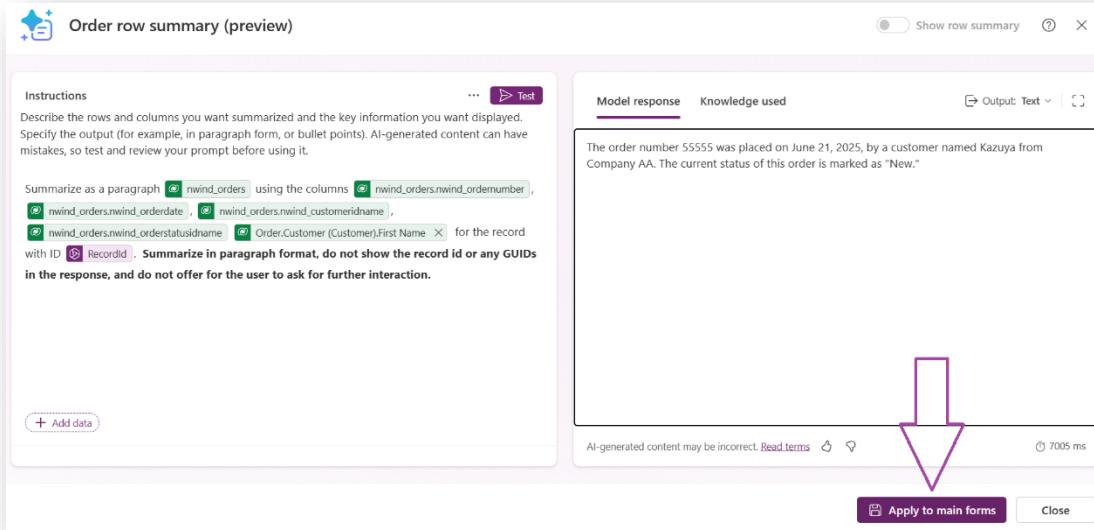


The screenshot shows the AI interface displaying the generated model response. It includes tabs for "Model response" (which is selected) and "Knowledge used". On the right, there are buttons for "Output: Text" and a copy/paste icon. The main content area shows the summarized text: "The order number 55555 was placed on June 21, 2025, by a customer named Kazuya from Company AA. The current status of this order is marked as "New."

Model response Knowledge used ➡ Output: Text [:]

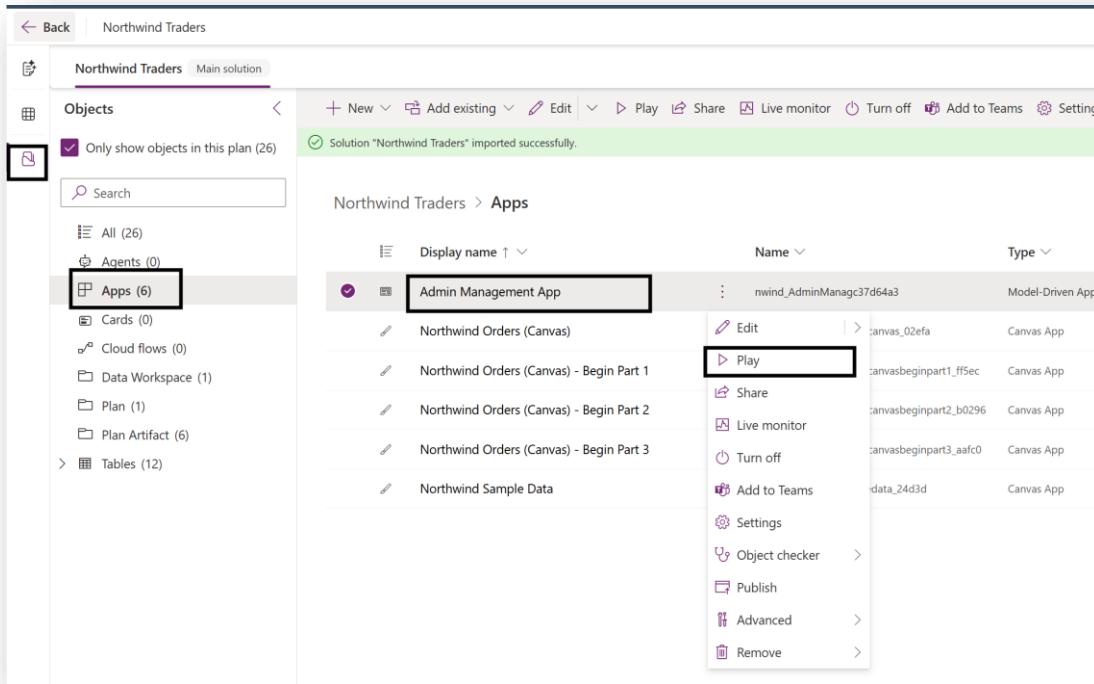
The order number 55555 was placed on June 21, 2025, by a customer named Kazuya from Company AA. The current status of this order is marked as "New."

4.8 Click **Apply to main forms**

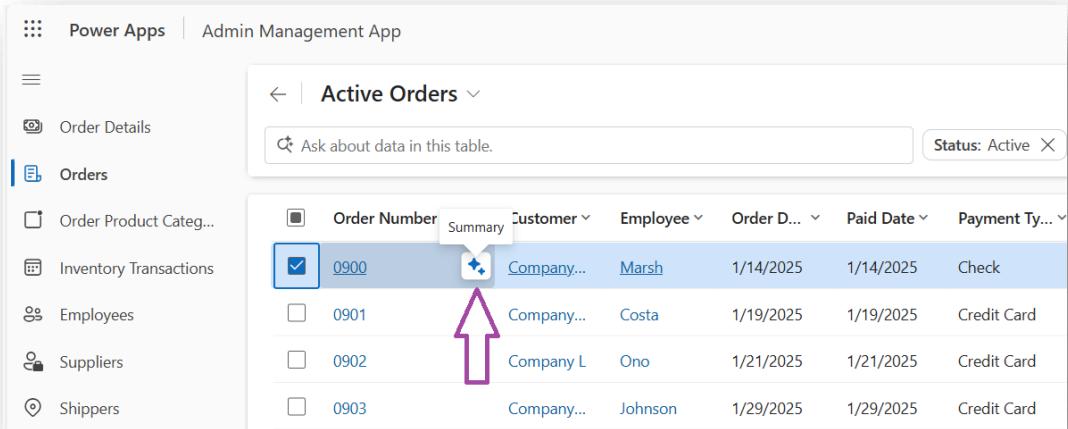


After it completes saving, close the prompt window.

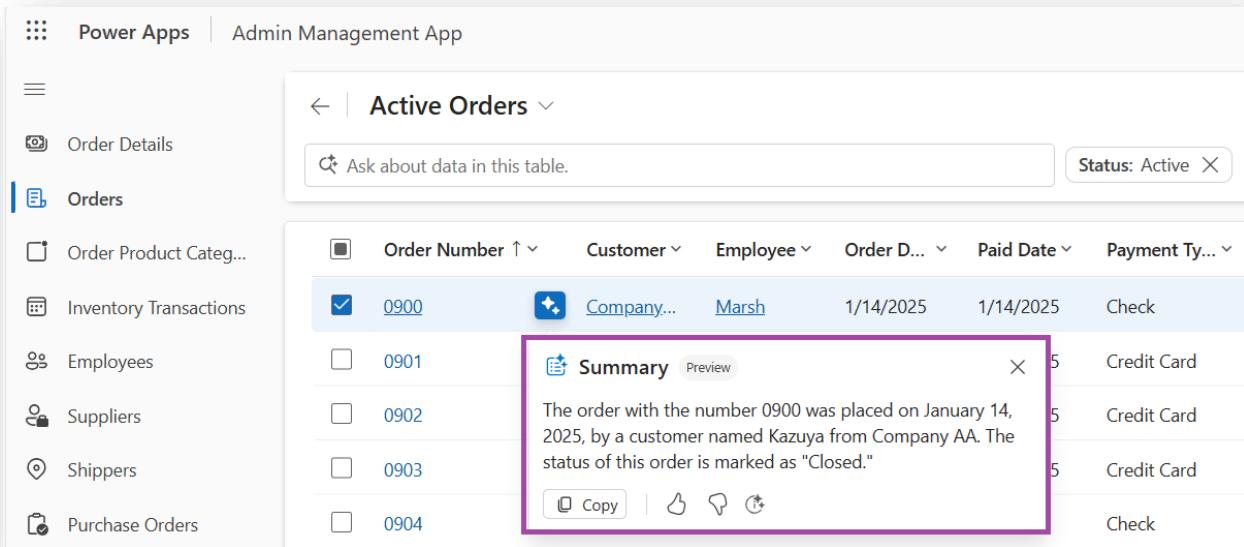
4.9 To view the summary in action, navigate to **Apps** in solution explorer, select the Admin Management Model-driven App, and click **Play**



4.10 When the App loads, **navigate to Orders**, select a record, click Summary and you will see the row summary indicator, you can click on the indicator to view the summary.



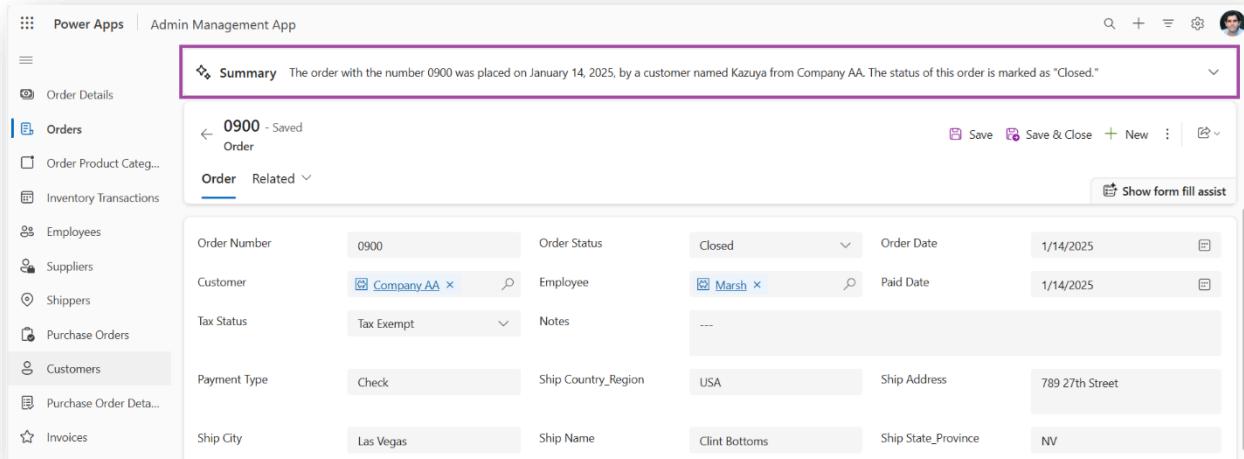
	Order Number	Customer	Employee	Order D...	Paid Date	Payment Ty...
<input checked="" type="checkbox"/>	0900	Company...	Marsh	1/14/2025	1/14/2025	Check
<input type="checkbox"/>	0901	Company...	Costa	1/19/2025	1/19/2025	Credit Card
<input type="checkbox"/>	0902	Company L	Ono	1/21/2025	1/21/2025	Credit Card
<input type="checkbox"/>	0903	Company...	Johnson	1/29/2025	1/29/2025	Credit Card



	Order Number ↑	Customer	Employee	Order D...	Paid Date	Payment Ty...
<input checked="" type="checkbox"/>	0900	Company...	Marsh	1/14/2025	1/14/2025	Check
<input type="checkbox"/>	0901	Company...				Credit Card
<input type="checkbox"/>	0902	Company L				Credit Card
<input type="checkbox"/>	0903	Company...	Johnson			Credit Card

4.11 Next, click on a record in Orders View to view the record details in the Order Form.

At the top of the form, you see the same row summary available!



Power Apps | Admin Management App

Order Details

Orders

Order Product Categ...

Inventory Transactions

Employees

Suppliers

Shippers

Purchase Orders

Customers

Purchase Order Data...

Invoices

Summary The order with the number 0900 was placed on January 14, 2025, by a customer named Kazuya from Company AA. The status of this order is marked as "Closed."

0900 - Saved Order

Order Related

Save Save & Close New Show form fill assist

Order Number	0900	Order Status	Closed	Order Date	1/14/2025
Customer	Company AA	Employee	Marsh	Paid Date	1/14/2025
Tax Status	Tax Exempt	Notes	---		
Payment Type	Check	Ship Country_Region	USA	Ship Address	789 27th Street
Ship City	Las Vegas	Ship Name	Clint Bottoms	Ship State_Province	NV

4.12 Next – Let's add a row summary for the Customers Table

Let's ask the summary agent to get count of Orders for a customer.

Add the following to the existing prompt:

Also count total number of orders from Customer Order

Summarize in paragraph format, do not show the record id or any GUIDs in the response, and do not offer for the user to ask for further interaction.

Customer Order – Put / -> then select Customer table -> then select Order related table -> then select Order column

Instructions

... ➤ Test

Describe the rows and columns you want summarized and the key information you want displayed. Specify the output (for example, in paragraph form, or bullet points). AI-generated content can have mistakes, so test and review your prompt before using it.

Summarize as a paragraph `@ nwind_customers X` using the columns

`@ nwind_customers.nwind_company X`, `@ nwind_customers.nwind_emailaddress X`,
`@ nwind_customers.nwind_businessphone X`, `@ nwind_customers.nwind_address X` for the record with
ID `RecordId X`.

Also count total number of orders from `Customer.Customer (Order).Order X`

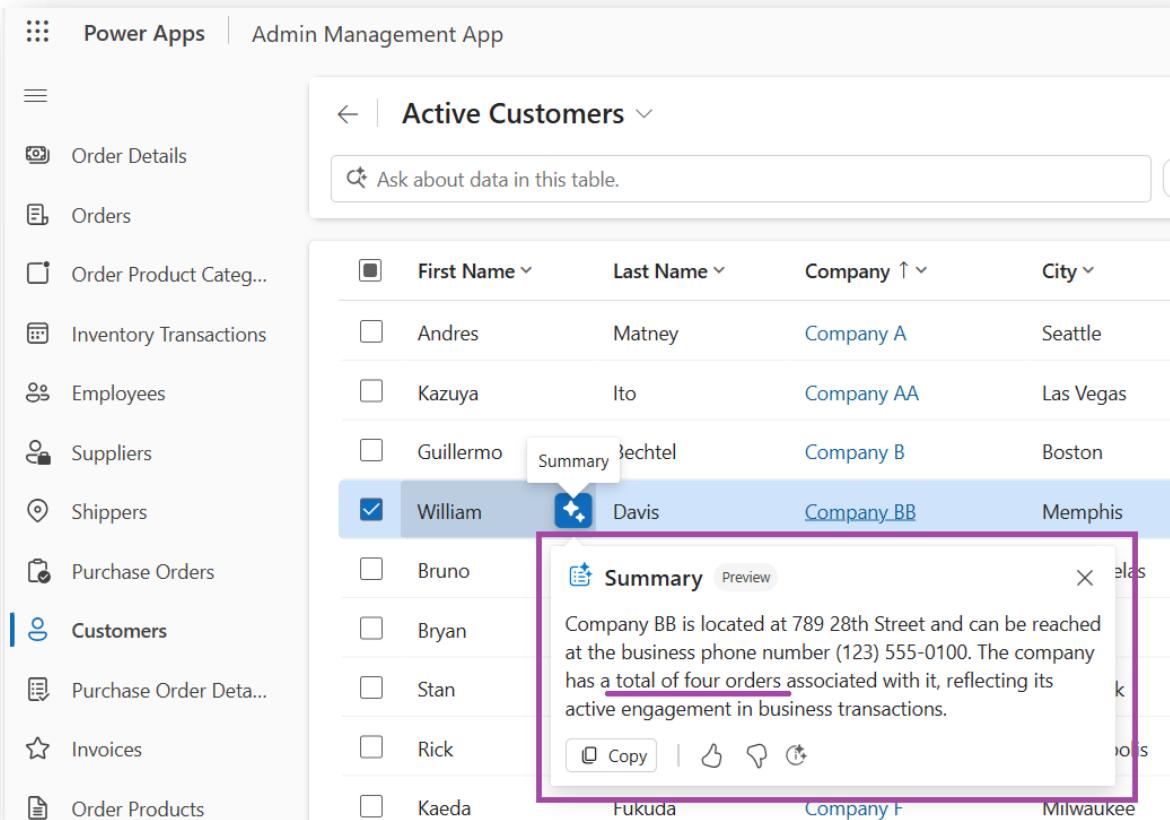
Summarize in paragraph format, do not show the record id or any GUIDs in the response, and do not offer for the user to ask for further interaction.

Test it out to see the result in action and then select “Apply to Main forms”

4.13 Now let's test out the row summary

Go to Customers Page and check the row summary for “Company BB”

You will note the row summary highlighting that there are 4 orders related to this customer.



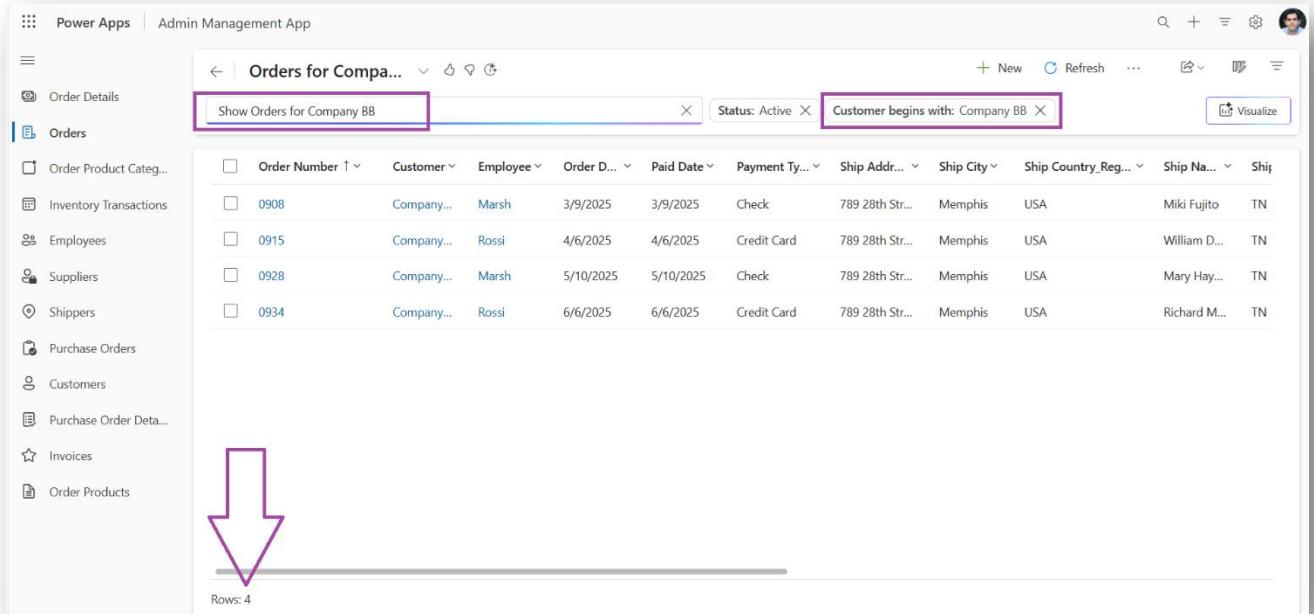
The screenshot shows the Admin Management App interface. On the left, a sidebar lists various entities: Order Details, Orders, Order Product Categ..., Inventory Transactions, Employees, Suppliers, Shippers, Purchase Orders, Customers (which is selected), Purchase Order Deta..., Invoices, and Order Products. The main area is titled "Active Customers" and contains a table with columns: First Name, Last Name, Company, and City. The table lists several customers, including Andres Matney (Company A, Seattle), Kazuya Ito (Company AA, Las Vegas), Guillermo Bechtel (Company B, Boston), and William Davis (Company BB, Memphis). A summary modal is open for the row of William Davis. The modal title is "Summary" and it contains the text: "Company BB is located at 789 28th Street and can be reached at the business phone number (123) 555-0100. The company has a total of four orders associated with it, reflecting its active engagement in business transactions." There are "Copy", "Like", "Dislike", and "Share" buttons at the bottom of the modal.

	First Name	Last Name	Company	City
<input type="checkbox"/>	Andres	Matney	Company A	Seattle
<input type="checkbox"/>	Kazuya	Ito	Company AA	Las Vegas
<input type="checkbox"/>	Guillermo	Bechtel	Company B	Boston
<input checked="" type="checkbox"/>	William	Davis	Company BB	Memphis
<input type="checkbox"/>	Bruno			
<input type="checkbox"/>	Bryan			
<input type="checkbox"/>	Stan			
<input type="checkbox"/>	Rick			
<input type="checkbox"/>	Kaeda			

4.14 Let's confirm the order count by using the data exploration agent in Orders Page

Use the following prompt:

Show Orders for Company BB



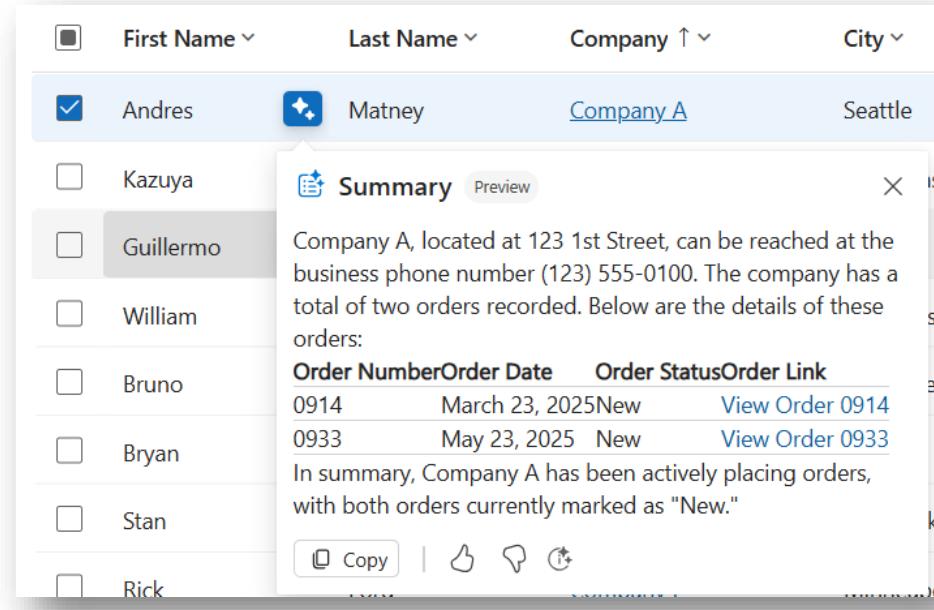
The screenshot shows the Admin Management App interface. On the left, there is a sidebar with various options: Power Apps, Order Details, Orders (which is selected and highlighted in blue), Order Product Categ..., Inventory Transactions, Employees, Suppliers, Shippers, Purchase Orders, Customers, Purchase Order Data..., Invoices, and Order Products. The main area is titled 'Orders for Compa...' and shows a list of four orders. The search bar at the top contains the text 'Show Orders for Company BB'. To the right of the search bar is a filter 'Customer begins with: Company BB'. A purple arrow points from the text 'Show Orders for Company BB' to the search bar. The table below has columns: Order Number ↑, Customer, Employee, Order D..., Paid Date, Payment Ty..., Ship Addr..., Ship City, Ship Country_Reg..., Ship Na..., and Ship. The data in the table is as follows:

Order Number ↑	Customer	Employee	Order D...	Paid Date	Payment Ty...	Ship Addr...	Ship City	Ship Country_Reg...	Ship Na...	Ship
0908	Company...	Marsh	3/9/2025	3/9/2025	Check	789 28th Str...	Memphis	USA	Miki Fujito	TN
0915	Company...	Rossi	4/6/2025	4/6/2025	Credit Card	789 28th Str...	Memphis	USA	William D...	TN
0928	Company...	Marsh	5/10/2025	5/10/2025	Check	789 28th Str...	Memphis	USA	Mary Hay...	TN
0934	Company...	Rossi	6/6/2025	6/6/2025	Credit Card	789 28th Str...	Memphis	USA	Richard M...	TN

Rows: 4

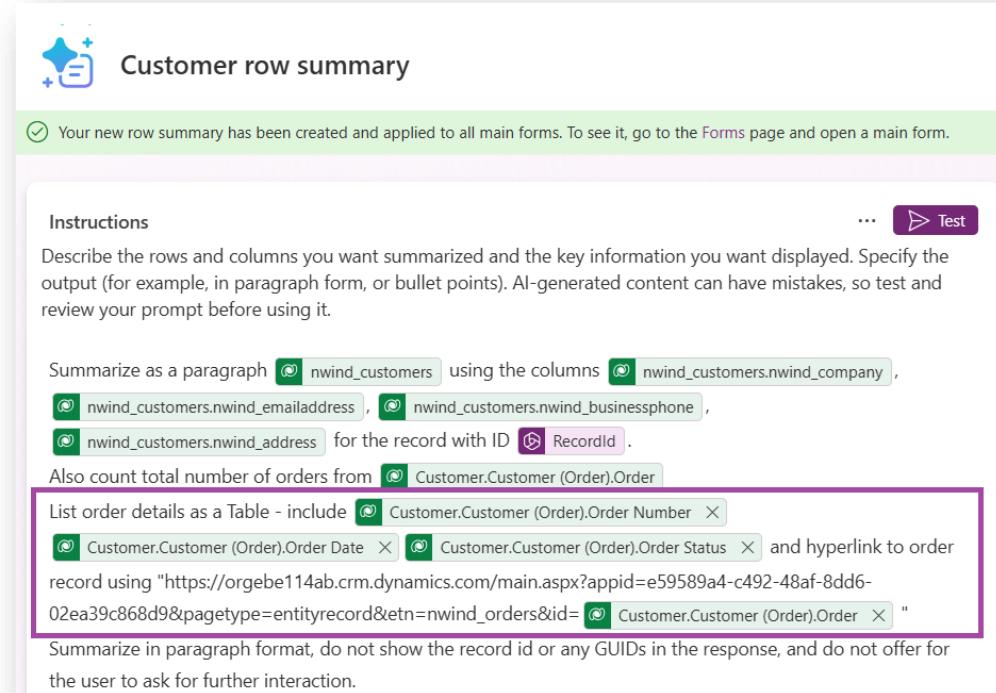
There are 4 Orders related to Company BB

4.15 You can take this to the next level by including tabular data from related tables, links to related records and more...



The screenshot shows a CRM application interface. On the left, there is a list of customers with columns: First Name, Last Name, Company, and City. A row for 'Company A' is selected, showing details: First Name (Andres Matney), Last Name (Company A), Company (Company A), and City (Seattle). A summary modal is open for 'Company A', titled 'Summary'. The summary text reads: 'Company A, located at 123 1st Street, can be reached at the business phone number (123) 555-0100. The company has a total of two orders recorded. Below are the details of these orders:' followed by a table of orders. The table has columns: Order Number, Order Date, Order Status, and Order Link. It shows two rows: 0914 (March 23, 2025, New, View Order 0914) and 0933 (May 23, 2025, New, View Order 0933). Below the table, a note says 'In summary, Company A has been actively placing orders, with both orders currently marked as "New."'. At the bottom of the summary modal are 'Copy', 'Like', 'Dislike', and 'Edit' buttons.

Prompt



The screenshot shows an AI-generated prompt for creating a customer row summary. The title is 'Customer row summary'. A green checkmark indicates: 'Your new row summary has been created and applied to all main forms. To see it, go to the [Forms](#) page and open a main form.' The 'Instructions' section contains the following text: 'Describe the rows and columns you want summarized and the key information you want displayed. Specify the output (for example, in paragraph form, or bullet points). AI-generated content can have mistakes, so test and review your prompt before using it.' Below this, there are two main sections: 1) 'Summarize as a paragraph' with the query: 'Summarize as a paragraph `Customer.Customer (Order).Order` using the columns `Customer.Customer (Order).Order Number`, `Customer.Customer (Order).Order Date`, `Customer.Customer (Order).Order Status`, and `Customer.Customer (Order).Order Link` for the record with ID `Customer.Customer (Order).RecordId`. Also count total number of orders from `Customer.Customer (Order).Order`'. 2) 'List order details as a Table - include' with the query: 'List order details as a Table - include `Customer.Customer (Order).Order Number`, `Customer.Customer (Order).Order Date`, `Customer.Customer (Order).Order Status`, and `Customer.Customer (Order).Order Link` and hyperlink to order record using "[https://orgeberbe114ab.crm.dynamics.com/main.aspx?appid=e59589a4-c492-48af-8dd6-02ea39c868d9&pagetype=entityrecord&etn=nwind_orders&id=Customer.Customer \(Order\).Order](https://orgeberbe114ab.crm.dynamics.com/main.aspx?appid=e59589a4-c492-48af-8dd6-02ea39c868d9&pagetype=entityrecord&etn=nwind_orders&id=Customer.Customer (Order).Order)"'. The bottom section contains the instruction: 'Summarize in paragraph format, do not show the record id or any GUIDs in the response, and do not offer for the user to ask for further interaction.'

5. Teaching mode for Data Entry Agent

Manual data entry is one of the most time-consuming and error-prone tasks in business workflows. The **Data Entry Agent** in Power Apps and Dynamics 365 helps streamline this process by intelligently suggesting values for form fields—saving time and reducing errors.

Now, with **Teaching Mode for data entry agent**, makers can take this even further by teaching the agent what “good” data entry looks like using real-world examples. Whether it’s a PDF invoice, a copied contract snippet, or a screenshot, Teaching Mode lets you guide the agent on how to interpret and suggest values based on your typical inputs.

Key Benefits:

- Fast, Intuitive Setup - No complex configuration or training pipelines. Just upload or paste an example, guide the agent once, and you're done.
- Works with single teaching example - For each type of document or input, a single teaching example can dramatically improve suggestions across similar use cases.
- Real-Time Impact - See improvements almost immediately - no waiting for retraining cycles or deployment delays.

Business Scenario

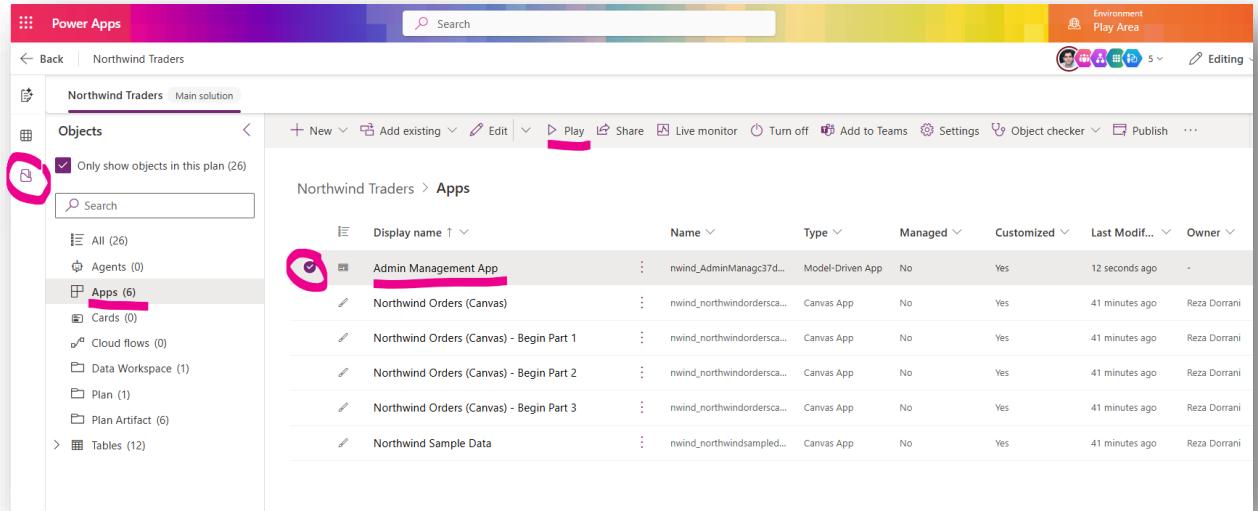
Imagine your team frequently fills out forms using industry-specific documents like invoices, contracts, or service reports. Some fields are correctly suggested by Data Entry Agent, but others require manual typing to get it right. With Teaching Mode, you can show the agent how to handle these documents once - and it will start suggesting values for those tricky fields the next time a similar document is used.

The result? Faster form completion, fewer errors, and a more productive team.

Let's Begin

5.1 Go to the Northwind Traders Solution.

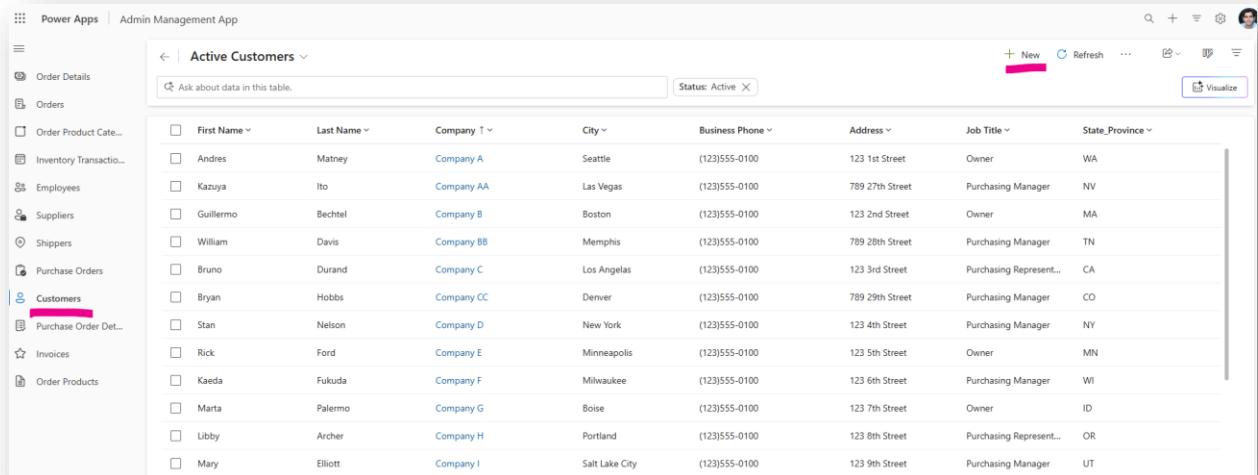
5.2 Navigate to **Apps** in solution explorer, select the Admin Management Model-driven App, and click **Play**



The screenshot shows the Power Apps solution explorer for the 'Northwind Traders' solution. The 'Objects' list on the left shows 'All (26)', 'Agents (0)', 'Cards (0)', 'Cloud flows (0)', 'Data Workspace (1)', 'Plan (1)', 'Plan Artifact (6)', and 'Tables (12)'. The 'Apps (6)' item is highlighted with a red circle. The main list shows the following apps:

Display name	Name	Type	Managed	Customized	Last Modif...	Owner
Admin Management App	nwind_AdminManagc37d...	Model-Driven App	No	Yes	12 seconds ago	-
Northwind Orders (Canvas)	nwind_northwindordersca...	Canvas App	No	Yes	41 minutes ago	Reza Dorrani
Northwind Orders (Canvas) - Begin Part 1	nwind_northwindordersca...	Canvas App	No	Yes	41 minutes ago	Reza Dorrani
Northwind Orders (Canvas) - Begin Part 2	nwind_northwindordersca...	Canvas App	No	Yes	41 minutes ago	Reza Dorrani
Northwind Orders (Canvas) - Begin Part 3	nwind_northwindordersca...	Canvas App	No	Yes	41 minutes ago	Reza Dorrani
Northwind Sample Data	nwind_northwindsampled...	Canvas App	No	Yes	41 minutes ago	Reza Dorrani

5.3 Navigate to the Customers Page and click New



The screenshot shows the 'Active Customers' list in the Admin Management App. The left sidebar shows 'Order Details', 'Orders', 'Order Product Date...', 'Inventory Transaction...', 'Employees', 'Suppliers', 'Shippers', 'Purchase Orders', 'Customers' (which is highlighted with a red circle), 'Purchase Order Det...', 'Invoices', and 'Order Products'. The main list shows the following customers:

First Name	Last Name	Company	City	Business Phone	Address	Job Title	State_Province
Andres	Matney	Company A	Seattle	(123)555-0100	123 1st Street	Owner	WA
Kazuya	Ito	Company AA	Las Vegas	(123)555-0100	789 27th Street	Purchasing Manager	NV
Guillermo	Bechtel	Company B	Boston	(123)555-0100	123 2nd Street	Owner	MA
William	Davis	Company BB	Memphis	(123)555-0100	789 28th Street	Purchasing Manager	TN
Bruno	Durand	Company C	Los Angeles	(123)555-0100	123 3rd Street	Purchasing Represent...	CA
Bryan	Hobbs	Company CC	Denver	(123)555-0100	789 29th Street	Purchasing Manager	CO
Stan	Nelson	Company D	New York	(123)555-0100	123 4th Street	Purchasing Manager	NY
Rick	Ford	Company E	Minneapolis	(123)555-0100	123 5th Street	Owner	MN
Kaeda	Fukuda	Company F	Milwaukee	(123)555-0100	123 6th Street	Purchasing Manager	WI
Marta	Palermo	Company G	Boise	(123)555-0100	123 7th Street	Owner	ID
Libby	Archer	Company H	Portland	(123)555-0100	123 8th Street	Purchasing Represent...	OR
Mary	Elliott	Company I	Salt Lake City	(123)555-0100	123 9th Street	Purchasing Manager	UT

5.4  Note: You will need to add this to the end of your URL to enable the feature:

```
&flags=FCB.FormPredictTeachingMode%3Dtrue%2CFCB.FormPredictUseAgen  
t%3Dtrue,FCB.FormPredictSourceSelectorFlyout%3Dtrue%2CFCB.FormPredic  
tOneDriveIntegration%3Dtrue%2CFCB.FormPredictTeamsIntegration%3Dtrue  
%2CFCB.FormPredictOutlookIntegration%3Dtrue
```

 Note: If you get an error while running this, copy the text in notepad and remove indentation.

And press **Enter**.



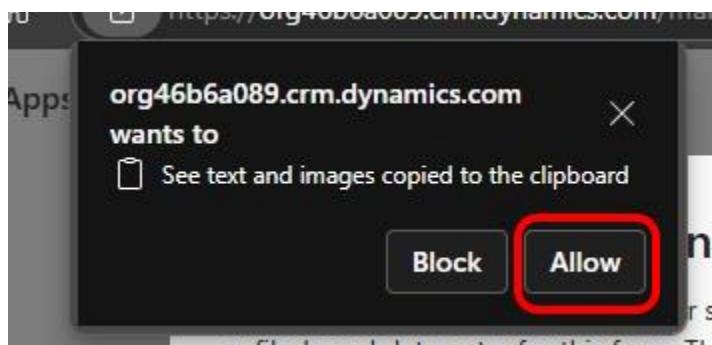
If you see "your recent activity" in the Form Fill Assist Toolbar, you can safely click the X against your recent activity to clear it out.



Let us observe how the Form Fill assistance agent interprets our prompt and provides suggestions prior to further training it on handling our data.

Copy and paste the below text

Note: If you get prompted by the browser, allow text and images to be copied from the clipboard.



Hello,
Our Sales team has worked very hard to successfully generate a new lead and customer relationship. Request to please create an entry in our customer table.

Customer, Ray Smith working in Company Tech Corp has agreed to work with us. They are operating based of 100 NE 1st St, Seattle, WA. You can reach out to Ray at his business Phone +1 **444 888 2222**. You can also reach out to him via email at **RaySmith@techcorp.com**. Customer ID is CUST-28183828. Ray is their Corporate Lead and can help us generate good business.

Clipboard data X Drop files or smart paste for Copilot to make suggestions

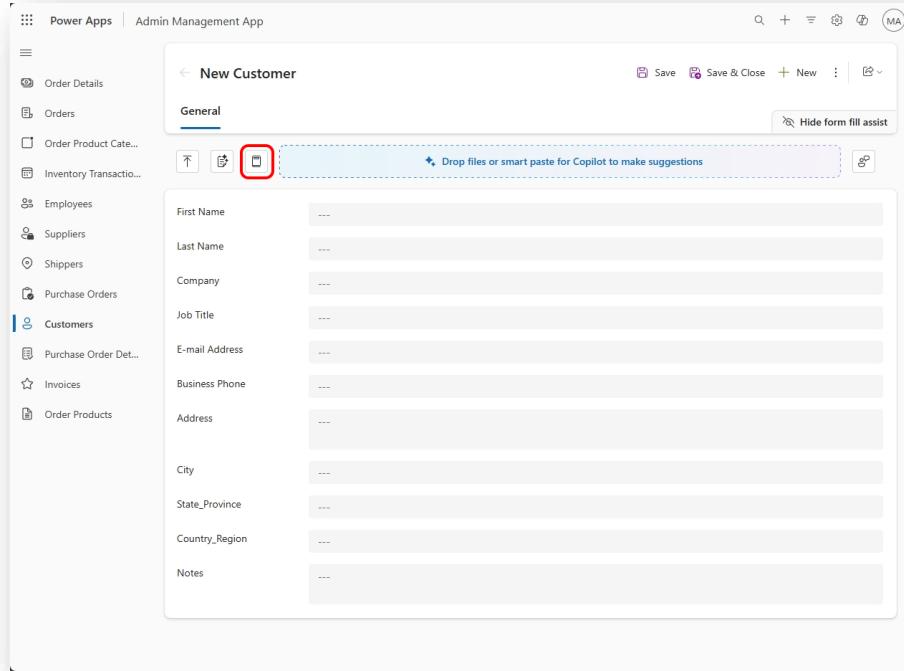
First Name	Ray
Last Name	Smith
Company	Tech Corp
Job Title	Corporate Lead
E-mail Address	RaySmith@techcorp.com
Business Phone	+1 444 888 2222
Address	100 NE 1st St
City	Seattle
State_Province	Washington
Country_Region	USA
Notes	Customer ID is CUST-28183828.

Now, we will try and teach the data entry agent to do the following:

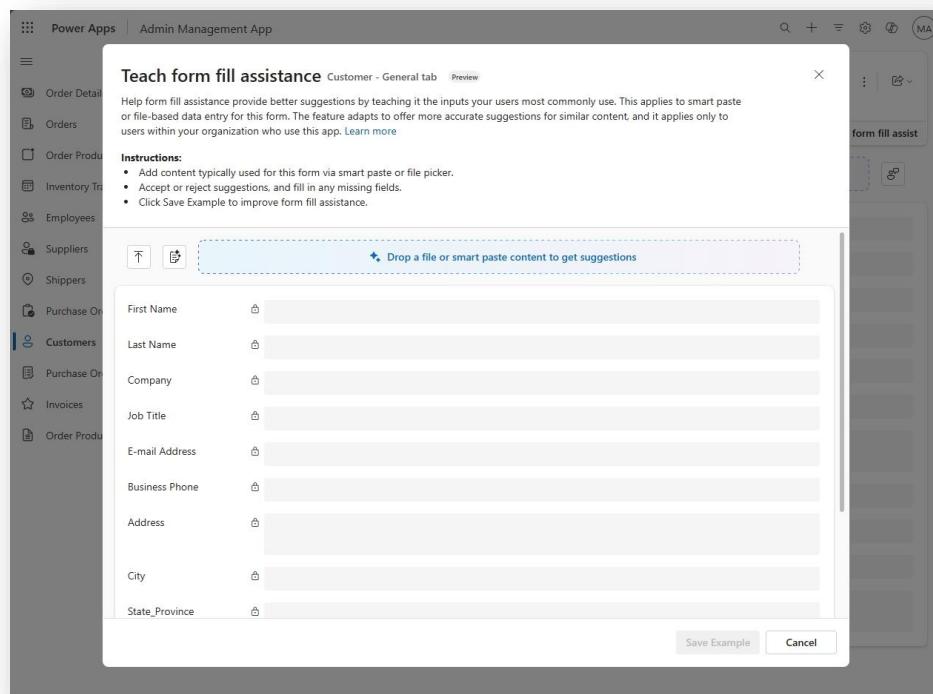
Email address – Here we will teach the agent to enter the email address in lower case.

Notes – Here we will teach the agent to enter the customer's name, address and customer ID. For Customer ID we also want to remove CUST from the Customer ID number.

5.5 Click the Teaching Mode button



5.6 Teaching mode dialog will open.



5.7 Here we will provide data to Teach the form fill assistance.

Copy and paste the below text

Hello,

Our Sales team has worked very hard to successfully generate a new lead and customer relationship. Request to please create an entry in our customer table.

Customer, Ray Smith working in Company Tech Corp has agreed to work with us.

They are operating based of 100 NE 1st St, Seattle, WA. You can reach out to Ray at his business Phone +1 444 888 2222. You can also reach out to him via email at

RaySmith@techcorp.com. Customer ID is CUST-28183828. Ray is their Corporate Lead and can help us generate good business.

Thanks

Admin

Paste here

Teach form fill assistance Customer - General tab Preview

Help form fill assistance provide better suggestions by teaching it the inputs your users most commonly use. This applies to smart paste or file-based data entry for this form. The feature adapts to offer more accurate suggestions for similar content, and it applies only to users within your organization who use this app. [Learn more](#)

Instructions:

- Add content typically used for this form via smart paste or file picker.
- Accept or reject suggestions, and fill in any missing fields.
- Click Save Example to improve form fill assistance.

Drop a file or smart paste content to get suggestions

First Name

Last Name



Based on the image provided to the teach form fill assistance, it will identify the fields and map the data providing smart fill suggestions as shown in the image below:

Teach form fill assistance Customer - General tab Preview X

Help form fill assistance provide better suggestions by teaching it the inputs your users most commonly use. This applies to smart paste or file-based data entry for this form. The feature adapts to offer more accurate suggestions for similar content, and it applies only to users within your organization who use this app. [Learn more](#)

Instructions:

- Add content typically used for this form via smart paste or file picker.
- Accept or reject suggestions, and fill in any missing fields.
- Click Save Example to improve form fill assistance.

First Name	Ray
Last Name	Smith
Company	Tech Corp
Job Title	Corporate Lead
E-mail Address	RaySmith@techcorp.com
Business Phone	+1 444 888 2222
Address	100 NE 1st St
City	Seattle
State_Province	Washington
Country_Region	USA
Notes	Customer ID is CUST-28183828; Ray can help generate business.

5.8 Next, we are going to teach the form fill agent on how to format the data and fill some fields.

Update data in form as below:

Email address – set as **raysmith@techcorp.com**

Notes – set as **Customer Ray Smith from Tech Corp is based out of 100 NE 1st St, Seattle, Washington, USA. Customer ID is 28183828**

Notice - In the notes, we are only selecting the 8-digit customer number (removed the leading 0s)

The teaching mode assistance should look like the below –

First Name	Ray
Last Name	Smith
Company	Tech Corp
Job Title	Corporate Lead
E-mail Address	raysmith@techcorp.com
Business Phone	+1 444 888 2222
Address	100 NE 1st St
City	Seattle
State_Province	Washington
Country_Region	USA
Notes	Customer Ray Smith from Tech Corp is based out of 100 NE 1st St, Seattle, Washington, USA. Customer ID is 28183828

5.9 Next, let's accept all the other suggestions by clicking on the “Accept suggestions” button

Teach form fill assistance Customer - General tab Preview

Help form fill assistance provide better suggestions by teaching it the inputs your users most commonly use. This applies to smart paste or file-based data entry for this form. The feature adapts to offer more accurate suggestions for similar content, and it applies only to users within your organization who use this app. Learn more

Instructions:

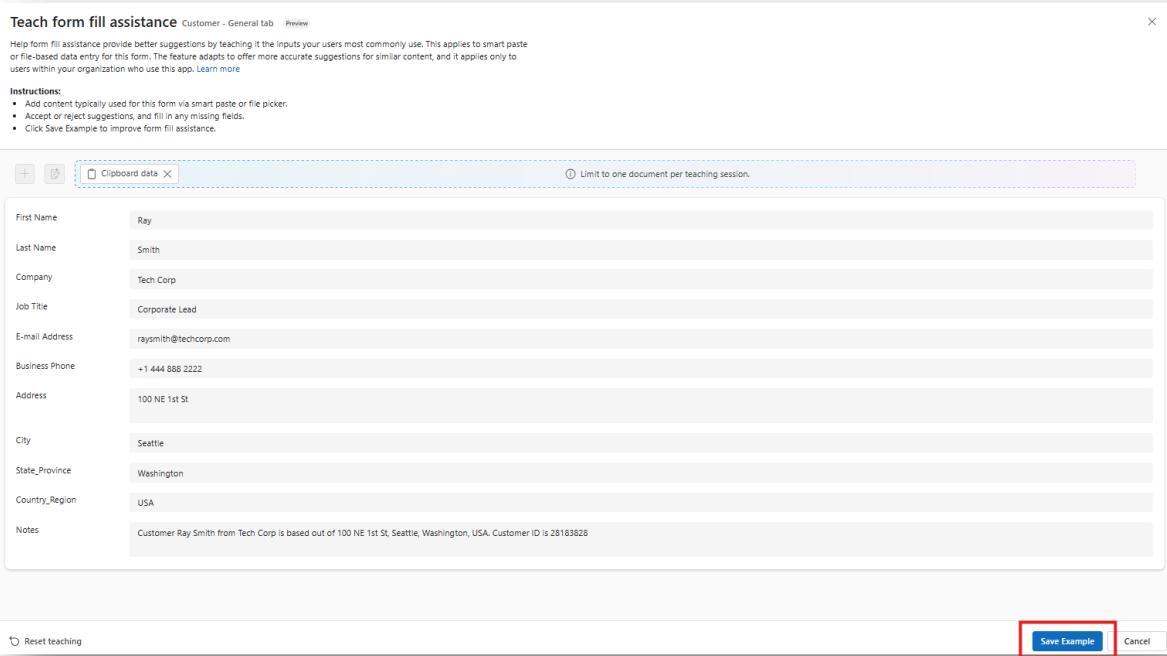
- Add content typically used for this form via smart paste or file picker.
- Accept or reject suggestions, and fill in any missing fields.
- Click Save Example to improve form fill assistance.

Clipboard data

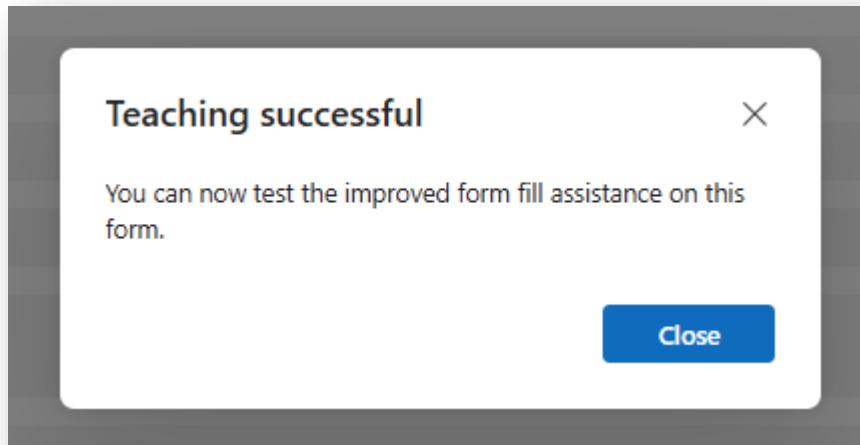
Limit to one document per teaching session.

First Name	Ray
Last Name	Smith
Company	Tech Corp
Job Title	Corporate Lead
E-mail Address	raysmith@techcorp.com
Business Phone	+1 444 888 2222
Address	100 NE 1st St
City	Seattle
State_Province	Washington
Country_Region	USA
Notes	Customer Ray Smith from Tech Corp is based out of 100 NE 1st St, Seattle, Washington, USA. Customer ID is 28183828

5.10 Next, let's save the teaching example by clicking the Save Example button.



5.11 You've successfully completed teaching the agent.



Close the dialog.

5.12 Now let's use the data entry agent!

Copy and paste the text below:

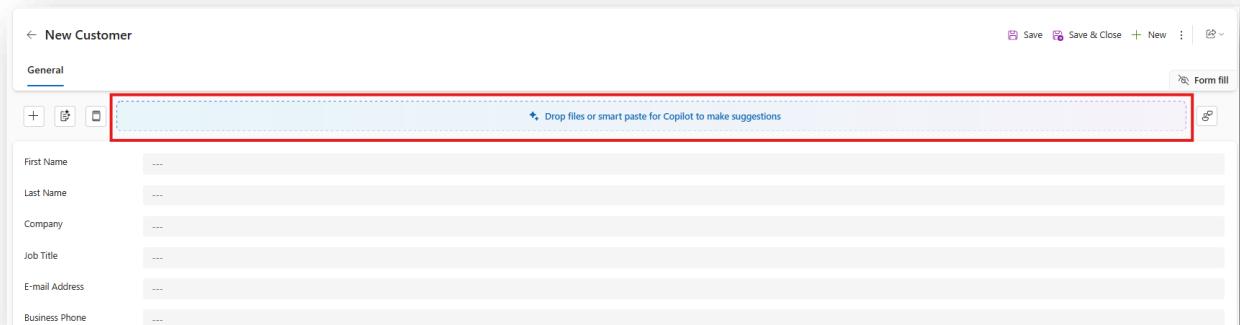
Hello,

Our Sales team has successfully generated a new lead and established a customer relationship. Please proceed to create an entry in our customer table. The customer, John Doe, is associated with Contoso Corp and has agreed to collaborate with us. Their office is located at 1 Microsoft Way, Redmond, WA, USA. John can be contacted at +1 332 566 4324 or via email at JOHN.DOE@contoso.com. The assigned Customer ID is CUST-65743685.

Thank you,

Admin

Paste it in the section highlighted below in the “New Customer” form screen



5.13 The data entry agent provides the suggestions including what we taught the agent in teaching mode as shown in image below.
You can Click on accept all suggestions and then save and close the form to save the record to your customer table.

← New Customer

General

Save Save & Close New Form fill

Clipboard data (30) Drop files or smart paste for Copilot to make suggestions Accept 10 suggestions

First Name	John
Last Name	Doe
Company	Contoso Corp
Job Title	---
E-mail Address	john.doe@contoso.com
Business Phone	+1 332 566 4324
Address	1 Microsoft Way
City	Redmond
State_Province	Washington
Country_Region	USA
Notes	Customer John Doe from Contoso Corp is based out of 1 Microsoft Way, Redmond, Washington, USA. Customer ID is 65743685.

Note: For a given form, teaching assistance can be taught only once. In case if you want to teach the agent to handle the fields differently, you will have to Reset teaching and start from scratch.

Teach form fill assistance Customer - General tab [Preview](#) [X](#)

Help form fill assistance provide better suggestions by teaching it the inputs your users most commonly use. This applies to smart paste or file-based data entry for this form. The feature adapts to offer more accurate suggestions for similar content, and it applies only to users within your organization who use this app. [Learn more](#)

Instructions:

- Add content typically used for this form via smart paste or file picker.
- Accept or reject suggestions, and fill in any missing fields.
- Click Save Example to improve form fill assistance.

[+](#) [Clipboard data](#) [X](#) ⓘ Limit to one document per teaching session.

First Name	Ray
Last Name	Smith
Company	Tech Corp
Job Title	Corporate Lead
E-mail Address	raysmith@techcorp.com
Business Phone	+1 444 888 2222
Address	100 NE 1st St
City	Seattle
State_Province	Washington
Country_Region	USA
Notes	Customer Ray Smith from Tech Corp is based out of 100 NE 1st St. Seattle, Washington, USA. Customer ID is 28183828

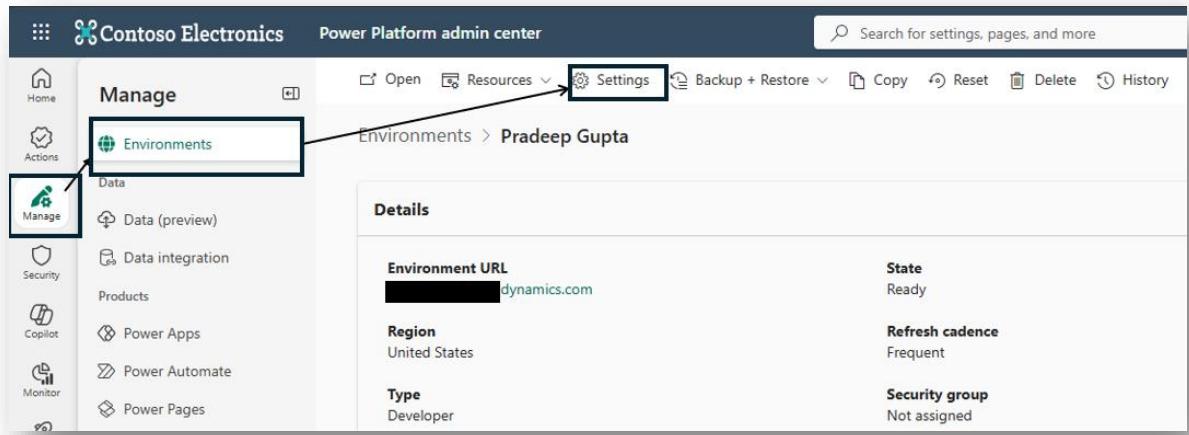
[Reset teaching](#) [Save Example](#) [Cancel](#)



**Congratulations... You have
completed the Module 3 !!!**

6. Prerequisites to enable In-App agents

1. The agentic features for Model Driven Apps are enabled by default.
2. Administrators can manage these features for their environments in the [Power Platform admin center](#).
 - a. In the admin center, Select Manage -> Environment ->Settings.



The screenshot shows the 'Power Platform admin center' interface for 'Contoso Electronics'. The left sidebar is titled 'Manage' and includes sections for Home, Actions, Data, Security, Copilot, and Monitor. The 'Environments' section is highlighted with a box. The main content area shows the 'Details' for the environment 'Pradeep Gupta'. The environment URL is listed as 'dynamics.com'. Other details include Region (United States), Type (Developer), State (Ready), Refresh cadence (Frequent), and Security group (Not assigned). The 'Settings' button in the top right is also highlighted with a box.

- b. Select **Product->Features** and set the value of following settings to **ON**
 - AI Prompts - Enable the AI prompts feature in Power Platform and Copilot Studio
 - AI Form Fill assistance – Automatic suggestions, Smart past and fill suggestions and Form fill assist toolbar.
 - Natural language grid and view search – Allow AI to generate chats to visualize the data in a view. Also set Enable this feature for – All Users immediately.
 - AI Insights cards – Record summaries and other Copilot insights will appear on main forms.

