**LAB-**10 **Create a knowledge agent for your public website**

**Answer customer questions in no time with an agent that provides contextualized answers using both your public website content as well as uploaded files as knowledge sources.**

# Lab Details

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| Level | Persona | Purpose | Estimated time to complete |
| 200 | Basic Maker | After completing this lab, attendees will be able to deploy an agent to their website that uses their own public website content and files to answer user questions using the tone and instructions reflecting their organization brand and tone. | 45 minutes |

## Prerequisites

You need to be able to create a custom agent in <https://copilotstudio.microsoft.com/>.

To publish your agent to your website or to a demo website, the following [data loss prevention policies](https://learn.microsoft.com/en-us/microsoft-copilot-studio/admin-data-loss-prevention) should NOT be blocked on your environment:

* Chat without Microsoft Entra ID authentication in Copilot Studio,
* Direct Line channels in Copilot Studio,
* Knowledge source with documents in Copilot Studio,
* Knowledge source with public websites and data in Copilot Studio.

## Summary of targets

Create an amazing website visitor experience by providing an AI assistant to help answer common customer queries using your own content, and without having to pre-script questions and answers, like in legacy FAQ pages or chatbots.

Understand how to create and deploy an agent to your website that uses content from your website and from your files to generate answers. Discover how instructions can influence the tone and format of the answers and can also help moderate topics you don’t want your agent to address. Finally, preview the end-result with the demo website.

| Use case/topic | Tagline | Page |
| --- | --- | --- |
| Create a new agent  [conversational creation experience while working in the context of solutions] | Copilot Studio AI Assistant – Create an intelligent agent that will answer your visitors’ questions on all things Copilot Studio. | 3 |
| Add knowledge [add more websites and files as knowledge sources] | An investment in knowledge pays the best interest – Your website may not have all the answers your visitors need. Enrich your agent with your own documents and make knowledge work for you. | 6 |
| Disable AI knowledge [reduce risks of hallucinations] | Your agent isn’t ChatGPT – Scope and ground AI-generated answers on your data. | 9 |
| Remove authentication [update security settings to match the desired channel and user experience] | Your agent is public – No login required! Since your agent doesn’t share private or confidential information, you can disable authentication to provide a seamless experience for your website visitors. | 12 |
| Fine-tune your AI assistant for smoother conversations [tweak existing system topics to improve the end-user experience] | Fine-tune for a flawless experience – Customize system topics to enhance interactions and deliver a smoother user experience. | 14 |
| Publish your agent and test it on the demo website [publish & demo] | Go live and test drive – Publish your agent and see it in action on the demo website. | 18 |
| Summary of learnings | Mastery is not a destination but a journey—a joyful path where every step brings growth, discovery, and endless possibilities. | 20 |
| Glossary | Speak the language, bridge the world—unlock hearts, opportunities, and the true essence of every land. | 22 |

## Documentation and additional training links

* [QuickStart: Create and deploy an agent](https://learn.microsoft.com/en-us/microsoft-copilot-studio/fundamentals-get-started?tabs=web)
* [Add a public website as a knowledge source](https://learn.microsoft.com/en-us/microsoft-copilot-studio/knowledge-add-public-website)
* [Upload files as a knowledge source](https://learn.microsoft.com/en-us/microsoft-copilot-studio/knowledge-add-file-upload)
* [Use prompt modification to provide custom instructions to your agent](https://learn.microsoft.com/en-us/microsoft-copilot-studio/nlu-generative-answers-prompt-modification)
* [Create and edit topics](https://learn.microsoft.com/en-us/microsoft-copilot-studio/authoring-create-edit-topics?tabs=webApp)
* [Configure user authentication](https://learn.microsoft.com/en-us/microsoft-copilot-studio/configuration-end-user-authentication)
* [Publish an agent to a live or demo website](https://learn.microsoft.com/en-us/microsoft-copilot-studio/publication-connect-bot-to-web-channels?tabs=preview)

# Use Case #1: Create a new agent

*Copilot Studio AI Assistant – Create a know-it-all agent that will answer your visitors’ questions on all things Copilot Studio.*

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| Use case | Value added | Estimated effort |
| Create a new agent | Quickly set the foundation for success with an intuitive, conversational creation experience, directly within your solution context. | 10 minutes |

## Summary of tasks

In this section, you’ll learn how to create an agent through a Copilot experience, guiding you naturally to build the first key components of your new agent.

**Scenario**: Create a smart AI assistant for your Microsoft Copilot Studio website that reflects your phrasing and tone while grounding its answers in key source websites.

## Step-by-step instructions

1. Navigate to the Copilot Studio **home** **page**.

<https://aka.ms/MCSStart>

1. **Optional:** If you haven’t created a solution yet, now is the time to do so.

Solutions are the best way to package your agents and deploy them across environments.

Go to the **Solutions** menu (located in the left-hand menu under the ellipsis …) and select **New solution**.

Provide a display name – this will persist across environment deployments, so avoid names tied to a specific environment (e.g., 'DEV') or development stage (e.g., 'POC'). Instead, choose a name that reflects the contents of your solution package, such as your agent or project name. For this lab, let’s name it '**Copilot Studio AI Assistant**'.

If this is your first time creating a solution in an environment, create a new **Publisher**—this can be your organization’s name. Choose a prefix that Copilot Studio will use for all your customizations' technical names. Select **Save** when ready.

Once your solution is ready, select **Create**, then return to the Copilot Studio **home page**.

1. In the **Describe your agent** **to create it** input box, set:

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| Create an AI assistant that helps website visitors find answers about Microsoft Copilot Studio. |

This will trigger the **conversational experience** to create a new agent.  
When asked about a **name** for your agent, set:

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| Copilot Studio AI Assistant |

When asked about the agent’s **behavior**, set:

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| The agent helps website visitors find answers on Microsoft Copilot Studio using knowledge from public websites and uploaded documents. |

When asked about **public website knowledge sources**, set:

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| Yes, <https://learn.microsoft.com/en-us/microsoft-copilot-studio/> and <https://www.microsoft.com/en-us/microsoft-copilot/> |

💡 **PRO TIPS:**

* Confirm website ownership for better search results. Doing so allows Copilot Studio to access additional information from your webpages, enhancing the quality of responses.
* URLs can have up to two levels of depth—subpaths indicated by a forward slash /.
* Copilot Studio doesn’t index your website content, instead, it’s using the Bing index, so results will only be as good as the quality of your indexing by Bing.   
  You can learn more about this with [Microsoft Bing Webmaster Tools](https://www.bing.com/webmasters/about).
* When using a public website as a knowledge source, [query data for the Bing Search is stored and processed in the United States](https://learn.microsoft.com/en-us/power-platform/admin/geographical-availability-copilot?tabs=new#regions-where-data-is-processed-for-copilots-and-generative-ai-features).
* Copilot Studio allows you to add up to four public website URLs for knowledge search at a time. If your use case requires more sources, consider setting up a [Bing Custom Search](https://learn.microsoft.com/en-us/microsoft-copilot-studio/nlu-generative-answers-bing) configuration, which enables broader access to relevant information while maintaining control over the content your agent references. This approach ensures your AI assistant remains well-informed without exceeding platform limitations.

1. **Optional:** Select the ***…*** menu, go to **Advanced Settings**, and choose a **Solution** (typically the one you created in Step 2). This allows for easy export and deployment to other environments. Ensure your **Schema Name** is unique to avoid creation errors.
2. Select **Create**
3. **Test** your agent! Ask questions based on the knowledge sources you have provided

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| What are popular templates to create agents in Copilot Studio? |

A screenshot of a chat

AI-generated content may be incorrect.

## Test your understanding

Now that you’ve created an AI assistant in Copilot Studio, take a moment to reflect on what you’ve learned.

**Key takeaways:**

* Agent Creation Flow – You can create an AI assistant through a guided, conversational experience.
* Solution Management – Packaging agents into solutions ensures easier deployment and management.
* Knowledge Sources – The AI assistant’s accuracy improves when grounded in high-quality sources. Answers can only be as good as the quality of the indexing of your website on Microsoft Bing.
* Best Practices – Use neutral, environment-independent naming conventions for solutions and

validate website ownership for better indexing.

**Lessons learned & troubleshooting tips:**

* Avoid using names that tie your agent to a specific environment (e.g., "DEV" or "POC").
* If your agent isn’t returning relevant answers, verify that knowledge sources are correctly added and accessible.
* Ensure your schema names are unique to prevent errors in solution creation.

**Challenge: apply this to your own use case**

* How would you adapt this agent to support your own website or product?
* What other knowledge sources could you integrate to improve responses?
* Think about your organization’s FAQs—how would you structure an agent to address them?

Take it further: Create a second agent with different knowledge sources or test variations in tone and response style. How do the results compare?

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# Use Case #2: Add knowledge

*An investment in knowledge pays the best interest – Your website may not have all the answers your visitors need. Enrich your agent with your own documents and make knowledge work for you.*

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| Use case | Value added | Estimated effort |
| Add knowledge | Easily supplement website content and optimize your agent's understanding by adding multiple websites and files as knowledge sources—ensuring accurate responses and a delightful customer experience. | 10 minutes |

## Summary of tasks

In this section, you’ll learn how to enhance your agent’s knowledge by adding additional websites and uploading your own documents. Expanding your agent’s knowledge base ensures more accurate and comprehensive responses tailored to your needs.

**Scenario**: To ensure your Copilot Studio AI Assistant delivers precise and valuable responses, it needs access to comprehensive and authoritative knowledge sources. By enriching it with additional websites—such as the Power Platform documentation, including roadmap items from release plans, and the Microsoft 365 Copilot documentation—you enable it to stay up to date with the latest advancements. Furthermore, uploading key reference documents, like the Copilot Studio Implementation Guide and the Copilot Studio Licensing Guide, empowers your assistant to provide more detailed and reliable information. This enhanced knowledge base helps users find accurate answers faster, reduces reliance on human support, and improves overall user experience.

## Step-by-step instructions

1. Navigate to the Copilot Studio **agent** you created in the first use case.

<https://aka.ms/MCSStart>

1. Go to the **knowledge** tab, and **add** the below knowledge sources:

Websites:

* Power Platform and release plans documentation:   
  <https://learn.microsoft.com/en-us/power-platform/>
* Microsoft 365 Copilot documentation:   
  <https://learn.microsoft.com/en-us/microsoft-365-copilot/>

Files:

* Copilot Studio Implementation Guide  
  <https://aka.ms/CopilotStudioImplementationGuide>
* Microsoft Power Platform Licensing Guide:   
  <https://go.microsoft.com/fwlink/?linkid=2085130>

💡 **PRO TIPS:**

* File Size Limit: You can upload files up to 512 MB in size.
* Storage: Files are stored in Dataverse file storage.
* Broadest File Type Support: Uploaded documents serve as the most versatile knowledge source in Copilot Studio, supporting the largest number of file types. Even images embedded in PDFs can contribute to generating answers.
* Encryption Considerations: Since files are indexed within Copilot Studio, ensure they are not encrypted (e.g., avoid applying confidential sensitivity labels via Microsoft Purview).
* File Upload Limits: You can upload up to 500 files per agent. However, since files are solution-aware, large solution files may fail to import in downstream environments.
* Citations & Availability: Uploaded files generate text citations along with answers, referencing snippets of their content. However, these files cannot be downloaded or accessed via a clickable link by end users.

1. **Wait** a few minutes for the file content to be indexed.
2. **Test** your agent by asking questions based on your newly added knowledge sources to ensure accurate and relevant responses. **Notice what happens you click on citations**.

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| What are ALM best practices for Copilot Studio agents? |

A screenshot of a computer

AI-generated content may be incorrect.

## Test your understanding

Now that you’ve added new knowledge sources to your Copilot Studio AI Assistant, take a moment to reflect on how this enhances your agent’s ability to provide accurate and valuable responses.

**Key takeaways:**

* Expanding Knowledge – Your agent can retrieve information from both websites and uploaded documents to improve response quality.
* Indexing & Storage – Files are stored in Dataverse file storage, and their content is indexed for searchability.
* Best Practices – Avoid encrypted documents, as they cannot be indexed, and be mindful of file size and solution limits.
* Citations – Uploaded documents generate text citations, allowing users to trace responses back to their source.

**Lessons learned & troubleshooting tips:**

* If your agent isn’t pulling information as expected, check that the files are properly indexed and not encrypted.
* Keep file size and solution limits in mind—exceeding them may cause import failures in other environments.
* When using multiple sources, ensure they are well-structured and relevant to maintain answer quality.

**Challenge: apply this to your own use case**

* How would you use knowledge sources to enhance your own agent?
* What internal documents could you upload to make your agent more useful?
* How would you balance using public websites vs. internal documents for your knowledge base?

Take it further: Experiment with different document types and website sources. How does each impact the accuracy and depth of your agent’s responses?

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# Use Case #3: Disable AI knowledge

*Your agent isn’t ChatGPT – Scope and ground AI-generated answers on your data.*

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| Use case | Value added | Estimated effort |
| Disable AI knowledge | Learn when to leverage or disable the built-in knowledge of Large Language Models (LLMs), reducing risks of hallucinations and ensuring your agent provides reliable, accurate responses. | 5 minutes |

## Summary of tasks

In this section, you’ll learn how to improve the accuracy and reliability of your agent by disabling its ability to rely on general AI knowledge. While allowing the AI to use its own training data can sometimes be helpful, it also increases the risk of hallucinations, outdated information, responses that may not align with your business objectives (such as suggesting a car model from another car dealer) and can contribute to customers getting inconsistent responses.

**Scenario**: To ensure your Copilot Studio AI Assistant provides fact-based, up-to-date, and controlled responses, you will disable the "Allow the AI to use its own general knowledge" setting. This prevents the AI from generating answers based on outdated or non-curated information, ensuring it only pulls responses from approved sources such as your uploaded documents and specified websites.

By taking this step, you reduce the risk of misinformation, prevent responses based on obsolete AI training data, and maintain trust in the assistant’s answers.

## Step-by-step instructions

1. Navigate to the Copilot Studio **agent** you created in the first use case.

<https://aka.ms/MCSStart>

1. **Ask** your agent a question that is not grounded in its existing knowledge sources (e.g., something outside the scope of its uploaded documents or added websites).

**Observe the response**: Notice how the assistant still attempts to generate an answer, and a disclaimer appears stating "AI-generated content may be incorrect." This indicates that the agent is pulling from general AI knowledge, which may lead to hallucinations, outdated information, or unreliable answers.

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| Create a Haiku describing Copilot Studio |

A screenshot of a phone

AI-generated content may be incorrect.

1. From the **overview** tab, **disable** the **Allow the AI to use its own general knowledge** setting.
2. **Wait** a minute, **refresh** the test pane, and **test** your agent again

A screenshot of a chat

AI-generated content may be incorrect.

💡 **PRO TIPS:**

* Understanding General AI Knowledge: The "Allow the AI to use its own general knowledge" setting on the Overview page enables your agent to use generative AI for responses. This includes the foundational knowledge the AI was trained on, which may be outdated or inaccurate for certain topics.
* Debugging Responses: When your agent doesn’t find an answer from its configured knowledge sources, you can check Debug Insights to see why (e.g., "No information was found that could help answer this"). These insights are only visible to makers and do not appear to end users.

## Test your understanding

Now that you’ve disabled general AI knowledge for your Copilot Studio AI Assistant, take a moment to reflect on how this impacts your agent’s accuracy and reliability.

**Key takeaways:**

* Scoped Responses – Your agent now relies only on approved knowledge sources, preventing hallucinations and outdated information.
* Trust & Consistency – Disabling general AI knowledge ensures control over the assistant’s responses, making them more predictable and aligned with your business needs.
* Debugging Tools – Debug Insights help troubleshoot why an agent isn’t returning answers, giving makers more visibility into knowledge gaps.

**Lessons Learned & troubleshooting tips:**

* If disabling AI knowledge results in too many unanswered queries, consider enriching your knowledge sources with relevant documents and websites.
* When testing responses, always refresh the test pane after making changes to ensure the latest settings are applied.
* If responses are still appearing overly generic, double-check that the AI knowledge setting is properly disabled in the Overview tab.

**Challenge: apply this to your own use case**

* What types of information should always be grounded in approved sources rather than general AI knowledge?
* How would enabling or disabling AI knowledge impact your organization’s chatbot strategy?
* When might it be beneficial to partially enable AI knowledge for broader responses?

Take it further: Test your assistant on a series of domain-specific questions before and after disabling AI knowledge. How does its accuracy and consistency improve?

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# Use Case #4: Remove authentication

*Your agent is public – No login required! Since your agent doesn’t share private or confidential information, you can disable authentication to provide a seamless experience for your website visitors.*

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| Use case | Value added | Estimated effort |
| Remove authentication | Confidently configure authentication priorities for agents accessing public data, ensuring security settings align seamlessly with your channel and desired user experience. | 5 minutes |

## Summary of tasks

In this section, you’ll learn how to remove authentication from your Copilot Studio AI Assistant, allowing public access without requiring users to log in. While authentication is essential for protecting sensitive data, it may not be necessary for agents that provide general, non-confidential information.

**Scenario**: To ensure a frictionless experience for website visitors, you will disable authentication, making your agent accessible to everyone. Since this assistant does not handle private or confidential information, removing authentication allows users to interact with it instantly without requiring sign-in.

By taking this step, you eliminate access barriers, improve engagement, and align security settings with your agent’s intended purpose, ensuring the best possible user experience.

## Step-by-step instructions

1. Navigate to the Copilot Studio **agent** you created in the first use case.

<https://aka.ms/MCSStart>

1. Go to your agent’s **settings**, then to **security**, **authentication**, select **No authentication**, and **save**.
2. **Review** the warning before **confirming**.

💡 **PRO TIPS:**

* Enterprise Restrictions: In a typical enterprise setup, your Power Platform administrator may have enforced [Data Loss Prevention (DLP) policies that restrict deploying agents without authentication](https://learn.microsoft.com/en-us/microsoft-copilot-studio/dlp-example-3). If needed, work with your admin to request an exception.
* Content Review: Before making your agent public, review its content to ensure no sensitive data is exposed. While public websites only provide already available information, uploaded documents may contain details that should not be accessible to all users.
* Integration Risks: If your agent connects to other systems (e.g., via connectors or cloud flows), verify that it does not use the maker’s authentication context—unless this is the desired behavior, this could create a data exfiltration risk if unintended access is granted.

## Test your understanding

Now that you’ve removed authentication from your Copilot Studio AI Assistant, reflect on how this impacts user access and security.

**Key takeaways:**

* Frictionless Access – Disabling authentication removes barriers, making the agent instantly accessible to all users.
* Security Considerations – Public agents should only handle non-confidential information to prevent unintended data exposure.
* Enterprise Policies – DLP policies may restrict anonymous agents, so coordination with Power Platform admins may be required.

**Challenge: apply this to your own use case**

* What type of information should remain behind authentication versus being made public?
* How would you handle security reviews before making an agent accessible without login?
* If your agent integrates with external systems, how would you ensure it doesn’t expose sensitive data??

Take it further: Test your agent as a public user—does it behave as expected, and are all responses appropriate for an anonymous audience?

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# Use Case #5: Fine-tune your AI assistant for smoother conversations

*Fine-tune for a flawless experience – Customize system topics to enhance interactions and deliver a smoother user experience.*

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| Use case | Value added | Estimated effort |
| Fine-tune your AI assistant for smoother conversations | Quickly customize built-in system topics to refine your agent’s responses, enhancing the end-user experience with minimal effort. | 5 minutes |

## Summary of tasks

Enhancing your Copilot Studio AI Assistant goes beyond knowledge sources—fine-tuning system topics allows you to improve user interactions and create a more seamless experience.

**Scenario**: Customize your assistant’s welcome message to make it more engaging and add suggested start prompts to guide users effectively. Additionally, refine or disable system topics like Escalate if they are unnecessary—for example, when integrating with a contact center solution for live agent handoff.

By adjusting these built-in topics, you ensure a more natural, helpful, and tailored experience, reducing friction and aligning the assistant with your organization’s needs.

## Step-by-step instructions

1. Navigate to the Copilot Studio **agent** you created in the first use case.

[https://aka.ms/MCSStart](https://aka.ms/MCSStart%20)

1. Go to your agent’s **topics** tab and select **System** topics.

Select the **Conversation start** topic.

Select the message and replace the text with a more personalized welcome message

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| --- |
| **👋 Welcome!**  I’m here to help you find answers about Microsoft Copilot Studio, using official documentation and curated knowledge to ensure accuracy.  **How can I assist you today?** |

**💡 PRO TIPS:**

1. Be clear and direct – Avoid jargon and long sentences.

* Encourage interaction – Provide a natural way for users to start asking questions.
* Set expectations – Briefly indicate what the assistant can and cannot do.
* Keep it concise – Too much information up front can be overwhelming.
* Use Markdown – Most clients support [Markdown](https://www.markdownguide.org/basic-syntax/) for advanced formatting options.

While still on the welcome message, select **Add**, then choose **Quick Reply**. These serve as suggested conversation starters for the end-user. When a user selects one, it will be sent to the agent as if they had typed it themselves.

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| * What is Copilot Studio? * How does message consumption work? * How can I secure my agents? |

A screenshot of a chat

AI-generated content may be incorrect.

**💡 PRO TIPS:**

* You can test your changes in a topic without needing to save. Just refresh the test pane to get the latest experience.

Notice there is still a **Speech variation available** note displayed on the message node. Toggle the experience from **Text** to **Speech**, and **delete** the “Tanks for calling, how can I help” variation (unless you do use a voice channel for your agent).

**Save** your topic.

1. Go to your agent’s **topics** tab and select **System** topics.

Select the **Escalate** topic.

Update the **text** to options that will more meaningfully unblock the end user if they need to take the conversation further.

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| I'm sorry, but I can't seem to be able to help you.  I recommend reaching out to our [Microsoft Copilot Studio community](https://aka.ms/CopilotStudioCommunity) or submitting a [support request](https://learn.microsoft.com/en-us/power-platform/admin/get-help-support). |

**💡 PRO TIPS:**

* Escalation Triggers – The Escalate topic activates when the end-user asks to speak with someone or when the Fallback topic fails to provide an answer three times in a row.
* Insights from Escalations – The Escalate topic helps track the number and percentage of conversations that lead to an escalation, highlighting gaps where users seek alternatives beyond the assistant.
* Disabling the Escalate Topic – If you choose to disable it, ensure that the Fallback topic no longer redirects to it to avoid errors in the conversation flow.

A screenshot of a chat

AI-generated content may be incorrect.

**Save** your topic.

## Test your understanding

Now that you’ve customized system topics in Copilot Studio, reflect on how these changes improve user interactions and optimize your assistant’s responses.

**Key takeaways:**

* A well-crafted welcome message sets the tone and improves engagement.
* Quick replies guide users to relevant topics, making interactions smoother.
* Customizing the Escalate topic ensures users receive meaningful next steps instead of default responses.
* Disabling the Escalate topic requires adjusting the Fallback topic to prevent errors.

**Lessons learned & troubleshooting tips:**

* Escalation topic triggering too often? Check if users frequently reach the Escalate topic and consider improving knowledge sources or fallback responses.
* Modified topics not behaving as expected? Refresh the test pane after saving changes to ensure updates are applied.

**Challenge: apply this to your own use case**

* How can you adjust the welcome message to reflect your organization’s branding?
* What quick replies would be most helpful for your users?
* If escalation is necessary, what alternative options can you provide beyond simply handing off to a live agent?

Take it further: Test different welcome messages and quick reply prompts. Which variations result in better engagement and fewer escalations?

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# Use Case #6: Publish your agent and test it on the demo website

*Go live and test drive – Publish your agent and see it in action on the demo website.*

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| Use case | Value added | Estimated effort |
| Publish your agent and test it on the demo website | Master the essentials of publishing your agent and effectively demonstrating it to stakeholders, accelerating feedback cycles and ensuring readiness for channel distribution. | 5 minutes |

## Summary of tasks

Once you're happy with how your agent behaves in the test pane, the next step is to publish it so that changes are reflected across your channels, including your public website.

The demo website in Copilot Studio allows you to instantly preview how your agent will look and function on a website. It also provides a shareable link to collect feedback before deploying it to your real site.

**Scenario**: Publish your Copilot Studio AI Assistant to the demo website and share it with others to gather feedback before integrating it into your official website.

## Step-by-step instructions

1. Navigate to the Copilot Studio **agent** you created in the first use case.

<https://aka.ms/MCSStart>

1. Select **Publish**.
2. Go to the **Channels** tab

Choose **Demo website** – see how you can customize the **welcome message** as well as **conversation starters** the users of the demo website can click to send pre-defined messages. Don’t forget to **save** if you make changes.

**Copy** the demo website URL, open it in a new **tab**, and **interact** with your agent.

**💡 PRO TIPS:**

* Easily Shareable – The demo website URL can be shared with others for quick feedback before deployment.
* Customizable UI – The chat canvas design can be adjusted before adding it to your website. You can align it with your organization’s brand or apply a Fluent UI theme for a more cohesive look. Check out the Web Chat customizer in the [Copilot Studio Kit](https://aka.ms/CopilotStudioSamples).
* Authentication Restrictions – The demo website is only available for unauthenticated agents or agents using manual authentication. It won’t be accessible if web channel security is enabled (e.g., requesting a secret to start a conversation).

## Test your understanding

Now that you’ve published and tested your agent, consider how this step improves your deployment process.

**Key takeaways:**

* Publishing applies changes across channels, ensuring your agent is up to date.
* The demo website provides a quick way to preview and gather feedback before full deployment.
* Customization options allow you to refine the experience before adding the agent to your real website.

**Challenge: apply this to your own use case**

* How would you use the demo website to collect feedback before launch?
* What branding and UI changes would improve the chat experience for your users?

Take it further: Share the demo website link with colleagues and observe their interactions. Do they engage naturally, or do you need to refine prompts and quick replies?

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# Summary of learnings

Une image contenant jaune, conception

Le contenu généré par l’IA peut être incorrect.*Mastery is not a destination but a journey—a joyful path where every step brings growth, discovery, and endless possibilities.*

Congratulations on completing this lab! You’ve explored the essential components of Microsoft Copilot Studio AI Assistants, learning how to create, refine, and deploy an intelligent agent that provides contextualized answers using both public websites and uploaded documents.

* **Creating an AI Agents** – Building an agent through a conversational experience and structuring it within solutions for better deployment and management.
* **Expanding Knowledge** – Enhancing responses by integrating additional websites and documents while ensuring accuracy and up-to-date information.
* **Ensuring Reliability** – Disabling general AI knowledge to prevent hallucinations and outdated responses, keeping the agent grounded in trusted sources.
* **Optimizing Accessibility** – Configuring authentication settings to match your audience’s needs while maintaining security and compliance.
* **Fine-Tuning Interactions** – Customizing system topics to improve conversation flow, engagement, and escalation handling.
* **Deploying with Confidence** – Publishing the agent, testing it on the demo website, and refining the experience before full deployment.

**Conclusions and recommendations**

To maximize the effectiveness of your Copilot Studio AI Assistant:

* Regularly update knowledge sources to maintain accuracy and relevance.
* Monitor user interactions and refine conversation flows to improve engagement and reduce escalations.
* Align authentication and security settings with your intended user experience.
* Leverage the demo website for quick testing and feedback before integrating the assistant into a live environment.
* Use clear, structured instructions to shape the assistant’s tone and ensure consistency with your brand.

By applying these best practices, you’ll create an AI assistant that delivers value, enhances user experiences, and evolves with your organization’s needs.

**We want your feedback!**

[**Start now**](https://aka.ms/MCSLabsFeedback)

**Recommended next steps**

To continue building your expertise, consider diving into these advanced labs:

* **LAB-11 Create an engaging user experience for your agent**Learn how to enhance user engagement by customizing the conversation start with a rich experience using Adaptive Cards.
* **LAB-12 Measure success - Track conversation outcomes and user feedback on AI responses**  
  Learn how to improve conversation tracking by refining the end of conversation topic, enabling rich insights into conversation analytics and KPIs, and offering feedback collection for AI-generated responses.

# Glossary

*Speak the language, bridge the world—unlock hearts, opportunities, and the true essence of every land.*

**Agent:**  
A digital assistant powered by AI, capable of understanding and responding to user inputs. In Copilot Studio, agents can be customized to for conversational experiences and/or can act autonomously based on pre-configured triggers and instructions.

**Channel:**  
A communication medium or platform through which users interact with an agent, such as a website, telephony, WhatsApp, Facebook messenger, Microsoft Teams, Slack, etc. While Copilot Studio can be seen as the engine or back-end, the channels effectively relay the activities between the agent and the end-user interacting through a client – or front-end. Each channel and client may each have their own specificities and limitations.

**Generative Answers / AI:**  
Responses created dynamically by AI based on user inputs and available knowledge sources. These answers are not pre-programmed but are generated in real-time using large language models and generative AI.

**Instructions:**  
Custom settings or guidelines configured in Copilot Studio to shape the behavior of Copilot agents. Instructions define how the agent should respond to specific queries or scenarios.