



Dynamics 365

FastTrack Partner Architect

Bootcamp

Lab 01: Extending Copilot in Sales

Hands-on Labs step-by-step

February 2026

Microsoft Copilot Studio Workshop for Dynamics 365

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LAB Extending Copilot in Sales

Extend Copilot in Sales to meet your specific business needs.

Lab Details

This lab is subject to the Terms of Use found at the end of this document.

There are many valid ways to approach and implement this scenario. In this lab, we have intentionally made certain design choices to demonstrate a broader range of tools, capabilities, and concepts available in Copilot Studio. While these choices may not always represent the most direct or optimized solution, they serve an educational purpose by exposing you to techniques you might use in more complex or varied situations.

Level	Persona	Purpose	Estimated time to complete
200	Advanced Maker	<p>After this lab you will be able to extend Copilot in Sales</p> <ul style="list-style-type: none">• How to create a new Topic in MCS• How to make a “HTTPS call” MCS• How to create an AI prompt• How to create and call an Agent Flow• How to create Adaptive card• How to use variables• How to use PowerFX function	60 minutes

Prerequisites

- You need to have access to Microsoft Copilot Studio using <https://copilotstudio.microsoft.com/>.
- Access to a CE environment with Sales Copilot enabled([Turn on and set up Copilot in Dynamics 365 Sales | Microsoft Learn](#)).

Documentation and additional training links

- [Add an Adaptive Card to a Copilot Studio message or question](#)
- [Adaptive Cards](#)
- [AI Prompt in Copilot Studio](#)
- [Make HTTP requests - Microsoft Copilot Studio | Microsoft Learn](#)
- [Agent flows overview - Microsoft Copilot Studio | Microsoft Learn](#)

Use Case

Problem Statement:

Sales teams often need to understand the financial health of publicly traded customer organizations before engaging in sales conversations, account planning, or pipeline reviews.

In most cases, sellers manually verify company financial information using public financial websites.

In most cases the process is manual and time-consuming:

- Sellers leave the CRM and navigate to a financial website.
- Search for the company using its stock symbol (ticker).
- Review financial details such as stock price, etc.
- Manually copy relevant information.
- Paste or update these details in the Account record or notes in the CRM.

This results in:

- Inconsistent and outdated financial data in the system.
- Increased effort for sellers.
- Reduced adoption of financial enrichment fields in CRM.

Solution Approach for this lab: (Note – The actual solution approach may vary depending on real-life scenarios. For this lab, we will keep things simple for learning purposes.)

By extending Copilot in Sales using Copilot Studio:

- Sellers can query company financial data directly from the Copilot chat pane while viewing an Account record.
- Copilot reads the Company Symbol (Ticker) stored on the Account record.
- It retrieves the latest financial information from Yahoo Finance using an external API e.g. <https://query1.finance.yahoo.com/v7/finance/chart/MSFT?&interval=1d>
- It summarizes the financial data for the seller.
- It will enrich the Account record with retrieved information (Update the description field with the summarized financial data).

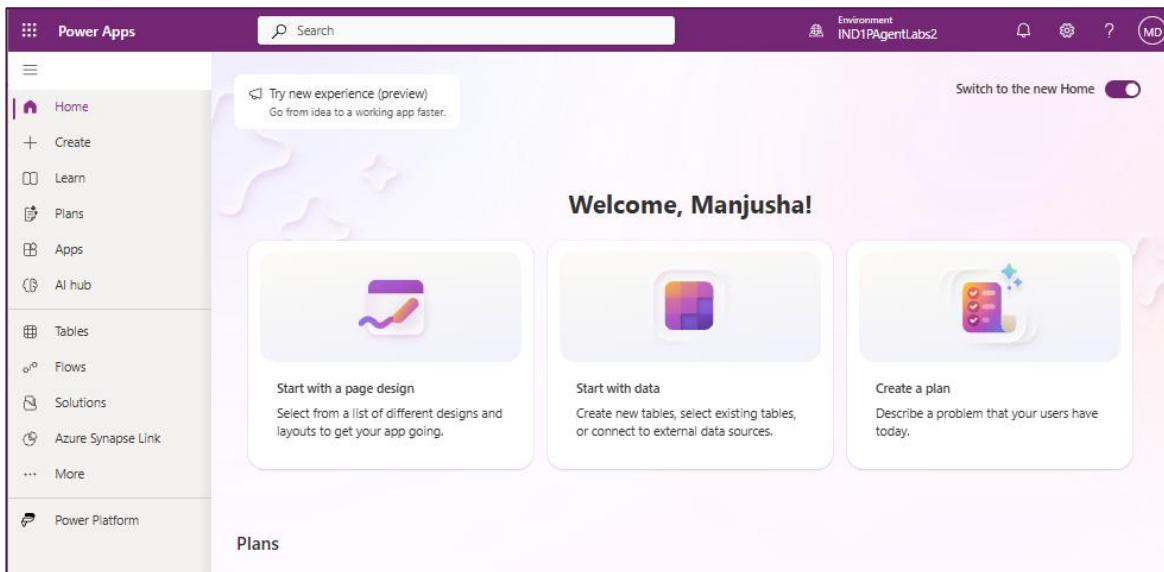
All actions happen in the context of the Account record, without leaving the Sales application.

Benefits:

- **Saves time** for sellers by eliminating manual financial research.
- **Improves data quality** by ensuring consistent and up-to-date financial information.
- **Increases seller productivity** during account research and preparation.
- **Enhances account planning** with standardized financial insights.
- **Drives CRM adoption** by making data enrichment effortless through Copilot.

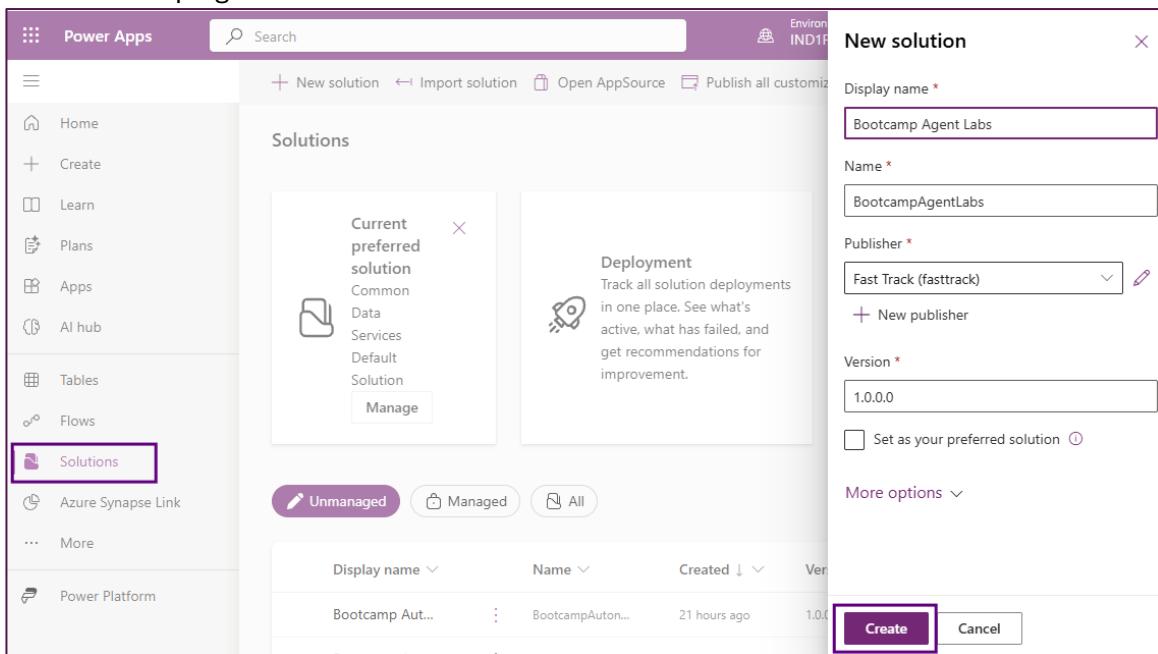
Task 1 – Create a solution in Power Apps maker experience

Step 1 Sign in to [Power Apps maker](#) experience. Verify that you are in the right environment.



Step 2 Select **Solutions** from the left navigation. If the item isn't in the side panel pane, select [...More](#) and then select **Solutions**.

Step 3 Select **New solution**, provide the required column values to create the solution e.g., 'Bootcamp Agent Labs' and click **Create**.



Step 4 Select **Add existing**, then select **Agent >>Agent**.

Step 5 Select **Copilot in Dynamics 365 Sales** agent and click **Add**.

Step 6 Click on the **Copilot in Dynamics 365 Sales** to open the agent in Microsoft Copilot Studio.

The screenshot shows the Power Apps environment with the title bar "Power Apps" and "Search". The left sidebar lists objects: "All (7)", "Agent components (3)", "Agents (1)" (which is selected and highlighted), "AI models (3)", "Apps (0)", "Cards (0)", "Cloud flows (0)", "Data workspaces (0)", and "Tables (0)". The main area displays the "Agents" list for "Bootcamp Agent Labs > Agents". The table has columns: "Display name ↑", "Name ↓", "Type", and "Managed ↓". One row is visible: "Copilot in Dynamics 365 Sales" (Agent, Yes). A search bar at the top right says "Search".

Task 2 – Create a new Topic (Search Financial Details)

Step 1 Once the Agent is opened in MCS, click on **Topics**.

The screenshot shows the "Copilot in Dynamics 365 Sales" interface with the "Topics" tab selected. Other tabs include "Overview", "Knowledge", "Tools", "Agents", "Topics", "Activity", "Evaluation", "Analytics", and "Channels".

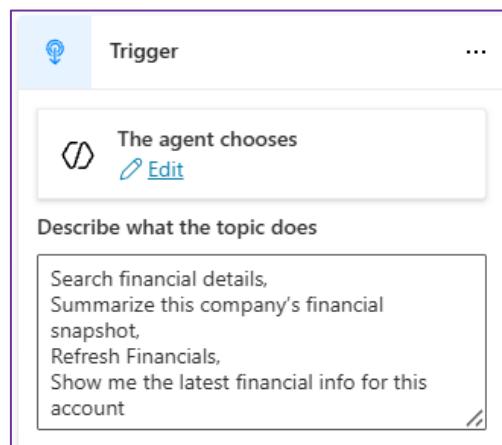
Step 2 Select **Add a topic** and select **From blank**.

The screenshot shows a dropdown menu with three options: "+ Add a topic" (selected and highlighted), "From blank" (selected and highlighted), and "Create from description with Copilot".

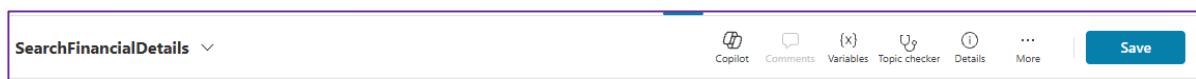
Step 3 Change the name of the topic from **Untitled** to **SearchFinancialDetails**.

The screenshot shows the "Untitled" topic editor. The top bar includes "Copilot in Dynamics 365 Sales", "Topics +8", and "Published 1/31/2026". The "Untitled" name is highlighted. The main area shows a "Trigger" block with "The agent chooses" and "Describe what the topic does" sections. The "Describe what the topic does" section contains placeholder text: "e.g. This topic provides information about support tickets, including current status, who it is assigned to and recent comments. It can answer questions such as, 'What is the current status of my ticket?'".

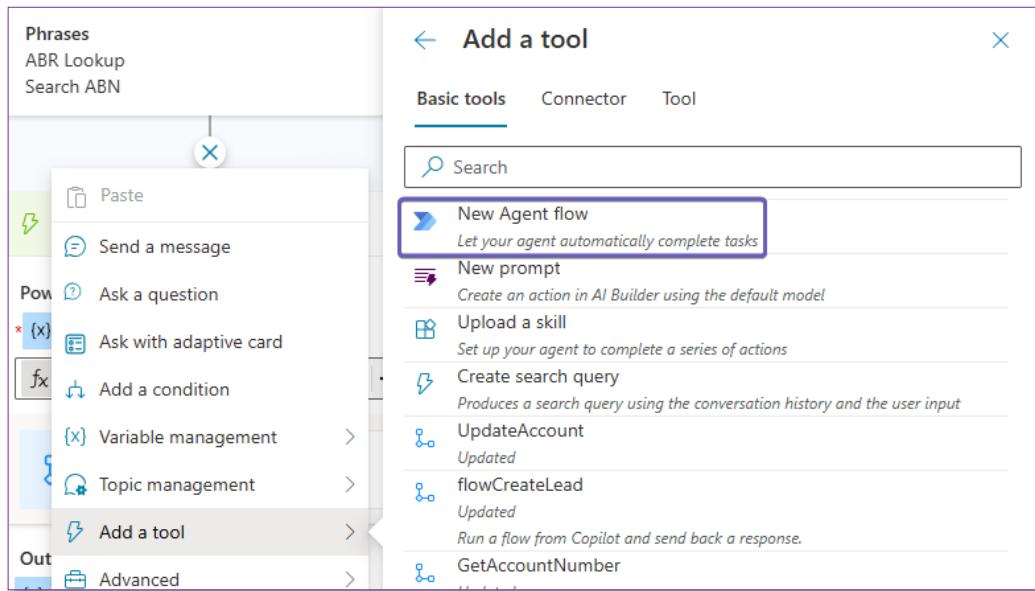
Step 4 In the Trigger, add phrases like **Search financial details, Summarize this company's financial snapshot, Refresh Financials, Show me the latest financial info for this account, Show me financial summary, Summarize financial health** as shown in below screenshot.



Step 5 Click **Save**

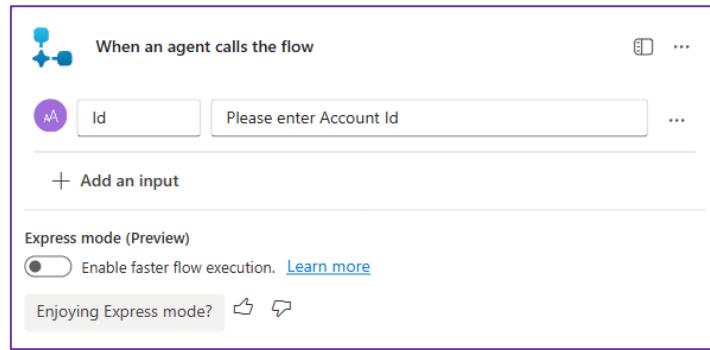


Step 6 After the trigger, click **+** and select **Add a tool >> New Agent Flow**.



It will open the flow in the maker experience.

Step 7 Click on **When an agent calls the flow**. Add a text input parameter to the trigger. Name it **Id**.



Step 8 Click (+) and Add Dataverse Connector **Get Row by ID** and the properties of the connectors as follows:

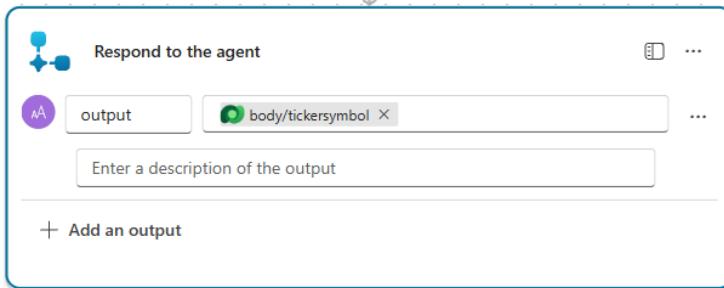
Table name : Accounts

Row Id : Id (Input parameter from above step)

Advanced Parameters>>Select columns: tickersymbol

Table name *	Accounts
Row ID *	Id
Advanced parameters	Show all
Select columns	tickersymbol

Step 9 Click on **Respond to the agent** and add a text output parameter to the trigger. Name it **output**. Set the output value to **tickersymbol(Dynamic Value)**.



Step 10 Rename the flow from Untitled to **Get Company Symbol**.

Step 11 Save the draft flow.

Step 12 Publish the flow.

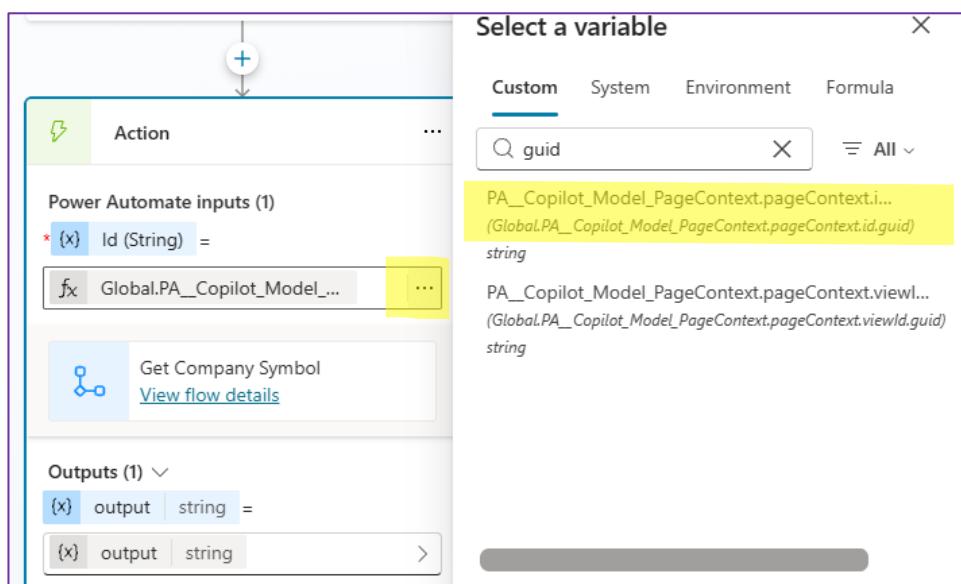
Step 13 Go back to the Copilot Studio on topic **SearchFinancialDetails** in Copilot in Dynamics 365 Sales.

Step 14 After Trigger, click (+) > **Add Tool >Get Company Symbol (Agent Flow)**

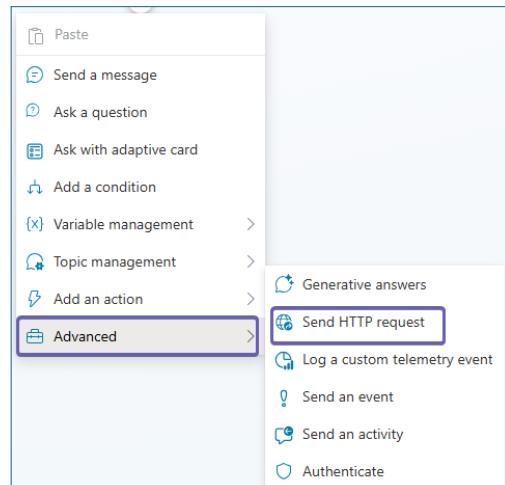
Step 15 Set the properties of the action:

Id: Global.PA__Copilot_Model_PageContext.pageContext.id.guid

Output: output (variable)



Step 16 To add node, click + and select **Advanced >>Send HTTP request**.



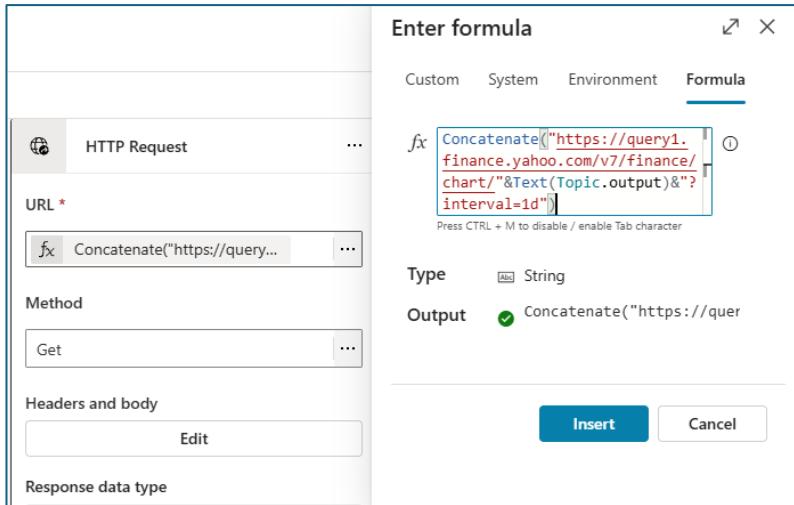
Set properties of the **Send HTTP request** as follow :

1. **URL:**

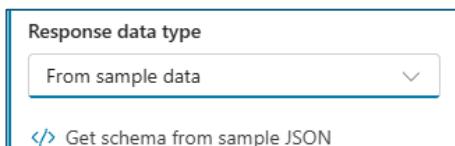
Concatenate("https://query1.finance.yahoo.com/v7/finance/chart/"&Text(Topic.output)&"?interval=1d")

2. **Response data type:** Select **From sample data** dropdown value

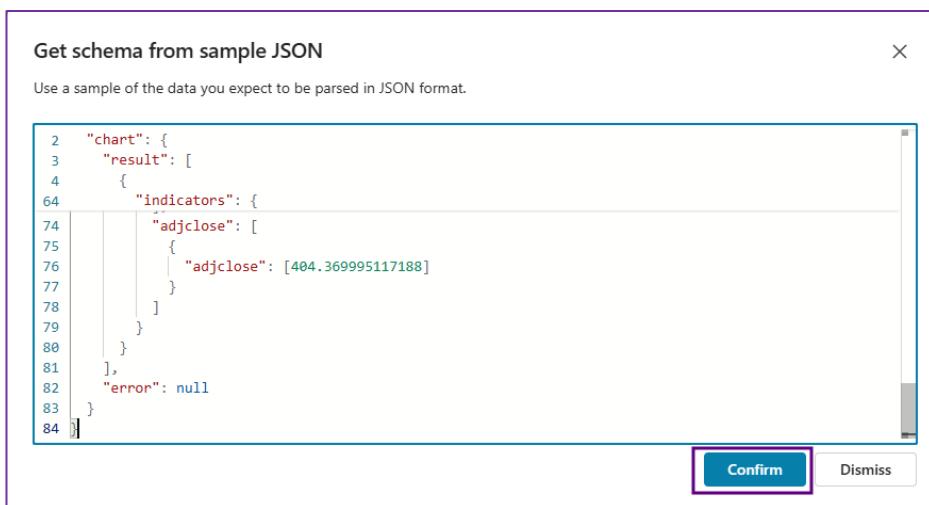
- In separate tab, hit the api (<https://query1.finance.yahoo.com/v7/finance/chart/MSFT?&interval=1d>) browser for response JSON and copy response JSON. Copy JSON response. You will use this value in the later steps.



- Click on Get schema from sample JSON



- Paste copied JSON response from browser in **Get schema from sample JSON** input box and click **Confirm**



3. **Save response as:**

- Click on Select a variable >Create a new variable>Name it as **HTTPResponse**

HTTP Request

URL *
fx Concatenate("https://query...")

Method
Get

Headers and body
Edit

Response data type
Record

Edit schema

Save response as
(x) HttpResponse record >

4. Set headers: Click Edit and set key and values as below .

Key : User-Agent

Value : Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko)
Chrome/122.0.0.0 Safari/537.36

HTTP Request properties

Choose a REST API to invoke/sends an HTTP request to an external endpoint.

Headers
Give additional information with values.

Key	User-Agent
Value	Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/122.0.0.0 Safari/537.36

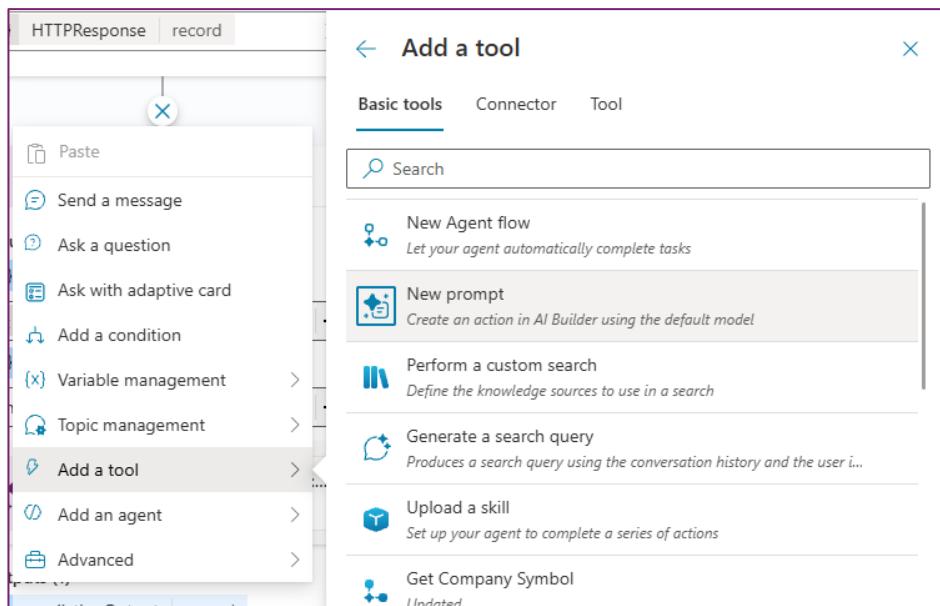
+ Add

Body
Decide what to send or send nothing
No content

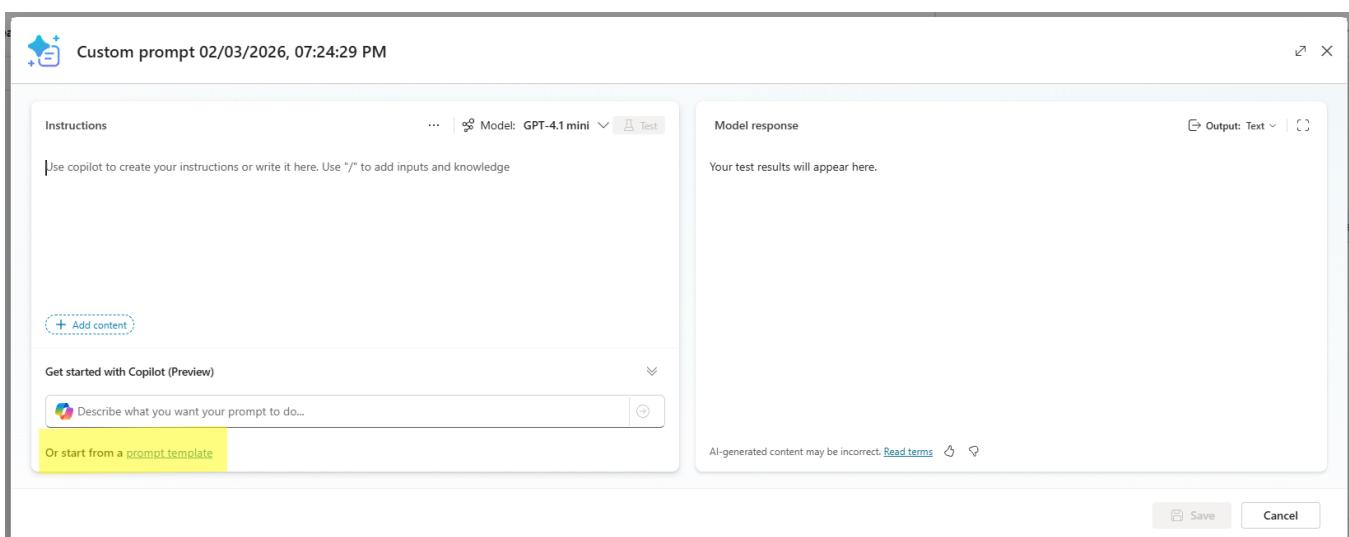
Request timeout (milliseconds)
30000

Response headers
Select a variable

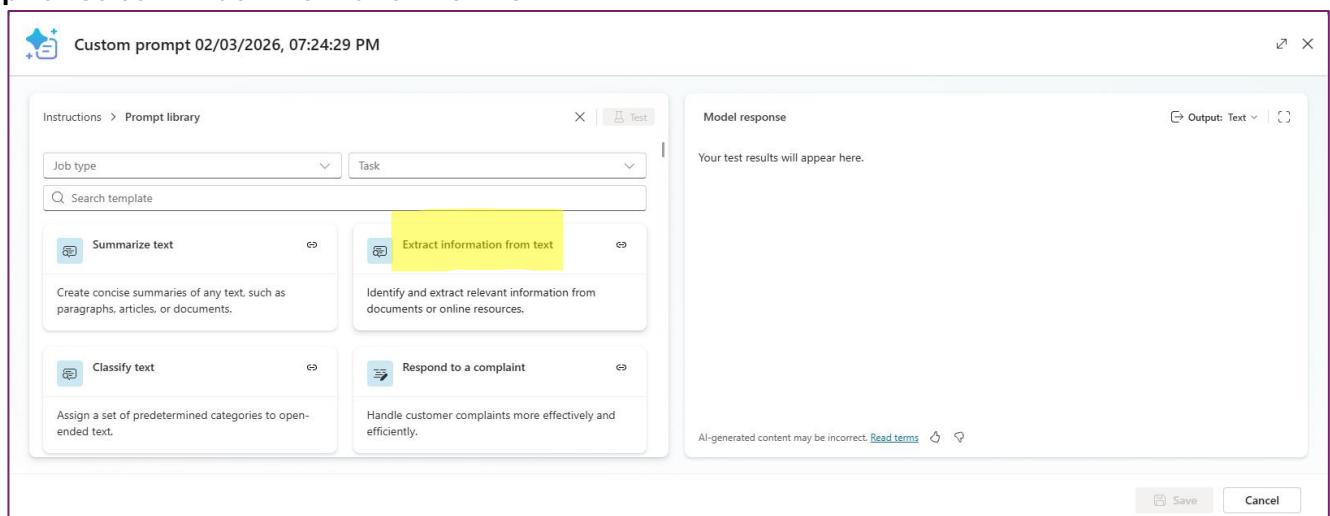
Step 17 Click + to add ne node and select **Add a tool >> New Prompt.**



Step 18 Click on start from a **prompt template**



Step 19 Select **Extract information from text**



Step 20 Rename the prompt name With **Financial Details Extraction Prompt**.

Step 21 Update Instruction as below:

- a. Append the Instruction text with **“Also include a summary of the overall financial health of the company in a new reader format which should also include how the company performed over 52 weeks.”**
- b. Replace the **example text** in the instructions pane with

```
{  
    "[symbol]": [extracted value],  
    "[longName]": [extracted value],  
    "[currency)": [extracted value],  
    "[regularMarketPrice)": [extracted value],  
    "[summary)": [extracted value]  
    // Continue listing additional entities with their values and data types  
}
```

The screenshot shows the configuration interface for the 'Financial Details Extraction Prompt'. At the top, there's a logo of a document with a plus sign and the title 'Financial Details Extraction Prompt'. Below the title, there's a section labeled 'Instructions' with a text area containing the JSON template. To the right of the text area are buttons for 'Model: GPT-4.1 mini' and 'Test'. The main text area contains the JSON template with several fields highlighted in blue, indicating they are selected or being edited. The highlighted text includes the instruction to add a summary of the company's financial health over 52 weeks and the JSON structure for extracting symbols, long names, currencies, regular market prices, and summaries.

Step 22 Click on **entity** in the instructions pane.

- Rename the input parameter **entity** to **FieldsToBeExtracted**
- In the **Sample data** field, add the following:

```
symbol, longName, currency, regularMarketPrice
```

Name
FieldsToBeExtracted

Sample data
symbol, longName, currency,
regularMarketPrice

Step 23 Click on in the instructions pane.

Rename the Input parameter **text** to **Input**.

In the **Sample data** field, add the value of api response copied in earlier **Step 16.2**.

Step 24 Click on **Text** in Model Response pane.

Select **JSON** as Output.

Financial Details Extraction Prompt

Instructions | Model: GPT-4.1 mini | Test

Extract the specified **FieldsToBeExtracted**, provided as a comma-separated list, from the provided **Input** with precision, paying special attention to preserving currency values. Flatten the hierarchy of entities, listing them at the same level in the output. Normalize entities to their respective data types, such as strings for text, numbers for quantities, and ISO 8601 format for dates. For currency values, include the numerical amount along with the currency symbol or code to maintain the value's context. Adapt to multilingual content, accurately extract quantities with units, and ensure the integrity of cross-referenced data. For each entity, especially currency, ensure that the JSON output accurately reflects the value with its currency symbol or code, and represents other data types appropriately. Also include a summary of the overall financial health of the company in a new reader format which should also include how the company performed over 52 weeks.

+ Add content | 2 inputs

Model response | Output format

Customize JSON | Output: JSON

Your test results will appear here.

AI-generated content may be incorrect. [Read terms](#)

Save | Cancel

Step 25 Click on **Test** prompt. Check the model response.

Financial Details Extraction Prompt

Instructions | Model: GPT-4.1 mini | Test

Extract the specified **FieldsToBeExtracted**, provided as a comma-separated list, from the provided **Input** with precision, paying special attention to preserving currency values. Flatten the hierarchy of entities, listing them at the same level in the output. Normalize entities to their respective data types, such as strings for text, numbers for quantities, and ISO 8601 format for dates. For currency values, include the numerical amount along with the currency symbol or code to maintain the value's context. Adapt to multilingual content, accurately extract quantities with units, and ensure the integrity of cross-referenced data. For each entity, especially currency, ensure that the JSON output accurately reflects the value with its currency symbol or code, and represents other data types appropriately. Also include a summary of the overall financial health of the company in a new reader format which should also include how the company performed over 52 weeks.

For example:

```
{
  "[symbol]": [extracted value],
  "[longName]": [extracted value],
  "[currency]": [extracted value],
  "[regularMarketPrice]": [extracted value],
  "[summary]": [extracted value]
  // Continue listing additional entities with their values and data types
}
```

+ Add content | 2 inputs

Model response | Output format

Customize JSON | Output: JSON

```
{
  "symbol": "MSFT",
  "longName": "Microsoft Corporation",
  "currency": "USD",
  "regularMarketPrice": 404.37,
  "summary": "Microsoft Corporation is trading at USD 404.37. Over the past 52 weeks, the stock"
}
```

AI-generated content may be incorrect. [Read terms](#)

Save | Cancel

Step 26 Click **Save**. This will add the prompt to the topic pane.

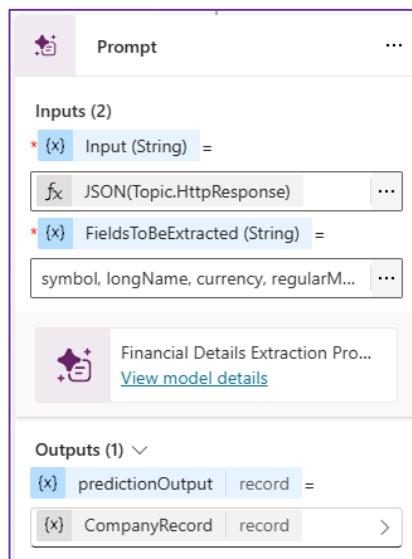
Step 27 Set the properties of the prompt.

1. **Input:** `JSON(Topic.HttpResponse)`

2. **FieldsToBeExtracted:**

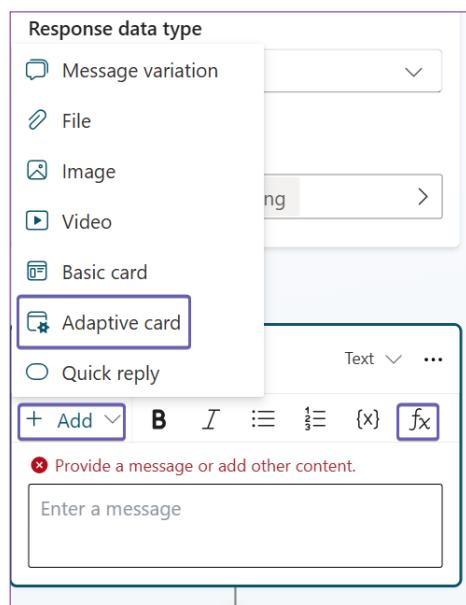
symbol, longName, currency, regularMarketPrice

3. Save **predictionOutput** as **CompanyRecord** (Click on Select a variable >Create a new variable>Name it as CompanyRecord)

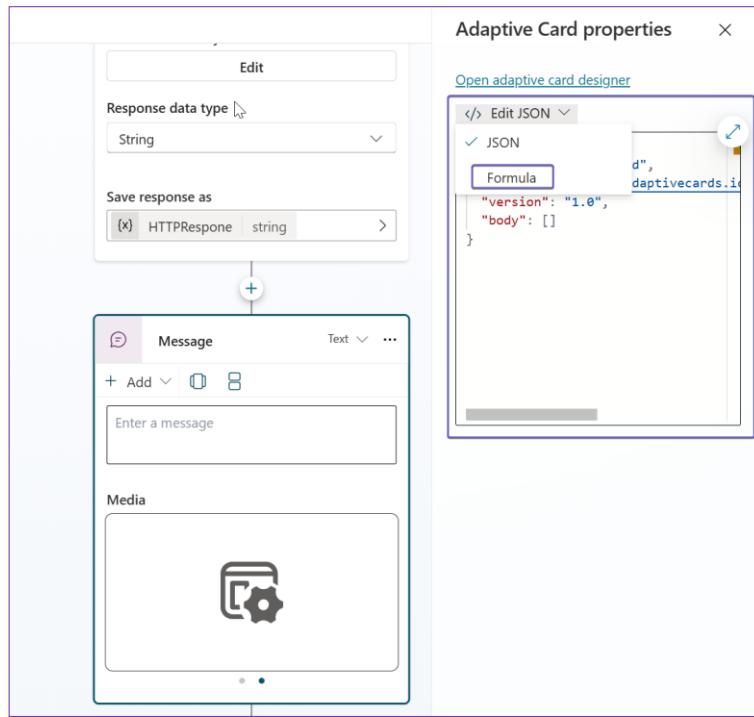


Step 28 Next node, click **+** and select **Send a message**.

1. Click **+Add**, select **Adaptive card** and click on **fx**.



2. In Adaptive Card properties, Click on Edit JSON and change it to Formula.



3. Replace the JSON in the property window with the following.

```
{
  type: "AdaptiveCard", '$schema': "http://adaptivecards.io/schemas/adaptive-card.json",
  version: "1.5",
  body: [
    {
      type: "TextBlock",
      text: "***Company Code:**" & " " & Topic.CompanyRecord.structuredOutput.symbol,
      wrap: true
    },
    {
      type: "TextBlock",
      text: "***Company Name:**" & " " & Topic.CompanyRecord.structuredOutput.longName,
      wrap: true
    },
    {
      type: "TextBlock",
      text: "***Currency:**" & " " & Topic.CompanyRecord.structuredOutput.currency,
      wrap: true
    },
    {
      type: "TextBlock",
      text: "***Stock Price:**" & " " & Topic.CompanyRecord.structuredOutput.regularMarketPrice,
      wrap: true
    },
    {
      type: "TextBlock",
      text: "***Summary:**" & " " & Topic.CompanyRecord.structuredOutput.summary,
      wrap: true
    }
  ]
}
```

```
}
```

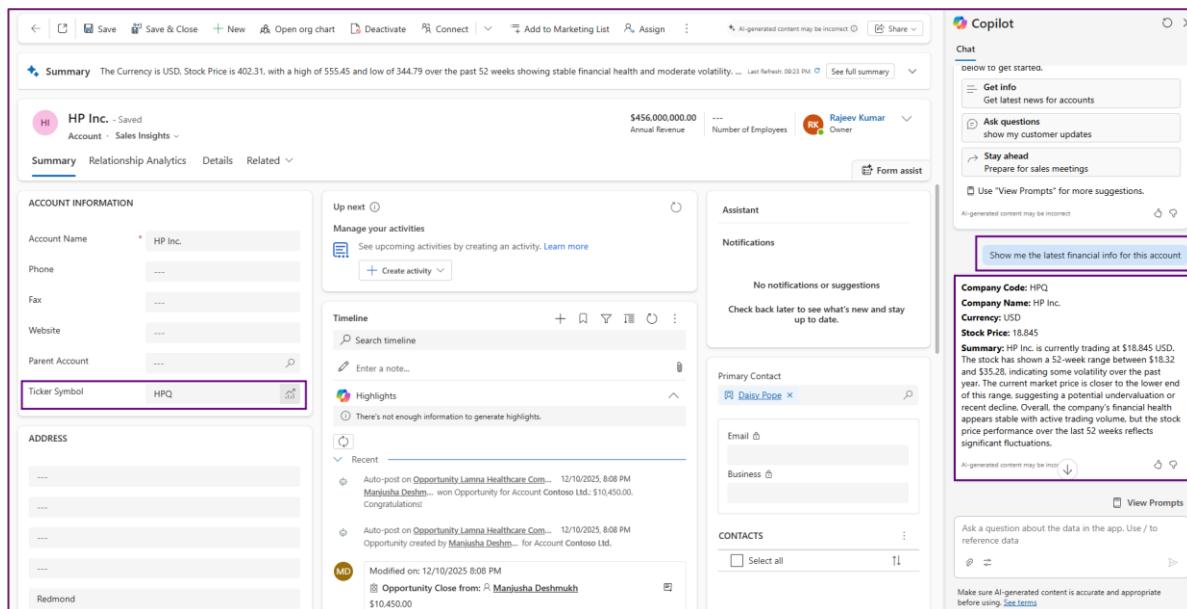
```
}]
```

Step 29 Publish the Copilot and test it in Sales Hub.

Step 30 Save the topic and publish the agent.

Step 31 Go to **Sales Hub app** and open an account. Make sure the ‘Ticker Symbol’ of the account is set to **HPQ**. (You can set symbol on test records e.g., MSFT, HAS, HPQ)

Step 32 Type **Show me the latest financial info for this account** in Copilot chat window and press **enter**. The copilot will display the ABN information.

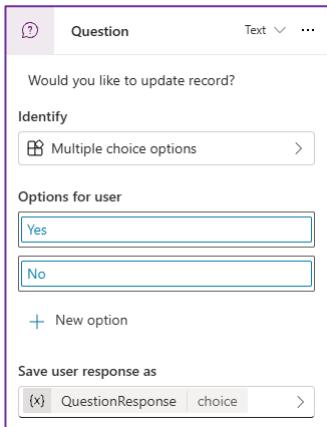


Task 4: Update the account record in CE.

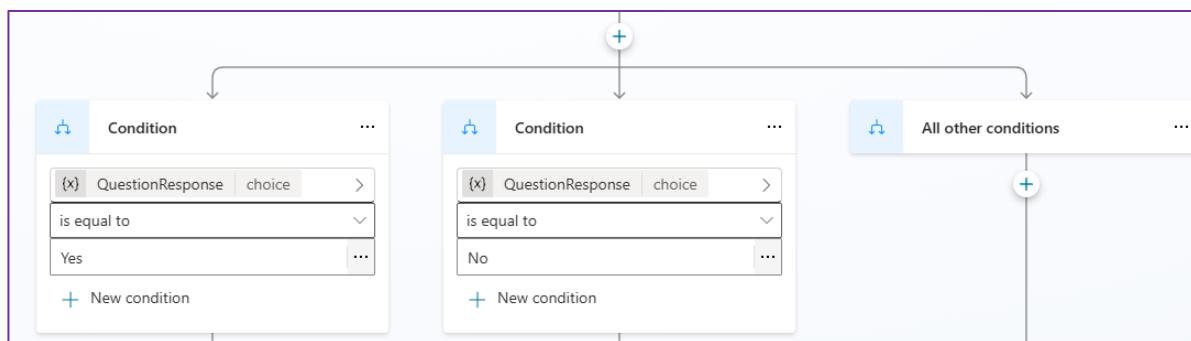
This step updates the account record by populating it with the extracted information.

Step 1 Go back to the Topic **SearchFinancialDetails**. After the Adaptive card message, click **+** and select **Ask a question**.

Step 2 Set the following values as specified, and save the user’s response in a named **QuestionResponse** for use in the later steps.



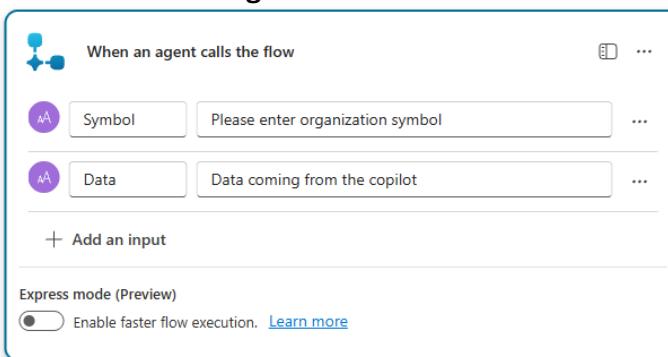
Step 3 Click **+** and select Add a condition. Set Condition **QuestionResponse** is equal to **Yes**.



Step 4 Click **Save**

Step 5 Click **+** in the condition (Yes node) and select **Add a tool >> New Agent Flow**. It will open the Power Automate flow editor.

Step 6 Click on **When an agent calls the flow** and add two text parameters **symbol** and **Data**.



Step 7 Click **+** and add **Parse JSON** action. Set the following properties

Content: **Data** (Input)

Schema: select **Use sample payload to generate schema** and paste response of the AI prompt or you can use the following sample. Click **Done**

```
{
  "symbol": "MSFT",
  "longName": "Microsoft Corporation",
  "currency": "USD",
  "regularMarketPrice": 404.37,
  "summary": "Microsoft Corporation is trading at USD 404.37. Over the past 52 weeks, the stock has ranged between USD 344.79 and USD 555.45, indicating significant volatility. The current price is closer to the lower end of this range, suggesting a potential undervaluation or market correction. Overall, the company's financial health appears stable with active trading volume, but investors should consider the 52-week performance for a comprehensive assessment."
}
```



The screenshot shows the configuration screen for the "Parse JSON" action in Power Automate. It includes fields for "Content" (containing "Data X") and "Schema" (containing the previously generated schema JSON). A button at the bottom says "Use sample payload to generate schema".

Step 8 Click **+** and add Dataverse **Update a row** action. Set the following properties:

Table name: Accounts

Row ID : accountId (input)

Description: Dynamics Contents from the Parse JSON action as shown below.

The screenshot shows the 'Add an action' dialog for Microsoft Dataverse. The search bar at the top contains 'update a row'. Below it, the 'Microsoft Dataverse' section is expanded, showing several actions:

- Update a row** (highlighted with a purple border)
- Update a row in selected envir...
- Unrelate rows
- List rows
- Upsert a row in selected envir...
- Relate rows
- Unrelate rows in selected envir...
- List rows from selected envir...

Below this, the 'Update a row' configuration screen is displayed:

- Row ID ***: A dropdown menu is open, showing 'AccountId' as the selected option.
- Account Name**: A text input field with placeholder 'Type the company or business name.'
- Address 1: City**: A text input field with placeholder 'Type the city for the primary address.'
- Address 1: Street 1**: A text input field with placeholder 'Type the first line of the primary address.'
- Address 1: Street 2**: A text input field with placeholder 'Type the second line of the primary address.'
- Address 1: ZIP/Postal Code**: A text input field with placeholder 'Type the ZIP Code or postal code for the primary address.'
- Annual Revenue**: A text input field with placeholder 'Type the annual revenue for the account, used as an indicator in financial performanc...'
- Description**: A text input field containing a note about financial information for the record.

Step 9 Click on **Respond to the agent** and add a text parameter to the trigger. Name it **output**. Set the output value to **The record is updated successfully**.

The screenshot shows the configuration for the 'Respond to the agent' action. It has a single parameter named 'output' with the value 'The record is updated successfully.' A note below states: 'Enter a description of the output'.

Step 10 Save the Draft flow.

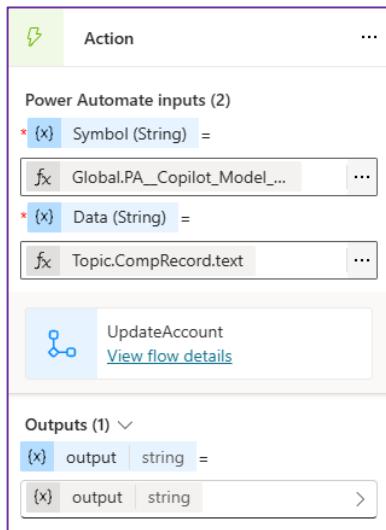
Step 11 Rename the flow from Untitled to **UpdateAccount**.

Step 12 Publish the flow.

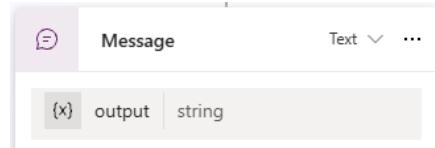
Step 13 Go back to the Copilot Studio to the Topic we working on.

Step 14 Add Tool> Select **UpdateAccount** and set the properties of the action:

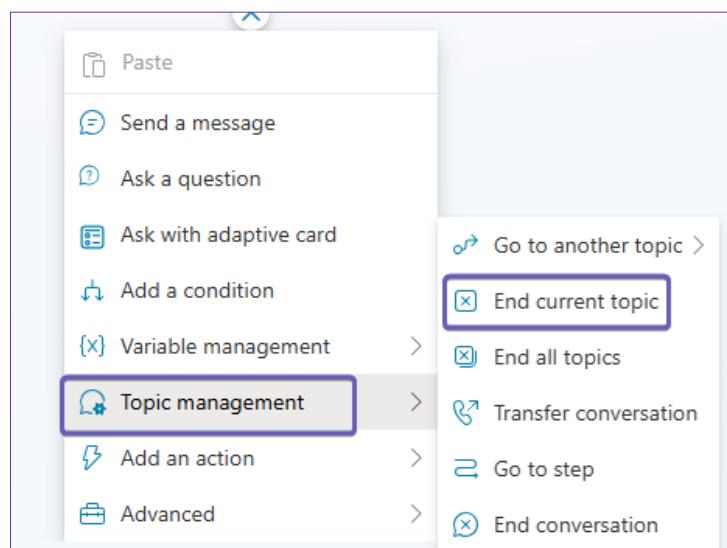
AccountId: Global.PA__Copilot_Model_PageContext.pageContext.id.guid
Data: Topic.CompRecord.text
output: output (variable)

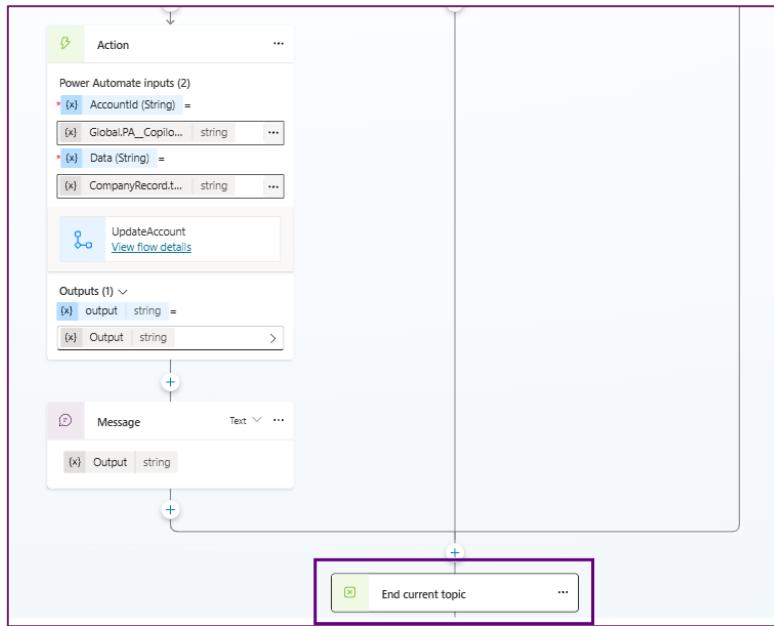


Step 15 Click **+** and select **Send a message**. Choose Variable **Topic.output**.



Step 16 Outside of the **Condition** loop, click **+** and select **Topic Management >>End current Topic.**





Step 17 Save the Topic and Publish the copilot.

Step 18 Test the scenario in SalesHub.

The screenshot shows the Microsoft Dynamics 365 Sales Hub interface. On the left, a company record for "Microsoft" is displayed with fields like Account Name, Phone, Fax, Website, Parent Account, and Ticker Symbol (MSFT). The Ticker Symbol field is highlighted with a purple box. On the right, the Copilot window is open, displaying financial details for Microsoft, including Company Code: MSFT, Company Name: Microsoft Corporation, Currency: USD, and Stock Price: 402.31. The Copilot also provides a summary of Microsoft's stock performance over the past 52 weeks and suggests updates to the record.

The screenshot shows the Microsoft Dynamics 365 Customer Engagement (Dynamics CE) interface. On the left, there's a detailed account record for 'Microsoft' (Account - Sales Insights). The record includes sections for Company Profile, Marketing, Billing, Contact Preferences, Shipping, and Child Accounts. A large callout box highlights the 'Description' section, which contains an AI-generated summary of Microsoft's financial performance. On the right, the Copilot AI sidebar is open, displaying financial details like Company Code (MSFT), Company Name (Microsoft Corporation), and Stock Price (402.31). It also shows a summary statement about Microsoft's current trading status and a prompt asking if the user wants to update the record.

Summary: Microsoft Corporation's Currency is USD with Stock Price at 402.31; the stock's high over the past 52 weeks was 555.45 and low was 344.79. We closed opportunity... Last Refresh: 09:07 PM. [See full summary](#)

Microsoft - Saved
Account · Sales Insights

COMPANY PROFILE

- Industry: ...
- SIC Code: ...
- Ownership: ...

MARKETING

- Originating Lead: ...
- Last Campaign Date: ...
- Marketing Materials: Send

BILLING

- Currency: US Dollar X
- Credit Limit: ...
- Credit Hold: No
- Payment Terms: ...

CONTACT PREFERENCES

- Contact Method: Any
- Email: Allow
- Follow Email: Allow
- Bulk Email: Allow
- Phone: Allow
- Fax: Allow
- Mail: Allow

SHIPPING

- Shipping Method: ...
- Freight Terms: ...

CHILD ACCOUNTS

Select all

Chat

Company Code: MSFT
Company Name: Microsoft Corporation
Currency: USD
Stock Price: 402.31
Summary: Microsoft Corporation is currently trading at 402.31 USD. Over the past 52 weeks, the stock has experienced a high of 555.45 USD and a low of 344.79 USD, indicating a significant range in performance. The company's financial health appears stable with a regular market price near the mid-range of its 52-week performance, reflecting moderate volatility and potential for growth.

Would you like to update record?

The record is updated successfully.

Ask a question about the data in the app. Use / to reference data

Make sure AI-generated content is accurate and appropriate before using. [See terms](#)

Glossary

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

Adaptive Cards:

Adaptive Cards are lightweight, flexible UI components that display rich content in a visually appealing way across different platforms. They allow you to present structured information, images, buttons, and interactive elements in a clean, responsive format. In Copilot Studio, Adaptive Cards enhance user interactions by making responses more engaging and intuitive, guiding users with quick replies, and ensuring a seamless conversational flow.

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.

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