Microsoft Power Platform

Copilot Studio Overview

AI Roadshow

Microsoft Power Platform

Power your AI transformation with Copilot Studio

Agenda

What is an agent?

Agents are AI assistants that can help **optimize business processes** and **enhance productivity** using large language models and generative AI.

Publish to...

Your applications

Deploy agents to your website and other line of business applications

Microsoft 365 Copilot

Add agents that give Copilot focused knowledge and new skills

Copilot for Sales
Copilot for Service
Copilot for Finance

Power Platform

Extend Power Platform with agents that transform your low code solutions.

Power Apps
Power Pages

Dynamics 365

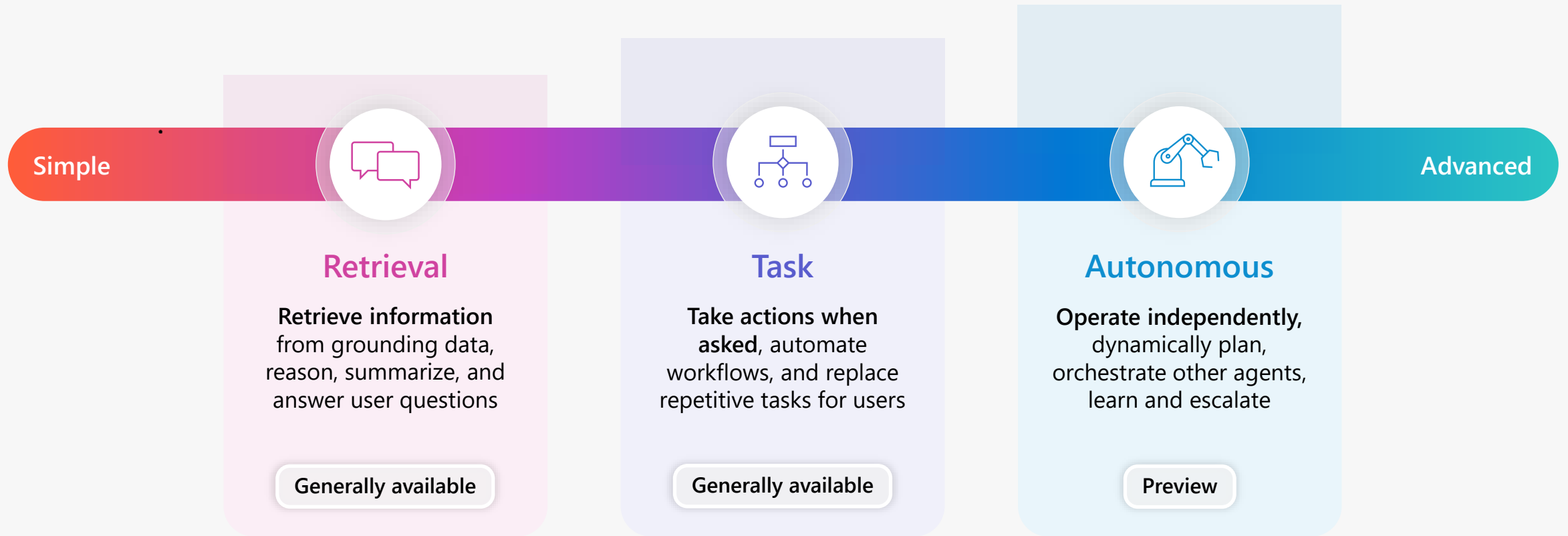Build agents that integrate and improve business processes

Dynamics 365 Sales
Dynamics 365 Finance
Dynamics 365 Customer Service

Spectrum of agents

Simple

Advanced

Retrieval

Retrieve information from grounding data, reason, summarize, and answer user questions

Generally available

Task

Take actions when asked, automate workflows, and replace repetitive tasks for users

Generally available

Autonomous

Operate independently, dynamically plan, orchestrate other agents, learn and escalate

Preview

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

Explore a continuum of solutions

IT Helpdesk agent

How do I connect to the corporate network?

Device Refresh agent

Request a new laptop and send approvals via IT Service tool.

Lead Gen agent

The agent has identified and researched 15 new leads for you to review.

Simple   Advanced

Project Tracker agent

What is the status of phase 2 for project X and the remaining budget?

Budget Management agent

Review outstanding open PO's and begin financial planning.
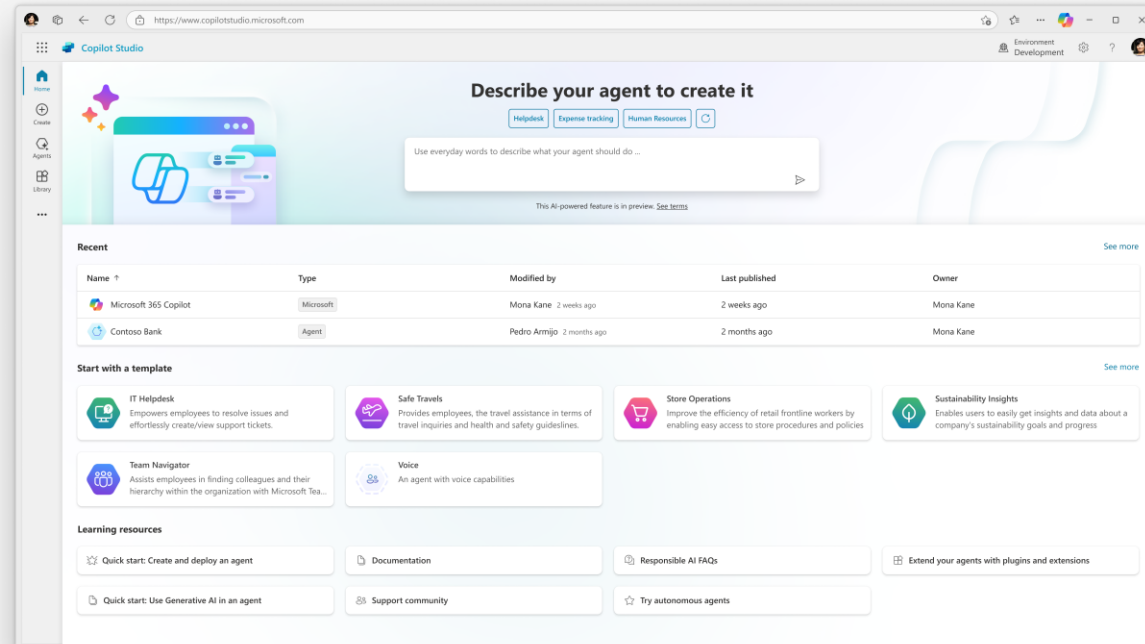
Customer Support agent

The agent has identified new support issues and triaged to other agents.

Copilot Studio

Copilot Studio is a platform to build agents that **extend Microsoft 365 Copilot** or **operate standalone**.

✓ 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

Create chat experiences that are...

Intelligent
Remember and understand user context and intent

Secure
Maintain industry standards for governance, security and lifecycle management

Automated
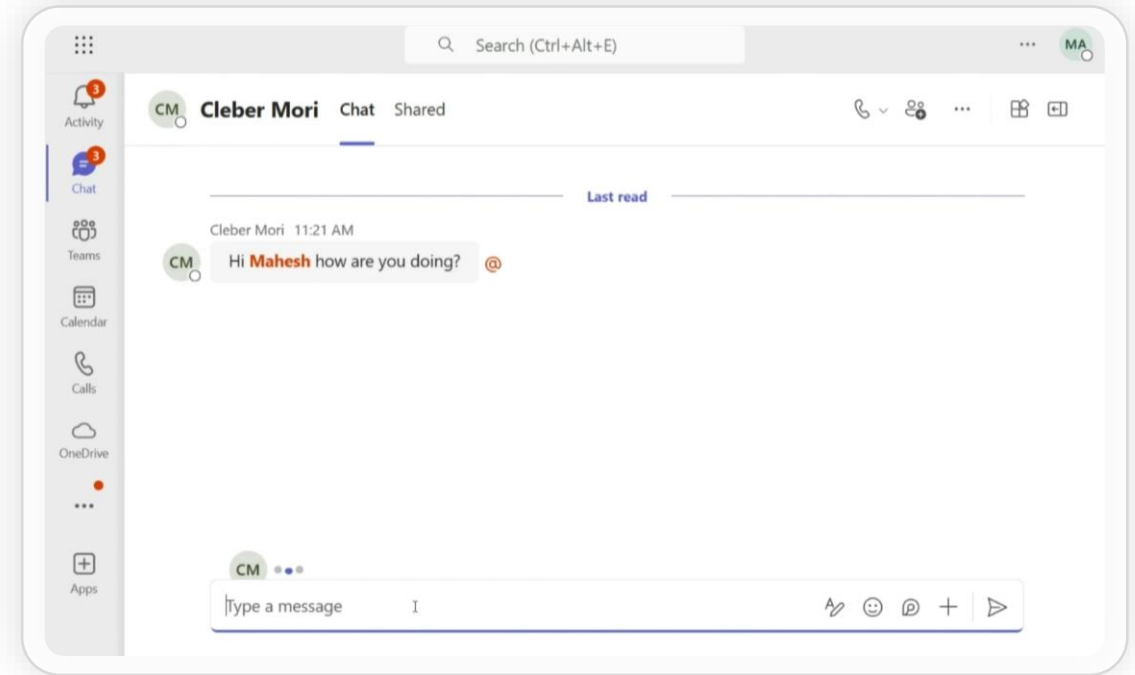Dynamically complete tasks and automate workflows

Customizable
Connect to your data and legacy systems, extend across Microsoft's ecosystem and more

Collaborative
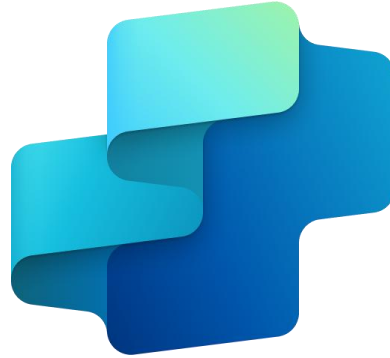Interact with agents as if they were another member of the team

Evolution

2023 — Search • Summarization • Generation

2024+ — Customization • Collaboration • Automation

Customer Service
Resolve more customer issues per hour

Sales
Generate more leads and upselling opportunities

Legal
Streamline contract management

Finance
Expedite processes and reduce manual errors

Copilot Studio solutions for
every function

HR
Onboard employees more quickly

Marketing
Improve communication channels

More than 30,000 customers across every industry have used Copilot Studio

to help improve performance and efficiency while reducing costs and risks

Rabobank
Offering conversational banking on telephony and digital channels

PayPal
Reducing costs and workload by providing HR/IT support for employees

Holland America Line
Helping customers to find and book the perfect cruise

accenture
Creating customer-focused solutions as a Microsoft Partner

hp
Helping customers find the right products and support

CINEPLEX
Providing customer service support for guests

Copilot Studio

Design   Enhance   Manage

Design

Design powerful, connected agents

Handle complex queries with ease
Design intelligent conversations with greater control over the LLM such as robust variable and dialog management, logic, and responses.

Design personalized, responsive interactions
Engage employees or customers with rich, dynamic interactions that remember user content and context.

Customize your agent how you want
Build custom plugins, connectors, and prompts, and surface your business data where you need it.

Connect to your organization's knowledge bases
Use generative AI to dynamically respond using your organization's real-time content.

Create automated workflows
Use Power Automate to trigger automation across your business with UI, API, DPA, and RPA automation capabilities.

Escalate to human agents when needed
Continue the conversation with full context with an end-to-end customer engagement platform.

Build the way you want

Users of all skill levels can create and test together

Templates

Get started quickly

Choose from a diverse set of pre-built scenarios across popular industries and functions.

Natural language

Build conversationally

Build agents by engaging in a conversational, natural, human-like experience.

Visual canvas

Navigate a modern UX

Design your conversation by following the low code graphical interface.

Code

Switch to YAML

Share and re-use topic logic between developers and agents in a side-by-side view.

Customize your agent

Easily tailor your agent's building blocks to meet your unique business needs in a comprehensive, end-to-end studio

Building blocks

Knowledge
Existing enterprise data in or outside of M365 that you agent can query

Actions
Tasks and processes your agent can perform across LOB services/apps

Logic
Defined conversation paths for your agent to follow when triggered

Channels
Where and how your end users engage with your agent

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 (coming soon)
File uploads	Microsoft Graph

Add available knowledge sources (Powered by Copilot connectors)

Users with edit permissions for this copilot can also reuse your connections for other topics within the copilot. Manage security settings

🔍 Keywords for the data you're looking for

Featured

Add existing knowledge Converts previous data sources to knowledge for this copilot	**Public website** Incorporate any relevant web content found on Bing	**Files** Upload documents from your local computer
SharePoint and OneDrive Securely integrate and manage internal data	**Dataverse** Customize and deploy structured data tables	**Microsoft Fabric** Accelerate data analysis with AI capabilities

Bring your enterprise data (16)

Enterprise website (preview)	Azure DevOps (preview)	Custom connector (preview)	Jira (preview)
ADLS Gen2 (preview)	Oracle SQL database (preview)	ServiceNow (preview)	File share (preview)
CSV (preview)	Microsoft SQL (preview)	MediaWiki (preview)	Salesforce (preview)
Confluence (preview)	Azure SQL (preview)	Zendesk (preview)	Power Platform connector

Actions

Easily connect to your key line of business systems.

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

Types of actions:

Prebuilt connectors — Choose from 1400+ prebuilt Power Platform connectors to popular data sources and apps

Custom connectors — Create a custom connector for any publicly available API

Flows — Bring in automated workflows built using Power Automate

Prompts — Provide custom instructions to the GPT model using AI Builder

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

1400+

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 live human agent.
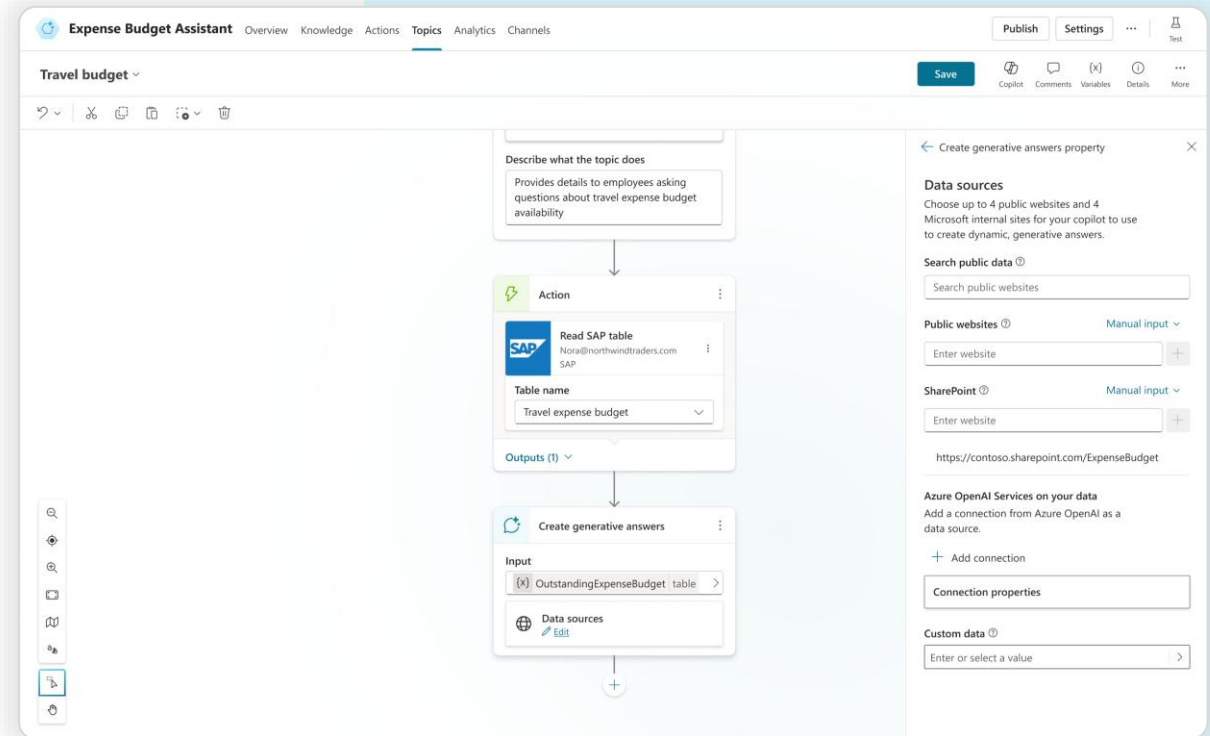
Channels

Publish and deploy to your channels of choice with a single click.

Add your agent to a custom app built with Power Apps or a custom website built with Power Pages.

You can access even more channels through ISVs, including:

WeChat

WhatsApp through Twilio

Google's Business Messages

Apple Messages for Business

Azure Communication Services

infobip

NICE

audiocodes

TeleSign

Custom

Expense Budget Assistant   Overview   Knowledge   Actions   Topics   Analytics   **Channels**   Pu

✓ Your copilot was published at 9:42 AM on 3/36/2024! Your users will see the new content soon.

Publish status   Publish
Verify or modify the availability of your copilot

✓ Published March 20, 2024   Details >

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

Teams	Demo website	Custom website	Mobile app	Facebook
Twilio	Skype	Slack	Telegram	Direct Line Speech
Email	Line	GroupMe		

Customer engagement hub
Connect to a customer engagement app to enable your copilot to hand off a chat session to a live agent or other copilot. Learn more

| Dynamics 365 Customer Service | Genesys | Salesforce | LivePerson | ServiceNow |
| ZenDesk | Customer engagement hub | | | |

Enhance

Enhance with advanced capabilities

Customize your agent with pro developer tools
Integrate with Azure AI Studio, Azure Cognitive Services, Bot Framework and a variety of other Microsoft conversational services.

Analyze your agent's performance
Access built-in conversational analytics that automatically track critical KPIs.

Continuously improve the conversation
AI-driven features will help you to fine-tune your agent over time by providing suggestions on how to optimize your conversations.

Build Agents with a comprehensive AI toolchain

Low-code with a managed stack   **Pro-code with full flexibility & control**

Microsoft Copilot Studio

- Managed genAI models and orchestration you can configure with visual tools
- Add knowledge and actions with 1400+ Copilot connectors to your business systems and Microsoft data
- Deploy your copilots anywhere, including as Copilot extensions
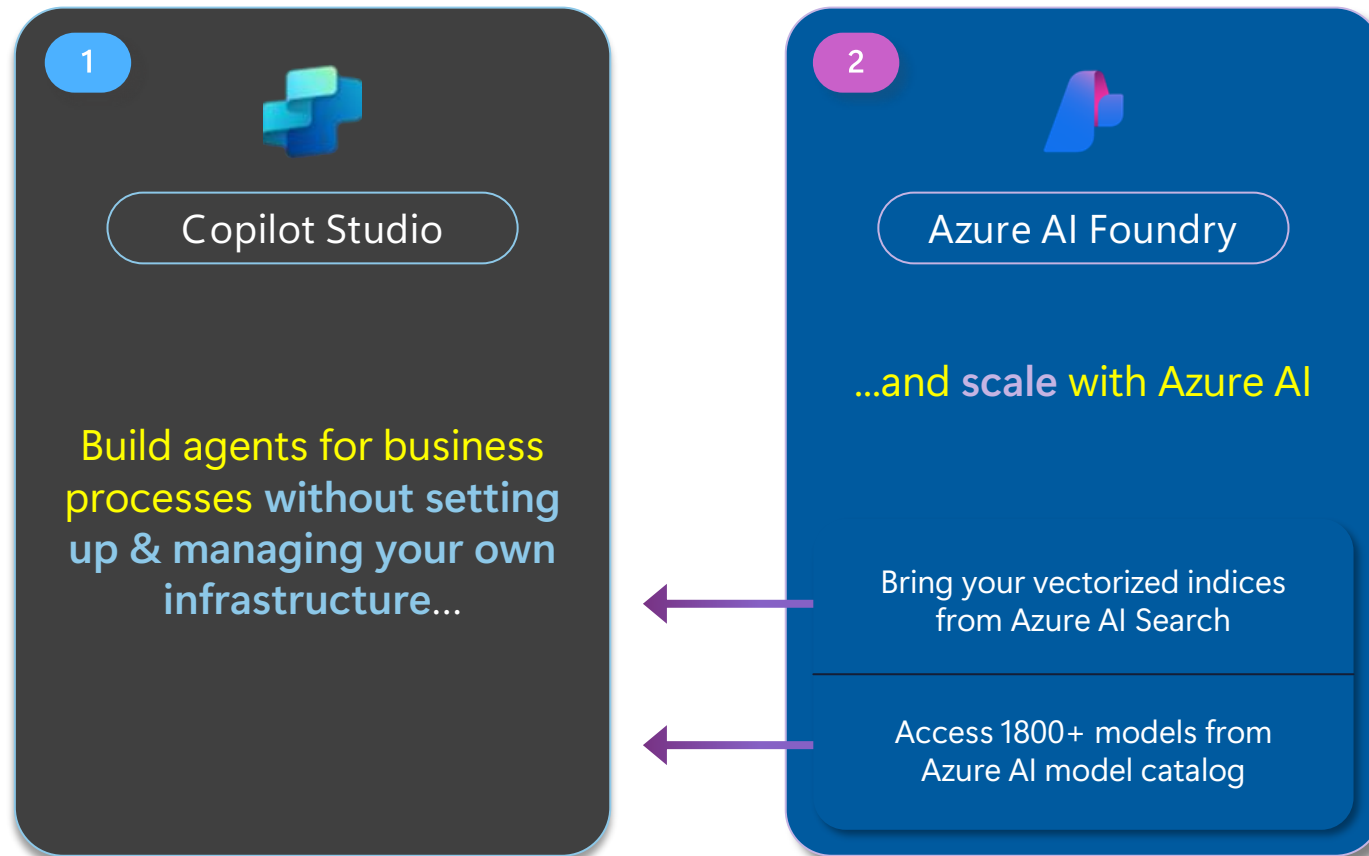- SaaS-based infrastructure managed by Microsoft

Azure AI Foundry Portal

- Full catalog of GenAI APIs and models you can customize with visual and code-first tooling
- Add knowledge, enable RAG over your secure data, and add actions with custom functions
- Deploy to Azure web apps or as containerized models
- PaaS with full developer control over infrastructure

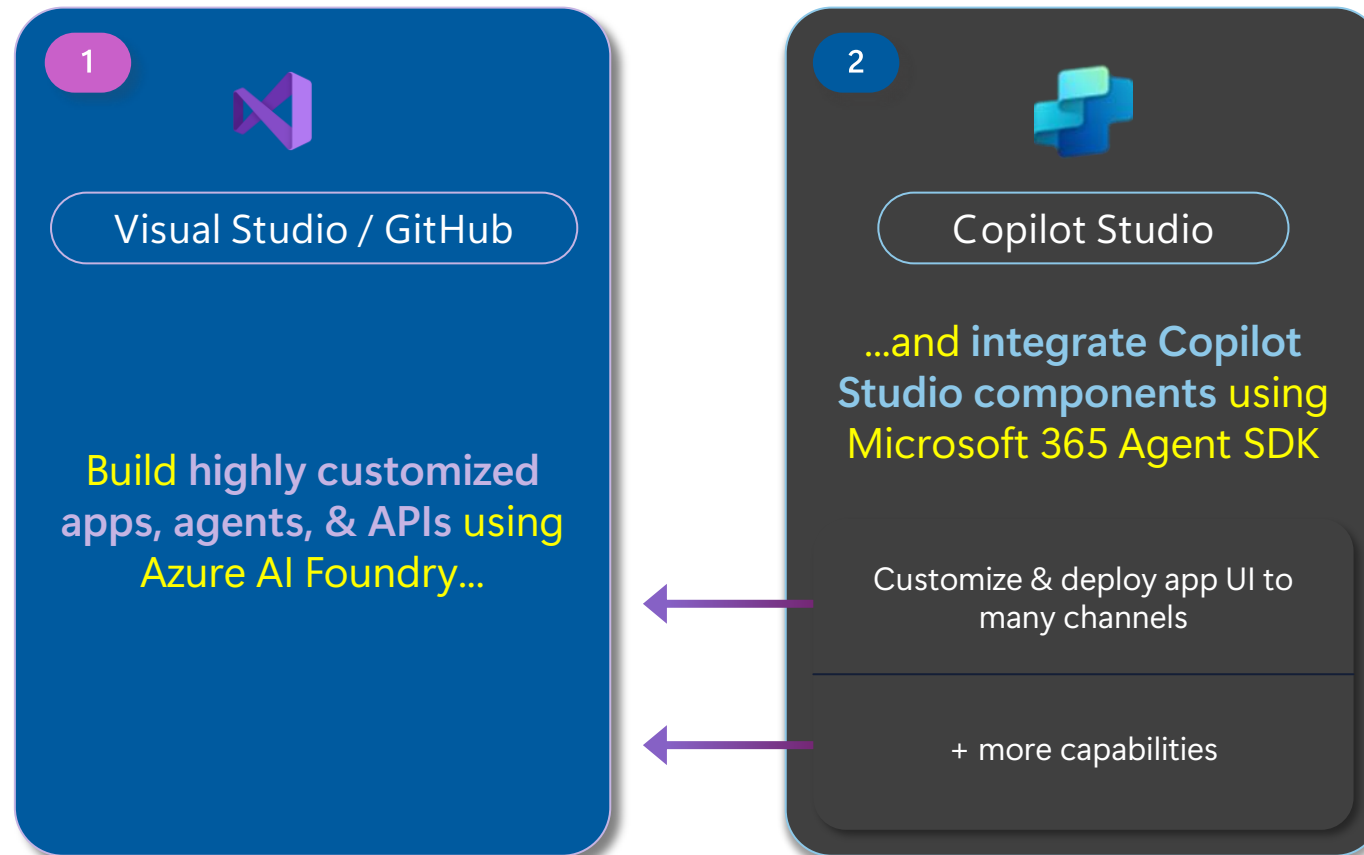# Start building agents with Copilot Studio

Build, deploy, realize value and prototype faster for simple scenarios

1

Copilot Studio

Build agents for business processes without setting up & managing your own infrastructure...

2

Azure AI Foundry

...and scale with Azure AI

Bring your vectorized indices from Azure AI Search

Access 1800+ models from Azure AI model catalog

Or start with code-first solutions

Control and customize with options to manage your own infrastructure

1

Visual Studio / GitHub

Build **highly customized apps, agents, & APIs** using Azure AI Foundry…

2

Copilot Studio

…and **integrate Copilot Studio components** using Microsoft 365 Agent SDK

Customize & deploy app UI to many channels

+ more capabilities

Copilot Studio or building your own custom agent

Low code / no code agent is the right choice for you, if you want to...

- **Integrate with Microsoft ecosystem:** Enhance user experience and reach millions.

- **Leverage Copilot orchestrator:** Improve service capabilities.

- **Build AI solutions:** Boost employee productivity.

- **Utilize Microsoft Graph:** Personalize user experiences.

- **Use RAG data sources:** Employ Graph Connector, SharePoint, or Dataverse.

Building a custom agent is right for you, if...

You're a proficient developer and want to build:

- **Custom end-to-end solutions:** Full control on branding, language models, orchestration, and regulation compliance.

Or, if you're building products like:

- **E-commerce chatbot** to enhance customer service.
- **Healthcare assistant** to schedule appointments.
- **AI in gaming** to create immersive experiences.

Microsoft Copilot Studio and Azure = Better together

Bring your own model
Deploy custom and fine-tuned models in Azure AI Foundry and use them for summarization.

Bring your own index
Vectorize content in Azure AI Search and surface the content for your agents as standard knowledge sources.

Bring your own natural language understanding model
Train your own models for intent recognition and entity extraction

Bring your own Model Context Protocol (MCP) Server
Create next-generation AI tools and data sources that can be consumed from agents

Bring your own agent
Use the Microsoft 365 Agents SDK or the Azure AI Bot service to invoke pro-code agents as skills.

Bring your own CI/CD pipeline
Configure pipelines in Azure DevOps to automatically deploy and source-control your agents

Isolate your agents and APIs
Isolate your agents with subnet delegation into your virtual networks for outbound connectivity, and setup IP firewalls and continuous access evaluation for inbound.

Monitor your agents
Stream technical telemetry for standard and custom events and integrations into Azure Application Insights.

Bring your own lake
Move conversation transcripts to a lake for long-term storage and usage and custom analytics.

Bring your WhatsApp and voice channels
From Azure Communication Services and with Dynamics 365 Contact Center for a voice telephony channel (IVR scenarios)

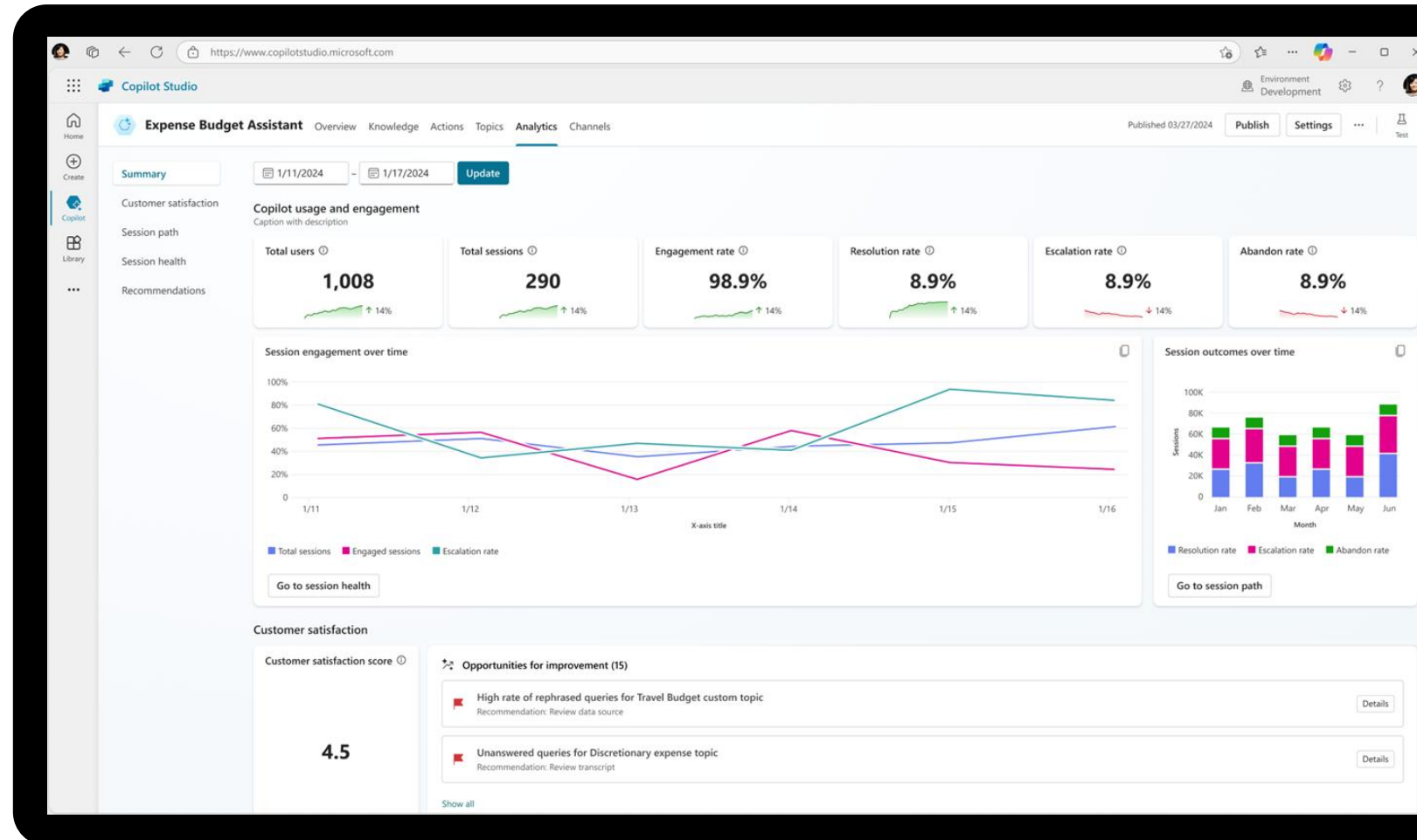# Manage

Easily optimize with data-driven insights

See which topics are having the greatest impact on escalation, abandon and resolution rates.

Quickly gain a sense of the most common questions your users are asking your agent.

Get access to detailed CSAT data, session transcripts, content moderation insights and more.

Identify where your agent didn't successfully return an answer so you can fill in the gaps.

Manage securely across channels

Get the benefits of a global SaaS platform

Eliminate infrastructure concerns, scale securely, and simplify management and governance with unified controls.

Ensure your agent is compliant

Meet the necessary regulatory standards for your area or industry like HIPAA, HITRUST, FedRAMP, PCI, SOC, ISO and more.
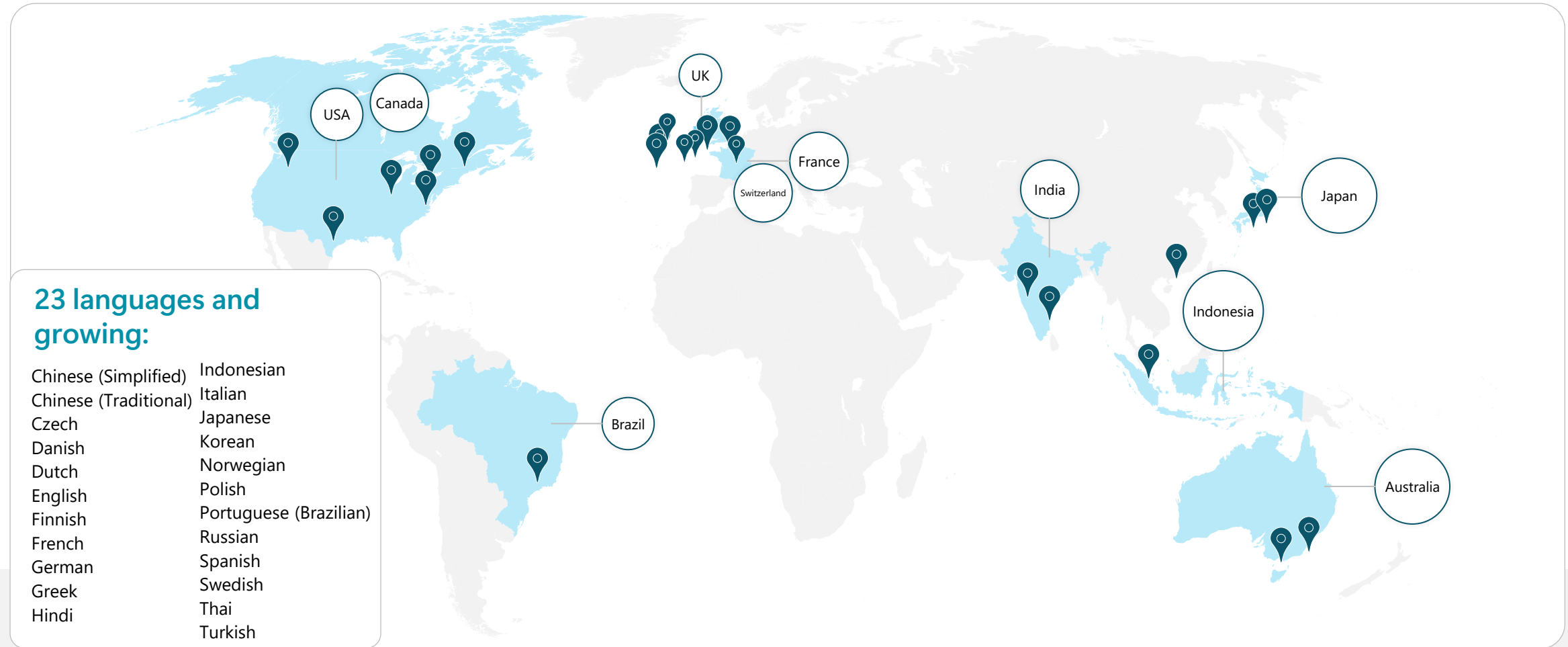
Safeguard your data

Deploy and scale with confidence using data encryption, data loss prevention policies, GDPR and privacy standards, and more.

Use AI responsibly

All generative AI features are aligned to Microsoft's responsible AI principles.
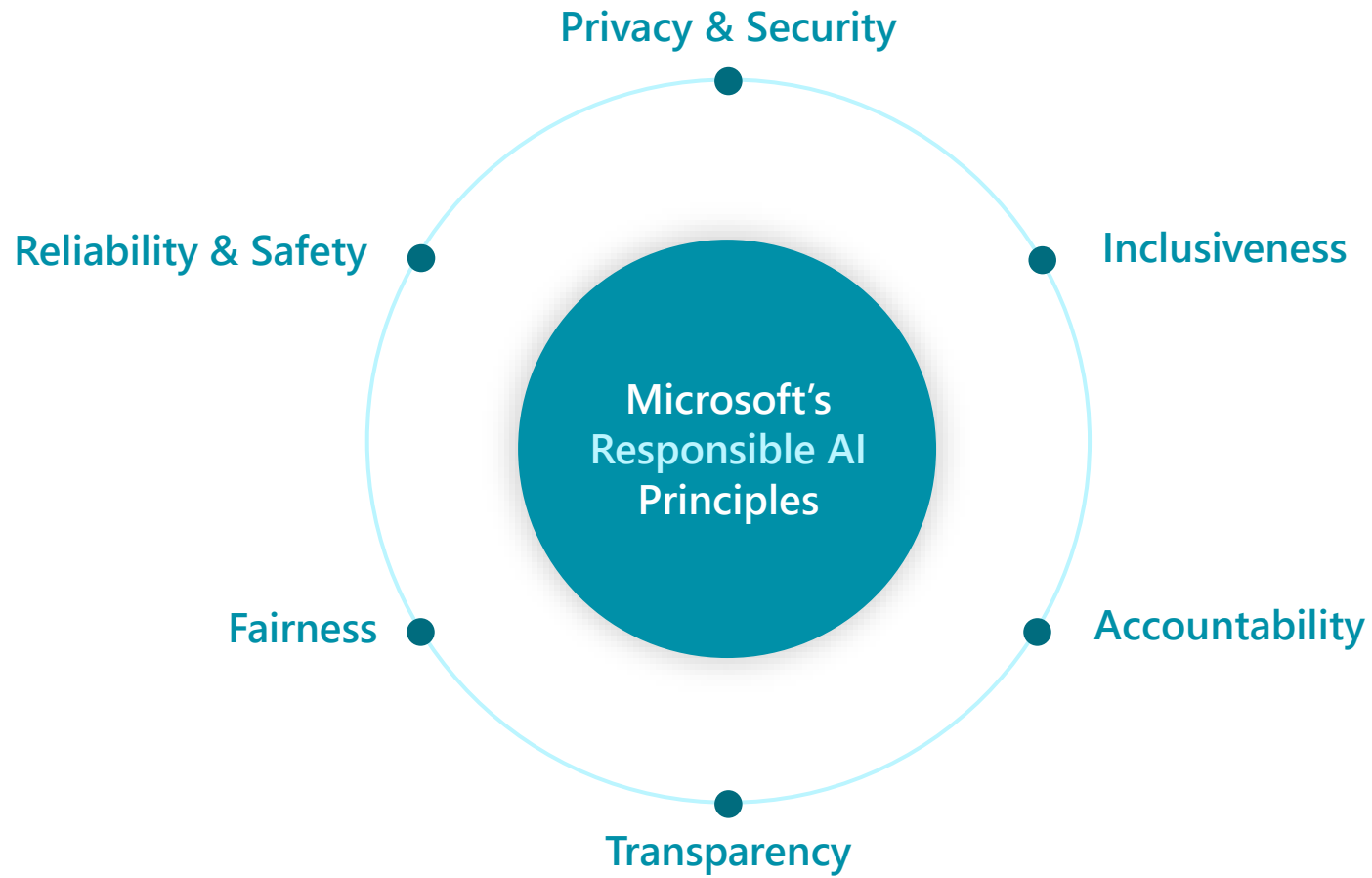
Copilot Studio's global footprint

23 languages and growing:

Chinese (Simplified)	Indonesian
Chinese (Traditional)	Italian
Czech	Japanese
Danish	Korean
Dutch	Norwegian
English	Polish
Finnish	Portuguese (Brazilian)
French	Russian
German	Spanish
Greek	Swedish
Hindi	Thai
	Turkish

USA · Canada · UK · France · Switzerland · India · Japan · Indonesia · Brazil · Australia

**22 datacenters worldwide
10 for generative AI**

National clouds
Commercial, GCC, GCC High

Preserve high levels of regulatory compliance, privacy, and industry standards conformance with Copilot Studio.

Responsible AI

Privacy & Security

Inclusiveness

Reliability & Safety

Microsoft's Responsible AI Principles

Fairness

Accountability

Transparency

Building blocks to enact principles

Tools and processes

Training and practices

Rules

Governance

Copilot Studio Authentication setups

Authentication setup & GenAI follow-up considerations

Anonymous / No Authentication

Authentication ✕

Verify a user's identity during a conversation. The copilot receives secure access to the user's data and is able to take actions on their behalf, resulting in a more personalized experience. Learn more

Choose an option

◉ No authentication
Publicly available in any channel

Basic copilot setup with no authentication action or authentication variables.

○ Authenticate with Microsoft
Entra ID authentication in Teams and Power Apps

Only Teams and Power Apps channels are available; all other channels will be disabled. Learn more

○ Authenticate manually
Set up authentication for any channel

No Sign-in Required

The Copilot in Demo Website, Published Production Website or any channels e/g; Facebook is fully anonymous.

Can be Disabled via DLP

Only for Teams & Power Apps / Authenticate with Microsoft

Authentication ✕

Verify a user's identity during a conversation. The copilot receives secure access to the user's data and is able to take actions on their behalf, resulting in a more personalized experience. Learn more

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○ Authenticate manually
Set up authentication for any channel

Automatic Setup of Entra ID Authentication

Copilots to be used as Standalone Teams Applications or embedded in Teams Sites, Or embedded in Power Apps. Entra ID required.

Custom Authentication / Manual

◉ Authenticate manually
Set up authentication for any channel

Supports Microsoft Entra ID or any OAuth2 identity provider. Available in any channel. Learn more

☑ Require users to sign in

Redirect URL

https://token.botframework.com/.auth/web/redirect   [Copy]

Service provider *

Azure Active Directory v2   ▾

Client ID *

7673559c-7f73-44d5-89f6-41f0fd5711c0

AAD v2, Generic Oauth 2 or AAD

Allows for custom publish locations such as Internal websites requiring authentication e.g; Entra ID Auth. App Registration and Secrets required.

App Registration Required

Copilot Studio is also available as a consumptive service

Copilot Studio became a pay-go service on December 1

Full feature parity across message pack and metered offering

Burn rate parity across message pack and metered offering

Leverage your existing Azure commitments (MACC) with the Pay-as-you go meter

New!

Message packs

- ✓ Tenant-wide message packs
- ✓ 25,000 messages/month
- ✓ $200 per pack/month

Pay-as-you-go

- ✓ New PAYG meter
- ✓ $0.01/message
- ✓ Can decrement MACC

Utilization rates depend on type of agent and prompt

*Rate changes in effect as of April 1, 2025

	Orchestration Mode	M365 Copilot Users	Copilot Chat Users	Use of Other Agents Built w/ Copilot Studio
Web-grounded answers Dynamically-generated responses based on the web as a knowledge source.	Classic & Generative	0	0	2 messages
Classic answers Predefined responses manually authored by makers through topics (includes messages, connectors, flows etc.) that are static unless manually updated in Classic Orchestration mode. Used when a precise or controlled response is desired output. Each action (not each topic) counts as an answer. Not available in agent builder.	Classic only	0	1 message	1 message
Generative answers [1,2] Dynamically-generated responses based on knowledge sources and context that provide flexible and natural interactions.	Classic & Generative	0	2 messages	2 messages
Tenant graph grounding for messages [1,2] Grounding to enhance AI agents with up-to-date, context-aware knowledge from Microsoft 365 and external data, offering built-in security and inheriting data access governance policies.	Classic & Generative	0	10 messages*	10 messages*
Agent actions [1,2] AI-led orchestration for triggers, topics, agent flows, text & generative AI tools, Power Platform premium connectors and custom connectors to automate complex business processes. Not available in agent builder.	Generative only	0[4]	5 messages*	5 messages*
Text & generative AI tools Specialized tools that extend agents capabilities by teaching them to perform specific tasks, leveraging a combination of AI prompt engineering, model configuration, code execution, and knowledge retrieval	-	-	-	-
Basic (Message rate per 10 responses[3])	Classic & Generative	1 message*	1 message*	1 message*
Standard (Message rate per 10 responses[3])	Classic & Generative	15 messages*	15 messages*	15 messages*
Premium (Message rate per 10 responses[3]) For deep reasoning prompts	Classic & Generative	100 messages*	100 messages*	100 messages*
Agent flow actions (Message rate per 100 agent flow actions) Agent flow actions are used to create agent flows. Agent flows are rules-based automations in Copilot Studio that follow a predefined sequence of agent flow actions to perform repetitive tasks.	Classic & Generative	13 messages*	13 messages*	13 messages*

Notes

1. Each interaction with an agent could utilize multiple utilization rates simultaneously i.e., an agent grounded in Tenant graph could use 12 messages (10 for the graph grounding and 2 for Generative Answer) to respond to a single complex prompt from the user. Most agents built natively in SharePoint or Copilot Chat will have tenant graph grounding enabled by default.
2. Generative answers, tenant graph grounding for messages, web-grounded answers and agent actions apply to both declarative agents and custom engine agents.
3. 1 response = 1,000 tokens for LLM models, 1 image for image processing, 1,000 characters for text processing and 1 row when processing rows for prediction. Billing will be prorated to exact number of responses.
4. Agent actions are included at no additional cost for interactive use only. Autonomous use will incur a 5 message charge

HR / IT Helpdesk agent

Key Assumptions

✓ End-users may or may not have M365 Copilot licenses

✓ Customer has enabled generative orchestration

✓ Customer has enabled "Enhanced Search"

SCENARIO

An internal-facing interactive agent deployed on Microsoft Teams is helping employees with a range of topics related to HR and IT using SharePoint and Graph connectors as a knowledge source.

MESSAGES

The agent is accessed by both users licensed for M365 Copilot and unlicensed users. A typical conversation involves 4 actions** and 3 topics that leverage tenant graph grounding. Actions and topics are agent actions in generative orchestration mode.

M365 Copilot Users – Cost Per Use

Type	# of answers	Utilization rate	# of billed messages
Tenant graph grounding	3	x 0	= 0 messages
Topics	3	x 0	= 0 messages
Actions	4	x 0	= 0 messages
Total = 0 billed messages *			

All Other Users – Cost Per Use

Type	# of answers	Utilization rate	# of billed messages
Tenant graph grounding	3	x 10	= 30 messages
Topics	3	x 5	= 15 messages
Actions	4	x 5	= 20 messages
Total = 65 billed messages			

* Costs are based on end-users having access to M365 Copilot
** Created via the actions tab in Copilot Studio when agent is built

Reference

Billing rates and management

https://learn.microsoft.com/en-us/microsoft-copilot-studio/requirements-messages-management

Rate limits for agents

Pricing plans

Copilot Studio Architecture and Performance

Copilot Studio Architecture

API-based clients

Copilot Studio standard clients
- Standard Web Chat widget
- Power Apps chat control
- Power Pages chat control

Custom clients
- Bot Framework Web Chat
- Custom apps & chat widgets

Server-to-server
- Custom middleware
- Azure AI Bot Service channels (Telegram, WeChat, etc.)
- 3rd-party engagements hubs

- Microsoft Teams
- Facebook Messenger
- WhatsApp (2025)
- Slack (2025)
- Dynamics 365 Contact Center (voice/text)
- Microsoft 365 Copilot

Azure AI Bot Service
- Bot Framework bot
- Bot Framework skill

Runtime

Native channels
- Direct Line (HTTP / WebSocket)
- Direct-to-Engine (HTTP / SSE)
- Microsoft Teams
- Facebook
- WhatsApp (2025)
- Slack (2025)
- Dynamics 365 Omnichannel
- Microsoft 365 Copilot

- Agent as a skill (private preview)

Integrations
- HTTP requests
- Power Platform connectors
- Power Automate cloud flows
- AI Builder prompts
- Bot Framework skills

ALM
- Power Platform solutions
- CI/CD (pipelines/ADO/GitHub)

Dialog management
- Topics
- Nodes
- Actions
- Power Fx
- Voice
- Multilingual

Generative actions
- AI-wrapper for integrations
- Inputs
- Outputs

Security
- Web channel security (secret)

End-user authentication
- No authentication
- Native / Custom auth

Power Platform DLP policies
- Authentication settings
- Enabled channels
- Enabled knowledge sources
- Enabled connectors

- Microsoft Purview audit logs
- VNET / IP firewall (2025)

Triggers (autonomous agents)

Language understanding

Classic
- Built-in NLU
- Bring your own NLU model

- Generative orchestration

Generative answers
- Query rewriting

Knowledge search
- Websites
- Custom data
- Files
- SharePoint
- DV Tables
- Graph
- Federated Knowledge
- Azure AI Search

Summarization
- Native
- BYOM (2025)

- AI general knowledge

Standard analytics

Technical telemetry

Conversation transcripts

Azure AI Language
- Conversational Language Understanding (CLU)

Microsoft 365 Graph
- Enhanced search results
- Graph connectors

Azure AI Search
- Vectorized search indexes

Azure AI Foundry
- LLMs, SLMs, Fine-tuned models

Azure Monitor
- Application Insights

Azure Storage
- Data lake

Azure Synapse Analytics
- Workspace

Microsoft Entra ID
- App registration

Natural Language Understanding

✓ Choosing the right option for intent recognition and entity extraction

Built-in NLU model	Custom Azure CLU model	Generative orchestration
✓ Default, out-of-the-box, model that comes pre-trained, with many predefined entity types. ✓ Configuration is done by adding trigger phrases and custom entities (either closed lists with values and synonyms, or regular expressions).	✓ Supports additional languages, with native models. ✓ Allows to further customize the intent triggering model for better intent recognition or to address specific industry requirements. ✓ Advanced entity extraction (e.g., same type, or silent extraction). ✓ Entity extraction can also leverage Copilot Studio standard NLU.	✓ Uses a large language model. ✓ Can handle complex utterances with multiple intents, chain topics/actions, and knowledge. ✓ Automatically generate questions for missing inputs. ✓ Allows corrections when running. ✓ When complete, a unified answer gets generated based on the outputs of all topics, actions, knowledge.
✓ Single intent recognition per query. ✓ Cannot be extended. ✓ Slot-filling multiple entities of the same type in the same query requires disambiguation for each (e.g., from and to cities)	✓ Single intent recognition per query. ✓ Configuration is done in Azure and involves additional costs. ✓ Has its own service limits that need to be evaluated. ✓ Azure CLU intents and Copilot Studio topics must be carefully kept in sync.	✓ 25 messages per topic or action chained in the orchestration. ✓ Limit of 127 topics and actions allowed for triggering for the orchestration.

Integration patterns considerations

✅ Choosing the right integration pattern for each requirement

Power Automate Cloud flows	HTTP requests & Connectors	Bot Framework Skills
✓ No-code / low-code. ✓ Clear separation of integration and conversational logic. ✓ Can be monitored separately. ✓ Existing cloud flows can be updated to integrate with Copilot Studio. ✓ Some connectors and custom connectors support Virtual Networks.	✓ No-code / low-code. ✓ Faster runtime execution. ✓ Can be monitored as part of Copilot Studio App Insights integration. ✓ Can leverage variables, including environment variables and secrets. ✓ Variables, conditions, parameters, etc. can use Power Fx formulas. ✓ Parsing and error handling support. ✓ Some connectors and custom connectors support Virtual Networks.	✓ Synchronous execution. ✓ Support for private endpoints. ✓ Existing Bot Framework investments can be reused.
✓ Invocation and execution of the cloud flow can add latency. ✓ If scale/performance are a concern, the higher-tier "Power Automate Process" plan can be evaluated. ✓ "Power Automate Process" required for service principal ownership. ✓ Need to return results within 100s.	✓ Mixing conversational logic and integration logic, but integration topics can be isolated, as they can be configured for inputs and outputs. ✓ Need to return results within 100s.	✓ Traditionally not leveraged unless of an Azure AI Bot Service footprint. ✓ Pro-code (e.g., C#) ✓ Runs in the Azure AI Bot Service. ✓ Additional costs need to be covered by an Azure subscription. ✓ ALM differs from Power Platform.

Why do we share this?

- Copilot Studio integration patterns are not exclusive and can be combined.
- Integration can only be as fast as the endpoints you connect to. In a conversational experience, queries should always be optimized.
- If Power Automate or Copilot Studio don't run your logic fast enough, or if logic is better handled in code, consider moving it to Dataverse custom APIs or Dataverse low-code plug-ins – both have 2-min timeout limit – or Azure functions. These can be invoked by connectors or HTTP.
- Alternatively, in specific scenarios, customers may want to do the data integration in a middle layer, effectively modifying messages as they are relayed (e.g., for data enrichment, data masking before they get to Copilot Studio, etc.).
- Use of premium connectors is covered as part of Copilot Studio licensing.

Useful resources:

- Call a cloud flow as an action
- Perform HTTP requests
- Use connectors
- Use plugin actions
- Use Bot Framework skills
- Dataverse custom APIs
- Dataverse low-code plug-ins
- Azure functions

Quotas & limits

Capability	Limits	Mitigation options
Copilot Studio		
• **Requests per Minute (RPM)**	8,000 per environment	Support request
• **OpenAI Capacity**	Undocumented (OpenAIRateLimitReached)	Support request
Power Automate cloud flows		
• **Power Platform requests**	250,000 / 24h	Power Automate per-process licenses
• **Execution timeout**	100s	None – redesign
Connectors and HTTP requests		
• **Standard connectors**	Check documentation for each connector	Depends on connectors
• **Custom connectors**	500 requests per minute	Support request
• **HTTP requests**	Same as RPM	Support request
• **Execution timeout**	100s	None – redesign
Bot Framework Skills		
• **Azure infra limits**	Check Azure documentation	Azure infra upscaling

Knowledge sources & Generative AI

1 ✎ Query rewriting ✦

Optimizing the user question for search

Last 10 turns are leveraged for contextualization

2 🔍 Content retrieval

Querying each source

Top 3 results per source

3 📝 Summarization ✦

Answer summarization from retrieved content

Citation generation

Answer personalization with custom instructions

📋 Validation at each step ✦

Moderation of harmful, malicious, uncompliant, or copyrighted answers

Grounding validation and hallucination removal

Public data

- Websites must be indexed by Bing.
- Bing cannot be restricted to a region.
- Confirming website ownership leads to better results.

Public Website
- Max 2 subpages depth (/en/help/), no direct pages.

Bing Custom Search
- One configuration ID, but it can be set using a formula.
- Azure costs covered by Microsoft.
- Up to 400 URLs, custom ranking options.
- Max 2 subpages depth (/en/help/), supports direct pages.

SharePoint
🛡 Internal only

- Requires the user to be authenticated with Entra ID to make delegated calls.
- Matching files (max 7 MB) are retrieved to get detailed snippets to summarize.
- Security trimming: returned results only include content the user has read access to.
- The premium 'Enhanced Search Results' features leverages Tenant Microsoft Graph grounding for messages, increasing results quality and max file size (200 MB).

Uploaded files

- Files (512 MB max) are stored in Dataverse file storage, with a maximum of 500 files per agent.
- Files are indexed in Dataverse Search and benefit for image/table recognition in PDFs.
- By default, citations don't contain a link to the file, but this can be done with customizations.

Dataverse tables 🛡

- Dataverse tables (max 15) can be configured with synonyms and a glossary to improve search.
- Natural language queries are transformed in analytical queries over structured data.

Graph Connectors 🛡

- Requires the user to be authenticated with Entra ID to make delegated calls.
- Connect to additional enterprise knowledge sources that are indexed in the Microsoft Graph index, like ServiceNow KB, Confluence, custom enterprise website data, etc.
- The premium 'Enhanced Search Results' feature leverages Tenant Microsoft Graph grounding.

Real-time Connectors 🛡

- Copilot connectors retrieve structured data from Salesforce, ServiceNow, Zendesk, Azure SQL.
- Connections to the target systems must be created by the logged-in user.

Azure AI Search

- Returns results from a linked vectorized Azure AI Search index.
- Connection isn't delegated: no security trimming, no authentication requirement for the user.

{ } Custom data

- Requires a prior step to query the source (e.g., with cloud flows, connectors, or HTTP requests).
- Results are passed as inputs to the generative answers to summarize an answer for the query.
- Input data needs to be in table format, with 3 properties: Content (typically snippets of relevant content), ContentLocation (optional, typically a URL) and Title (optional).
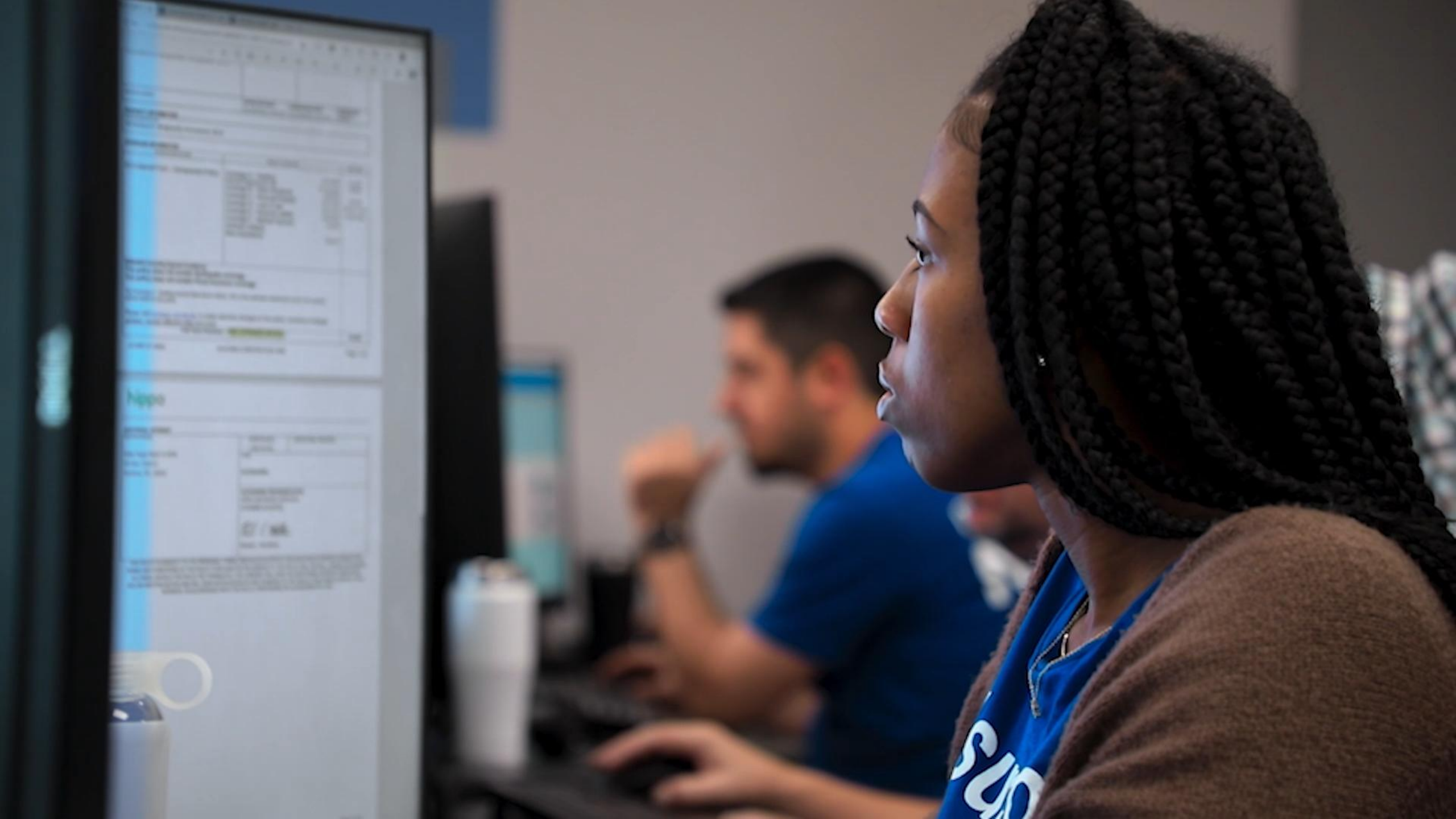
Build agents that work for you…

in your industry…

✈ Travel and Transport	Manage bookings	Change my trip dates	virgin atlantic
🤝 Professional Services	Lead generation	Get a quote	pwc
🏛 Government	Public programs	Get childcare assistance	Ottawa
🛒 Retail	Manage orders	I want to make an exchange	giant eagle
♥ Healthcare	Claims	Submit health insurance claim	NHS
◎ Financial Services	Manage accounts	Report lost card	Standard Bank
🎓 Education	Admissions	How to get financial aid?	SÃO PAULO GOVERNO DO ESTADO
📊 Manufacturing	Supply	Check stock	hp

…and department.

Customer Service
Reduce call volume for quick resolutions

Request a refund	Describe your issue
Support tickets	**Centralized FAQs**

Finance
Save time by automating budget and expense approvals

Update tax information	Submit expenses for approval
Payroll	**Budget requests**

HR
Improve employee satisfaction and retention

Sign up for healthcare plan	Book time off
Benefits	**Leave and absence**

IT
Optimize employee troubleshooting

Reset my password	Refresh my laptop
Support services	**Equipment requests**

Operations
Improve efficiency by digitizing paper processes

Find case file	Check order delivery times
Find documents	**Manage inventory**

Sales and Marketing
Increase up-sell and conversion opportunities

You're eligible for a free upgrade!	Update your email preferences
Upselling	**Email**

Microsoft leveraged Copilot Studio to scale its own customer support across different products. It only took 5 months to develop and launch the "Skylight" copilot, which has helped to reduce ticket creation and increase customer satisfaction.

Microsoft products using Copilot Studio:

2M
Sessions per month

561
Live copilots

42
Languages supported

Examples of agent templates in Copilot Studio

Copilot Studio is a great way to build powerful, custom agents to improve business processes. The pre-built agents in Copilot Studio are a great way to get started as they are preconfigured to speed the process of building more complex agents. For more information on how to get started with a pre-built agent see here.

Agent Name	Description
Store Operations	The Store *Operations Copilot* agent improves the efficiency of retail frontline workers by enabling easy access to store procedures and policies
Sustainability Insights	The *Sustainability Insights* Copilot agent enables users to easily get insights and data about their company's sustainability goals and progress
Awards and Recognition	*Awards and Recognition* is designed to streamline the process of nominating and recognizing your employees for their contributions and achievements
IT Helpdesk	*IT Helpdesk* uses your organization's knowledge base to enhance operational efficiency, improve employee satisfaction, and optimize resource utilization in helpdesk scenarios
Weather	The *Weather* copilot is the go-to assistant for getting weather forecasts embedded in Teams or a website. Users can ask about the weather anywhere in the world to get current conditions and future forecasts

Get started today

🔍 aka.ms/**trycopilotstudio**

📄 **Learn more**

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Microsoft Build sessions	aka.ms/**copilotstudioatbuild**
Community page	aka.ms/**copilotstudiocommunity**
Implementation guide	aka.ms/**copilotstudioimplement**

Microsoft Power Platform

Thank you!