

2025

Copilot Assistant Management Tool

JUAN SALVADOR HUERTAS ROMERO

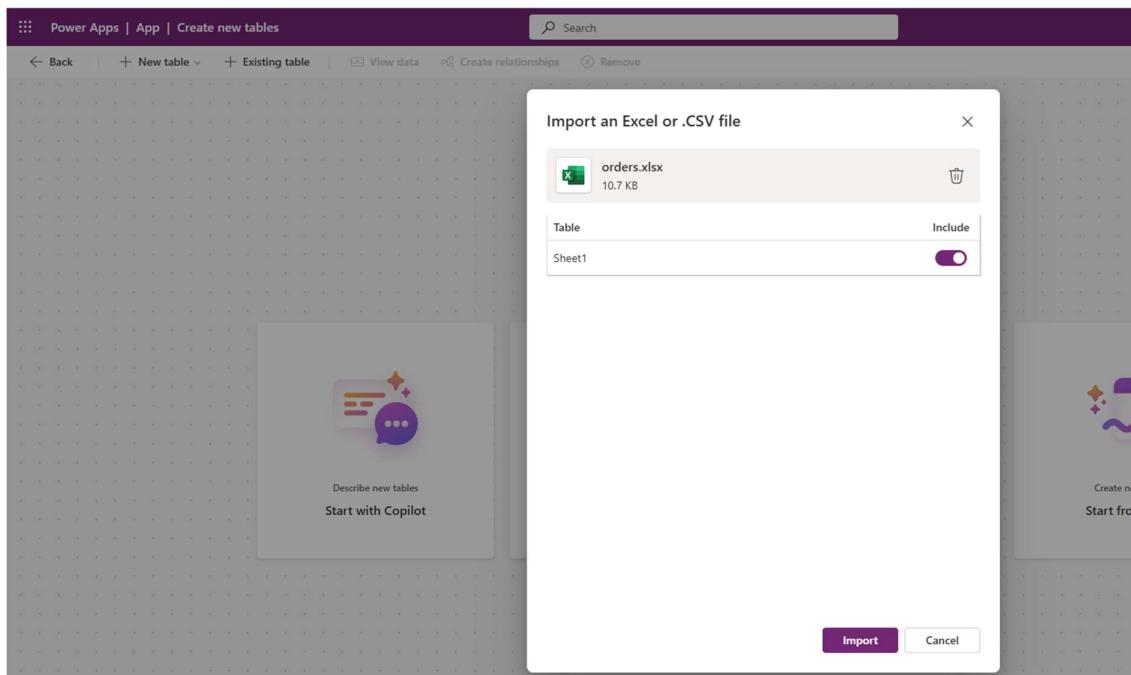
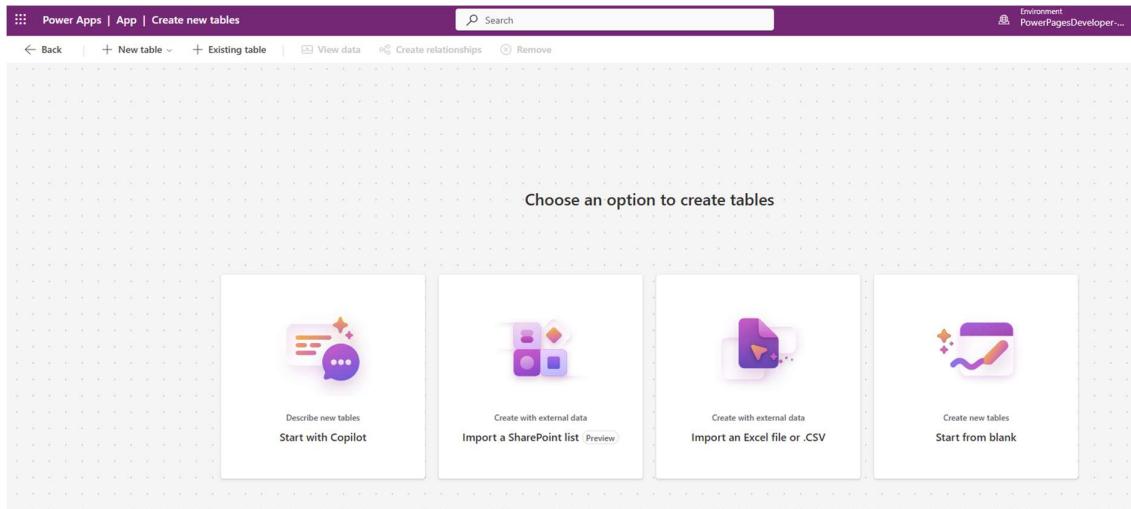
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Power APP Interface

Create order Table



Power Apps | App | Create new tables

orders.xlsx

Order

Order Number	Product Name	Quantity	Order Date	Expected Delivery Date	Delivery Status
ORD-1001	Wireless Keyboard	25	1/5/2024	5/5/2024	Pending
ORD-1002	Bluetooth Mouse	40	2/5/2024	6/5/2024	Pending
ORD-1003	Laptop Stand	15	3/5/2024	7/5/2024	Pending
ORD-1004	USB-C Docking Station	30	4/5/2024	8/5/2024	Pending
ORD-1005	Noise Cancelling Headset	10	5/5/2024	9/5/2024	Pending
ORD-1006	External Hard Drive	20	6/5/2024	10/5/2024	Pending

make.powerapps.com/e/d22e7403-8095-ec79-b693-f46a203e5747/s/00000001-0000-0000-0001-00000000000b/data-workspace?referrer=CreatePage&launchAppDesigner=true

Power Apps | App | Create new tables

orders.xlsx

Order

Order Number	Product Name	Quantity	Order Date	Expected Delivery Date	Delivery Status
ORD-1001	Wireless Keyboard	25	1/5/2024	5/5/2024	Pending
ORD-1002	Bluetooth Mouse	40	2/5/2024	6/5/2024	Pending
ORD-1003	Laptop Stand	15	3/5/2024	7/5/2024	Pending
ORD-1004	USB-C Docking Station	30	4/5/2024	8/5/2024	Pending
ORD-1005	Noise Cancelling Headset	10	5/5/2024	9/5/2024	Pending
ORD-1006	External Hard Drive	20	6/5/2024	10/5/2024	Pending

Save and open app

Canvas app

Model-driven app

Done working?

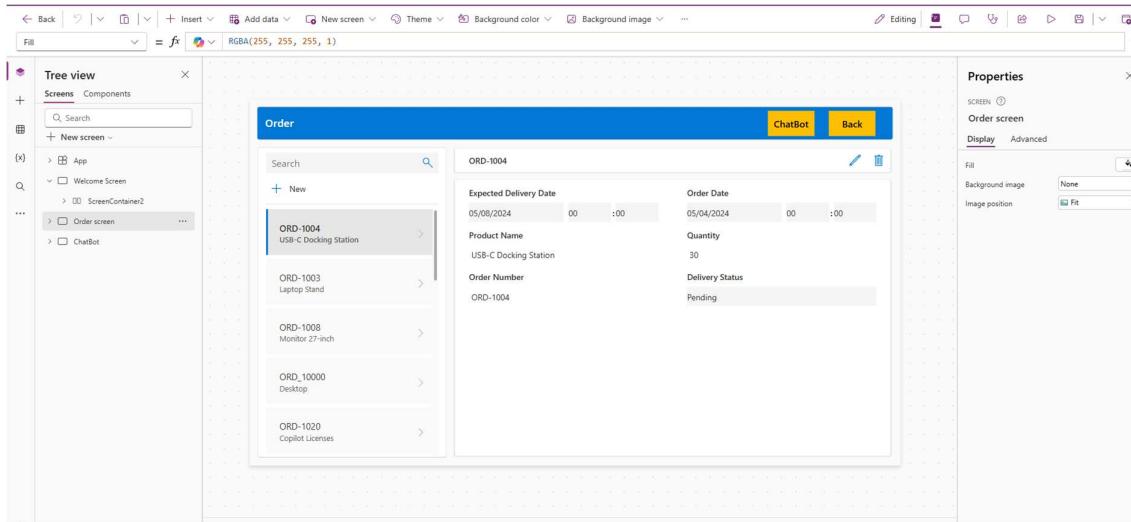
When you're done working, select Save and open app. This action will save the tables and relationships you've created and open your app in Power Apps Studio.

Don't ask me again

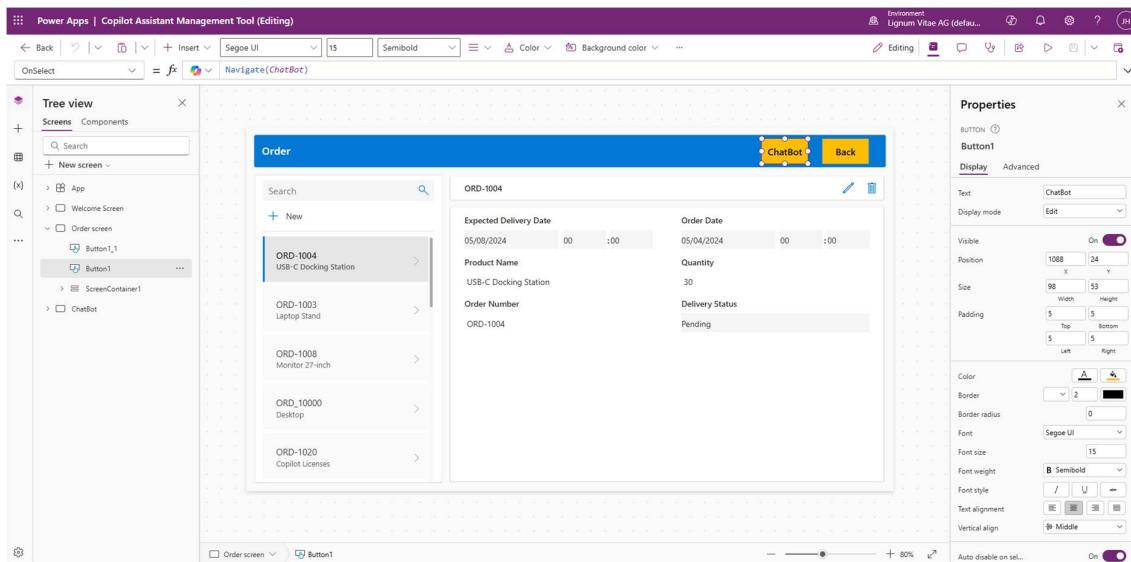
Save and open app Cancel

Product Name	Quantity	Order Date	Expected Delivery Date	Delivery Status
Wireless Keyboard	25	1/5/2024	5/5/2024	Pending
Bluetooth Mouse	40	2/5/2024	6/5/2024	Pending
Laptop Stand	15	3/5/2024	7/5/2024	Pending
USB-C Docking Station	30	4/5/2024	8/5/2024	Pending
Noise Cancelling Headset	10	5/5/2024	9/5/2024	Pending
External Hard Drive	20	6/5/2024	10/5/2024	Pending
Office Chair	5	7/5/2024	11/5/2024	Pending

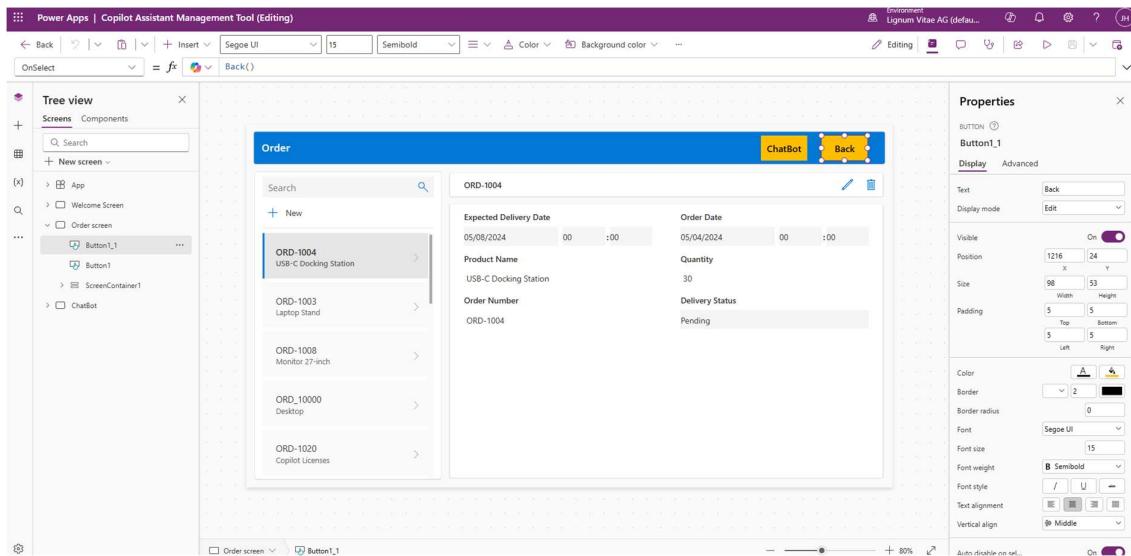
Enable record creation through a form interface



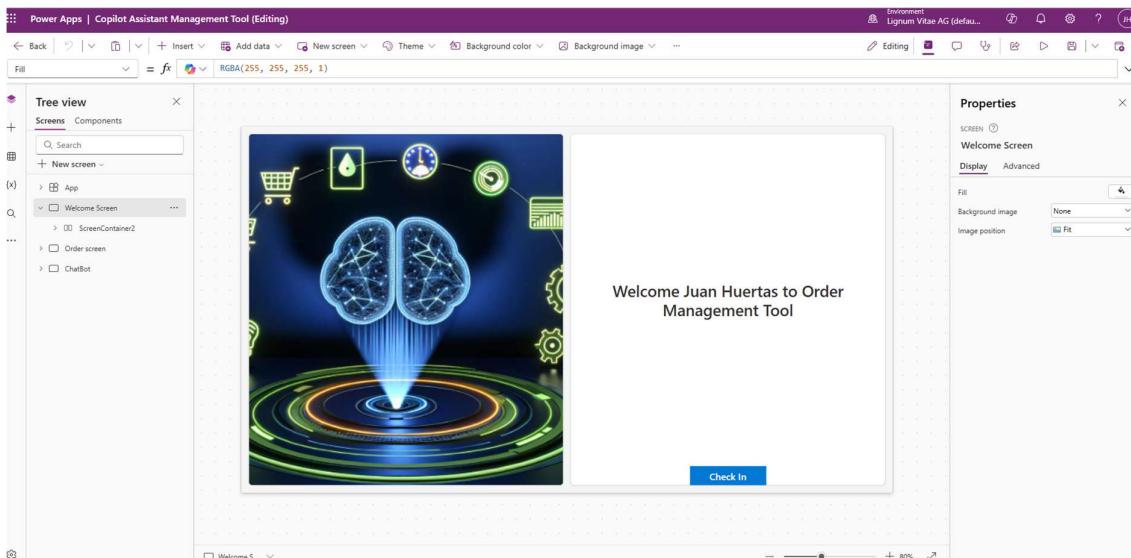
Implement navigation within the app



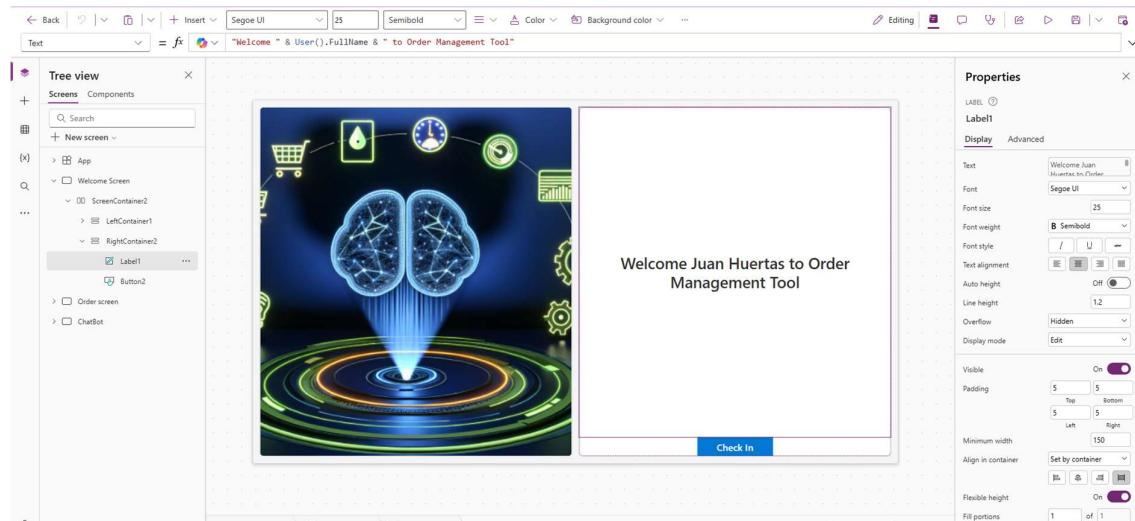
Implement navigation within the app 2



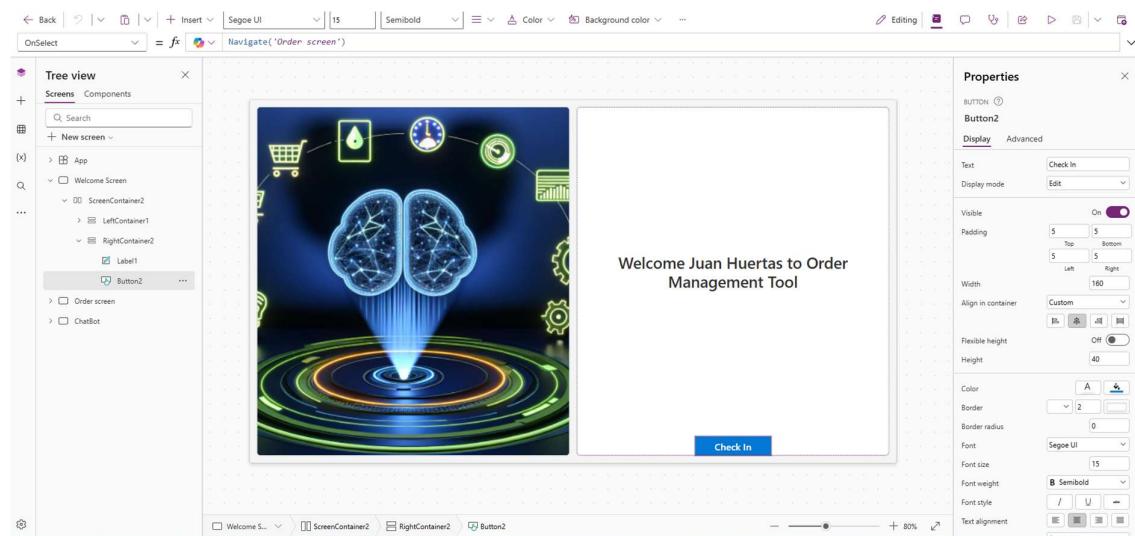
Demonstrate the ability to create a personalized app interface



User Name

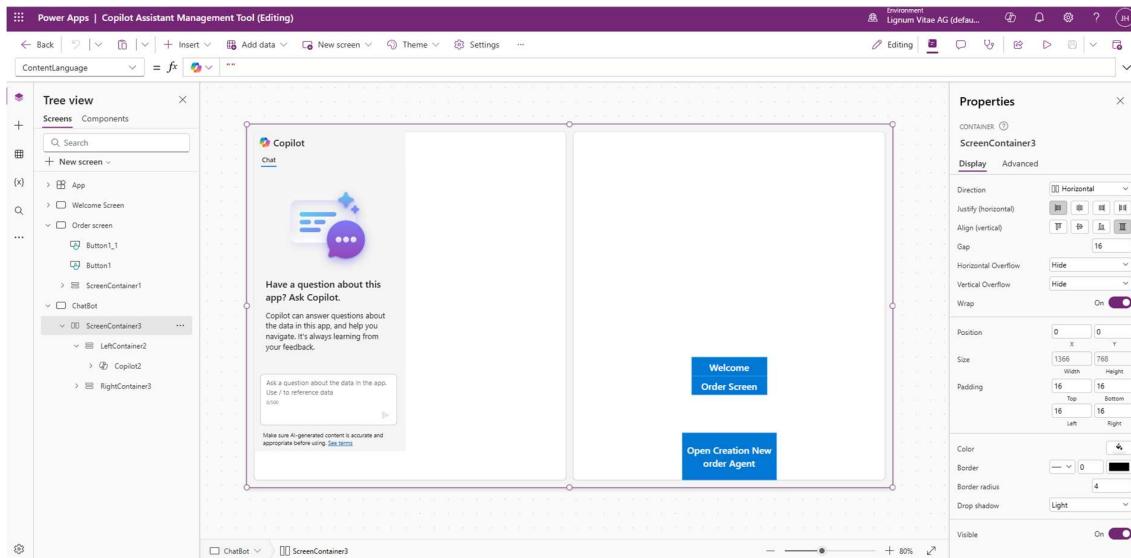


Navigate



ChatBot Screen

This contains a Copilot Component , Navigation to the different Screens.



Copilot Agent

Overview

The screenshot displays the Copilot Studio interface for managing AI agents. On the left, a sidebar provides navigation links for Home, Create, Agents, Posts, and Tools. The main area is titled "Order Record Assistant" and includes tabs for Overview, Knowledge, Tools, Agents, Topics, Activity, Analytics, and Channels.

Details:

- Name: Order Record Assistant
- Description: Agent which creates automatically orders based in a chat with the user
- Orchestration: Use generative AI to determine how best to respond to users and events. [Learn more](#). Enabled.
- Response model: GPT-4o (default)

Instruction:

- Monitor the chat interface for new user messages containing order requests.
- Analyze the user's chat input to extract relevant order details such as product name, quantity, order date, expected delivery date, and any other required fields.
- Validate the extracted information to ensure all necessary order data is present and correctly formatted.
- Automatically create a new order record in the 'c039_orders' table using the "Create new order record in organization orders table" action. For the "item" parameter, use the extracted details from the chat, including product name, quantity, order date, expected delivery date and any other required details.
- If the chat context or predefined business rules require updates to the order status or additional fields, use the "Update existing order details in organization orders table" action. For the "recordid" parameter, use the GUID of the created order, and for the "item" parameter, specify the fields to update such as delivery status, expected delivery date, product name, or quantity as needed.
- Send a confirmation message to the user in the chat summarizing the created order and providing any relevant follow-up information.

Knowledge:

- Add data, files, and other resources to inform and improve AI-generated responses.
- <https://copilotstudio.microsoft.com>

Test your agent:

A minute ago: I want to create a new order.

A minute ago: Please provide the Delivery_Status for the new order.

A minute ago: Please enter the quantity for the order.

A minute ago: Please provide the Order Number.

What is the product name for the new order?

Ask a question or describe what you need

Knowledge

The screenshot shows the Copilot Studio interface with the 'Knowledge' tab selected. On the left, a sidebar lists various tools and agents, including 'Order Record Assistant', 'Agent create new orders', 'Order Record Assistant', 'Agent', 'Weather', 'Forensic Legal Agent', 'Copilot for Microsoft 365', and 'Copilot in Power Apps'. The main area displays a table of agents:

Type	Available to	Last modified	Status
Public website	Order Record Assistant	Juan Huertas...	Ready
Dataverse	Order Record Assistant	Juan Huertas...	Ready

To the right, a 'Test your agent' window is open, showing a conversation with an AI agent:

- I want to create a new order.
- Please provide the Delivery_Status for the new order.
- Please enter the quantity for the order.
- Please provide the Order Number.

Tools

The screenshot shows the Copilot Studio interface with the 'Tools' tab selected. On the left, a sidebar lists various tools, including 'Order Record Assistant' (selected), 'Agents', 'Flows', 'Connectors', and 'Actions'. The main area displays a table of tools:

Name	Type	Available to	Trigger	Last modified	Errors	Enabled
Add new order	Flow	Order Recd	By agent	Juan Huertas 12 minutes...	0	On
Create new order record in organization ord...	Connector	Order Recd	By agent	Juan Huertas 27 second...	0	Off
Delete specific order from organization ord...	Connector	Order Recd	By agent	Juan Huertas 22 second...	0	Off
List order records with OData filtering options	Connector	Order Recd	By agent	Juan Huertas 15 second...	0	Off
Retrieve specific order from organization ord...	Connector	Order Recd	By agent	Juan Huertas 10 second...	0	Off
Update existing order details in organization...	Connector	Order Recd	By agent	Juan Huertas 5 seconds...	0	Off

To the right, a 'Test your agent' window is open, showing a conversation with an AI agent:

- I want to create a new order.
- Please provide the Delivery_Status for the new order.
- Please enter the quantity for the order.
- Please provide the Order Number.

Input fields show 'ORD-4444' and '0/2000'.

Topics

The screenshot shows the 'Topics' section of the Copilot Studio interface for the 'Order Record Assistant'. The top navigation bar includes 'Copilot Studio', 'Order Record Assistant', 'Overview', 'Knowledge', 'Tools', 'Agents', 'Topics' (which is underlined), 'Activity', 'Analytics', and 'Channels'. On the left, a sidebar has icons for 'Home', 'Create', 'Agents', 'Flows', 'Tools', and three dots. Below the sidebar, there's a button '+ Add a topic' and a search bar 'Search custom topics'. A filter bar shows 'All', 'Custom (5)', and 'System (9)'. A timestamp 'Last refreshed now' is also present. The main table lists five topics:

Name	Type	Trigger	Last modified	Editing	Errors	Enabled
Create new Order	Topic	By agent	Juan Huertas 5 minutes...	JH		On
Goodbye	Topic	By agent	Juan Huertas 15 minute...			On
Greeting	Topic	By agent	Juan Huertas 15 minute...			On
Start Over	Topic	By agent	Juan Huertas 15 minute...			On
Thank you	Topic	By agent	Juan Huertas 15 minute...			On

Detail

The screenshot shows the 'Details' page for the 'Add new order' topic. The top navigation bar includes 'Order Record Assistant' (with a green checkmark), 'Overview', 'Knowledge', 'Tools' (underlined), 'Agents', 'Topics', 'Activity', 'Analytics', and 'Channels'. On the left, a sidebar has 'Details', 'Inputs', and 'Completion'. The main area shows the 'Details' section with a description: 'What it is, how it operates, and how the orchestrator identifies it.' with a 'Learn more' link. The 'Name' field is set to 'Add new order' (13/64 characters). The 'Description' field is also set to 'Add new order' (13/1024 characters). Under 'Agent flow', there's a link to 'Add new order'. Under 'Available to', there's a box containing 'Order Record Assistant'. A 'Save' button is at the top right, and a '... More' button is below it. At the bottom, there's a 'Inputs' section.

Inputs (Pass parameters to an automation in Power Automate)

 Inputs

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

Input name	Fill using ⓘ	Value	⋮
Product_Name *	Dynamically fill with AI	∅ Customize	⋮
Delivery_Status *	Dynamically fill with AI	∅ Customize	⋮
Order_Number *	Dynamically fill with AI	∅ Customize	⋮
quantity *	Dynamically fill with AI	∅ Customize	⋮

Output

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

After running:
Don't respond (default)

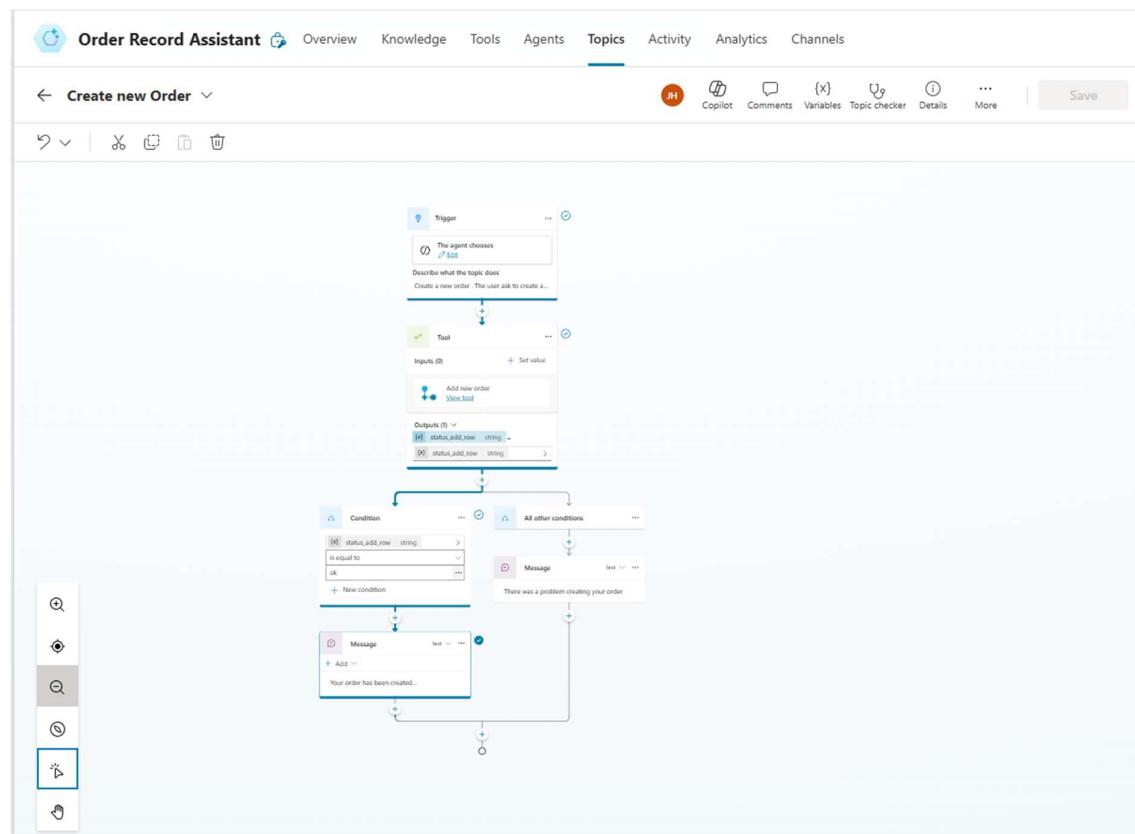
Advanced

Outputs available to the agent and other tools
Defines which outputs are available to the agent and other tools
All

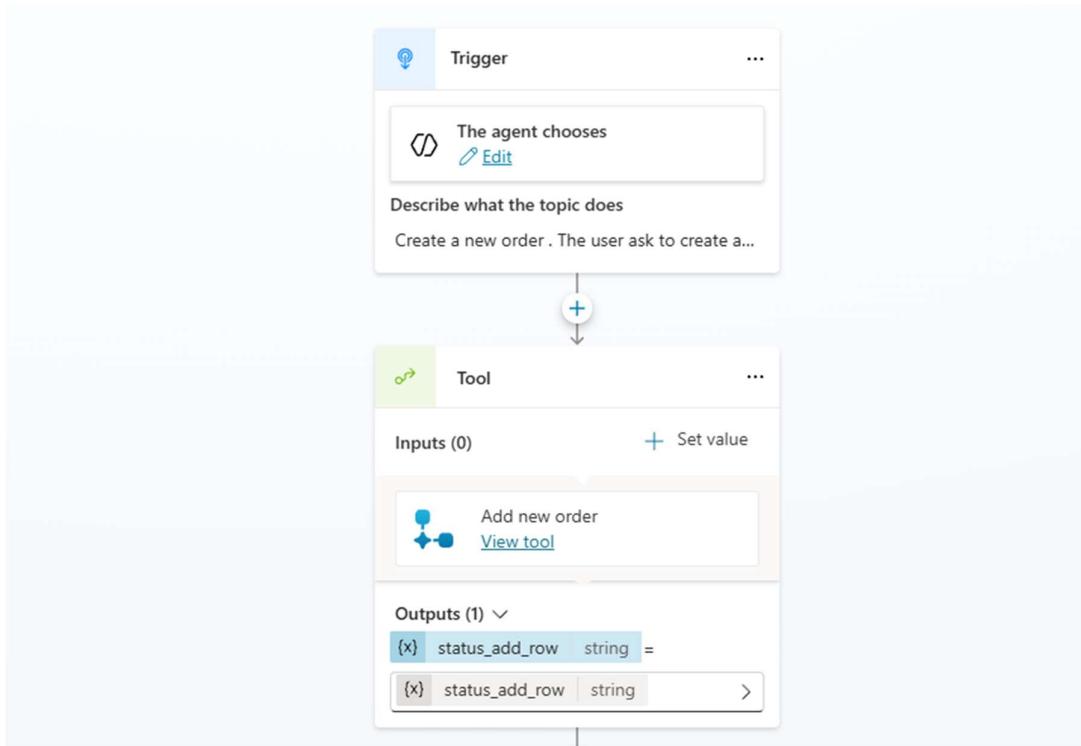
Outputs

Status_add_row
status_add_row

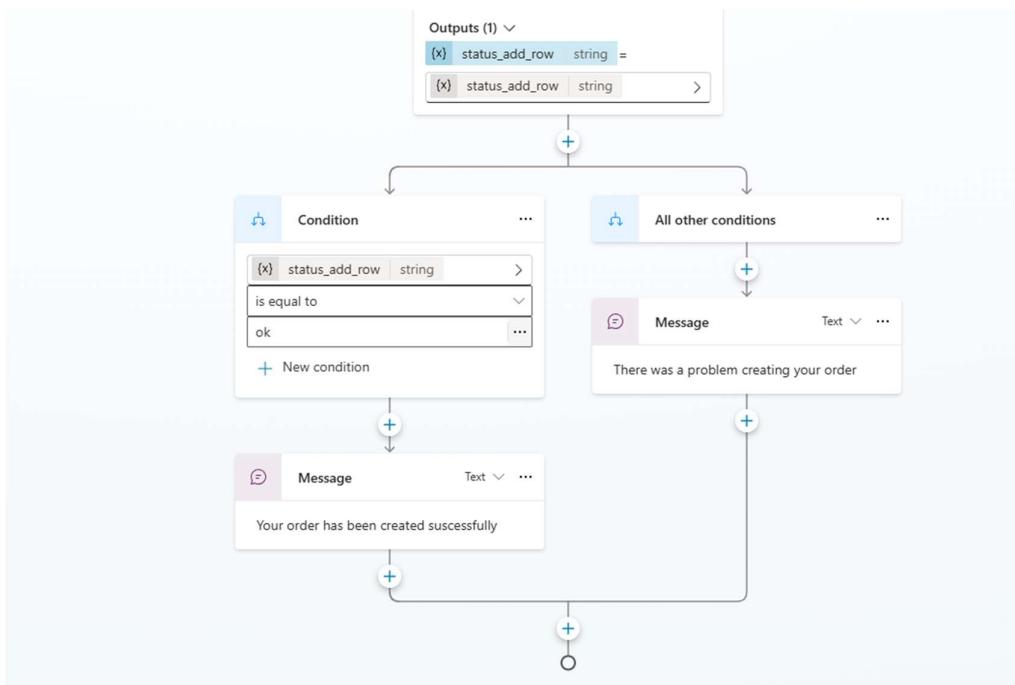
Create New Topic



Configure topic triggers for the Copilot Agent



Design message responses for Copilot Agents



Testing agent Topic

Demonstrate user interaction with the Copilot Agent

The screenshot displays two separate sessions of user interaction with the "Order Record Assistant" agent in the Copilot Studio interface.

Session 1 (Top):

- Activity map:** Shows a single step titled "Create new Order Topic" with a status of "In progress".
- Create new Order Topic (Modal):**
 - Description:** "Create a new order - The user ask to create a new order and the agent ask for the Product Name, Quantity Delivery Status and Order Number"
 - Message:** "Hello, I'm Order Record Assistant, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI."
 - User Input:** "Just now" - "I want to create a new order"
 - Agent Response:** "Please provide the order number."
 - User Input:** "Just now" - "ORD-5555"
 - Agent Response:** "Please enter the quantity for the order."
 - User Input:** "Just now" - "6"
 - Agent Response:** "Please provide the Delivery_Status for the new order."
 - User Input:** "Just now" - "Pending"
 - Agent Response:** "What is the product name for the new order?"
 - User Input:** "Just now" - "Keyboards Siemens"
 - Agent Response:** "Your order has been created successfully"

Session 2 (Bottom):

- Activity map:** Shows the same "Create new Order Topic" step, but with a completion percentage of "64.39%" and a status of "Complete".
- Create new Order Topic (Modal):** The same interaction details as Session 1 are shown, including the user's intent to create a new order, the agent's request for product information, and the subsequent exchange of order details like quantity, delivery status, and product name.

Another Test

The screenshot displays a conversational AI interface with two main sections: an "Activity map" on the left and a "Test your agent" session on the right.

Activity map: This section shows a "Create new Order" topic card with a "Topic" icon, 64.39s duration, and a "List all orders in the cr039_orders table" knowledge card with a "Knowledge" icon, 14.02s duration. A "Complete" button is visible at the bottom of the topic card.

Test your agent: This section shows a "Create new Order" dialog box with a "Topic" icon. The "Description" field contains the instruction: "Create a new order .. The user ask to create a new order and the agent ask for the Product Name, Quantity Delivery Status and Order Number". Below the dialog is a message from the AI: "Your order has been created successfully" with a timestamp "A minute ago".

Test Session: The AI asks, "Can you list the orders we have in the table?" Below this is a list of orders from the cr039_orders table:

- Order ORD-4444
 - Product: Desktop Computer HP
 - Quantity: 5
 - Order Date: 8/27/2025 6:39:29 AM
- Order ORD-5555
 - Product: Keyboards Siemens
 - Quantity: 6
 - Order Date: 8/27/2025 6:48:41 AM
- Order ORD-1004
 - Product: USB-C Docking Station
 - Quantity: 30
 - Order Date: 4/4/2024 11:00:00 PM
- Order ORD-1003
 - Product: Laptop Stand
 - Quantity: 15
 - Order Date: 03/05/2024
- Order ORD-1008
 - Product: Monitor 27-inch
 - Quantity: 12

At the bottom of the test session, there is a note: "Ask a question or describe what you need" and a timestamp "0.0000".

Copilot / Power Flows

The screenshot shows the 'Agent flows' section of the Copilot Studio interface. At the top, there's a search bar with the placeholder 'What would you like your flow to do?' and a button with three dots. Below the search bar is a table with columns: Name, Last modified, Owner, and Status. Two flows are listed:

Name	Last modified	Owner	Status
Add new order	15 hours ago	Juan Huertas	Published
Get forecast for today	2 days ago	Juan Huertas	Published

Overview

The screenshot shows the 'Add new order' flow details page. On the left, there's a sidebar with options like Home, Create, Agents, Flows, Tools, and The main area has tabs: Overview (selected), Designer, Activity, and Analytics. Under Overview, there are buttons for Run, Delete, Turn off, and Repair tips off. The 'Details' section shows the flow name 'Add new order', status 'On', and creation date 'Aug 26, 04:17 PM'. It also shows the flow access 'Juan Huertas' (Primary owner). Below this is a '28-day run history' table:

Start	Duration	Status
Aug 27, 07:48 AM (6 min ago)	432 ms	Succeeded
Aug 27, 07:39 AM (15 min ago)	970 ms	Succeeded
Aug 26, 07:09 PM (12 h ago)	556 ms	Succeeded
Aug 26, 05:16 PM (14 h ago)	544 ms	Succeeded
Aug 26, 04:59 PM (14 h ago)	251 ms	Succeeded

Design

The screenshot shows the 'Designer' tab of the 'Add new order' flow. The designer canvas displays the flow logic:

```
graph TD; Start((When an agent calls the flow)) --> AddRow((Add a new row)); AddRow --> Respond((Respond to the agent))
```

The sidebar on the left includes icons for Home, Create, Agents, Flows, Tools, and The top navigation bar has tabs: Overview, Designer (selected), Activity, and Analytics. There are also buttons for Version history, Flow checker, Test, Save draft, and Publish.

Inputs

When an agent calls the flow

Product_Nan Please enter your input

Delivery_Stat Please enter your input

Order_Numb Please enter your input

quantity Please enter a number

+ Add an input

Add New Row to Dataverse Table

Add a new row

Table name * Order

Advanced parameters Showing 6 of 14 ▾ Show all Clear all

Delivery Status Pending

Expected Delivery Date `f: addDays(...)` X

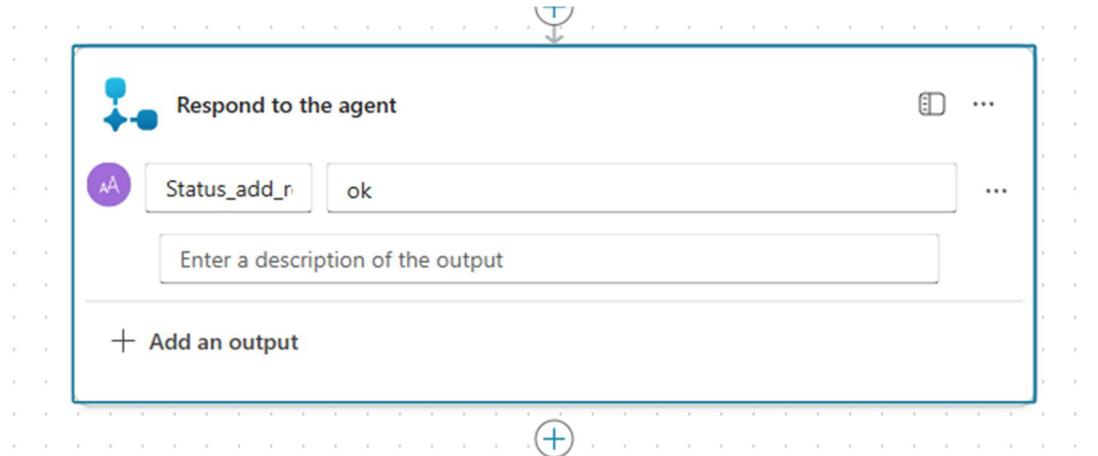
Order Date `f: utcNow()` X

Order Number `t: Order_Number` X

Product Name `t: Product_Name` X

Quantity `t: quantity` X

Outputs



PowerApps

The screenshot shows the Microsoft Power Apps Flows list page. It displays a list of flows, each with a name, modified date, and type. The flows listed are:

Name	Modified	Type
Add new order	15 h ago	Instant
Get forecast for today	2 d ago	Instant
Create a manually triggered flow that adds a new...	1 wk ago	Instant
Add Data to Dataverse	1 wk ago	Instant
Add new record	2 wk ago	Instant
Extract details for Real Estate Showing	5 mo ago	Automated

Same but view Details from Power App Flows

The screenshot shows the Microsoft Power Apps Flow details page for the 'Add new order' flow. The page includes sections for 'Details', 'Savings', 'Connection references', 'Co-owner', and 'Flow runs error trends (last 7 days)'. The 'Details' section shows the flow's name, description, primary owner (Juan Huertas), and status (On). The 'Savings' section has a 'Start tracking savings' button. The 'Connection references' section lists 'Microsoft Dataverse Cr0cb3e-c0 JuanHuertas@LignumVitaeAG'. The 'Co-owner' section shows three user icons. The 'Flow runs error trends (last 7 days)' section shows two entries with start times, durations, and statuses.

Start	Duration	Status
Aug 27, 07:48 AM (8 min ago)	432 ms	Succeeded
Aug 27, 07:39 AM (17 min ago)	970 ms	Succeeded

Create a record in Dataverse using Power Automate

Power Apps

Flows > Add new order

Details

Flow	Add new order	Status	On
Description	When an agent calls the flow and send back a response.	Created	Aug 26, 04:17 PM
Primary owner	Juan Huertas	Modified	Aug 26, 04:21 PM
Increase flow capacity	Disabled	Type	Instant
		Plan	Copilot Studio

28-day run history

Start	Duration	Status
Aug 27, 10:27 AM (37 min ago)	373 ms	Succeeded
Aug 27, 10:16 AM (47 min ago)	652 ms	Succeeded
Aug 27, 08:22 AM (2 h ago)	549 ms	Succeeded
Aug 27, 07:48 AM (3 h ago)	432 ms	Succeeded
Aug 27, 07:39 AM (3 h ago)	970 ms	Succeeded
Aug 26, 07:09 PM (15 h ago)	556 ms	Succeeded
...		

Savings

Start tracking savings With savings rules, measure the time and money saved. Learn more

Connection references

Microsoft Dataverse Cr0db

Co-owner

JH F E

Flow runs error trends (last 7 days)

Delivery_Status *

Pending

Order_Number *

ORD-666666

quantity *

1001

This flow uses Microsoft Dataverse. Review connections and actions

Run flow

Run Now **Cancel**

Power Apps

Flows > Add new order

Details

Flow	Add new order	Status	On
Description	When an agent calls the flow and send back a response.	Created	Aug 26, 04:17 PM
Primary owner	Juan Huertas	Modified	Aug 26, 04:21 PM
Increase flow capacity	Disabled	Type	Instant
		Plan	Copilot Studio

28-day run history

Start	Duration	Status
Aug 27, 11:06 AM (1 sec ago)	300 ms	Succeeded
Aug 27, 10:27 AM (38 min ago)	373 ms	Succeeded
Aug 27, 10:16 AM (49 min ago)	652 ms	Succeeded
Aug 27, 08:22 AM (2 h ago)	549 ms	Succeeded
Aug 27, 07:48 AM (3 h ago)	432 ms	Succeeded
Aug 27, 07:39 AM (3 h ago)	970 ms	Succeeded
Aug 26, 07:09 PM (15 h ago)	556 ms	Succeeded
...		

Savings

Start tracking savings With savings rules, measure the time and money saved. Learn more

Connection references

Microsoft Dataverse Cr0db

Co-owner

JH F E

Flow runs error trends (last 7 days)

Run flow

Done

Add new order > Run history			
Start time	Duration	+ Add column	Status
Aug 27, 11:06 AM (35 sec ago)	330 ms		Succeeded
Aug 27, 10:27 AM (39 min ago)	373 ms		Succeeded
Aug 27, 10:16 AM (49 min ago)	652 ms		Succeeded
Aug 27, 08:22 AM (2 h ago)	549 ms		Succeeded
Aug 27, 07:48 AM (3 h ago)	432 ms		Succeeded
Aug 27, 07:39 AM (3 h ago)	970 ms		Succeeded
Aug 26, 07:09 PM (15 h ago)	556 ms		Succeeded
Aug 26, 05:16 PM (17 h ago)	544 ms		Succeeded
Aug 26, 04:59 PM (18 h ago)	251 ms		Succeeded
Aug 26, 04:53 PM (18 h ago)	481 ms		Succeeded
Aug 26, 04:26 PM (18 h ago)	248 ms		Succeeded
Aug 26, 04:21 PM (18 h ago)	891 ms		Test succeeded
Aug 26, 04:19 PM (18 h ago)	106 ms		Failed

Add new order • Ran at 27/08/2025 11:06:03

Your flow ran successfully.

Skills

INPUTS

```
{
  "type": "object",
  "properties": {
    "text": {
      "description": "Please enter your input",
      "title": "Product Name",
      "type": "string"
    }
  }
}
```

OUTPUTS

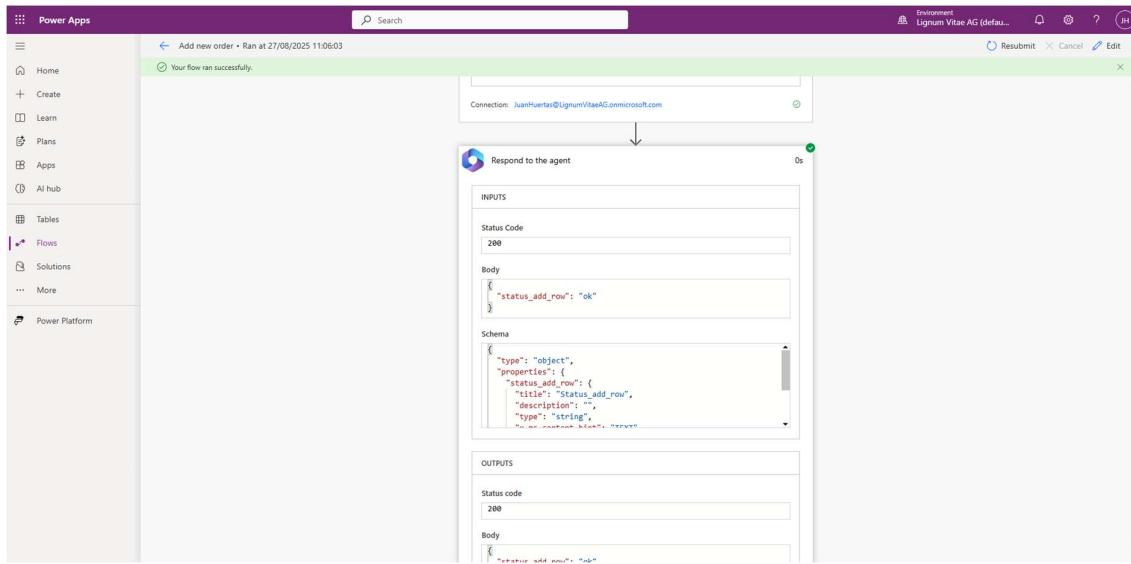
Product_Name	Product from Power FX manual
Delivery_Status	Pending
Order_Number	ORD-666666
quantity	1001

Show more ▾

Add new order • Ran at 27/08/2025 11:06:03

Your flow ran successfully.

Modified By (Type)	systemuser
Modified By (Value)	58570dab-5abf-ef11-b0e9-6045bd2b788a
Modified On	2025-08-27T10:06:03Z
Order	#0153c70-2d83-f011-b4cb-00224bf28134
Order Date	2025-08-27T10:06:03Z
Order Number	ORD-666666
Owner (Type)	systemuser
Owner (Value)	58570dab-5abf-ef11-b0e9-6045bd2b788a
Owning User (Type)	systemuser
Owning User (Value)	58570dab-5abf-ef11-b0e9-6045bd2b788a
Product Name	Product from Power FX manual



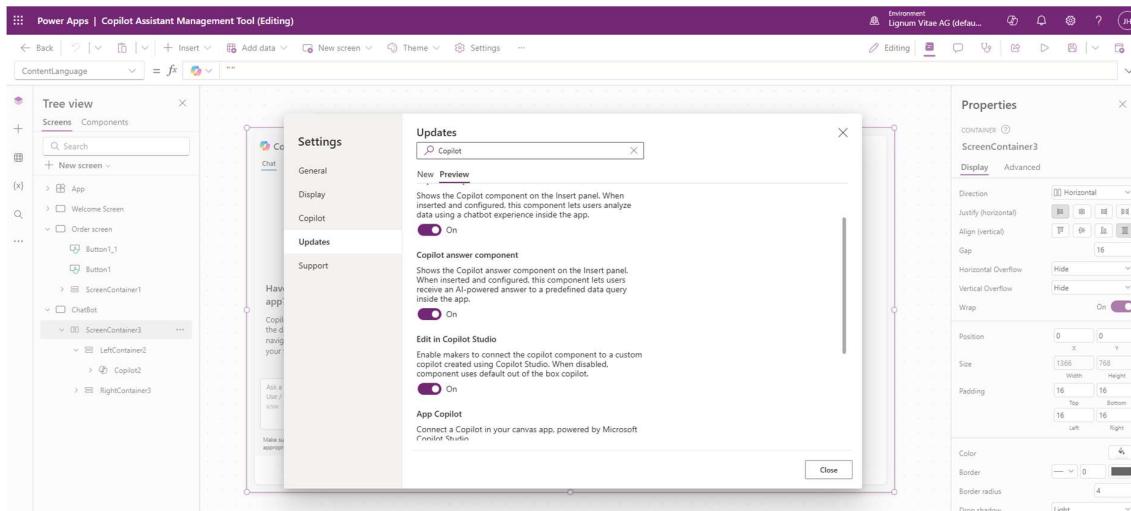
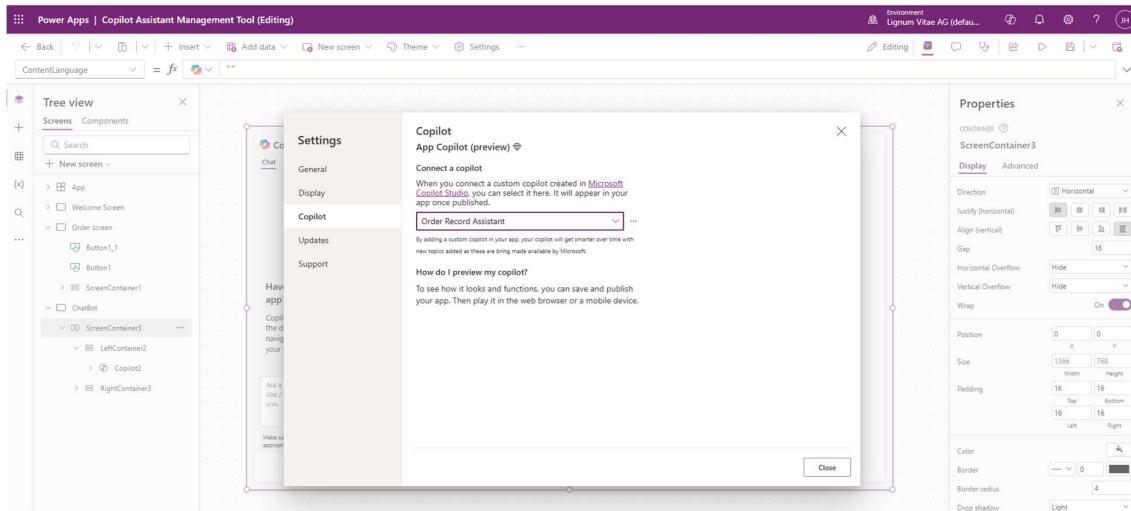
Verify Creation In Table

The screenshot shows the "Copilot Assistant Management Tool" interface, specifically the "Order" table. On the left, a list of orders is visible, including "ORD-666", "ORD-6666", and "ORD-66666". The "ORD-66666" entry is selected, showing its details on the right. The order details are as follows:

Expected Delivery Date	Order Date
26/09/2025 11:06	27/08/2025 11:06
Product Name	Quantity
Product from Power FX manual	1001
Order Number	Delivery Status
ORD-66666	Pending

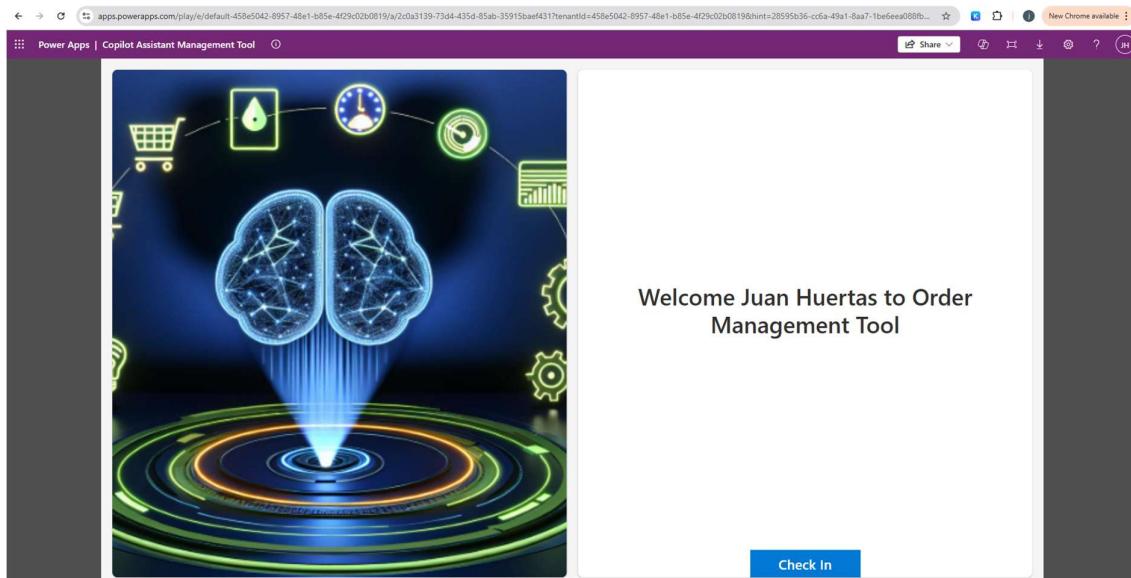
At the top right of the table view, there are "ChatBot" and "Back" buttons.

Integrate Copilot functionality into the app

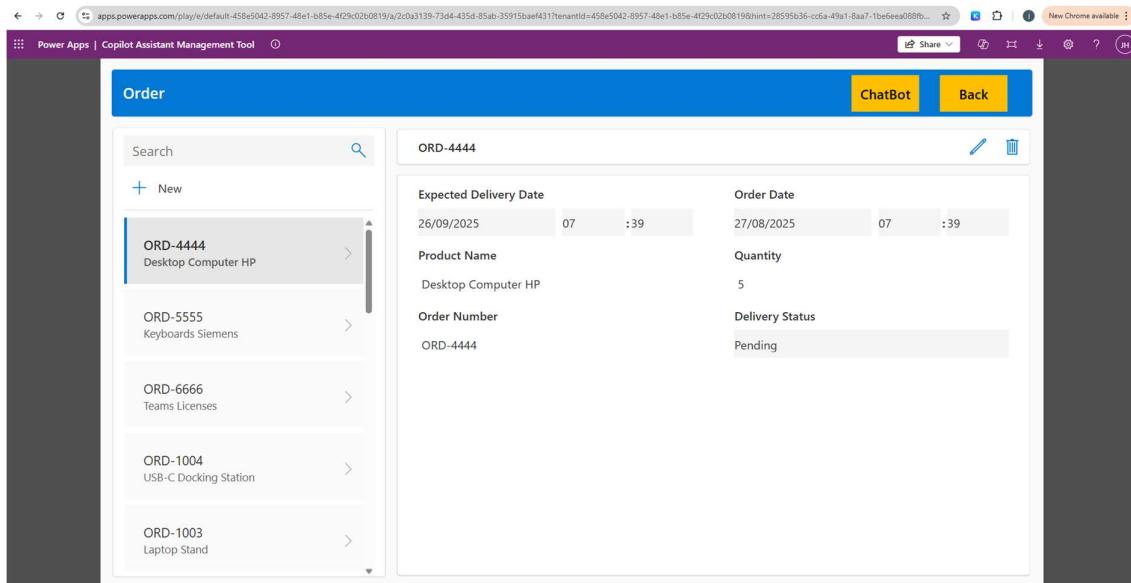


APP Demo

Welcome Screen



Demonstrate navigation logic using Power FX (Click in Check In)



Search Order

The screenshot shows a Power Apps application titled "Order". On the left, a list of orders is displayed with a search bar and a "New" button. One order, "ORD-8888 Desktop Computer Dell", is selected and expanded. On the right, a detailed view of this order is shown with fields for Expected Delivery Date (26/09/2025), Order Date (27/08/2025), Product Name (Desktop Computer Dell), Quantity (30), Order Number (ORD-8888), and Delivery Status (Pending). There are edit and delete icons at the top right of the detail view.

Create New Order in Application

The screenshot shows a Power Apps application titled "Order". On the left, a list of products is displayed with a search bar and a "New" button. One product, "ORD-666666 Product from Power FX manual", is selected and expanded. On the right, a new order form is being filled out for "ORD-666666". The form includes fields for Expected Delivery Date (31/12/2001), Order Date (31/12/2001), Product Name (Product from Power FX manual), Quantity (1), Order Number (ORD-666666), and Delivery Status (Pending). A checkmark icon is visible at the top right of the detail view.

Power Apps | Copilot Assistant Management Tool

Order

Search

+ New

- ORD-666666 Product from Power FX manual
- ORD-1004 USB-C Docking Station
- ORD-1003 Laptop Stand
- ORD-1008 Monitor 27-inch
- ORD_10000 Desktop

ORD-666666

Expected Delivery Date: 31/12/2001 00 : 00 : 00

Order Date: 27/08/2025 00 : 00 : 00

Product Name: Create Order from Web APP

Quantity: 1

* Order Number: ORD-5151

Delivery Status: Pending

ChatBot Back

Power Apps | Copilot Assistant Management Tool

Order

Search

+ New

- ORD-5151 Create Order from Web APP
- ORD-1004 USB-C Docking Station
- ORD-1003 Laptop Stand
- ORD-1008 Monitor 27-inch
- ORD_10000 Desktop

ORD-5151

Expected Delivery Date: 31/12/2001 00 : 00 : 00

Order Date: 27/08/2025 00 : 00 : 00

Product Name: Create Order from Web APP

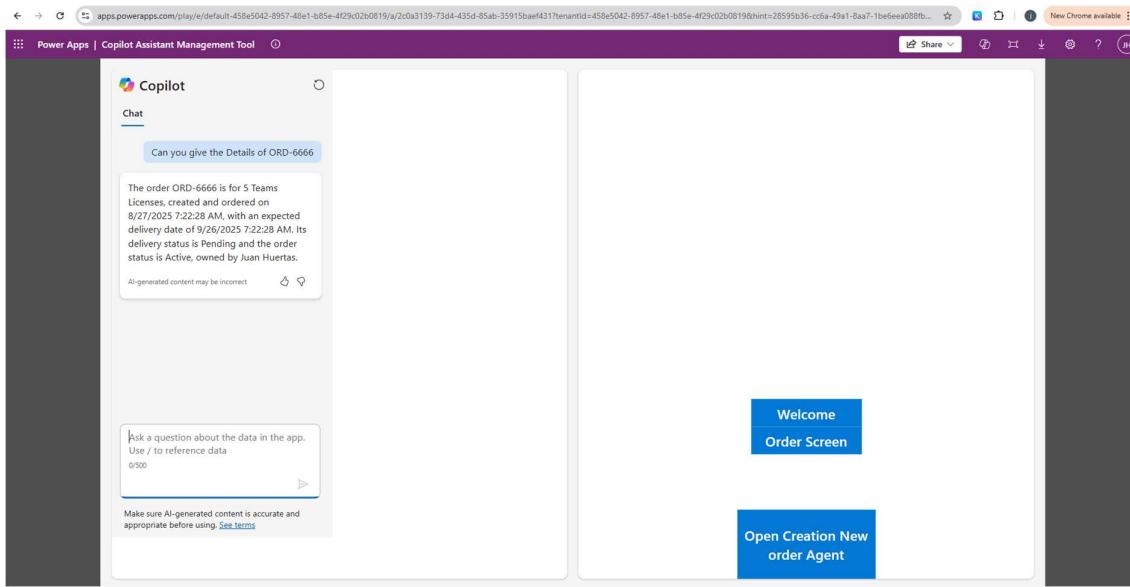
Quantity: 1

Order Number: ORD-5151

Delivery Status: Pending

ChatBot Back

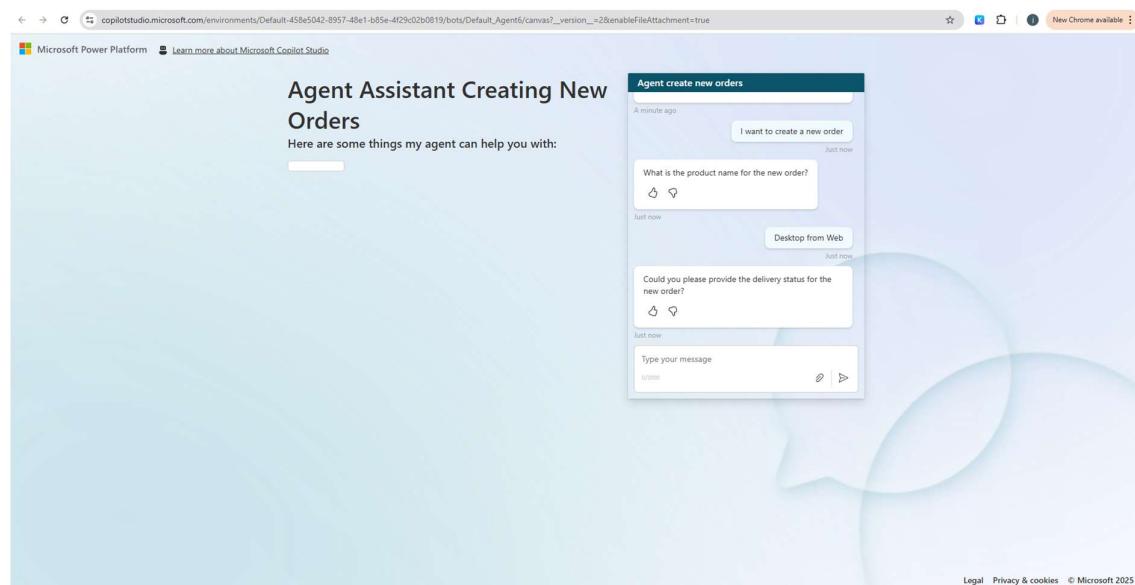
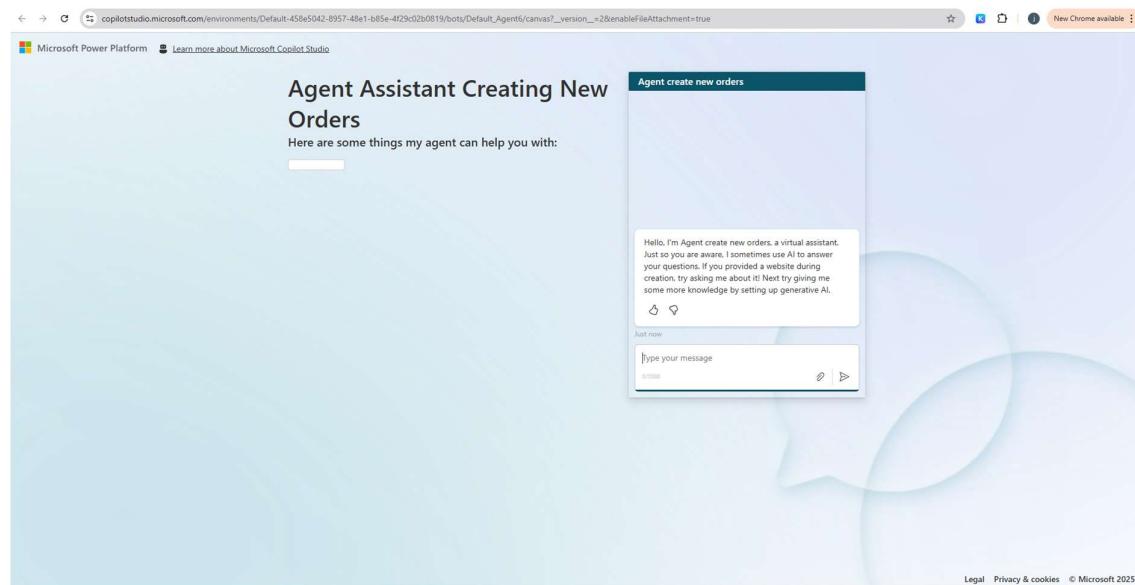
Demonstrate user interaction with the Copilot Agent

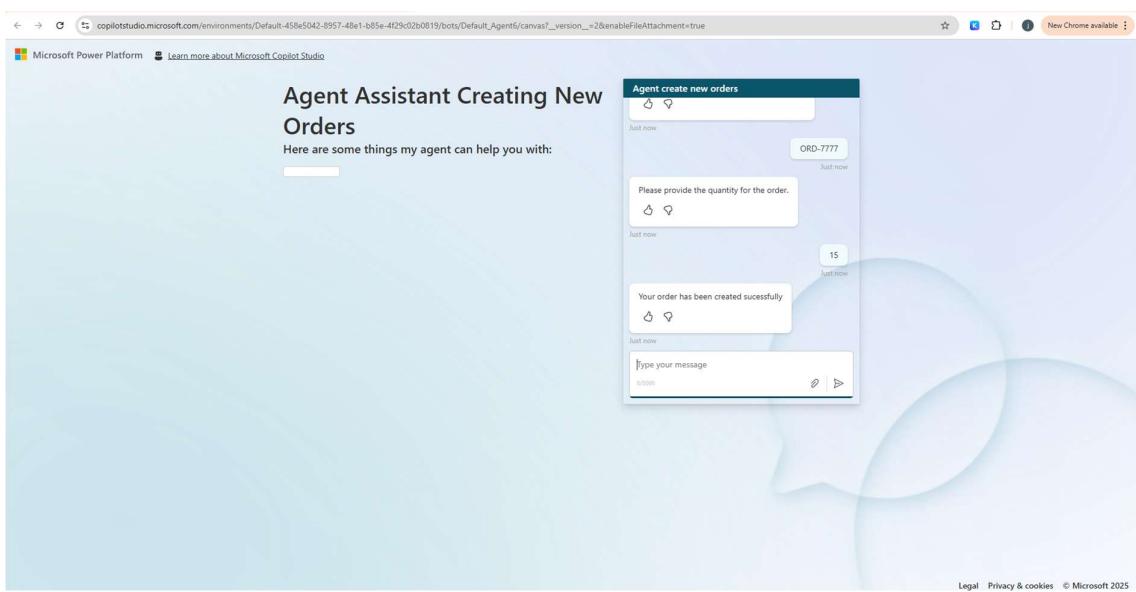
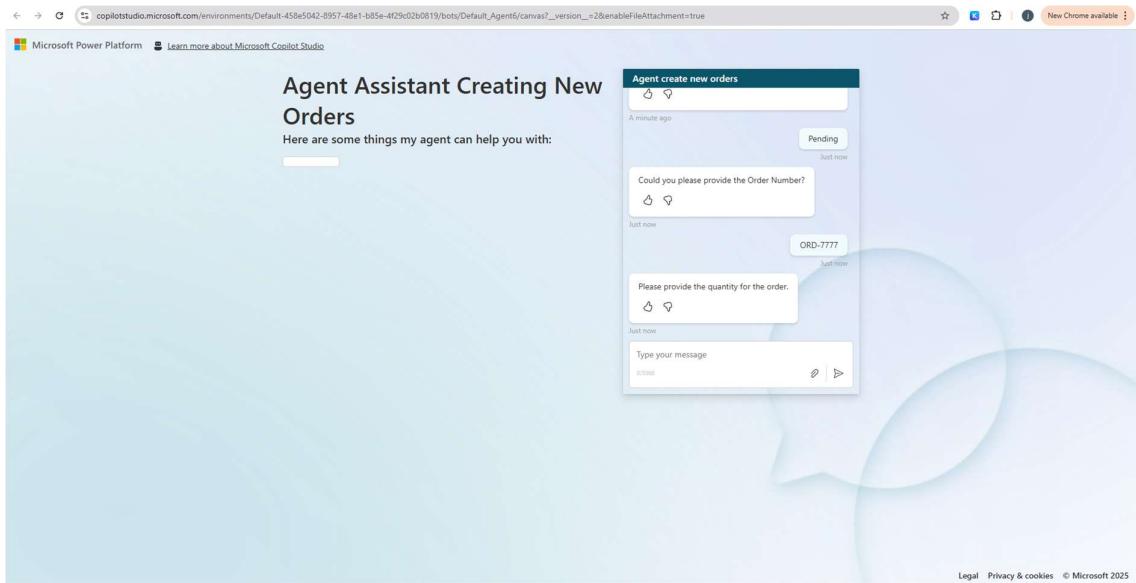


Open Creation New Agent Button

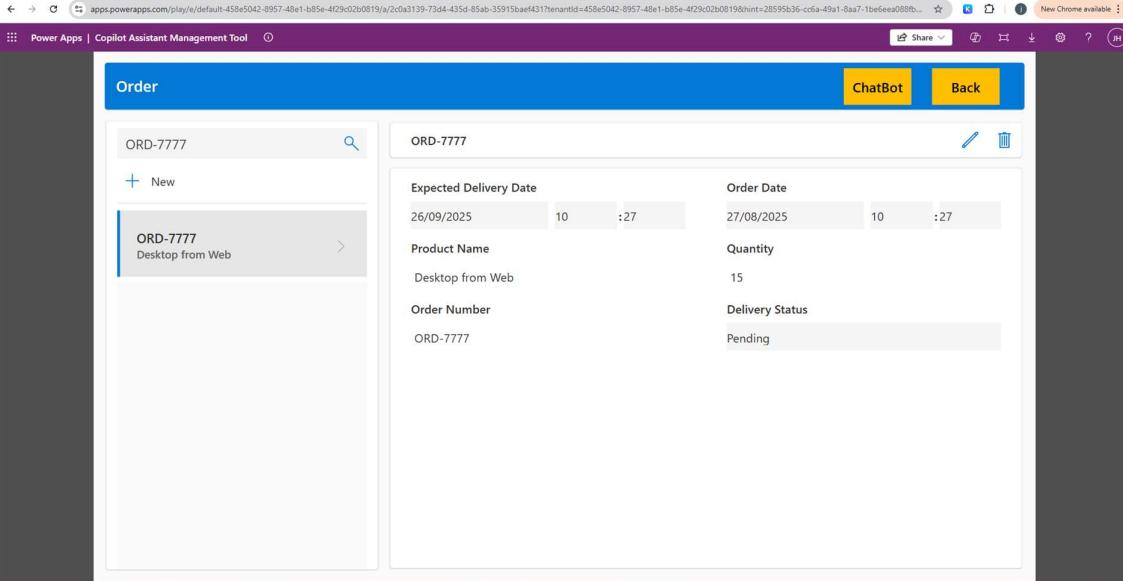
Demonstrate user interaction with the Copilot Agent

Showcase the ability to create records via the Copilot Agent





Validate the Dataverse Table



The screenshot shows a Power Apps interface titled "Order". On the left, there's a list view with one item: "ORD-7777 Desktop from Web". On the right, there's a detailed view of the selected item, "ORD-7777". The detailed view includes fields for Expected Delivery Date (26/09/2025), Order Date (27/08/2025), Product Name (Desktop from Web), Quantity (15), Order Number (ORD-7777), and Delivery Status (Pending). There are edit and delete icons at the top right of the detailed view.

Expected Delivery Date	Order Date
26/09/2025	27/08/2025

Product Name	Quantity
Desktop from Web	15

Order Number	Delivery Status
ORD-7777	Pending

Publishing Agent to Copilot and Teams Channel

The screenshot shows the Microsoft Copilot Studio interface. On the left, there's a sidebar with icons for Home, Agents, Tools, and more. The main area has tabs for Order Record Assistant, Overview, Knowledge, Tools, Agents, Topics, Activity, Analytics, and Channels. The Channels tab is selected. A message at the top says, "Because you chose Microsoft authentication, only the Teams + Microsoft 365 and SharePoint channel is available. To use other channels, change your authentication settings." Below this, there's a section titled "Draft agent status" with a warning about sharing credentials. It shows the agent was published by Juan Huertas on 8/27/2025, 7:54 AM. Under "Share a preview", there are sections for "Microsoft channels" (Teams and Microsoft 365 Copilot, SharePoint) and "Other channels" (Web app, Native app, Facebook, WhatsApp, Slack, Telegram, Twilio, Line). On the right, a modal window titled "The channel was added" is open, showing "Teams and Microsoft 365 Copilot" and "Microsoft 365 Copilot". It includes a note about publishing to Teams, a "Make agent available in Microsoft 365 Copilot" checkbox, and buttons for "Edit details", "Availability options", "See agent in Microsoft 365", and "See agent in Teams".

Teams Agent (Demonstrate user interaction with the Copilot Agent)

The screenshot shows a Microsoft Teams chat window titled "Order Record Assistant". The window has tabs for "Chat" and "Shared". The AI has generated two messages:

1. Message 1 (10:17 AM):

Order Record Assistant: Ai generated: 10:17
Here are the details for order number ORD-6666:
• Product: Teams Licenses
• Quantity: 5 units
• Order Date: 9/27/2025 at 7:22:28 AM
• Expected Delivery Date: 9/26/2025 at 7:22:28 AM
• Current Status: Active
• Status Reason: Active
• Delivery Status: Pending
• Managed By: Juan Huertas

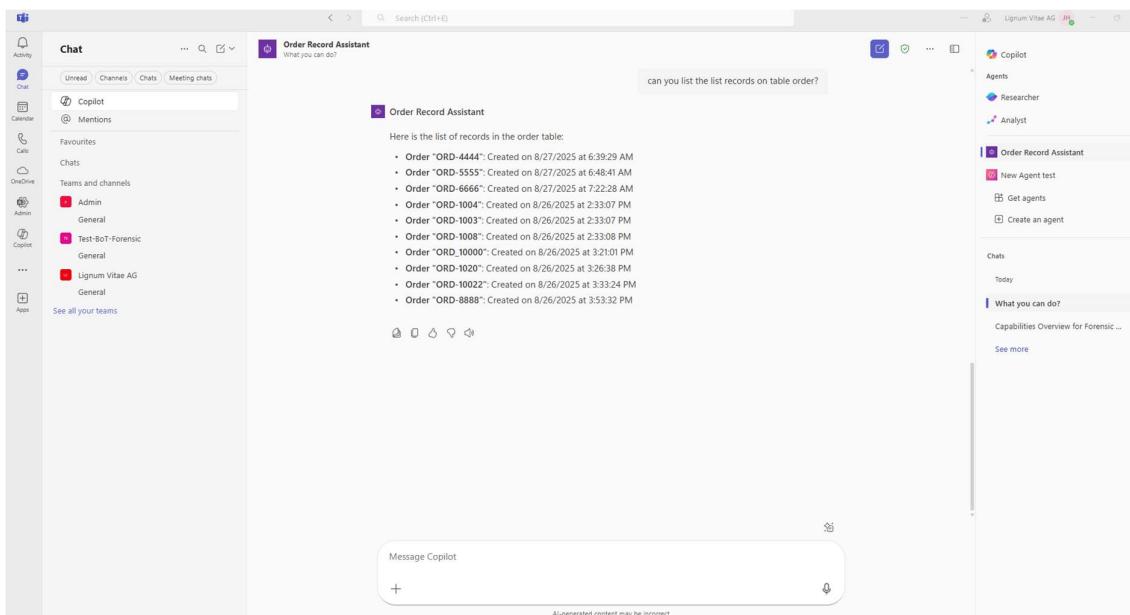
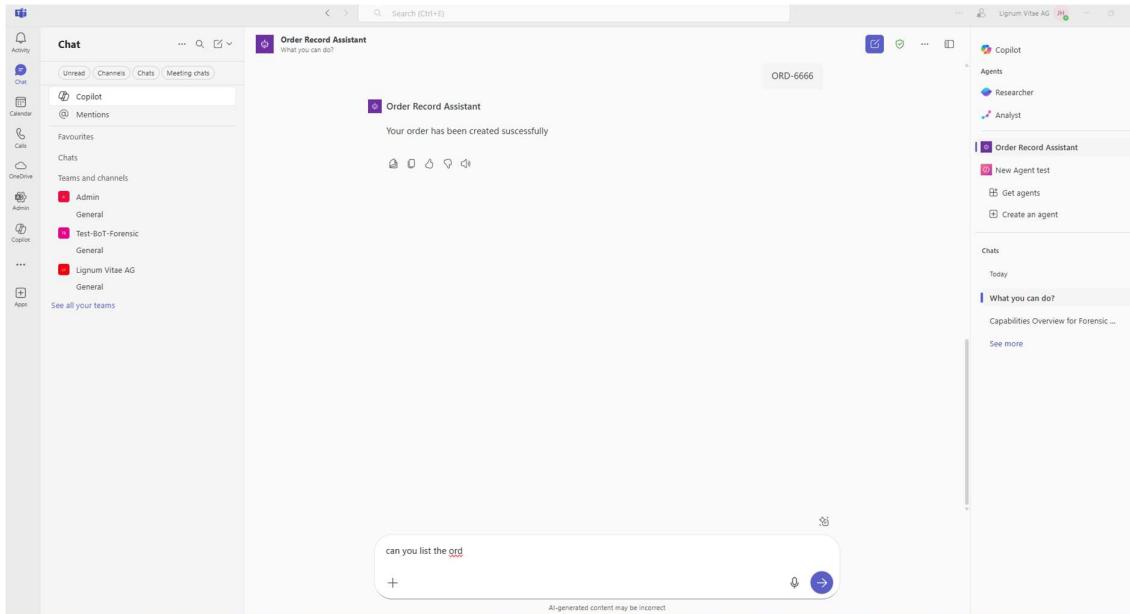
2. Message 2 (10:18 AM):

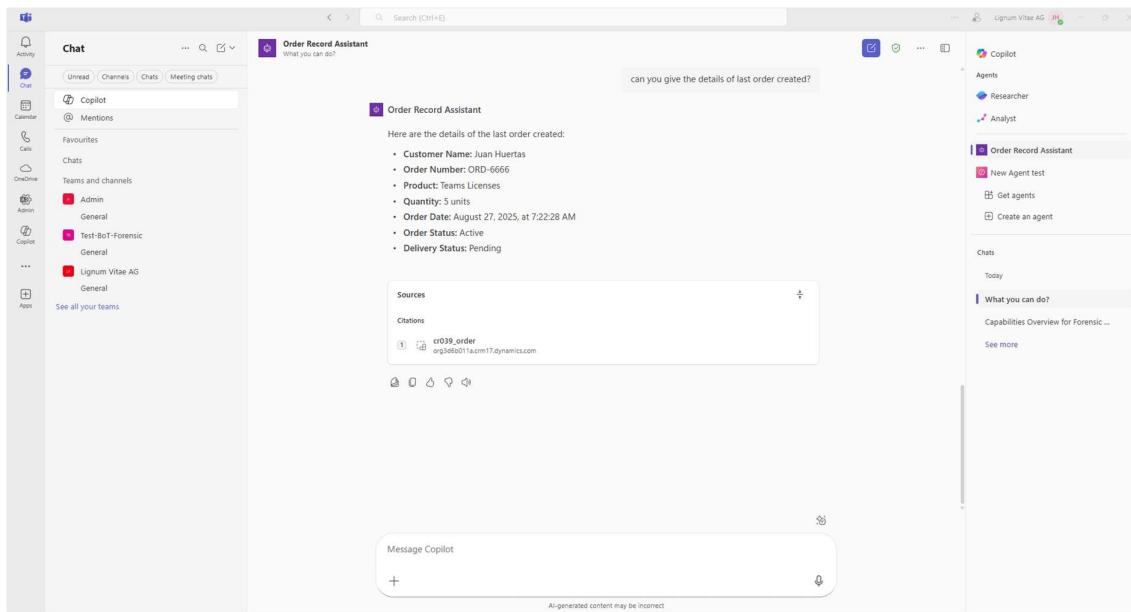
Order Record Assistant: Ai generated: 10:18
Here are the details for order number ORD-8888:
• Managed by: Juan Huertas
• Products:
 • Desktop Computer Dell
 • Quantity: 30
 • Status: Active
 • Status Reason: Active
 • Delivery Status: Pending
 • Order Date: August 27, 2025, 9:16:41 AM
 • Desktop All-in-One Web
 • Quantity: 5
 • Status: Active
 • Status Reason: Active
 • Delivery Status: Pending
 • Order Date: August 26, 2025, 3:53:32 PM

Both orders are currently active with a delivery status marked as pending. !.

The message bar at the bottom contains a placeholder "Type a message" and several icons for file attachments and sharing.

Teams Copilot (Demonstrate user interaction with the Copilot Agent)





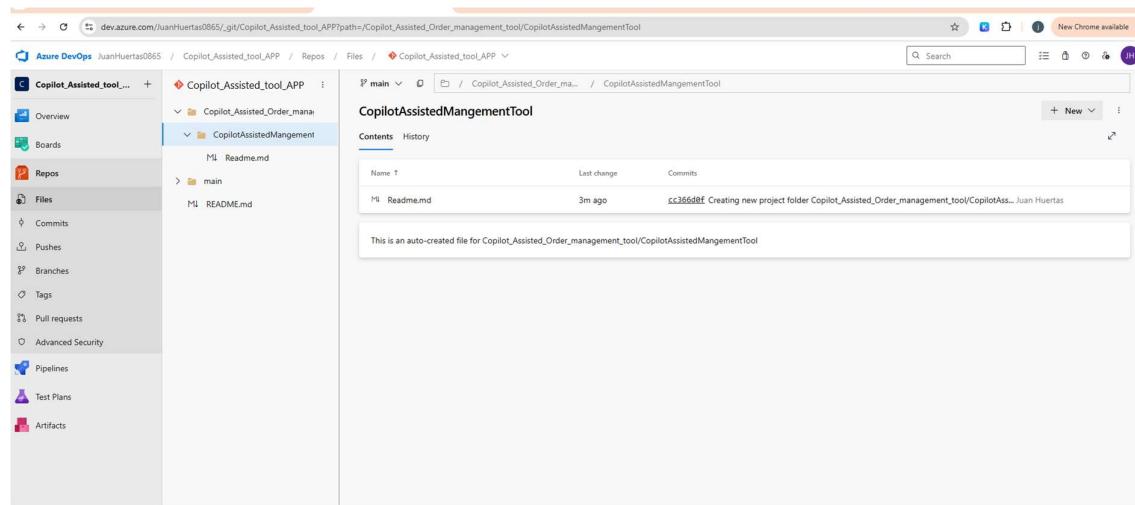
Solution Copilot Assisted Management Tool

Validate the structure of the Power Platform solution

The screenshot shows the 'Solutions' section of the Power Apps environment. It displays a list of solutions, with 'Copilot Assisted Management Tool' being the current preferred solution. Other listed solutions include 'AI Assisted Order Management Tool', 'Common Data Services Default Solution', and 'Default Solution'. The interface includes filters for 'Unmanaged', 'Managed', and 'All'.

The screenshot shows the 'Objects' section of the Power Apps environment, specifically for the 'Copilot Assisted Management Tool' solution. The left sidebar lists various object types: Overview, Objects (selected), History, Pipelines, and Source control. The main area displays a list of objects, including 'Add new order', 'Conversation Start', 'Conversational boosting', 'Copilot Assistant Management Tool', 'cr039_order', 'Create new Order', 'Create new order record in organization orders...', 'Delete specific order from organization orders...', 'End of Conversation', 'Escalate', 'Fallback', 'Goodbye', 'Greeting', 'https://copilotstudio.microsoft.com', and 'List order records with OData filtering options'. The table includes columns for Display name, Name, Type, Managed, Customized, Last Modified, Owner, and Status.

Azure DevOps



VsCode

