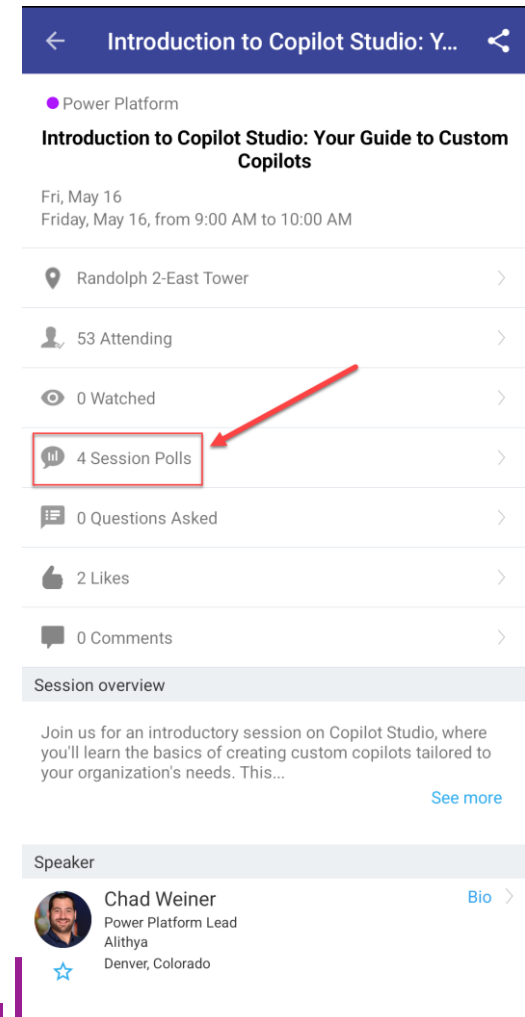


2025 DYNAMICS CON



Introduction to Copilot Studio: Your Guide to Custom Copilots

Answer the Poll Questions in the App if you can



The screenshot shows a Microsoft Teams event page. At the top, the title 'Introduction to Copilot Studio: Y...' is visible with back and share icons. Below the title, it indicates the event is part of the 'Power Platform' series. The main title is 'Introduction to Copilot Studio: Your Guide to Custom Copilots'. The date and time are 'Fri, May 16' and 'Friday, May 16, from 9:00 AM to 10:00 AM'. The location is 'Randolph 2-East Tower'. The attendance is '53 Attending'. There are '0 Watched' and '0 Questions Asked'. The '4 Session Polls' section is highlighted with a red box and a red arrow pointing to it. Below this, there are '2 Likes' and '0 Comments'. A 'Session overview' section follows, with a description: 'Join us for an introductory session on Copilot Studio, where you'll learn the basics of creating custom copilots tailored to your organization's needs. This...' and a 'See more' link. The 'Speaker' section lists 'Chad Weiner' as the 'Power Platform Lead' at 'Alithya' in 'Denver, Colorado', with a 'Bio' link.

← Introduction to Copilot Studio: Y... →

● Power Platform

Introduction to Copilot Studio: Your Guide to Custom Copilots

Fri, May 16
Friday, May 16, from 9:00 AM to 10:00 AM

📍 Randolph 2-East Tower >

👤 53 Attending >

👁 0 Watched >

💬 4 Session Polls >

💬 0 Questions Asked >


👍 2 Likes >

💬 0 Comments >

Session overview

Join us for an introductory session on Copilot Studio, where you'll learn the basics of creating custom copilots tailored to your organization's needs. This... [See more](#)

Speaker

 **Chad Weiner** [Bio](#) >
Power Platform Lead
Alithya
Denver, Colorado





Chad Weiner
Power Platform Lead
Alithya

Email:
chad.weiner@alithya.com

Twitter:
[ChadWeiner_D365](https://twitter.com/ChadWeiner_D365)



Want the Presentation?

https://bit.ly/DynCon25_CW

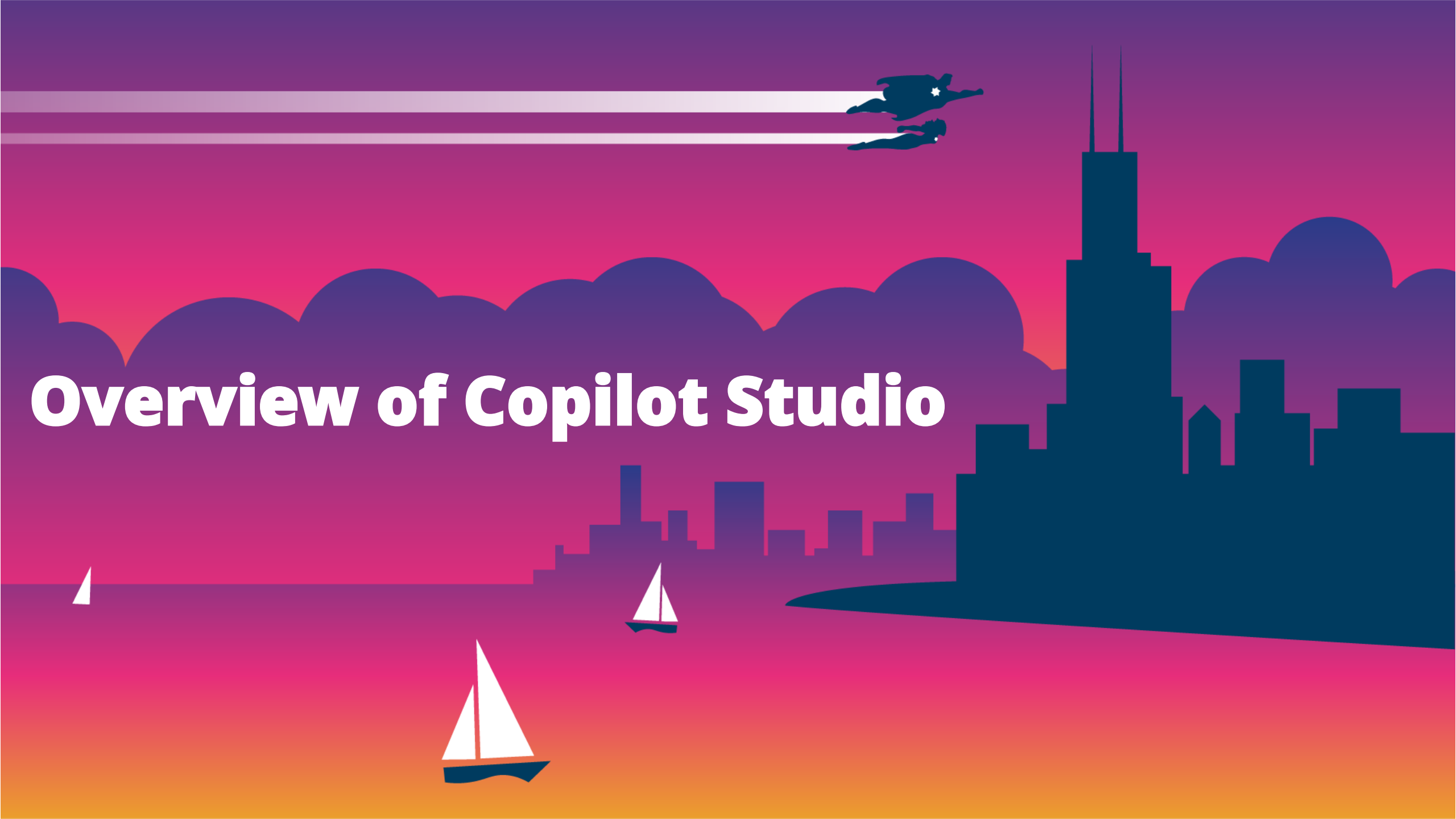


High Level Agenda

- An overview of Copilot Studio and its features.
- How to navigate the Copilot Studio interface and tools.
- Examples of how custom copilots can be used in various business scenarios.
- Tips for getting started with your first custom copilot project.
- How to monitor and optimize your copilot's performance.



Overview of Copilot Studio



What is an agent?

Agents use AI to **automate and execute business processes**, working alongside or on behalf of a person, team, or organization.

Deploy to...



Microsoft Copilot

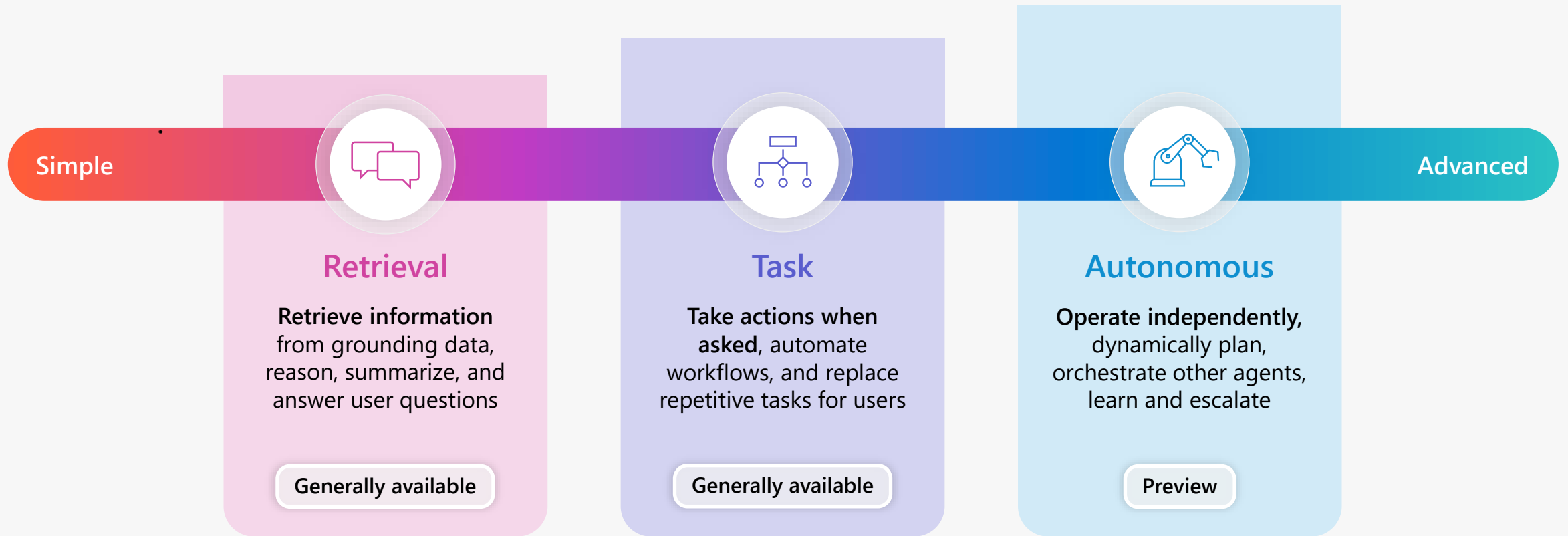


Your applications



Your websites

Spectrum of agents

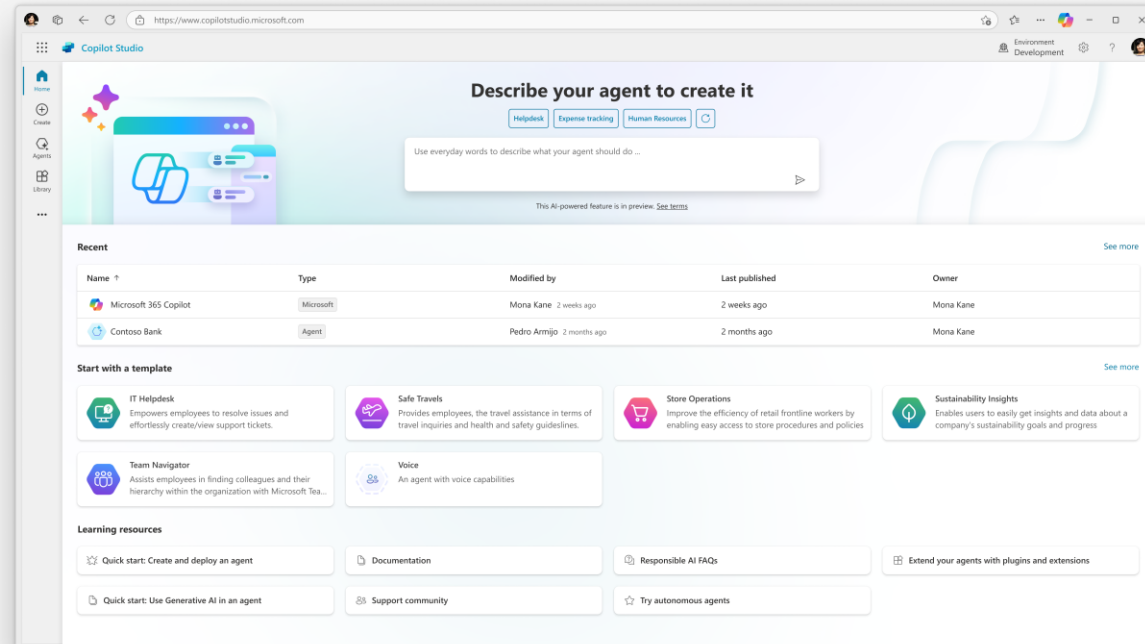


←..... Agents vary in levels of complexity and capabilities depending on your need→



Copilot Studio

Copilot Studio is a low code tool for **building agents** and **extending Microsoft 365 Copilot**.



✓ Meet your users where they already are

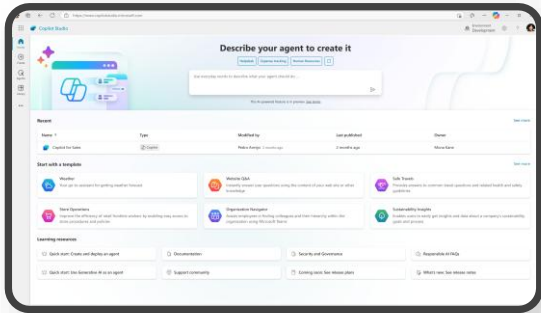
✓ Access everything in one place

✓ Automate your workflows

✓ Integrate with your external apps

✓ Connect to your data in Microsoft 365

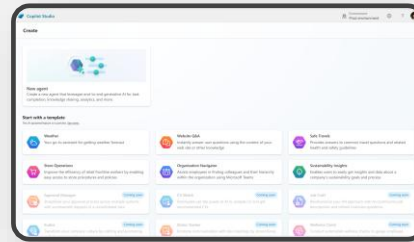
What's in Copilot Studio?



Agent Building Studio

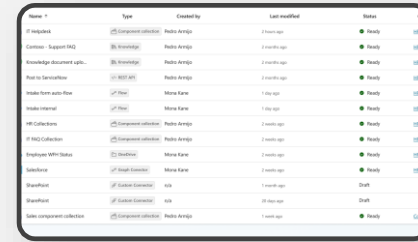
Makers of all skill levels can use low code and AI to create their own agents and extend Microsoft 365 Copilot

Workspaces



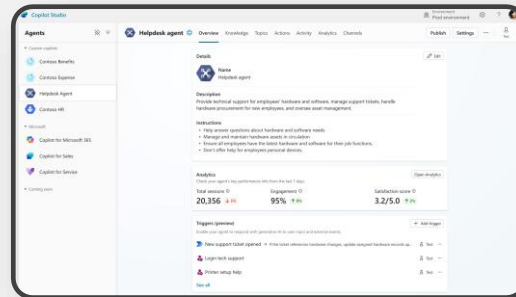
Create

Quickly get started using natural language or an agent pre-built for you



Tools

View your full list of custom agent components that enable knowledge and actions



Agents

Connect to your org's knowledge, create topics, add actions, view analytics, choose which channels to deploy to and more



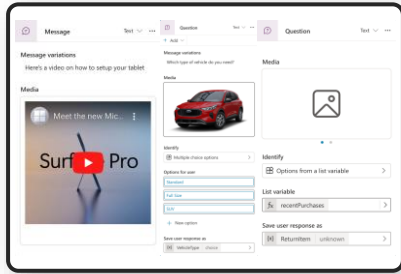
Admin Studio

Deploy agents securely using central administration, built-in security roles, and simple management across environments to maintain compliance and governance.

Copilot Studio Core Capabilities

Intuitive UX	Visual canvas	Low code design	Pro code views	Real-time testing	Easy collaboration	Natural language to build	
Conversation Design	Build + publish custom actions	Tailor specific topics	Create rich + dynamic responses	Multi-language	Multi-channel	Templates	
Conversation Orchestration	Multi-turn conversations	Logic / variable management	Escalate to live agent	Multi-LLM routing	Dynamic content based on user		
Data Connectivity	Deep reasoning	1,400 pre-built data connectors	Custom data connectors	Agent flows	Generative actions	Generative answers	
Pro-Dev Extensibility	DIY gen AI	Bring your own Model (BYOM)*	Custom Azure Bot Framework Skills	Knowledge base extension	Custom analytics	Azure app insights telemetry	
Streamlined Management	Responsible AI checks	Trusted platform	Admin center	Compliance standards	Analytics	ALM automation	Custom authentication
End-to-end conversational AI platform							

Popular authoring features



Rich responses



Adaptive
Cards



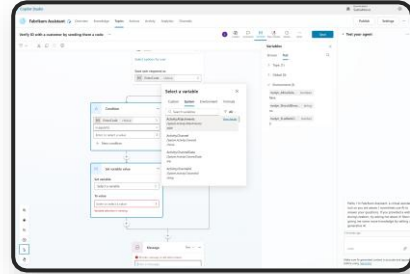
Images



Videos

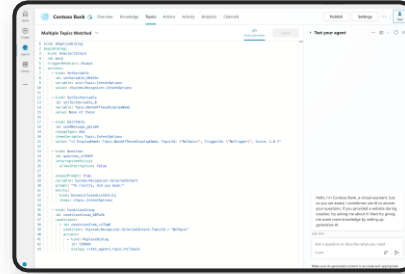


Quick
Replies



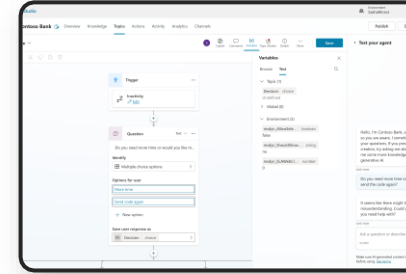
Power Fx-based variables system

- Power Fx integrated formula editor for variable management
- List/record type support
- Condition nodes with Power Fx formula support
- Iterate over a list with new Loop nodes



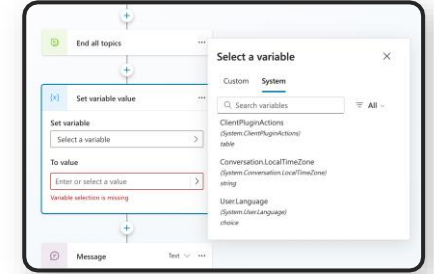
Code side-by-side

- Move between a visual editor and code
- Share and re-use topic logic between developers and agents



Event-driven & contextual triggering

- Trigger an event if it detects a certain value has been received
- Add more nuanced responses to a message when the agent runs into an issue
- Agents can stay within context when a user asks for help or more details



Productivity

- Cut, Copy, Paste
- Multi-node selection
- Enhanced topic navigation

Knowledge

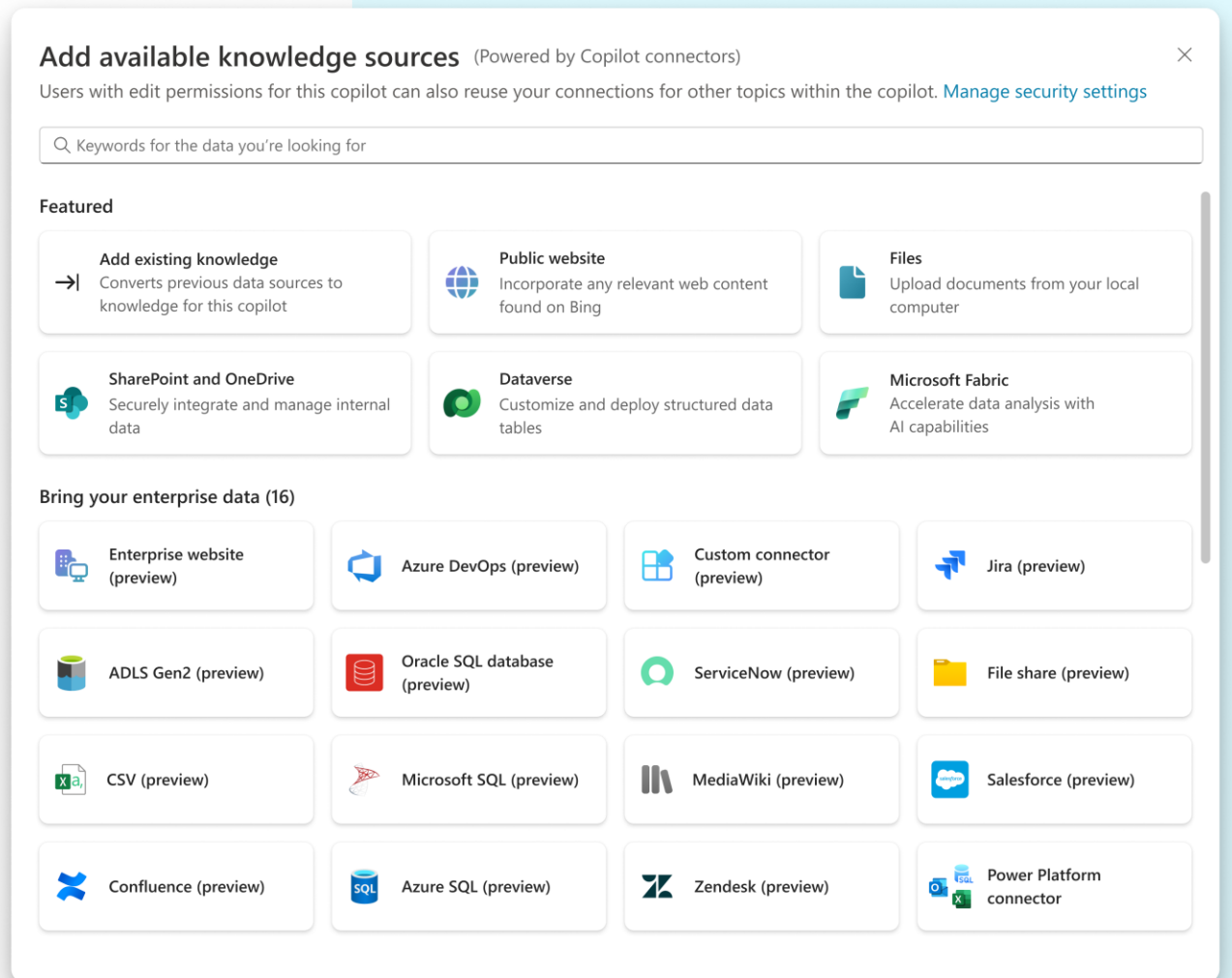
Add your **public and enterprise data** sources using agent connectors.

Your agent will be able to **dynamically generate multi-turn answers** in real time using your enterprise data.

Allows you to create an **immediately useful** agent.

Supported data sources include:

Public websites	SharePoint / OneDrive
Dataverse	Microsoft Fabric <i>(coming soon)</i>
File uploads	Microsoft Graph connectors



Actions

Easily connect to your key line of business systems.

Enable your agent to automate your business processes and complete tasks.

Tell your agent when to execute an action by adding autonomous triggers.

Types of actions:

Prebuilt connectors

Choose from 1500+ prebuilt Power Platform connectors to popular data sources and apps

Custom connectors

Create a custom connector for any publicly available API

Agent flows

Enhance your agents with predefined logic that executes repetitive tasks quickly.

Prompts

Provide custom instructions to the agent model using AI Builder (standard or advanced reasoning)

Skills

Add a bot built using Azure Bot Framework as a skill

Step 1 of 3: Choose an action

Create an action or browse through our list of actions you want to use to get information from external sources.

[Learn more](#)

Discover an action

Search for flows, skill actions, and commonly used connector actions

Search

11 actions found

Connectors

Custom Connectors

Flows

Skills

Dataverse



Untitled

Get information about industries, solutions, services and cont...



Run a flow built with Power Automate for desktop

Desktop flows



Delete a row

Excel Online (Business)



Run script

Excel Online (Business)



Get a row

Excel Online (Business)



Run script from SharePoint library

Excel Online (Business)

Cancel



1500+

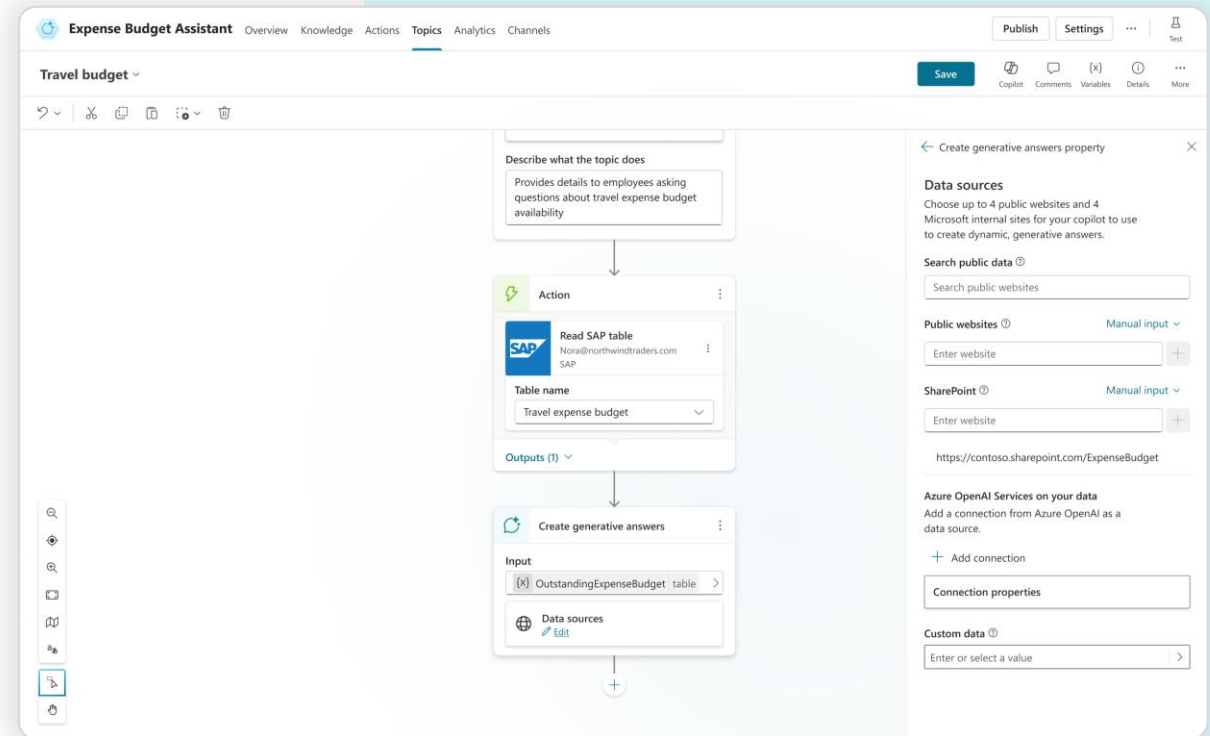
Logic

Have **complete control over critical scenarios** by designing specific step-by-step topics.

Enable your agent to **automatically select the most appropriate action or topic** to respond to a user using generative AI.

Easily mix and manage both **generative and custom dialog** in one system.

Connect to your contact center so your agent can escalate and hand off the conversation with full context to a human agent.



Extend Microsoft 365 Copilot

Copilot Studio agent builder allows you to build an agent directly in Copilot Chat and SharePoint

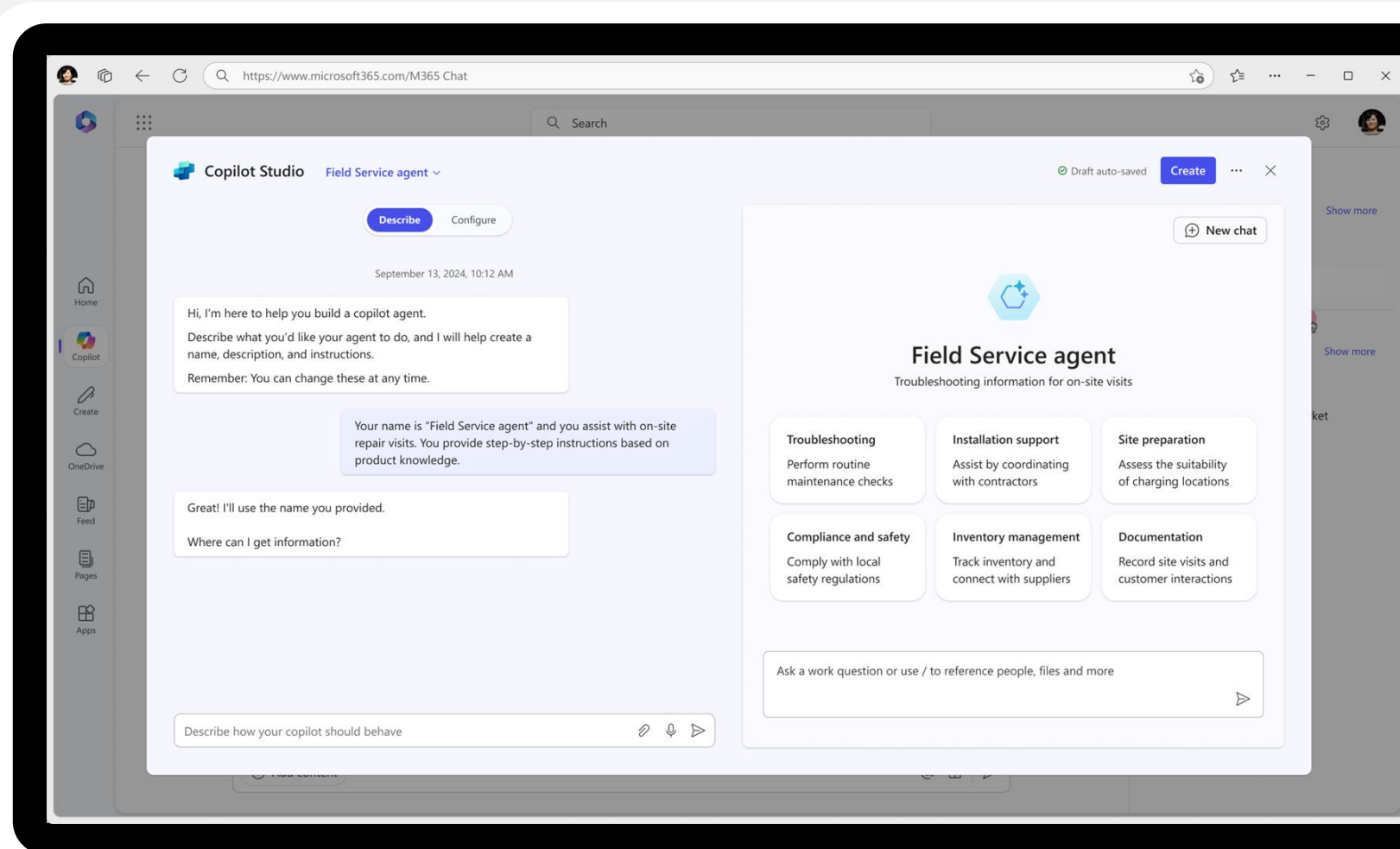
Empower end users to **build knowledge-only agents** using natural language

Get started quickly with **agents pre-built for you** in Copilot Chat

Take your agent a step further by **adding actions** in the full Copilot Studio experience

Seamlessly **share your agent** across your organization with shareable links

Ensure compliance with **centralized management** tools



How to Get Started in Your Organization

- Start by aligning copilots with business goals like productivity or customer experience.
- Identify champions in business units to lead early pilots.
- Partner closely with IT and security to ensure governance and data compliance.
- Launch small, high-impact copilots to prove value, then share success stories to build momentum.
- Offer training and workshops to upskill teams and encourage co-creation.
- Establish feedback loops and iterate quickly.
- Scale with a Center of Excellence and standard practices.
- Focus messaging on enabling teams, not replacing them—position copilots as tools to amplify human capability.



Voice Agent Demo

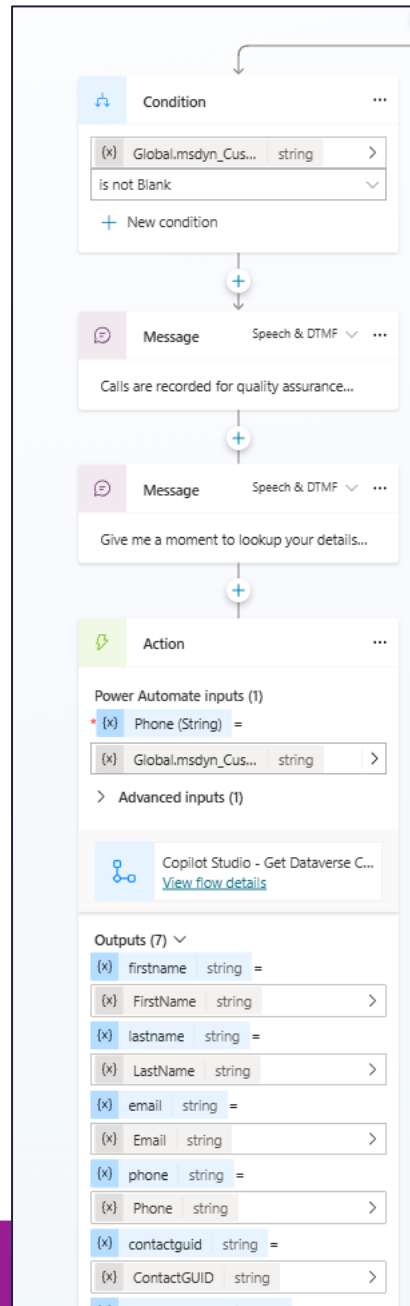
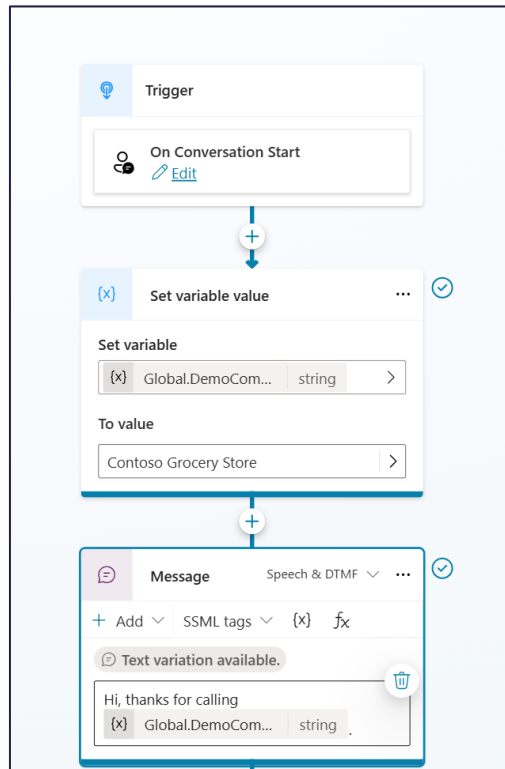
- Copilot Agent Connected to D365 Contact Center and Azure Communication Services
- Self-service for Retail Grocery Store

Shopper bought some bad strawberries

- In under 25 seconds – lookup and greet the customer
- In under 1 min 30 seconds – look up customer history, issue a coupon, and auto create a case
- Store on Haynes Bridge Road in Alpharetta, GA is low on eggs
 - In under 2 minutes 20 seconds – report store is low on eggs, auto create a case
- Provide some feedback for an amazing cashier
 - In under 3 minutes - Auto creates a feedback response



Voice Agent



The screenshot shows a ServiceNow incident record for 'Incident - INC0010031'. The record includes fields for Number, Caller, Category, Subcategory, Service, Service offering, Configuration item, Short description, and Description. The 'Short description' field contains the text 'Low stock of Eggs at store: Alpharetta reported on 5/14/2025'. The 'Description' field is empty. The record also includes fields for Channel, State, Impact, Urgency, Priority, Assignment group, and Assigned to.

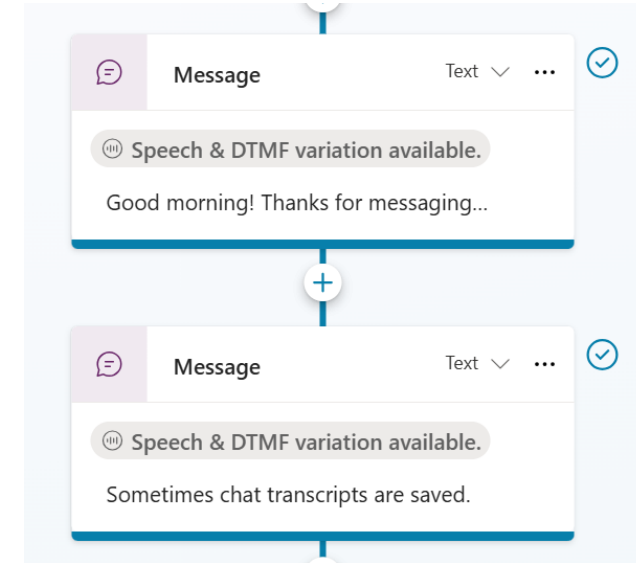
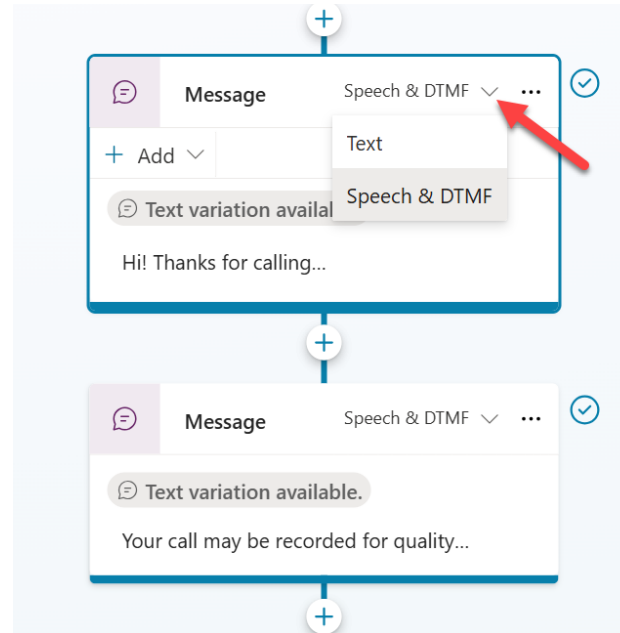
Testing Agents on Different Channels

- You can switch between Text and Voice when testing your agent in Copilot Studio

The screenshot displays the Copilot Studio interface for a virtual agent named 'Voice_VirtualAgent'. The main workspace shows a flowchart with three steps: 'Set variable value' (setting 'Global.DemoCom...' to 'Contoso'), 'Message' (with text 'Hi! Thanks for calling...'), and another 'Message' (with text 'Your call may be recorded for quality...'). The 'Test your agent' panel on the right shows a list of test triggers, including 'Speech & DTMF' (selected) and 'Text'. A dropdown menu is open, showing options for 'Speech & DTMF' and 'Text'. The 'Text' option is highlighted with a red circle. The 'Test your agent' panel also shows a list of test triggers, including 'Speech & DTMF' (selected) and 'Text'. A dropdown menu is open, showing options for 'Speech & DTMF' and 'Text'. The 'Text' option is highlighted with a red circle. The 'Test your agent' panel also shows a list of test triggers, including 'Speech & DTMF' (selected) and 'Text'. A dropdown menu is open, showing options for 'Speech & DTMF' and 'Text'. The 'Text' option is highlighted with a red circle.

Testing Agents on Different Channels

- In Message and Question nodes, you can have different messaging for each channel



3:52

Autonomous agents

Handle variability and complexity at infinite scale

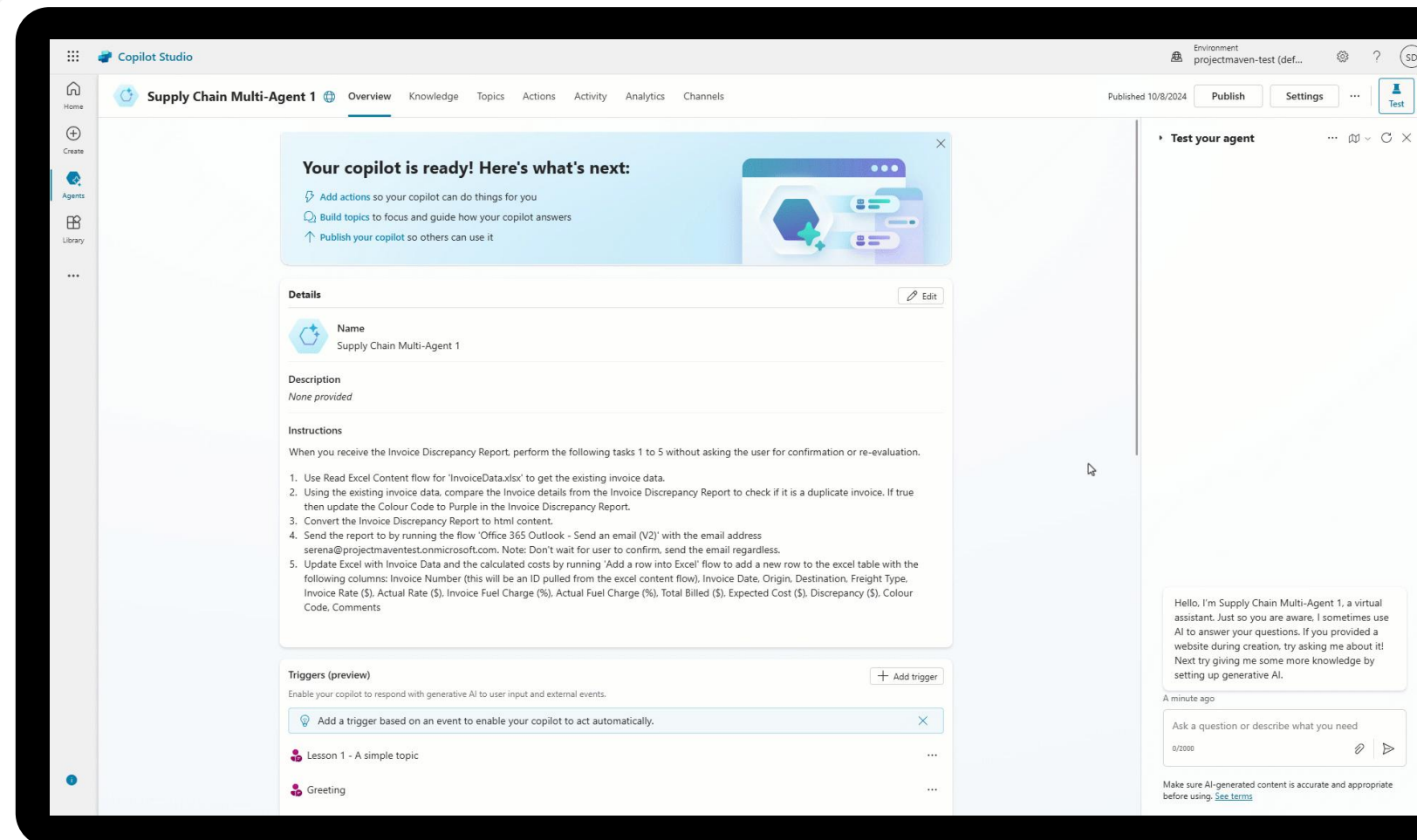
Independently begins work based on autonomous triggers

Automates long running processes with your actions

Dynamically reasons over its capabilities in real time

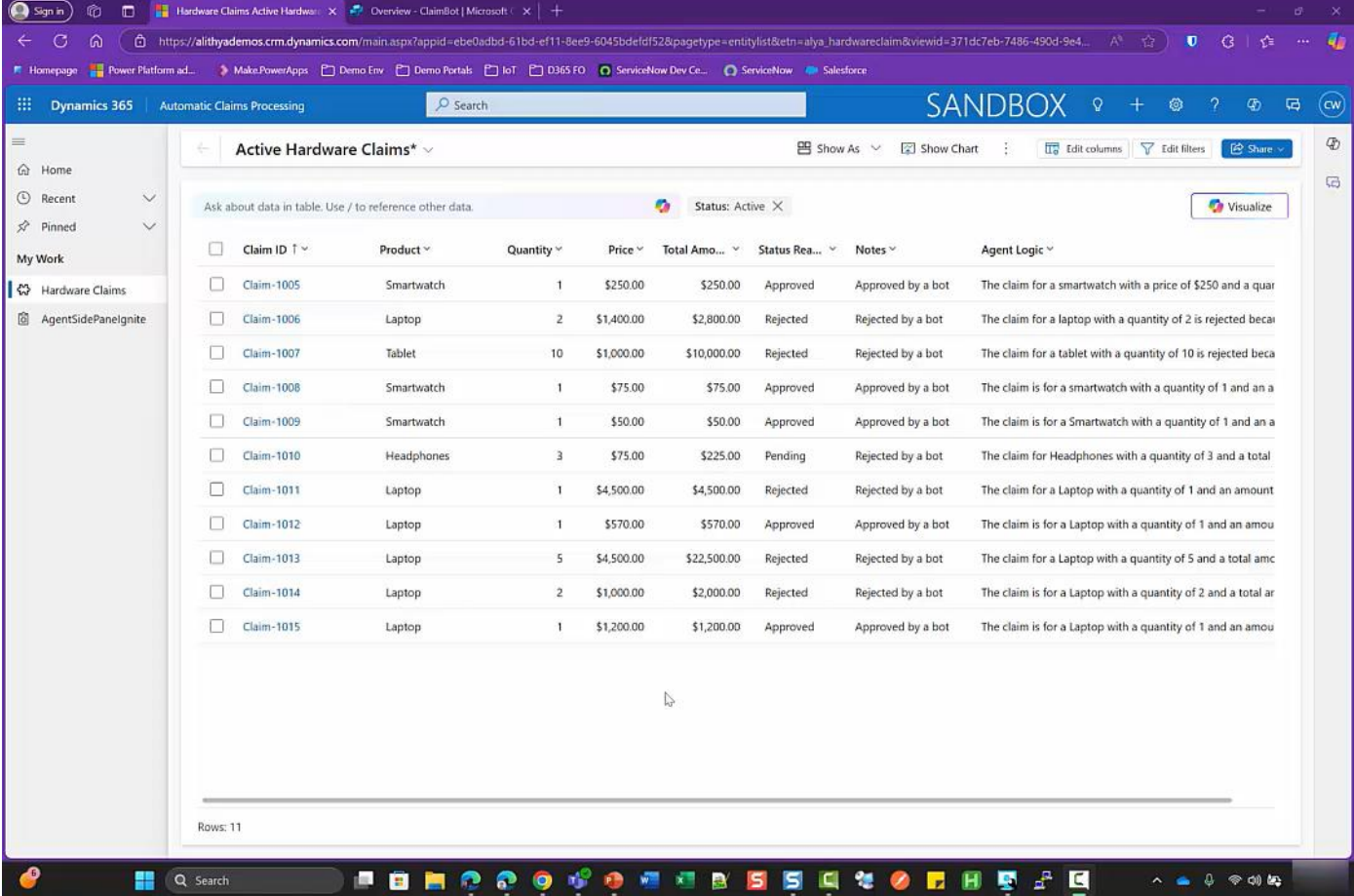
Monitor performance and adapt instructions

Follows human guard rails and asks for help



Autonomous Agent Demo

- Copilot agent monitors support mailbox
- Uses natural language instructions to classify emails based on ServiceNow, Salesforce, and D365 case categories
- Uses native Power Automate connectors to create Incidents and Cases in CRM



Ask about data in table. Use / to reference other data. Status: Active X Visualize

<input type="checkbox"/>	Claim ID ↑	Product	Quantity	Price	Total Amo...	Status Rea...	Notes	Agent Logic
<input type="checkbox"/>	Claim-1005	Smartwatch	1	\$250.00	\$250.00	Approved	Approved by a bot	The claim for a smartwatch with a price of \$250 and a quar
<input type="checkbox"/>	Claim-1006	Laptop	2	\$1,400.00	\$2,800.00	Rejected	Rejected by a bot	The claim for a laptop with a quantity of 2 is rejected beca
<input type="checkbox"/>	Claim-1007	Tablet	10	\$1,000.00	\$10,000.00	Rejected	Rejected by a bot	The claim for a tablet with a quantity of 10 is rejected beca
<input type="checkbox"/>	Claim-1008	Smartwatch	1	\$75.00	\$75.00	Approved	Approved by a bot	The claim is for a smartwatch with a quantity of 1 and an a
<input type="checkbox"/>	Claim-1009	Smartwatch	1	\$50.00	\$50.00	Approved	Approved by a bot	The claim is for a Smartwatch with a quantity of 1 and an a
<input type="checkbox"/>	Claim-1010	Headphones	3	\$75.00	\$225.00	Pending	Rejected by a bot	The claim for Headphones with a quantity of 3 and a total
<input type="checkbox"/>	Claim-1011	Laptop	1	\$4,500.00	\$4,500.00	Rejected	Rejected by a bot	The claim for a Laptop with a quantity of 1 and an amount
<input type="checkbox"/>	Claim-1012	Laptop	1	\$570.00	\$570.00	Approved	Approved by a bot	The claim is for a Laptop with a quantity of 1 and an amou
<input type="checkbox"/>	Claim-1013	Laptop	5	\$4,500.00	\$22,500.00	Rejected	Rejected by a bot	The claim for a Laptop with a quantity of 5 and a total amc
<input type="checkbox"/>	Claim-1014	Laptop	2	\$1,000.00	\$2,000.00	Rejected	Rejected by a bot	The claim is for a Laptop with a quantity of 2 and a total ar
<input type="checkbox"/>	Claim-1015	Laptop	1	\$1,200.00	\$1,200.00	Approved	Approved by a bot	The claim is for a Laptop with a quantity of 1 and an amou

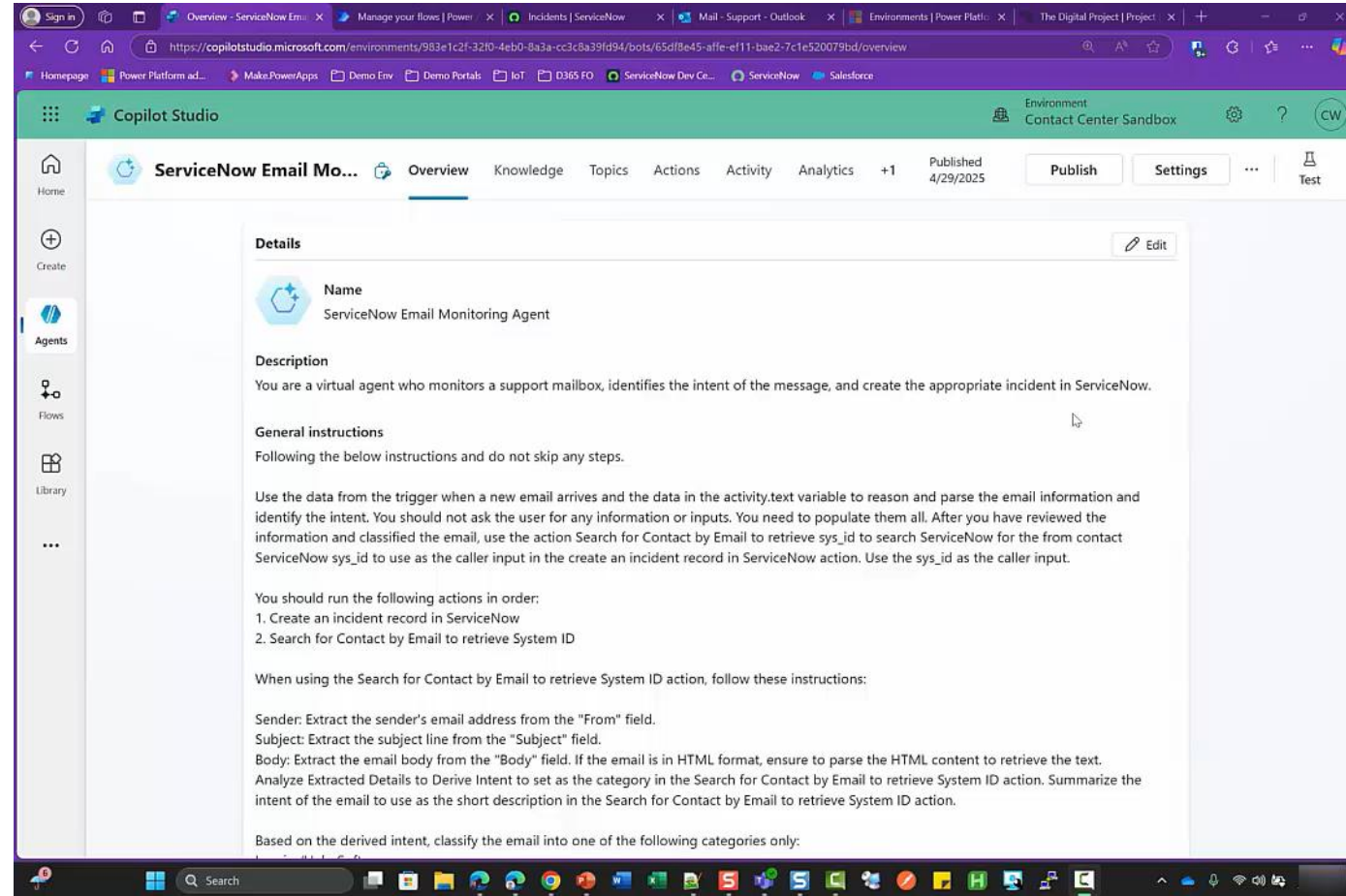
Rows: 11

3:52



Autonomous Agent Demo

- Expense or Claim information is submitted to Dataverse
- Copilot Agent reviews information (Product, Quantity, Total Amount) and determines based on natural language instructions if it should be approved or rejects
- Updates status of record in Database



2:05





Deep reasoning in agents

Execute ambiguous and multi-faceted business processes

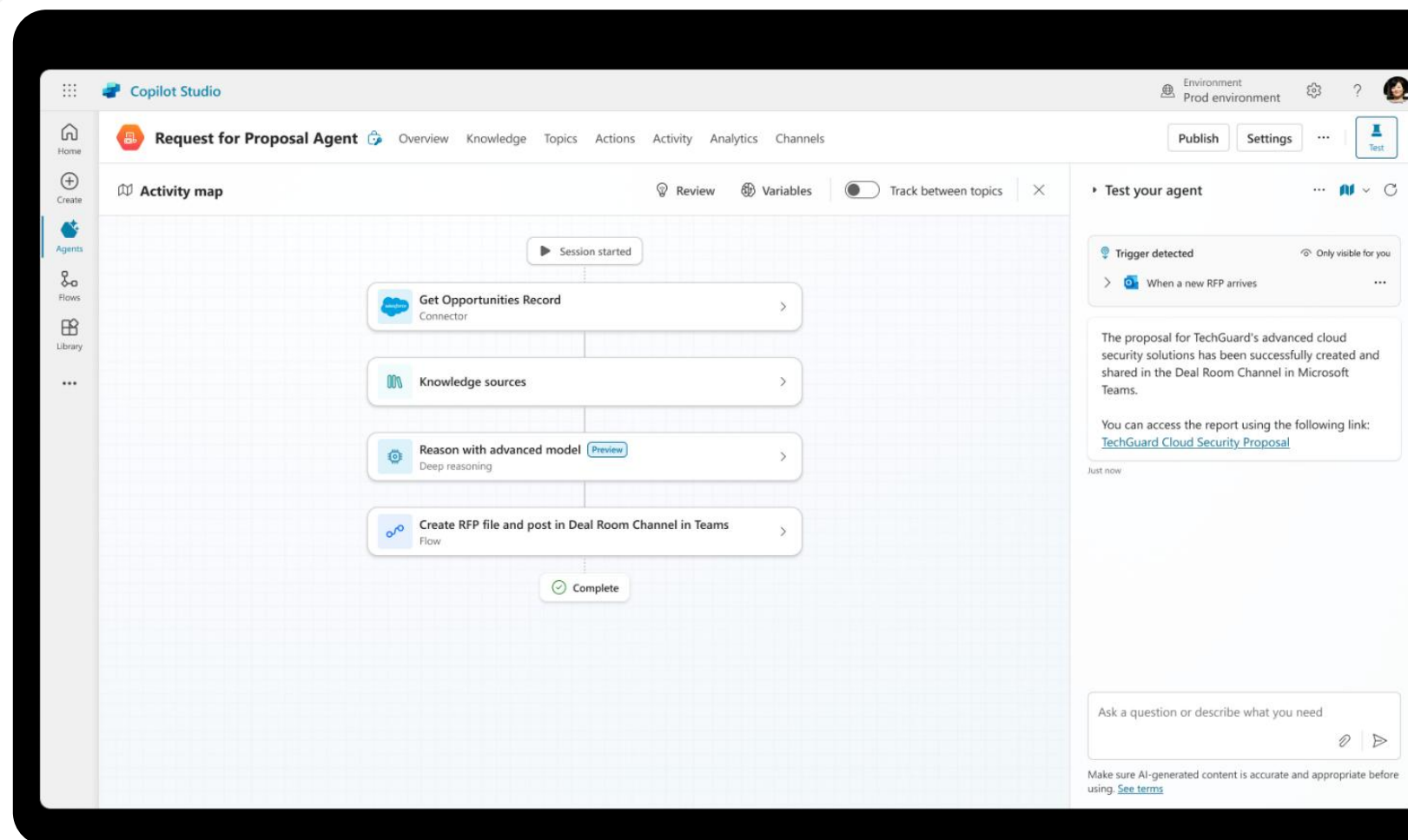
Preview

Makers can add deep reasoning to the agent workflow by specifying the need within the agent instructions.

Agents use reasoning models like Azure OpenAI o1 model with enterprise data to complete complex tasks.

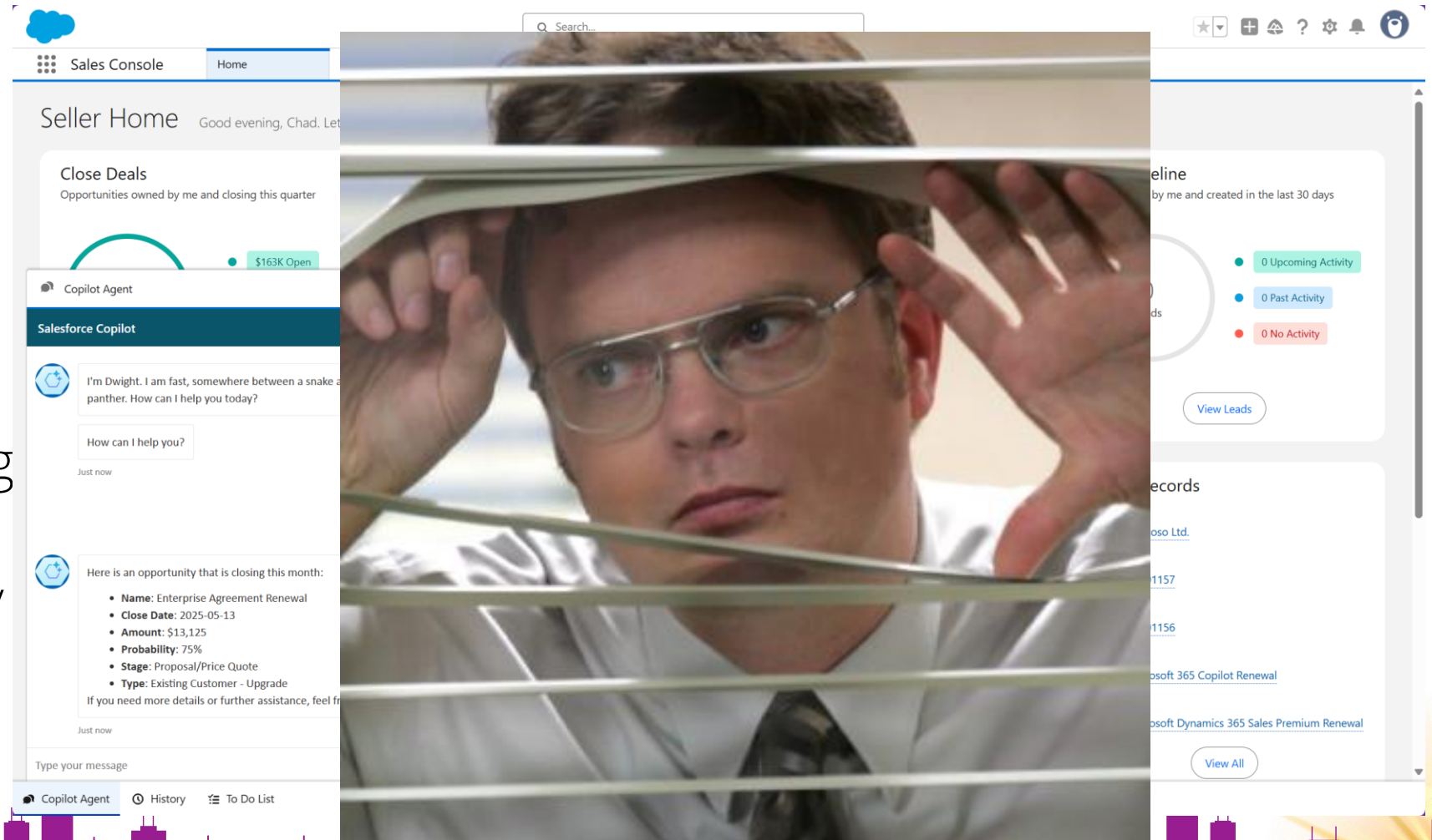
Agents can spend more time thinking before responding, leading to greater accuracy in solving tasks that require logical deliberation, problem-solving, step-by-step analysis, and organizational context.

New scenarios: Request for Proposals (RFPs), contract reviews or even market analysis.

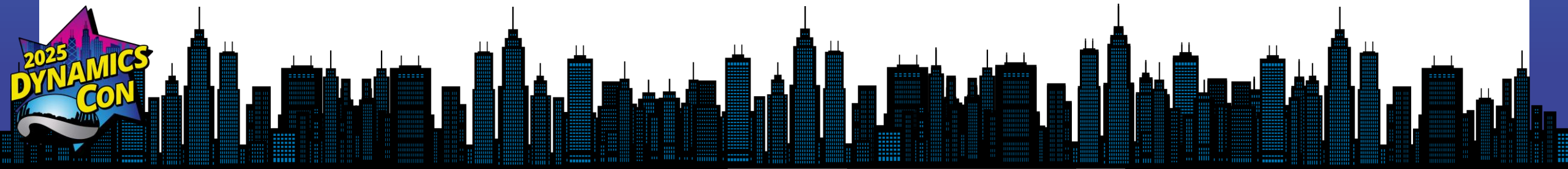


Dwight Sales Assistant Demo

- Works Across any CRM
- Demo
 - Actions
 - Salesforce
 - Email
 - Dynamics Chaining
 - Deep Reasoning
 - Embed in 3rd party CRM



Agent Creation Demo



Create



New agent
Create an agent that leverages end-to-end generative AI for task completion, knowledge sharing, analytics, and more.

Explore agents

This AI-powered feature is currently in preview. [See terms](#)



Safe Travels
Provides answers to common travel questions and related health and safety guidelines



Website Q&A
Instantly answer user questions using the content of your web site or other knowledge.



Team Navigator
Assists employees in finding colleagues and their hierarchy within the organization using Microsoft Teams



IT Helpdesk
Empowers employees to resolve issues and effortlessly create/view support tickets.



Store Operations
Improve the efficiency of retail frontline workers by enabling easy access to store procedures and policies



Case Management
Provide round-the-clock automated support to customers by understanding their issues and creating cases



Inclusivity
Helps employees to have a safe place to ask questions and to learn how to activate inclusivity in a modern and diverse workforce.



Sustainability Insights
Enables users to easily get insights and data about a company's sustainability goals and progress



Weather
Your go-to assistant for getting weather forecast



Voice
A Copilot with voice capabilities.



Awards and Recognition Copilot
Use the Awards and Recognition Copilot to submit nominations for recognizing individual coworkers and teams, and to view your own recognitions.



Wellness Check Agent
Conduct automated wellness checks to gauge employee morale and provide insights for a healthier workplace.



Approval Manager Coming soon
Streamline your approval process across multiple systems with summarized requests in a consolidated view



CV Match Coming soon
Employees use the power of AI to analyze CV and get recommended CVs



Job Craft Coming soon
Revolutionize your HR approach with AI-constructed job descriptions and refined interview questions



Kudos Coming soon
Transform your company culture by crafting and promoting well-deserved positive peer-to-peer recognition



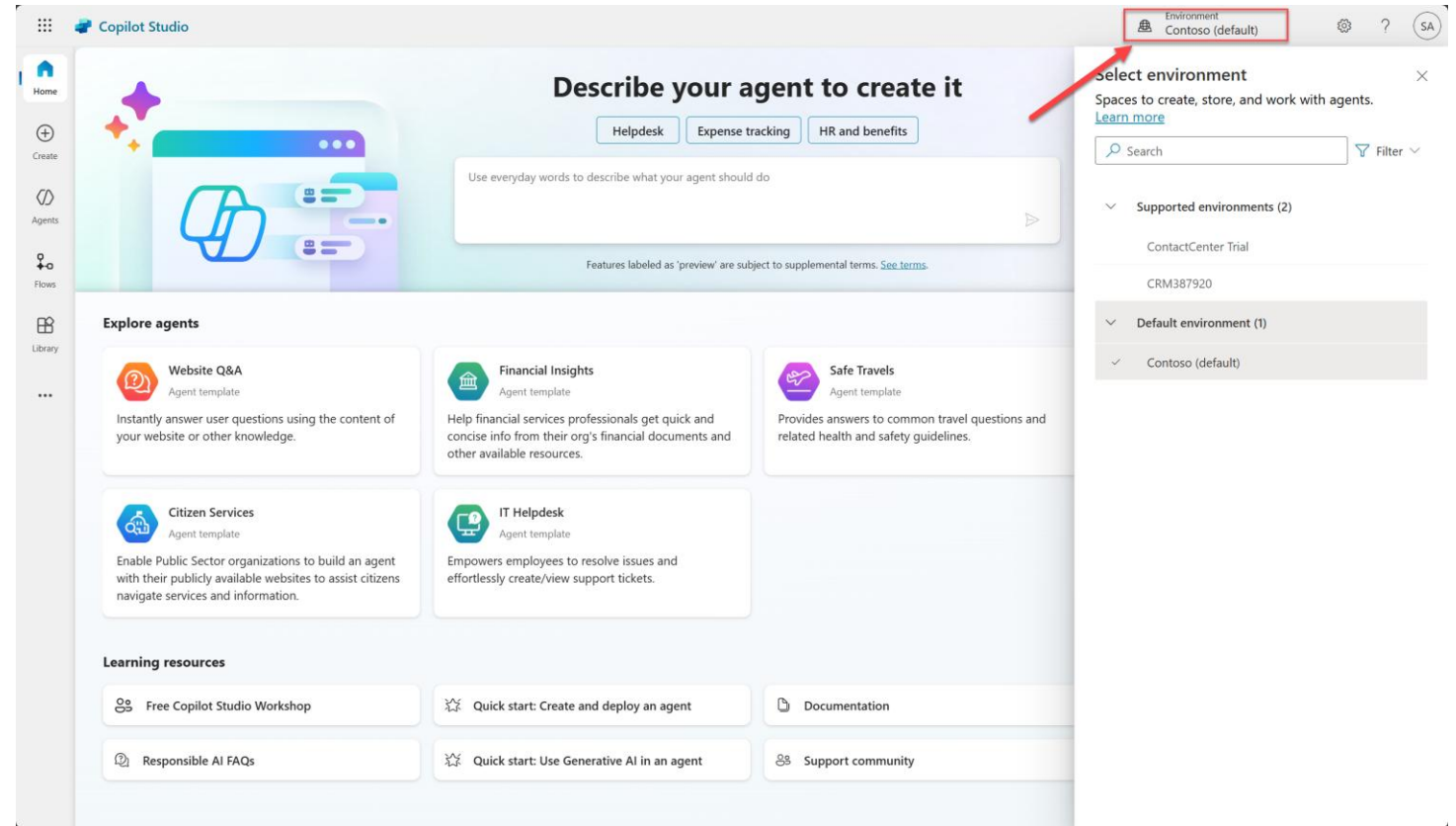
Status Tracker Coming soon
Promote communication with less meetings by streamlining your team's status updates with automated surveys



Wellness Check Coming soon
Conduct automated wellness checks to gauge employee morale and provide insights for a healthier workplace

Copilot Studio & Environments

- Each agent/bot is created in a Dataverse environment
- Verify you are in the correct environment before creating
- Agents and components can be added to solutions and moved between environments



Copilot Studio Kit

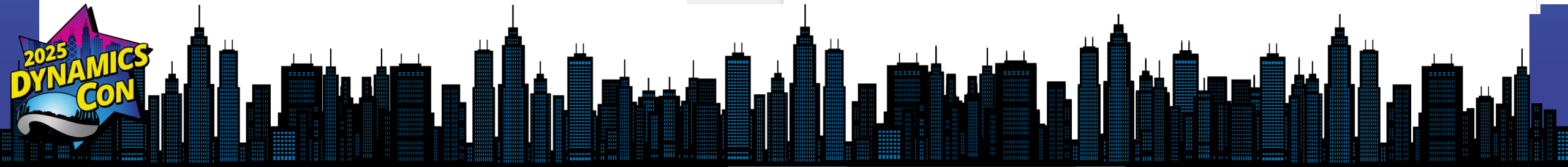
- Testing capabilities
- Conversation KPIs
- SharePoint synchronization
- Webchat Playground
- Adaptive Cards Gallery
- Agent Inventory
- Agent Review Tool

• <https://github.com/microsoft/Power-CAT-Copilot-Studio-Kit>

The screenshot displays the Dynamics 365 Copilot Studio interface. At the top, there's a search bar and navigation tabs. The main area shows a 'Customer service hours - Saved' test set. A dropdown menu is open, showing 'Track Order Test - Saved' and 'Store Operations - Basic - Saved'. The 'Store Operations - Basic' test set is selected, and its 'General' tab is active. Below this, a table titled 'My Test Results*' shows the results of four test runs. The table has columns for 'Conversation ID', 'Test Utterance', 'Response', 'Test Type', 'Triggered Topic / Event', 'Latency (ms)', 'Result', and 'Result Reason'. The results show a mix of 'Success' and 'Failed' outcomes. A red box highlights the 'Test Type' column and the 'Store Operations - Basic' test set name. Another red box highlights the 'Result' and 'Result Reason' columns for the 'Track order' test run.

Conversation ID	Test Utterance (Copilot Test)	Response	Test Type (Copilot Test)	Triggered Topic / Event	Latency (ms)	Result	Result Reason
1/LorYUDz9J8W997bPdb...	What are the customer service hours?	We provide support 24x7. Our o...	Response Match	Store hours	386	Success	Exact match between the expected message and the received message
8XQG2VagUuC1nPdQzh...	What is Surface Dock?	The Surface Dock is an accessor...	Generative Answers	UnknownIntent	5.745	Success	AI-generated assessment of the response. Please review.
73Nhx9Shel9K9J6T5Qbc...	Information about Lenovo	Product found!	Attachments (Adaptive Cards ...)	Adaptive Card Produ...	3.596	Failed	Not an exact match between the expected attachment(s) JSON and the ...
gdnDDCKoEaEECNWuW...	I want to know the status of an order	What is the order number?	Topic Match	Track order	475	Success	Exact match on the triggered topic or event name

Rows: 4



Copilot Studio Licensing

Microsoft Copilot Studio

Pay for only what you use. Build and deploy agents across multiple channels to assist employees and customers.

Pay-as-you-go

Start using without any commitment up front

[Get started](#)[Explore pricing](#)

Microsoft Copilot Studio

Build your own agents, available across multiple channels, to assist employees and customers.

\$200.00

25,000 messages/month^{1, 2, 3}

[Buy now](#)[Try free](#)

Message Scenarios

[Billing rates and management - Microsoft Copilot Studio | Microsoft Learn](#)

Copilot Studio feature	Billing rate	Use in Microsoft 365 Copilot scenarios ¹	Autonomous triggers ²
Classic answer	1 message	No charge	N/A
Generative answer	2 messages	No charge	2 messages
Agent action	5 messages	No charge	5 messages
Tenant graph grounding for messages	10 messages	No charge	10 messages
Agent flow actions <i>per 100 actions</i>	13 messages	13 messages	13 messages
AI tools			
- Text and generative AI tools (basic) <i>per 10 response</i>	1 message	1 message	1 message
- Text and generative AI tools (standard) <i>per 10 response</i>	15 messages	15 messages	15 messages
- Text and generative AI tools (premium) <i>per 10 response</i>	100 messages	100 messages	100 messages



Pay-as-you-Go

- In the Power Platform Admin Center
- Under Licensing → Billing Plans
- Create a Billing Plan for your environment and select Copilot Studio

The screenshot shows the Power Platform Admin Center interface. The left sidebar contains navigation links for Home, Actions, Manage, Security, Copilot, Monitor, Deploy, Licensing, and Support. The main content area is titled 'Billing plans' and shows a table with one active plan: 'D365ContactCenterBillingPlan'. A modal window titled 'D365ContactCenterBillingPlan' is open, displaying the 'Power Platform products' dropdown menu. The dropdown menu is open, showing options: 'Dataverse', 'Power Apps', 'Power Automate', 'Power Pages', 'Copilot Studio' (selected), and 'Power Platform Requests'. Red arrows and numbers 1 and 2 highlight the dropdown menu and the 'Copilot Studio' option respectively.

Name	Status	Azure subscription name
D365ContactCenterBillingPlan	Enabled	PreSales - Azure Subscription

D365ContactCenterBillingPlan

Available options for editing this plan include selecting the Power Platform products to be associated with this plan and modifying the target environments.

Name *

D365ContactCenterBillingPlan

Power Platform products *

Dataverse, Copilot Studio

- ☒ Dataverse
- ☐ Power Apps
- ☐ Power Automate
- ☐ Power Pages
- ☒ Copilot Studio
- ☐ Power Platform Requests

Save Cancel

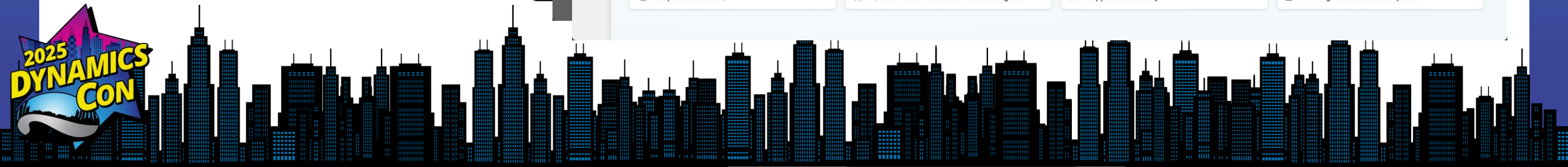
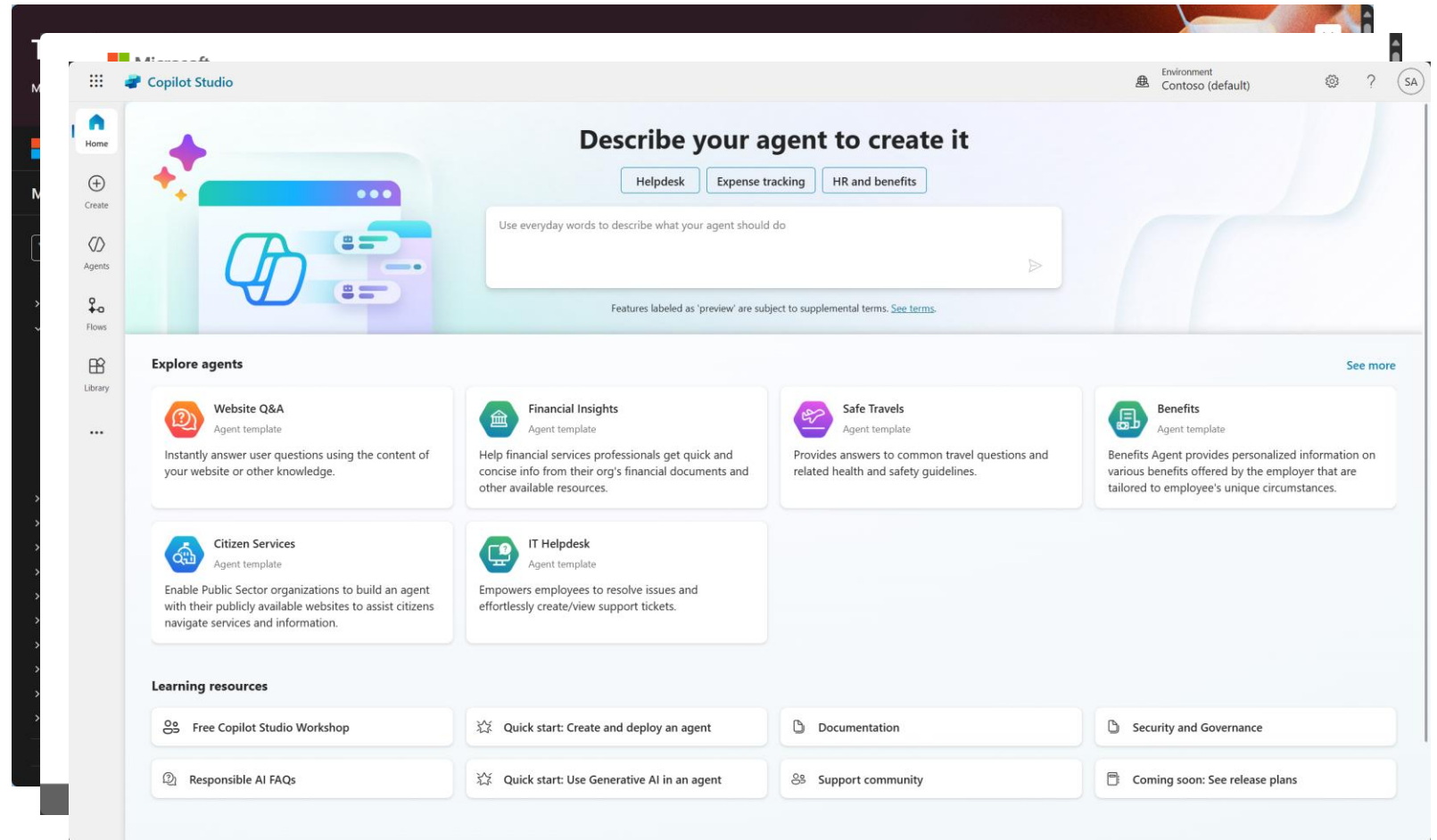
Can You Access Copilot Studio?

<https://copilotstudio.microsoft.com/>



Steps to start trial

- Sign up for a trial - Microsoft Copilot Studio | Microsoft Learn



Power CAT Copilot Studio Webinars

- Microsoft Power CAT AI Webinars are a series of interactive virtual sessions designed to help your organization adopt Microsoft Copilot Studio and agents.
- In these sessions you'll engage with Microsoft experts and other customers to gain the knowledge and skills needed to successfully adopt and thrive with agents in your organization.
- [Microsoft Power CAT AI Webinars](#)

The screenshot displays the Microsoft Power Customer Advisory Team (Power CAT) website, specifically the 'Upcoming Sessions' section. The page header includes the Microsoft logo and 'Power Customer Advisory Team'. Below the header, the 'Upcoming Sessions' section is titled and contains three cards. Each card lists a session title, date, time, description, a link to the session, and a 'Register Now' button. The sessions are: 'Application Lifecycle Management' (May 7, 9 AM PDT), 'Deep Dive into Autonomous Agents' (June 4th, 9 AM PDT), and 'Elevate your Copilot Adoption' (June 25th, 9 AM PDT). Below the 'Upcoming Sessions' section, there is a 'Previous Sessions' section with three cards: 'Unlocking the Potential of Copilot Studio', 'Where Agents Meet Opportunity', and 'Navigating AI Risks: A Practical Guide'.

Session Title	Date	Time	Description	Link	Register Now
Application Lifecycle Management	May 7	9 AM PDT	Wondering how to move your Copilot Studio agents from dev to test to prod the right way? In this session, we'll guide you through Application Lifecycle Management (ALM) options – from the simplest to the most advanced – so you can adopt to what fits your team today and grow as your needs evolve.	https://aka.ms/MCS/ALM	Register Now
Deep Dive into Autonomous Agents	June 4th	9 AM PDT	Explore the world of Autonomous Agents and gain a comprehensive understanding of their terminology, differentiation, and operational mechanisms. Witness live demonstrations that will inspire you to prioritize building autonomous agents now.	https://aka.ms/mcs/AutoAgents	Register Now
Elevate your Copilot Adoption	June 25th	9 AM PDT	Curious about boosting Copilot adoption in your organization? Join our upcoming webinar to discover how Microsoft's Customer and Partner Solutions organization is driving successful adoption and transformation with Copilot. Learn proven strategies and change management techniques that can enhance your journey.	https://aka.ms/mcs/adoption	Register Now

Session Title	Description
Unlocking the Potential of Copilot Studio	Discover the power of autonomous agents and AI tools through real-world examples and interactive activities.
Where Agents Meet Opportunity	Uncover high-value opportunities for AI implementation in your organization.
Navigating AI Risks: A Practical Guide	Learn to identify, assess, and mitigate risks associated with implementing AI in your organization.



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