

Copilot Studio and Azure AI Workshop

Lab 4: Deploying the Sales Buddy
Agent.

Hands-on Lab Step-by-Step Guide

April 2025

Lab Overview and Pre-requisites

Learning Objectives

In this lab, participants will deploy the **Sales Buddy Agent** to **Microsoft Teams** and a **demo website**, enabling seamless collaboration and customer interaction.

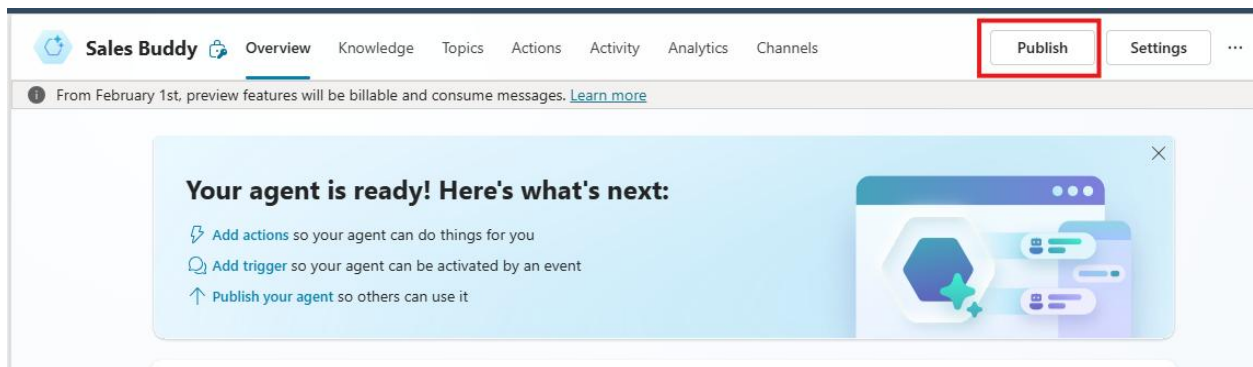
Pre-requisites

- You will need credentials to a demo tenant that has Copilot Studio and AI Builder trial enabled.
- You should have completed Lab 2
- Access to Lab 4 Assets folder

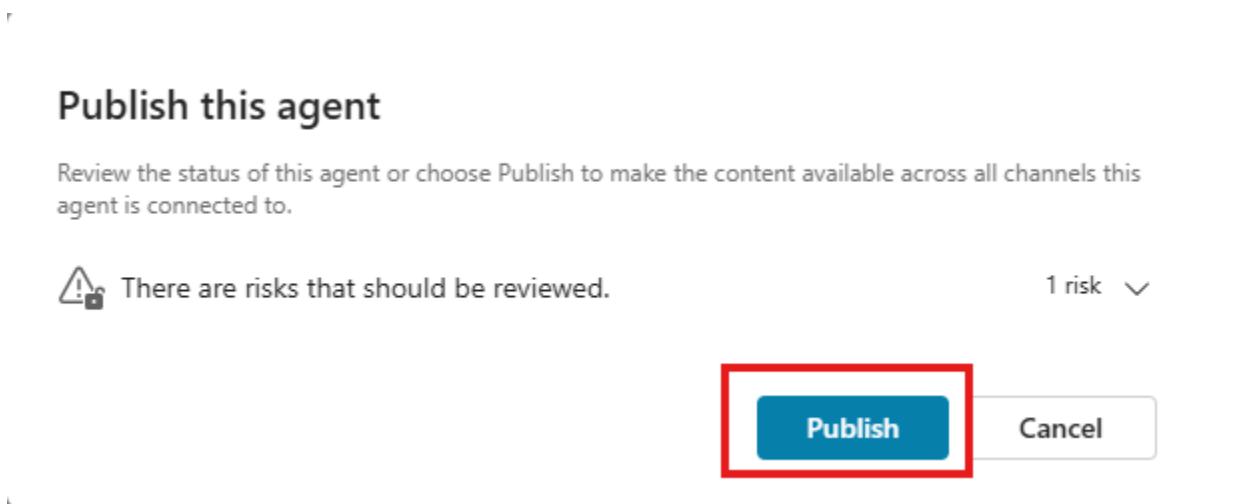
Lab 4: Deploying the Sales Buddy Agent.

>>Publish the Sales Buddy agent<<

1. Login to Copilot Studio <https://copilotstudio.microsoft.com/> and click on the Sales Buddy agent you have worked on. Click on **Publish**




2. Click on **Publish**, again



Just FYI: There might be risks, depending on the agent configuration. You can proceed and click on Publish

Publish this agent

Review the status of this agent or choose Publish to make the content available across all channels this agent is connected to.

 There are risks that should be reviewed. 1 risk ^


Your agent is shared with all users in the organization Share settings

Allowing anyone in an organization to chat with your agent allows them to access content added to your agent. [Learn more](#)

Publish Cancel

While the agent is being published, you can close the window. This will not impact the process.

Your agent is being published

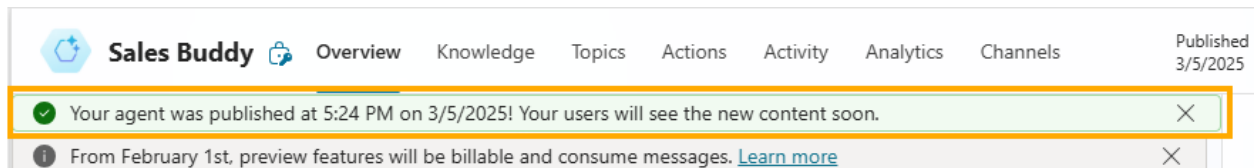


Publishing...

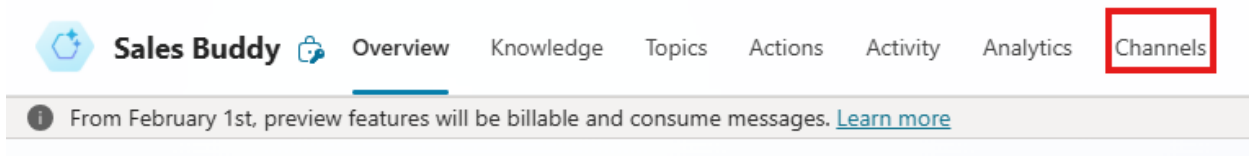
Feel free to close this window. Your agent will keep publishing in the background.

Close

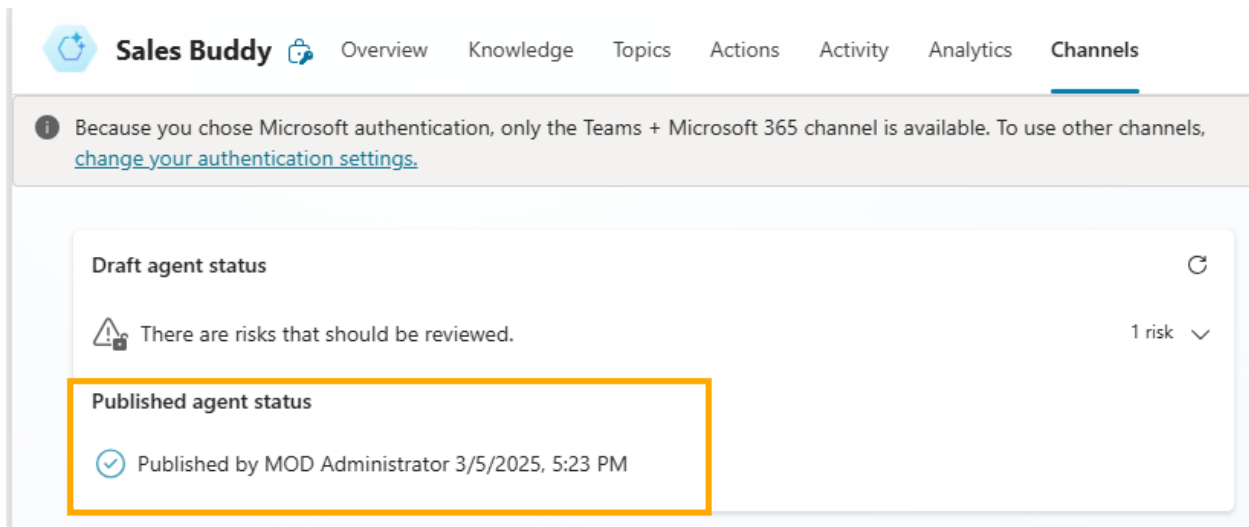
3. You will see confirmation that the agent is now published





4. Click on Channels




You will also see that the agent is published




5. Scroll down and click on Teams + Microsoft 365

 **Sales Buddy** 

OverviewKnowledgeTopicsActionsActivityAnalytics**Channels**


 Because you chose Microsoft authentication, only the Teams + Microsoft 365 channel is available. To use other channels, [change your authentication settings.](#)


Published agent status


 Published by MOD Administrator 3/5/2025, 5:23 PM


Channels


Configure your agent channels to meet your customers where they are.


 **Telephony**


 **Teams + Microsoft 365**


 **Demo website**


 **Custom website**


 **Mobile app**


 **Facebook**


 **Skype**


 **Slack**


 **Telegram**

 **Twilio**

 **Line**

 **GroupMe**

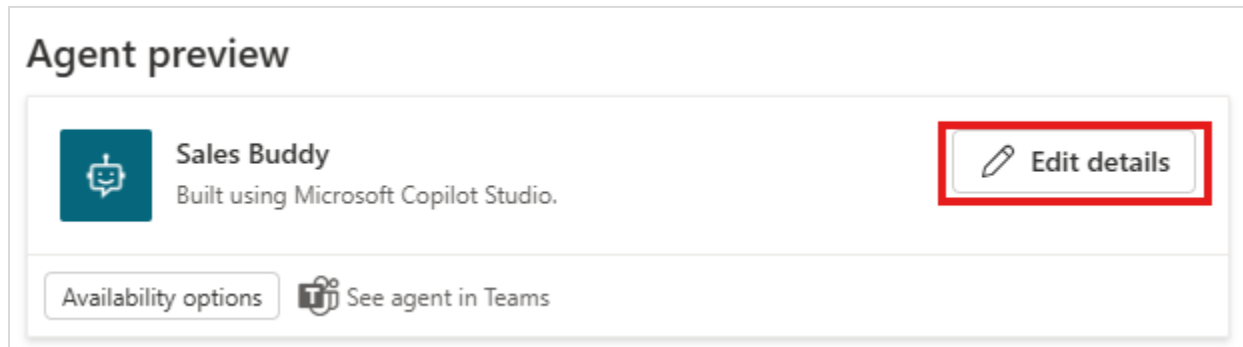
 **Direct Line Speech**

 **Email**

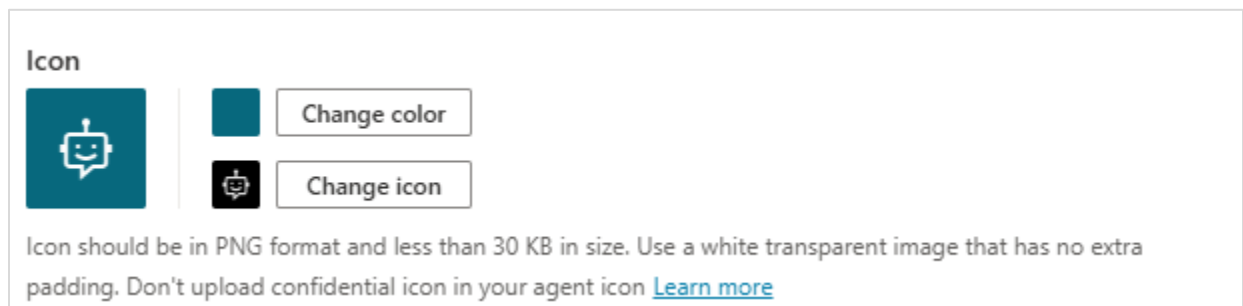
6. Click on Add Channel

Add channel

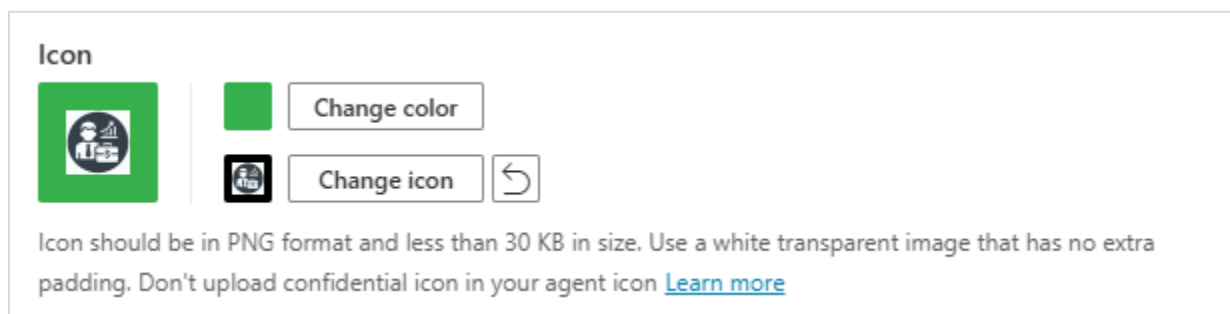
7. Here you have the chance to customize some aspects by clicking on **Edit Details**



8. You can change the color and Icon. Click **Change Icon** and upload the PNG file as Icon available in **Lab 4 Assets** folder. Click **Change Color** and select a new background color.



Example:



9. Provide **Short Description**: *Sales Buddy built using Microsoft Copilot Studio.*

In the long description, you can use the same description as the initial one provided when the agent was created: *Sales Buddy agent provides information on sales process, customer onboarding, customer events and information from dataverse like - Accounts, Contacts and Activities*

Short description

Sales Buddy built using Microsoft Copilot Studio.

Up to 80 characters

Long description

Sales Buddy agent provides information on sales process, customer onboarding, customer events and information from dataverse like - Accounts, Contacts and Activities



Up to 3400 characters

10. Select both: Users can add this agent to a team and Use this agent for group and meeting chats

Teams settings

Decide where and how your agent should function in Teams.

☒ Users can add this agent to a team

 Review best practices and adjust settings to prevent spamming team members.[Go to Teams settings](#) 

☒ Use this agent for group and meeting chats

11. Click on **More** and Complete with your name

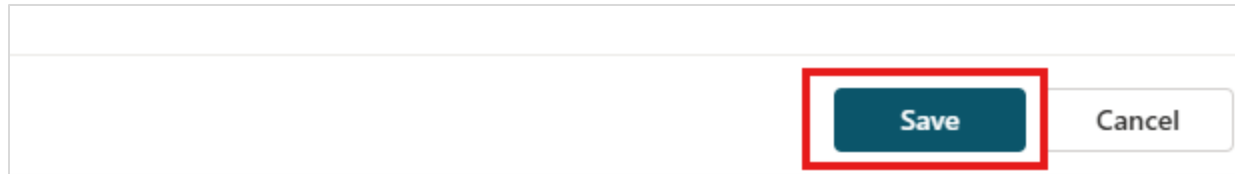
More 

Developer name

Your developer name

Up to 32 characters

12. Click on **Save**



13. Close the Teams + M365 Channel

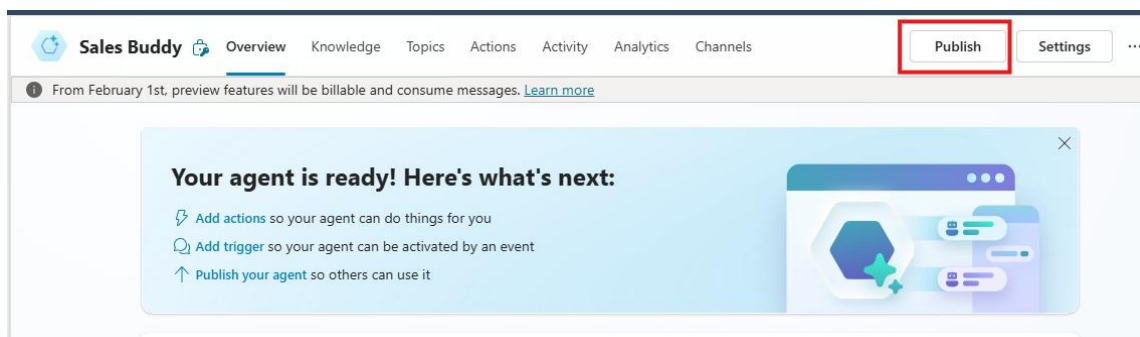
Teams + Microsoft 365



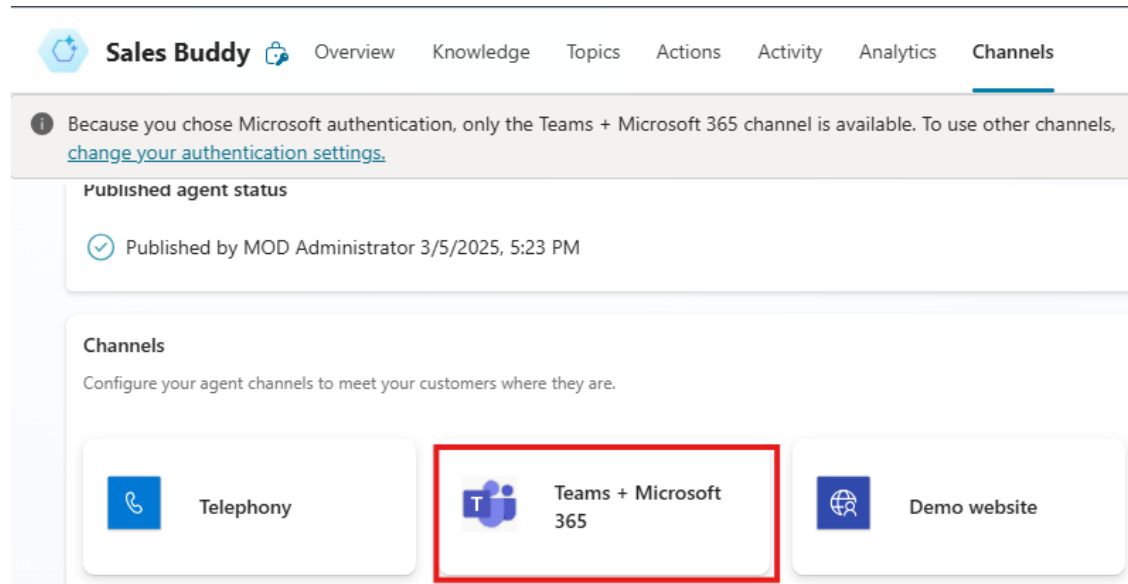
Microsoft 365 is your cloud-powered productivity solution and includes Outlook, Word, Excel, PowerPoint, and OneDrive. [Learn more](#)

When you publish your agent to Microsoft 365, we'll publish it to Teams too. You'll get all of your agent's advantages in Teams: meeting summaries and transcripts, pointers to open issues or unresolved questions, and more effective collaboration.

14. Publish the agent again (Steps 1 to 3)

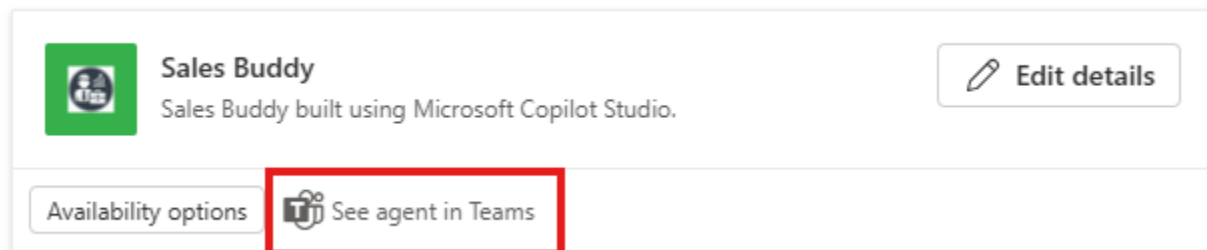


15. Go back to Teams + M365 Channel



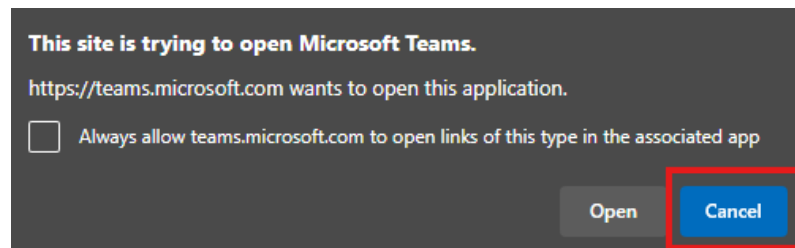
16. Click on See agent in Teams

Important: This will show the agent in your Microsoft Teams app only. This will not make the agent available to anyone else. This step is useful for testing. We will cover how to make the agent available to the entire organization later in this guide

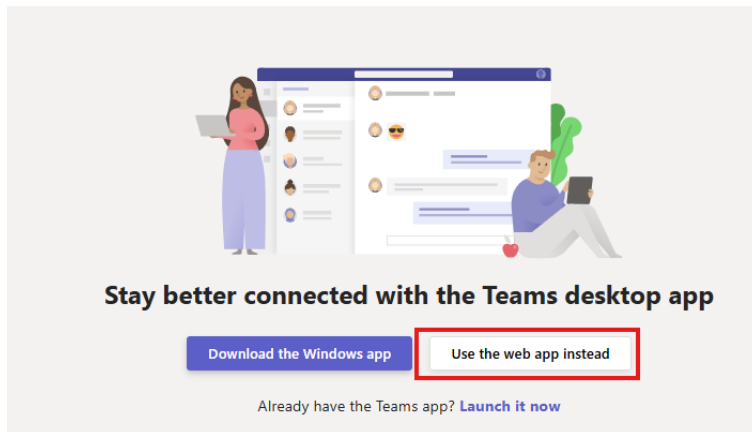


If it tries to open the Teams application, click **Cancel** to open Teams on web.

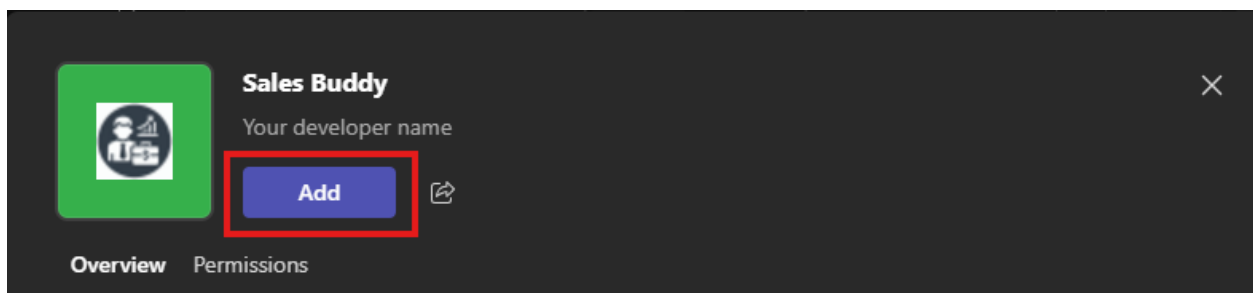
Note: In case you already have MS Teams app configured, you can proceed and use the application. Keeping the Teams on Edge will help you to save time if your Teams app is not installed and/or configured



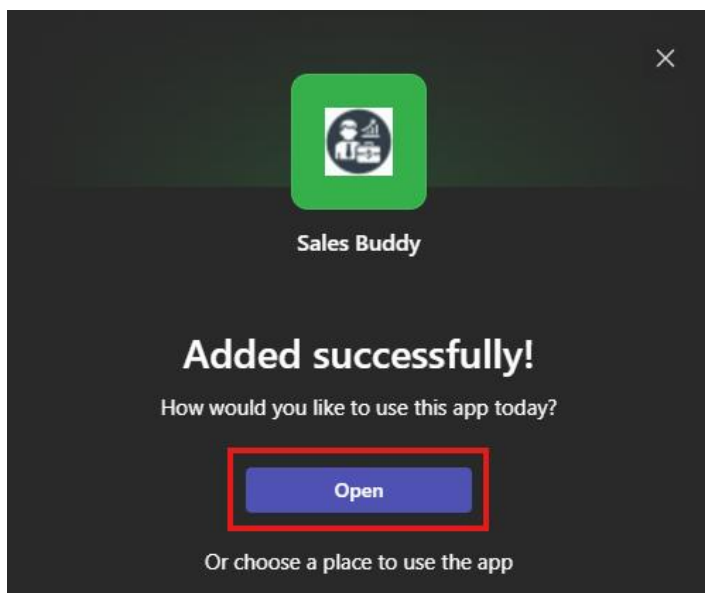
Click on Use the web app instead



17. On MS Teams, click on **Add**

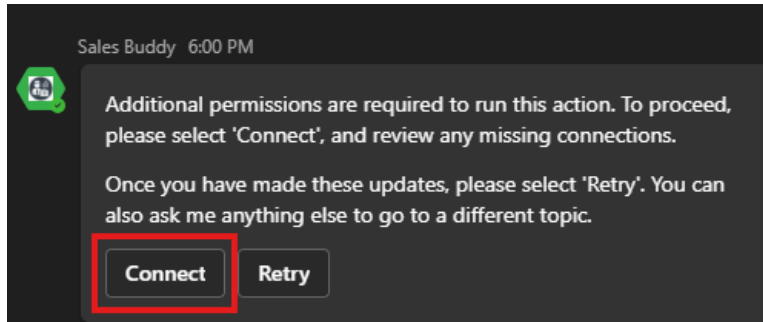


18. Then click on **Open**






19. Now you have the agent ready on your MS Teams. You can ask questions like you did while testing on Copilot Studio

For the first time, it might ask you to connect to access the connectors



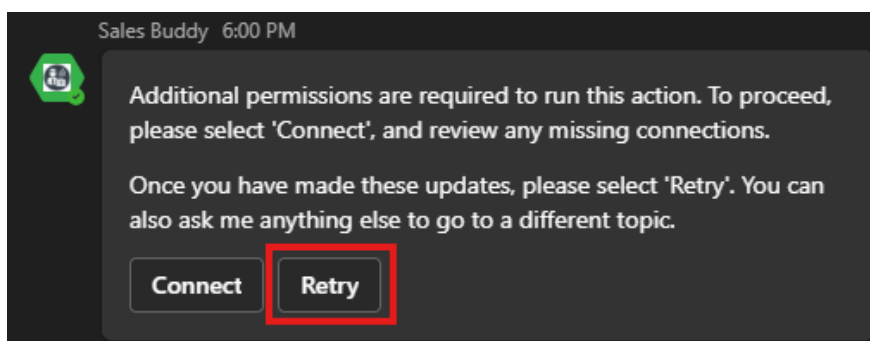
20. Click on each **connect** option

<input type="checkbox"/>	Name	Used By	Status	
<input type="checkbox"/>	 Excel Online (Business) Excel Online (Business) connector lets you work with Excel files in document libraries suppo...	1 action	⚙ Not Connected	Connect
<input type="checkbox"/>	 Microsoft Dataverse Provides access to Microsoft Dataverse actions and triggers for Power Platform environme...	1 action	⚙ Not Connected	Connect
<input type="checkbox"/>	 Register Attendee	2 actions	⚙ Not Connected	Connect

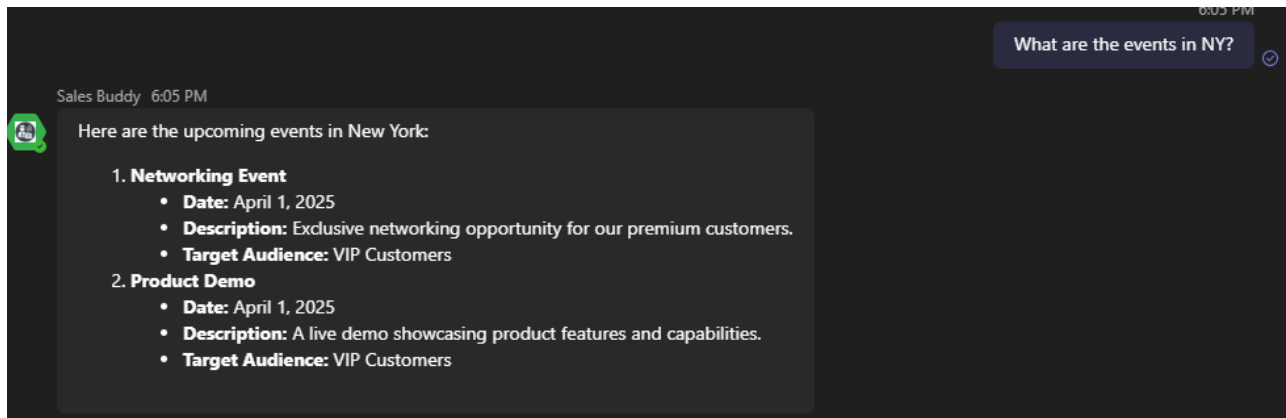
21. And then on **Submit**.



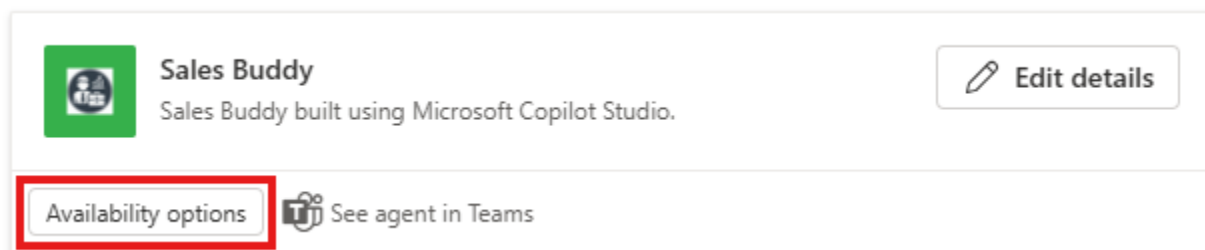
22. Once all connectors are connected, you can go back to Teams and click on Retry



23. You now have the agent working in your Microsoft Teams. You can ask a question.



24. Let's make sure the agent is available to the entire organization. Back to Copilot Studio, you will see the Teams + Microsoft 365 Channel. Click on Availability Options



Here you will see 4 options:

- A. Get a link and manage who can open the agent in Microsoft Teams using this link
- B. Download a file so you can add this agent to Microsoft Teams or M365 Store
- C. Use the store to show the agent to selected people
- D. Use the store to make the agent available to the entire organization. This guide will cover this option

25. Click on **Show to everyone in my org**

Show in the store

Decide who you want to show your agent to:

Show to my teammates and shared users

Appears in **Built by your colleagues**

Show to everyone in my org

Appears in **Built by your org** after admin approval

26. Click on submit for admin approval. This will send the Agent to be approved by the Admin

Submit for admin approval

27. Click on **Yes**

Give everyone access to this agent?

Sharing your agent with your organization requires you to give everyone access to the agent. Do you want to do this?

[Learn more](#)

Yes

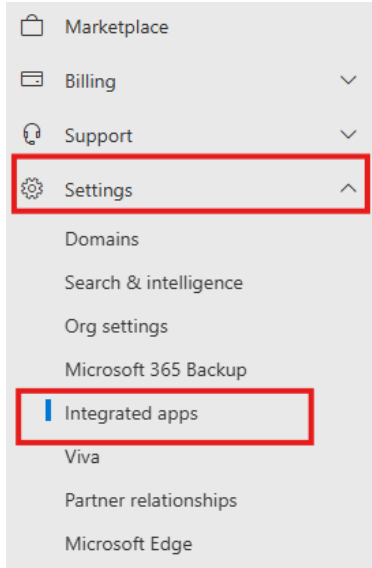
Cancel

You will see the confirmation that the agent was submitted for approval

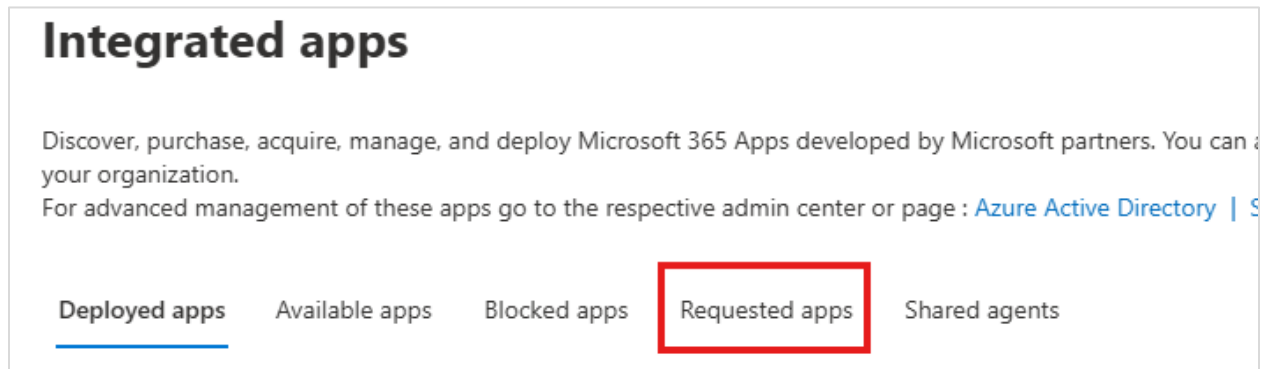
i Your agent is submitted and waiting for approval from your Teams admin.

28. To approve the Agent, access <https://admin.microsoft.com/> and login as Tenant Admin



Click on **Settings** and then **Integrated Apps**



29. Click Requested Apps



30. You will see the Sales Buddy with Publish Pending Status. Click on the Agent name

Name	Host products	Status	Last Modified ↓
 Sales Buddy Sales Buddy built using Microsoft Copilot Studio.	Teams	 Publish Pending	3/5/2025

31. Click on Publish

Description
Sales Buddy agent provides information on sales process, customer onboarding, customer events and information from dataverse like - Accounts, Contacts and Activities

Actions

Publish

Reject

32. And then click on confirm

Confirm

Cancel

Now the Agent appears on "Available Apps". You can use the Search Bar to find the Agent and then manage it.

Deployed apps

Available apps

Blocked apps

Requested apps

Shared agents

All apps in this list are available for users in your organization to install according to the status shown in Availability Status.

Any changes you make here will affect how these apps show up in Outlook, Microsoft 365 (formerly known as Office.com) and Microsoft Copilot. Apps installed for a user may be automatically used by Microsoft 365 Copilot to answer that user's prompt or take actions such as create, update or delete records on behalf of user as per the capabilities provided by the app. Once acquired from app store by users, apps will be default enabled for use in Microsoft Copilot. Each app is provided under its own terms of use. [Learn more](#)



To manage how these apps show up in Teams, go to the Teams Admin Center. To view or edit policies for Outlook add-ins, go to the Exchange Admin Center. To view or edit status for Word, Excel, and PowerPoint add-ins, go to Microsoft 365 Admin Center > Org Settings.

Refresh

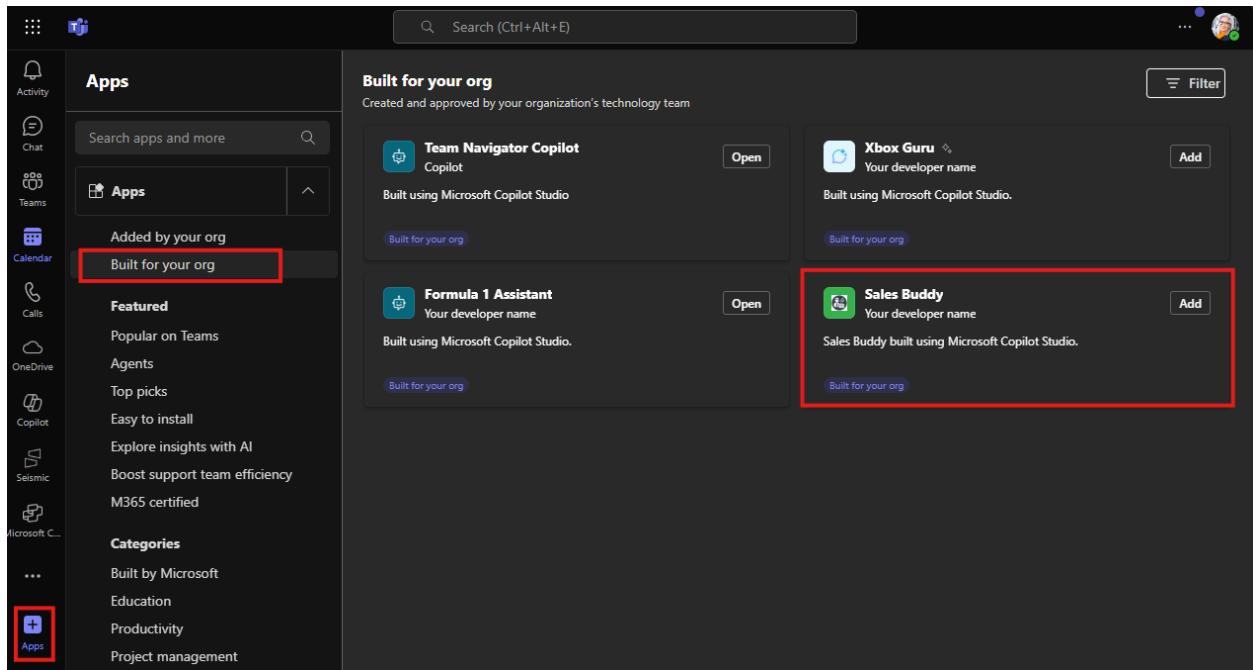
1 items

Filter

sales buddy

Name ↑	Host products	Availability Status
 Sales Buddy Sales Buddy built using Microsoft Copilot Studio.	Teams	 All users in the organization can install

At this point, any user in the organization can access the Apps in Microsoft Teams, click on "Built for your org" and see the agent available

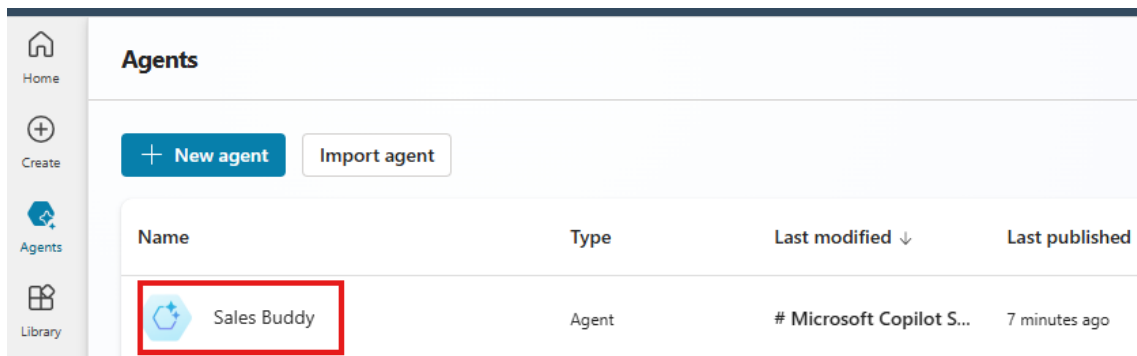


Testing the Sales Buddy Agent on a Demo Website

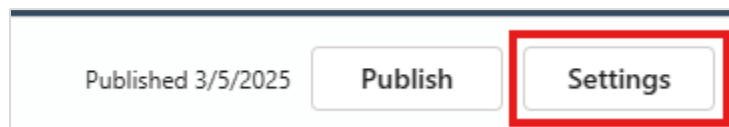
Now that the Sales Buddy Agent is successfully deployed to Microsoft Teams, let's test its functionality on a demo website. This will mimic the process of deploying the bot to an external custom website, allowing us to evaluate its interactions in a web-based environment before full integration.

First, let's make changes to the security configuration so the Agent can be published outside of Teams and/or Copilot. This will allow the agent to access user's files when published in website by asking for authentication

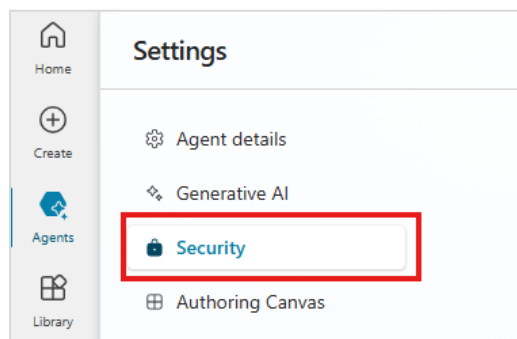
1. Go back to Copilot Studio and Click on the **Sales Buddy agent**



2. Click on **Settings**



3. Click on **Security**



4. Click on **Authentication**

Security


Authentication
Verify a user's identity during a chat.

Web channel security
Review other enhanced security options.

Allowlist
Let other agents call your agent as a skill.

5. Select **Authenticate Manually** and enable "Require users to sign in"

Choose an option

☐ No authentication 
Publicly available in any channel


☐ Authenticate with Microsoft
Entra ID authentication in Microsoft Teams, Power Apps, or Microsoft 365 Copilot

☒ **Authenticate manually**
Set up authentication for any channel

☒ **Require users to sign in**

Redirect URL

https://token.botframework.com/.auth/web/re

 **Copy**

Service provider *

Azure Active Directory v2

Client ID *

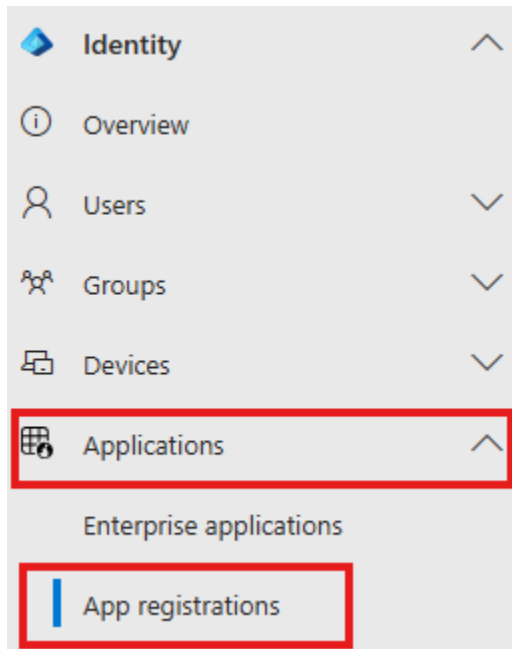
37433d59-75c2-46e4-a00c-603dc3780777

Client secret *

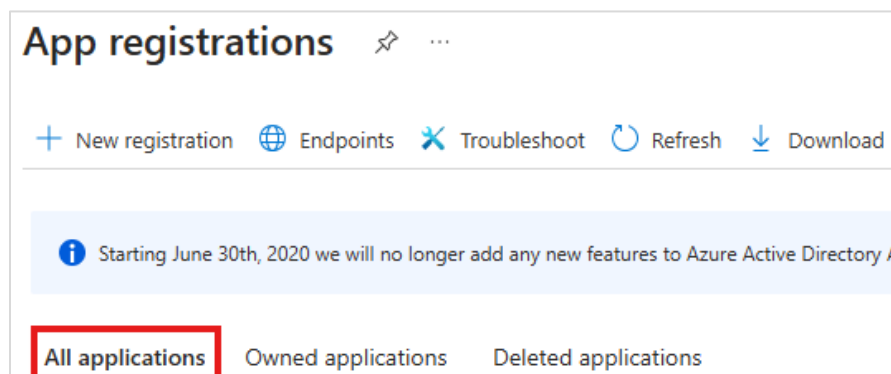
.....

Now, we need to get the Client ID and Client Secret on Entra ID Portal. Access <https://entra.microsoft.com/>

6. On the left menu, click on **Applications** and then **App Registrations**



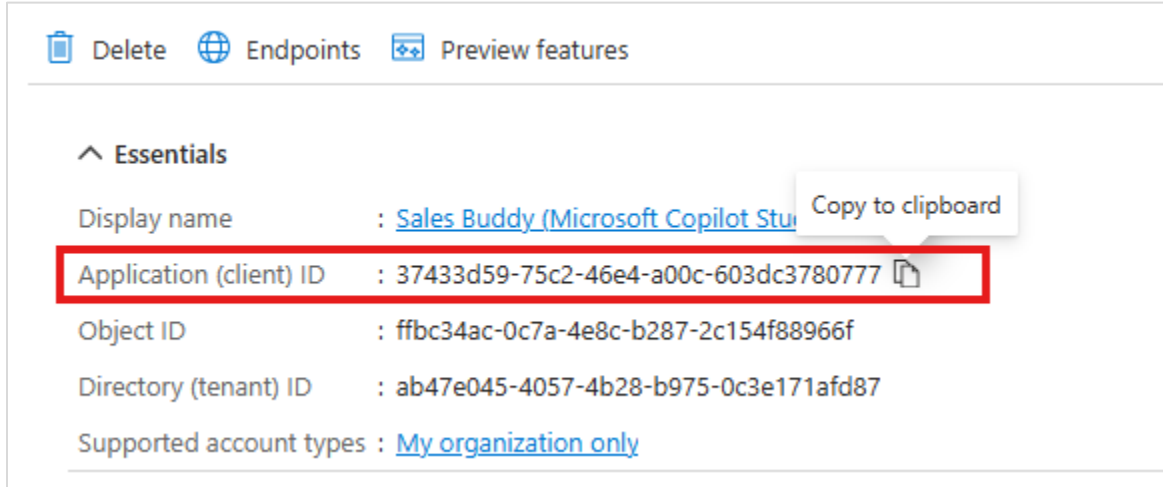
7. Click on **All applications**



8. Look for your application on the list and click on it




9. Copy the Application (client) ID and save it in a notepad for next step.



Delete Endpoints Preview features

^ Essentials

Display name : [Sales Buddy \(Microsoft Copilot Studio\)](#)

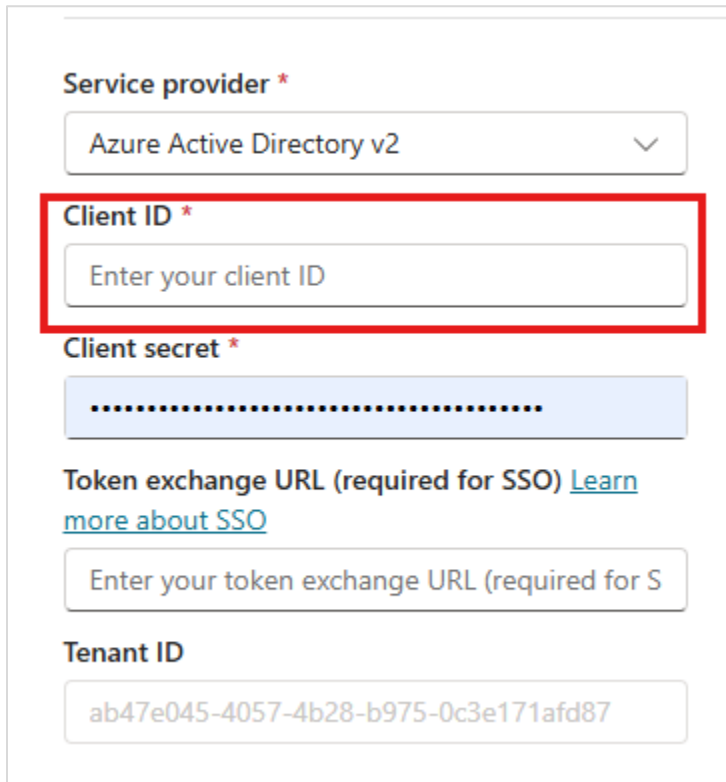
Application (client) ID : 37433d59-75c2-46e4-a00c-603dc3780777 

Object ID : ffbc34ac-0c7a-4e8c-b287-2c154f88966f

Directory (tenant) ID : ab47e045-4057-4b28-b975-0c3e171afd87

Supported account types : [My organization only](#)

10. Go back to Copilot Studio and paste the ID in the **Client ID** field



Service provider *

Azure Active Directory v2

Client ID *

Enter your client ID

Client secret *

.....

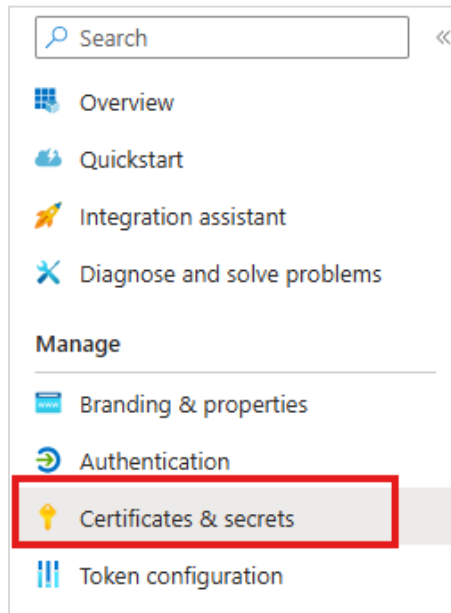
Token exchange URL (required for SSO) [Learn more about SSO](#)

Enter your token exchange URL (required for S

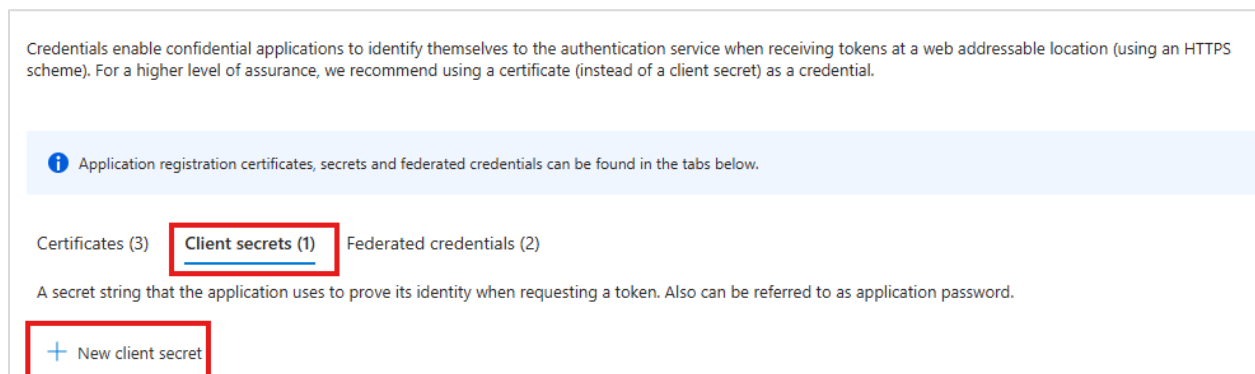
Tenant ID

ab47e045-4057-4b28-b975-0c3e171afd87

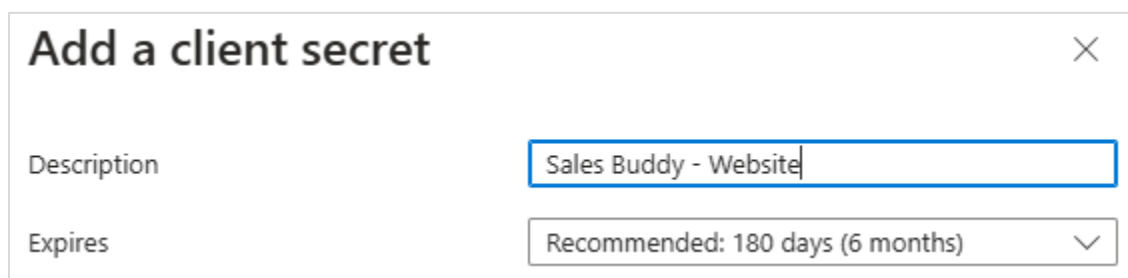
11. Return To your app Registration in Entra ID and click on **Certificates & secrets**



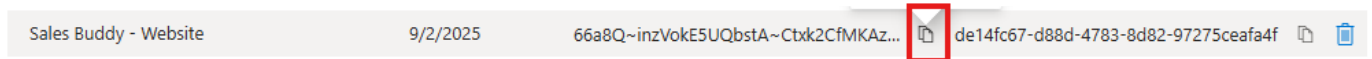
12. Click on **Client Secrets** and then **+ New Client Secret**



13. Enter a **description** and select **expiration date**

A screenshot of the 'Add a client secret' dialog box. The 'Description' field contains the text 'Sales Buddy - Website'. The 'Expires' dropdown menu is set to 'Recommended: 180 days (6 months)'.

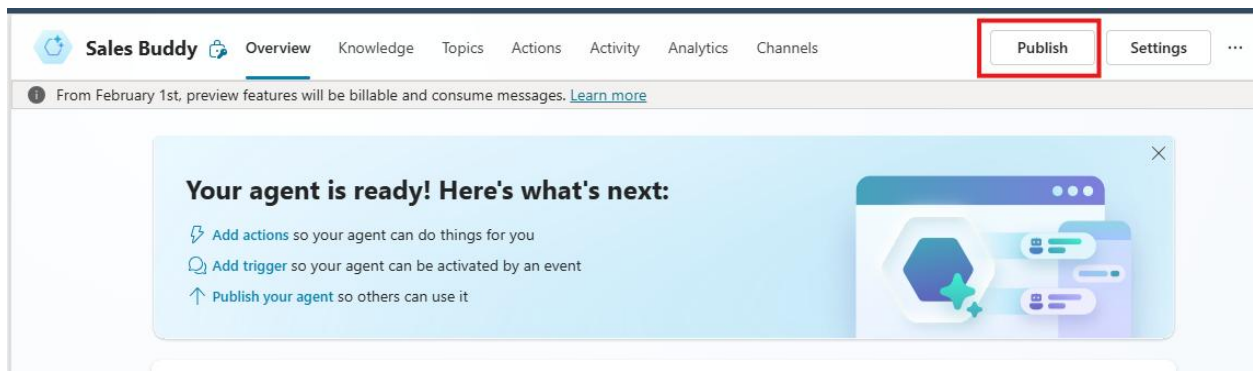
14. Below you will see the new entry created. Copy the **Value** field and save it in a notepad
(**Note:** you won't be able to access the client secret if you close or refresh the window)



15. Go back to Copilot Studio, paste the **Value** to **Client Secret** field and save it

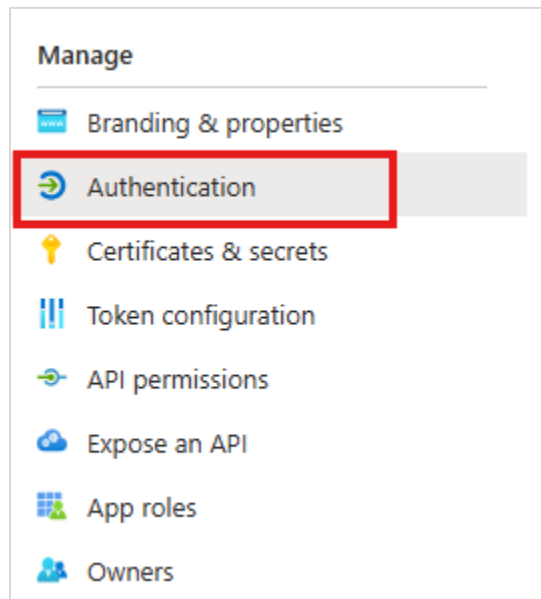
A screenshot of the Copilot Studio configuration form. The form has several fields: Service provider (Azure Active Directory v2), Client ID (Enter your client ID), Client secret (a blue box with dots, highlighted with a red rectangle), Token exchange URL (required for SSO) (Learn more about SSO), Tenant ID (ab47e045-4057-4b28-b975-0c3e171afd87), and Scopes (profile openid). At the bottom, there is a blue Save button, also highlighted with a red rectangle.

16. **Publish** the agent again




Now the Copilot Studio security configuration is completed. We will need to complete the configuration on the Entra ID portal to allow the agent to access the user's files.

17. Back to **Entra ID Admin Center**, click on **Authentication**




18. Click on + **Add a platform**

 Got feedback?

Platform configurations

Depending on the platform or device this application is targeting, additional configuration may be required such as redirect URIs, specific authentication settings, or fields specific to the platform.

 Add a platform

Supported account types


Who can use this application or access this API?


☒ Accounts in this organizational directory only (Contoso only - Single tenant)

☐ Accounts in any organizational directory (Any Microsoft Entra ID tenant - Multitenant)

19. Click on Web

Web applications


 **Web**
Build, host, and deploy a web server application. .NET, Java, Python

 **Single-page application**
Configure browser client applications and progressive web applications. Javascript.

20. On Redirect URIs insert: <https://token.botframework.com/.auth/web/redirect>

*** Redirect URIs**

The URIs we will accept as destinations when returning authentication responses (tokens) after successfully authenticating or signing out users. The redirect URI you send in the request to the login server should match one listed here. Also referred to as reply URLs. [Learn more about Redirect URIs and their restrictions](#)



21. On Front-channel logout URL insert:

<https://unitedstates.token.botframework.com/.auth/web/redirect>

Front-channel logout URL

This is where we send a request to have the application clear the user's session data. This is required for single sign-out to work correctly.

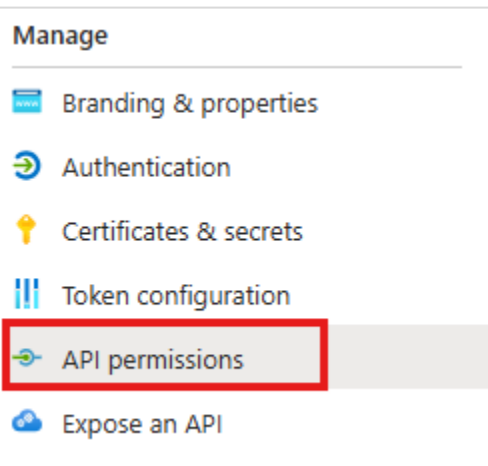
<https://unitedstates.token.botframework.com/.auth/web/redirect> ✓

22. Select both options as below and select **Configure**.

Select the tokens you would like to be issued by the authorization endpoint:

- ☒ Access tokens (used for implicit flows)
- ☒ ID tokens (used for implicit and hybrid flows)

23. Click on **API Permissions**



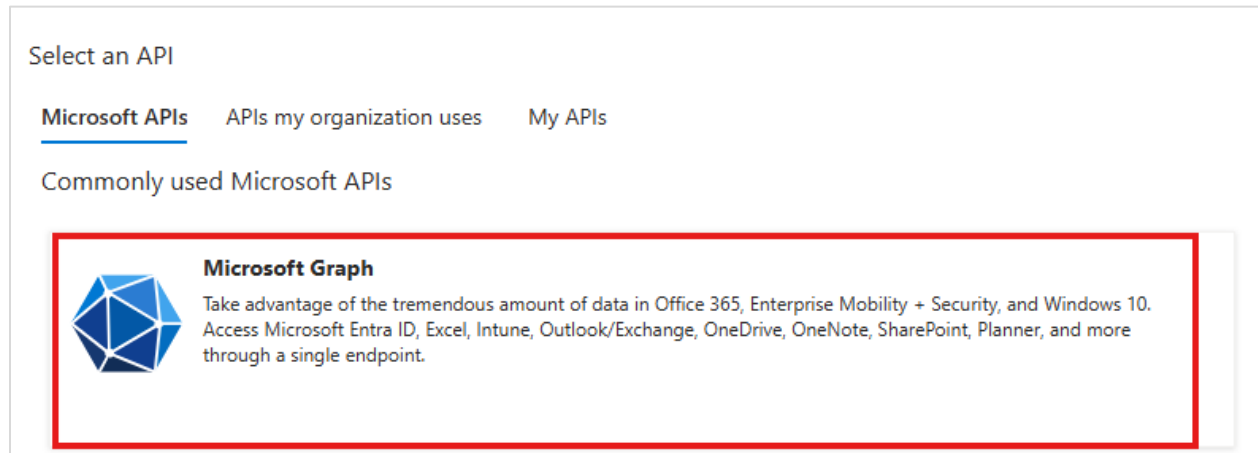
24. And then click on **+ Add a permission**

Configured permissions

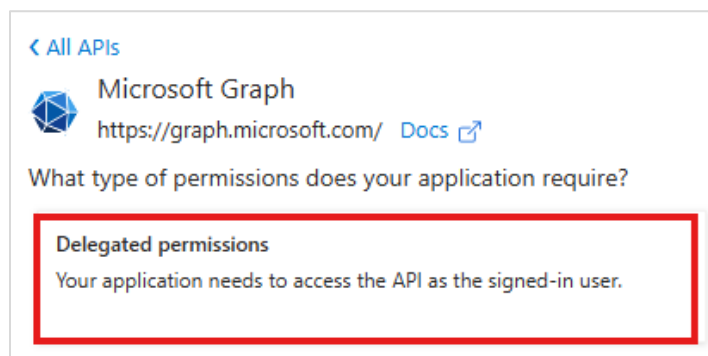
Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. all the permissions the application needs. [Learn more about permissions and consent](#)

[+ Add a permission](#) ✓ Grant admin consent for Contoso

25. Select Microsoft Graph

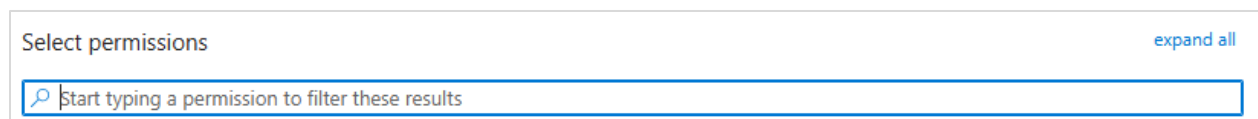


26. And select Delegated permissions



27. Using the search bar, add the following permissions:

Files.Read.All
offline_access
openid
profile
Sites.Read.All
User.Read



Example (do the same for all permissions above)

Select permissions

expand all

files.read.all

The "Admin consent required" column shows the default value for an organization. However, user consent can be customized per permission, user, or app. This column may not reflect the value in your organization, or in organizations where this app will be used. [Learn more](#)

Permission	Admin consent required
Files (1)	
<input checked="" type="checkbox"/> Files.Read.All ⓘ Read all files that user can access	No

28. Once all permissions are added, click on **Grant admin consent**

Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions should include all the permissions the application needs. [Learn more about permissions and consent](#)

+ Add a permission

☒ Grant admin consent for Contoso

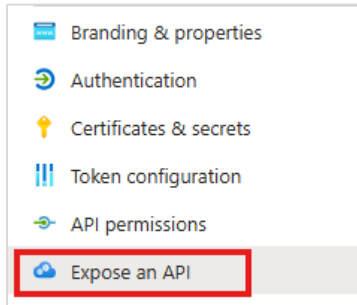
API / Permissions name	Type	Description	Admin consent requ...	Status
Microsoft Graph (6)				...
Files.Read.All	Delegated	Read all files that user can access	No	...
offline_access	Delegated	Maintain access to data you have given it access to	No	...
openid	Delegated	Sign users in	No	...
profile	Delegated	View users' basic profile	No	...
Sites.Read.All	Delegated	Read items in all site collections	No	...
User.Read	Delegated	Sign in and read user profile	No	...

29. Click on **Yes**

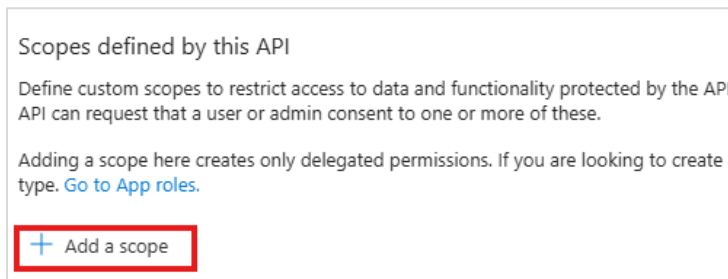
Grant admin consent confirmation.

Do you want to grant consent for the requested permissions for all accounts in Contoso? This will update any existing admin consent records this application already has to match what is listed below.

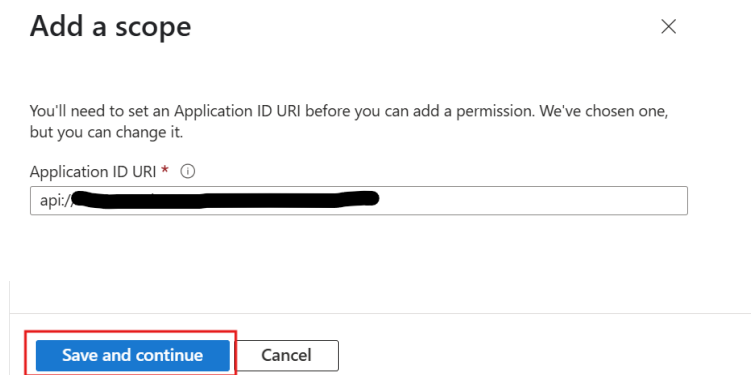
30. Click on **Expose an API**



31. Click on **Add a scope**



32. You can modify or accept the Application ID URI. Click **Save and Continue**.



33. Complete the fields as below

Scope name * ⓘ
Files.Read
api://37433d59-75c2-46e4-a00c-603dc3780777/Files.Read

Who can consent? ⓘ
Admins and users Admins only

Admin consent display name * ⓘ
Read User files

Admin consent description * ⓘ
Allow the app to read sign-in user's files

User consent display name ⓘ
Read your files ✓

User consent description ⓘ
Allows the app to read your files

State ⓘ
Enabled Disabled

34. Click on **Add scope**



35. Go back to Copilot Studio, click on **Channels** and then **Demo website**

Sales Buddy Overview Knowledge Topics Actions Activity Analytics **Channels**

Draft agent status

There are risks that should be reviewed. 1 risk ▾

Published agent status

Published by MOD Administrator 3/6/2025, 9:47 AM [Demo website](#)

Channels
Configure your agent channels to meet your customers where they are.

Telephony

Teams + Microsoft 365

Demo website

36. Copy the URL and open it in a new window

Welcome message
Introduce your agent and its purpose to your team members.

Try out the agent we made!


Conversation starters
Provide some common trigger phrases to help your team members start a conversation with your agent.

"Hello"
"Start over"
"Talk to a person"

Share your website
To invite team members to see your agent in action, copy the link below.

<https://copilotstudio.microsoft.com/environments/5134d38b-999c-ebf9-8c59-467fc> Copy

37. Click on **Login** and follow the authentication process (if not done yet)



Hello! To be able to help you, I'll need you to sign in.

To continue, please login

Login

Just now

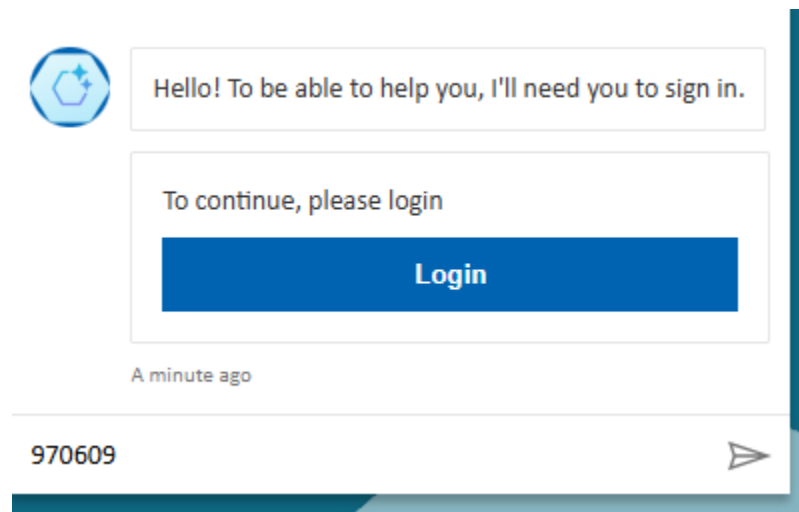
38. A new window will appear. Copy the code

Please enter this validation code into the chat window to complete the sign-in:

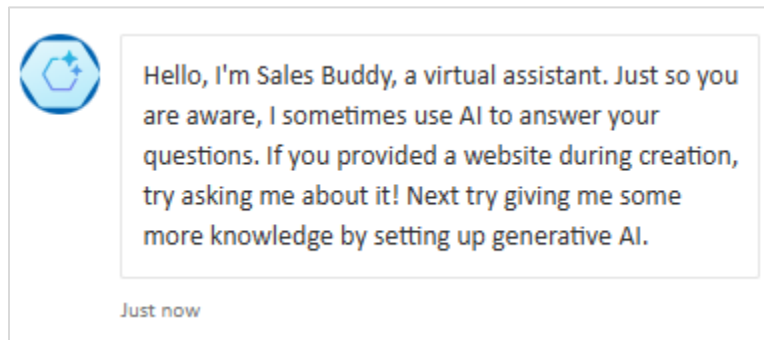
970609

Copy

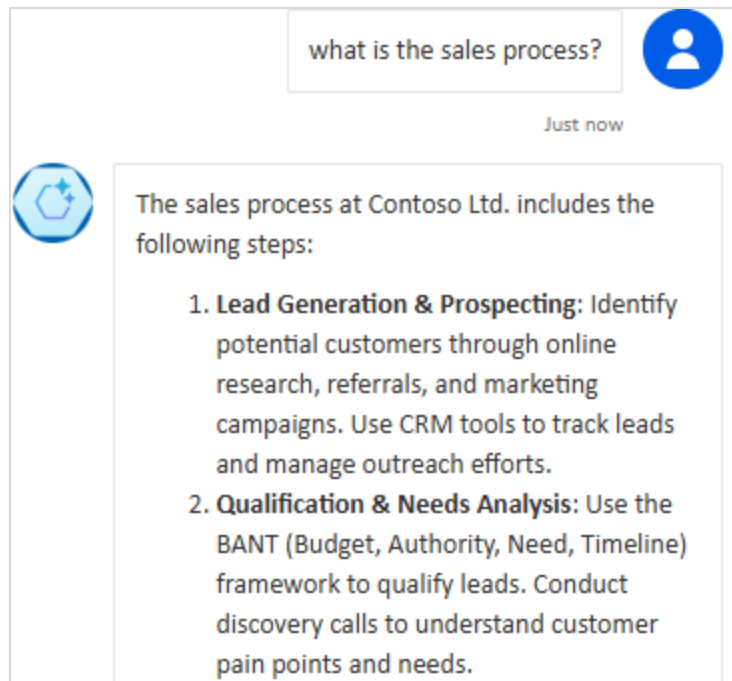
39. Go back to the **Demo website** and paste the code



When you see the greetings, your BOT is ready to answer your questions



Example:

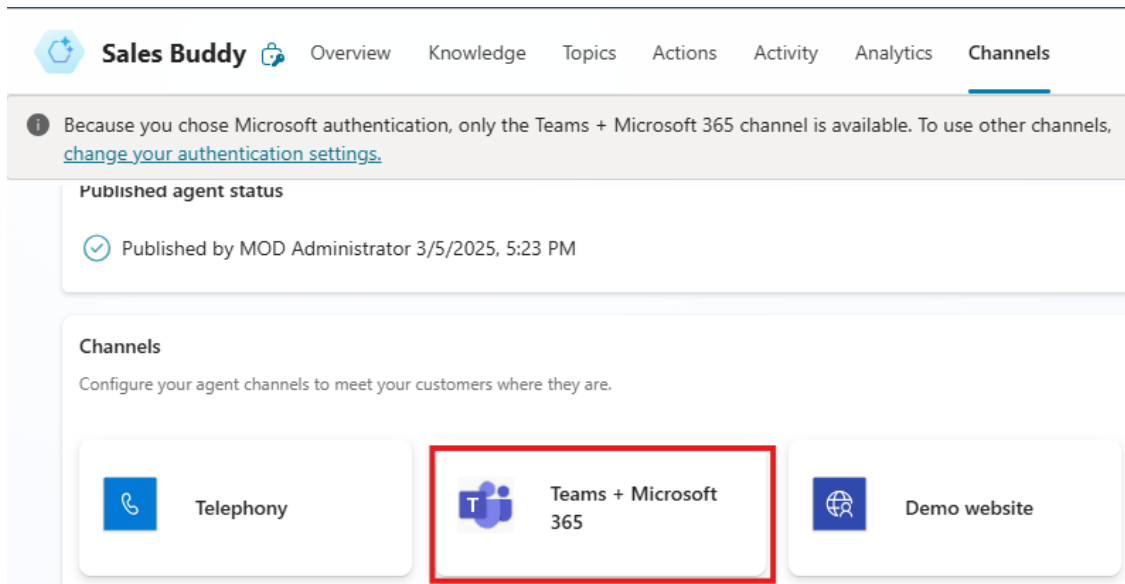


Congratulations! You have completed Lab 4.

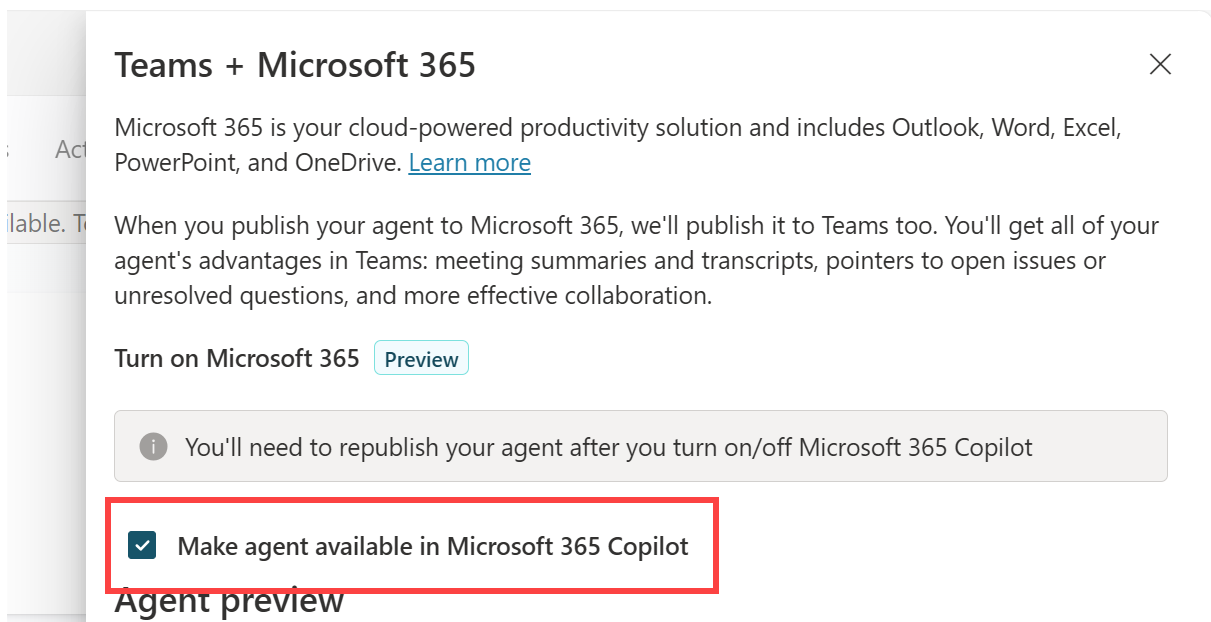
Appendix: Publish the Sales Buddy Agent to Microsoft 365 Copilot Chat

The following instructions demonstrate how to publish the Sales Buddy agent to Microsoft 365 Copilot Chat.

1. Open the Sales Buddy Agent in Copilot Studio and navigate to Channels. Click **Teams + Microsoft 365**.

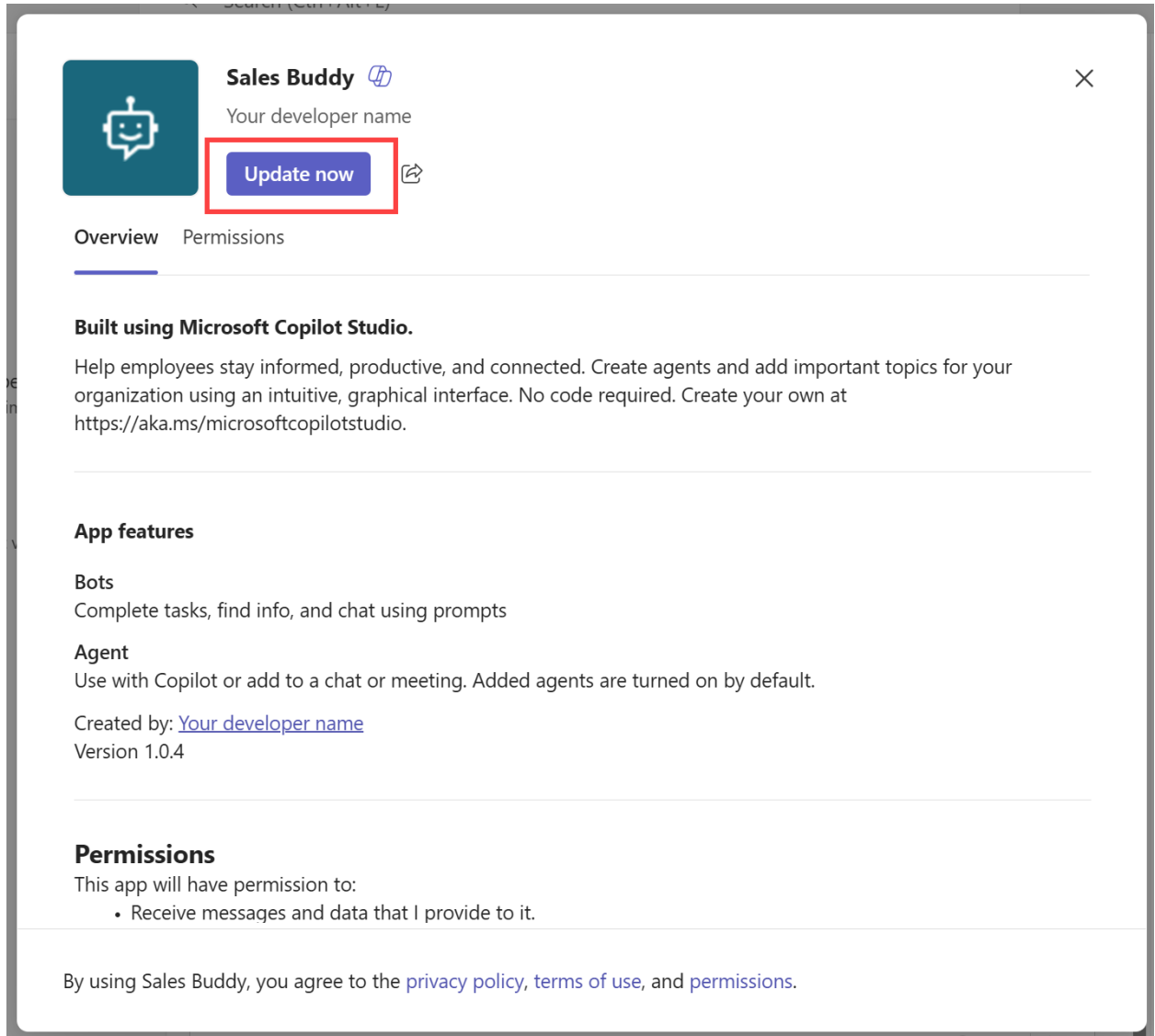


2. Under **Turn on Microsoft 365**, make sure the checkbox beside **Make agent available in Microsoft 365 Copilot** is selected, click **Save**, then close the channel details pane.



3. Republish the agent by clicking the **Publish** button in the top right of Copilot Studio.

4. Open the **Teams + Microsoft 365** channel details pane again, and under **Agent preview**, click **See agent in Teams**.
5. In the agent details window that appears, click **Update now**.



6. Open Microsoft 365 Copilot Chat. The Sales Buddy agent should appear under the **Agents** menu on the right.