



Copilot Studio Full – Unlocking the Power of Copilot



Master
SERIES

Meet Our Speaker



Kevin is a Principal Solution Engineer at Microsoft, specializing in Microsoft Copilot Studio and Power Platform. He has worked in low-code consulting and delivery for almost three decades.

Kevin DeCoster

Copilot Studio
Solution Engineer

Journey to the Frontier Firm

Phase 1

Human with assistant



Every employee has an AI assistant that helps them work better and faster

Phase 2

Human-led agents



Agents join teams as "digital colleagues," taking on specific tasks at human direction

Phase 3

Human-led, agent-operated



Humans set direction and agents run entire business processes and workflows, checking in as needed

Copilot Studio

1

**Built on Microsoft.
Connected to
Everything.**

Achieve goals faster by enabling agents with your company's data and third-party systems.

2

**Build any agent.
From simple to
sophisticated.**

Reduce development time and costs on custom agents by selecting from your choice of models, knowledge, tools, and channels.

3

**Govern every agent.
Secure every action.**

Innovate at scale by managing data access, agent sprawl, compliance and risk.



Dow reimagines productivity and supply chain efficiency

"We're using Copilot Studio to create and connect agents to Copilot, helping drive an autonomous and sustainable supply chain and ensuring our operations remain effective for the customer, efficient for Dow, and sustainable for the environment"

- Jeff Tazelaar, Global ISC Innovation Director

4k

Daily shipping invoices processed

100k

Invoices received annually

Industry Manufacturing **Org size** 10,000+ employees

Products Copilot Studio, Microsoft 365 Copilot

[Read the full story here >](#)



Challenge

Dow faced significant challenges in cost management and operational efficiency within its supply chain. With millions at stake in logistics spending, the company sought a solution to improve billing accuracy, streamline processes, and reduce costly overcharges.

Solution

After a successful initial rollout of Microsoft 365 Copilot to employees, Dow launched two supply chain agents to further optimize logistics, cut costs and prevent costly mistakes. One agent analyzes freight invoices and flags discrepancies, while the other autonomously processes PDF invoices from email and automatically detects and routes mismatches for correction.

Impact

Using Microsoft 365 Copilot and AI agents built with Copilot Studio, Dow has greater supply chain visibility, smoother communication and collaboration among employees, and faster, more actionable insights across all business processes. They anticipate this will save them millions of dollars on shipping operations in the first year.



Cineplex reduces manual processing time through automation

“Our guest services agents are thrilled with the simplicity and functionality of the Microsoft Copilot Studio. Our copilot has processed over 5,000 refund requests in just 5 months—while reducing our handling time, back-office work and increasing both guest experience and our agent CSAT.”

- Monique Binder, Vice President of Guest Services

5,000

Refund requests processed in five months

80%+

Reduction in handling time for refund requests

Industry Media

Org size 10,000+ employees

Products Copilot Studio, Power Platform

[Read the full story here >](#)



Challenge

Cineplex had many manual and time-consuming business processes that increased the likelihood of errors and inefficiencies in various departments such as finance and guest services. There was a lack of deep integration in existing systems leading to fragmented workflows and scalability issues that hindered their ability to expand and adapt quickly, which resulted in higher operational costs and a greater chance of human error.

Solution

Cineplex created a Guest Services support agent to handle customer refund requests. The agent recognizes the refund type and initiates the appropriate desktop flows, which include integration with ServiceNow and the company's other backend systems. They also built a Tax Management agent to categorize invoices from vendors and determine the applicability of provincial sales taxes.

Impact

The Guest Services agent reduced back-office work while improving both the guest experience and customer satisfaction score. Handling time has been reduced from 5 to 15 minutes per request down to less than a minute—typically just 30 seconds. And the Tax Management agent saved an average of 30 minutes each time it's used in the payment process.



香港大學
THE UNIVERSITY OF HONG KONG

The University of Hong Kong builds a more dynamic learning environment

“The UG Copilot provides quick and accurate answers to my questions making it much easier to navigate academic and administrative processes. I got the answers to almost all the questions I have on course registration. The UG Copilot really made my life at HKU much easier”

- Adrian Yung, HKU student

39k

Students

13.7k

Admin staff and faculty

Industry Education

Org size 1,000-9,999 employees

Products Copilot Studio, Microsoft 365 Copilot

[Read the full story here >](#)



Challenge

HKU faced a complex onboarding process for its diverse student body and an increasing administrative workload for faculty and staff, making it difficult to manage the growing student population and hybrid learning models.

Solution

In addition to rolling out Microsoft 365 Copilot, HKU introduced the HKU First-Year UG Copilot, a GenAI-powered agent designed to assist first-year students with a wide range of academic inquiries on topics like course selection and scholarship opportunities.

Impact

The HK First-Year UG Copilot has enhanced student support by providing quick and accurate answers, reduced the faculty's burden by handling large volumes of queries, and improved engagement, creating a more dynamic and supportive learning environment for both students and faculty.

Orchestrator

An orchestrator **recognizes intent, routes to the correct agent**, and keeps everything organized.

Provide **instructions and human guard rails**, adapting them as needed.

Use autonomous triggers so your agent **can independently begin work** and **dynamically reason** over its capabilities without human intervention.

Easily mix and manage both **generative orchestration and more traditional automation** in one system.

The screenshot displays the 'Financial Planning Advisor' interface. The main content area is titled 'Create financial plan' and includes the following sections:

- Name ***: A text input field containing 'Create a financial plan'.
- Description ***: A text input field containing 'To help the user through the process of creating a plan to meet their goals'.
- Instructions**: A list of instructions with associated actions:
 - Create a plan using the clients financial goals.
 - Send the plan to the customer using [Send an email](#)
 - Assess the risk of the plan using [Risk assessment](#) and include details in the risk assessment section.
 - If plan risk assessor returns a value of 'risky' then [Submit for manager approval](#)
- Knowledge**: A section with a '+ Add' button and the text 'Add data, files, and other resources to inform and improve AI-generated responses. [Learn more](#)'.
- Web search**: A section with a toggle switch set to 'Enabled' and the text 'Let your agent search all public websites. [Learn more](#)'. Below this is an 'Add knowledge' button with a bar chart icon.

On the right side, there is a 'Test your agent' panel with a message: 'Hello, I'm Financial Planning Advisor, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions.' Below the message is an input field with the placeholder text 'Ask a question or describe what you need' and a send button.

At the bottom of the interface, a disclaimer reads: 'Make sure AI-generated content is accurate and appropriate before using. [See terms](#)'.

Knowledge

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

Your agent will be able to **dynamically generate multi-turn answers** in real time using your enterprise data, so you have a useful agent immediately.

Supported data sources include:

Public websites

SharePoint / OneDrive

Dataverse

Microsoft Fabric (coming soon)

File uploads

Copilot connectors

Open web search (public preview)

Add knowledge

Help your agent provide more relevant information and insights. [Learn more](#)



Upload file

Drag and drop or [select to browse](#). Files can be up to 512 MB, and can't be labeled Confidential or Highly Confidential or contain passwords.

☆ Featured **Advanced** [See recommendations](#)

 Microsoft Fabric	 Confluence	 Oracle SQL database	 SAP OData
 Snowflake	 Zendesk	 GitHub Microsoft Graph only	 Jira Microsoft Graph only
 Stack Overflow Microsoft Graph only			

[Explore more](#)

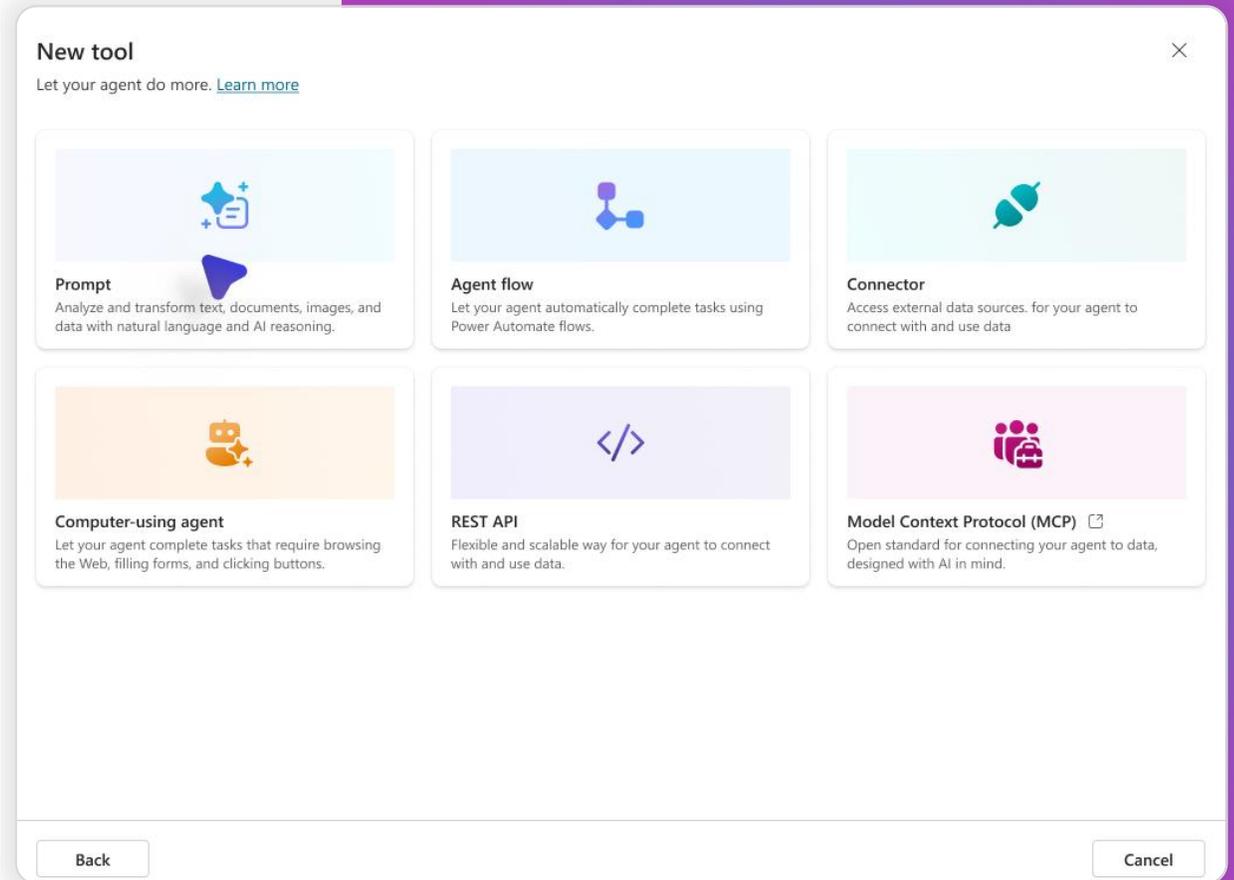
Cancel

Tools

Enable your agent to take actions and **automate your business processes**.

Easily connect to your **key line of business systems**.

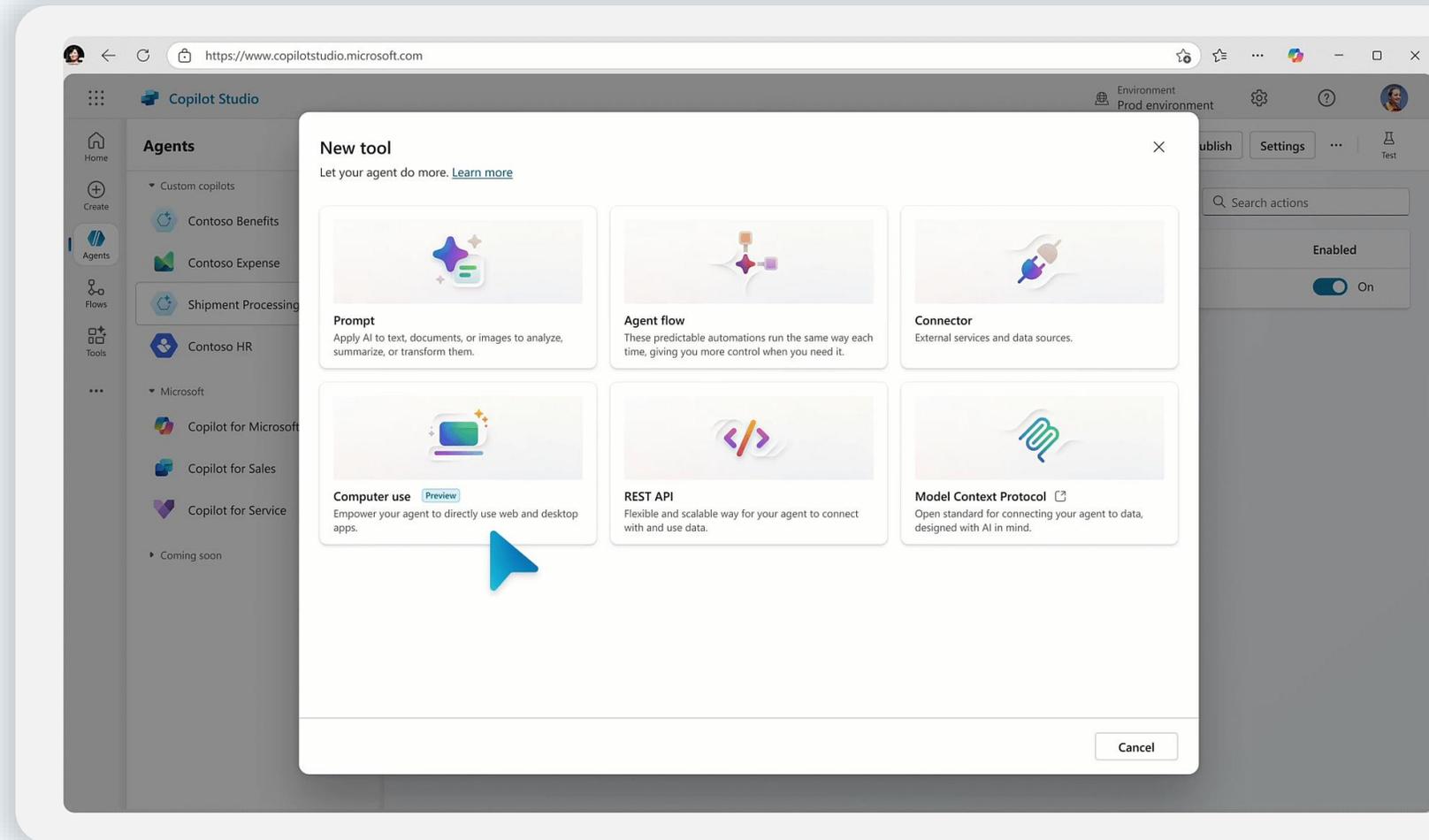
Select from advanced workflows, data connectors, autonomous agents that use “vision,” custom instructions, the model-context protocol, and more to **give your agents skills and capabilities**



¹ Frontier only
² Paid public preview
³ Private preview

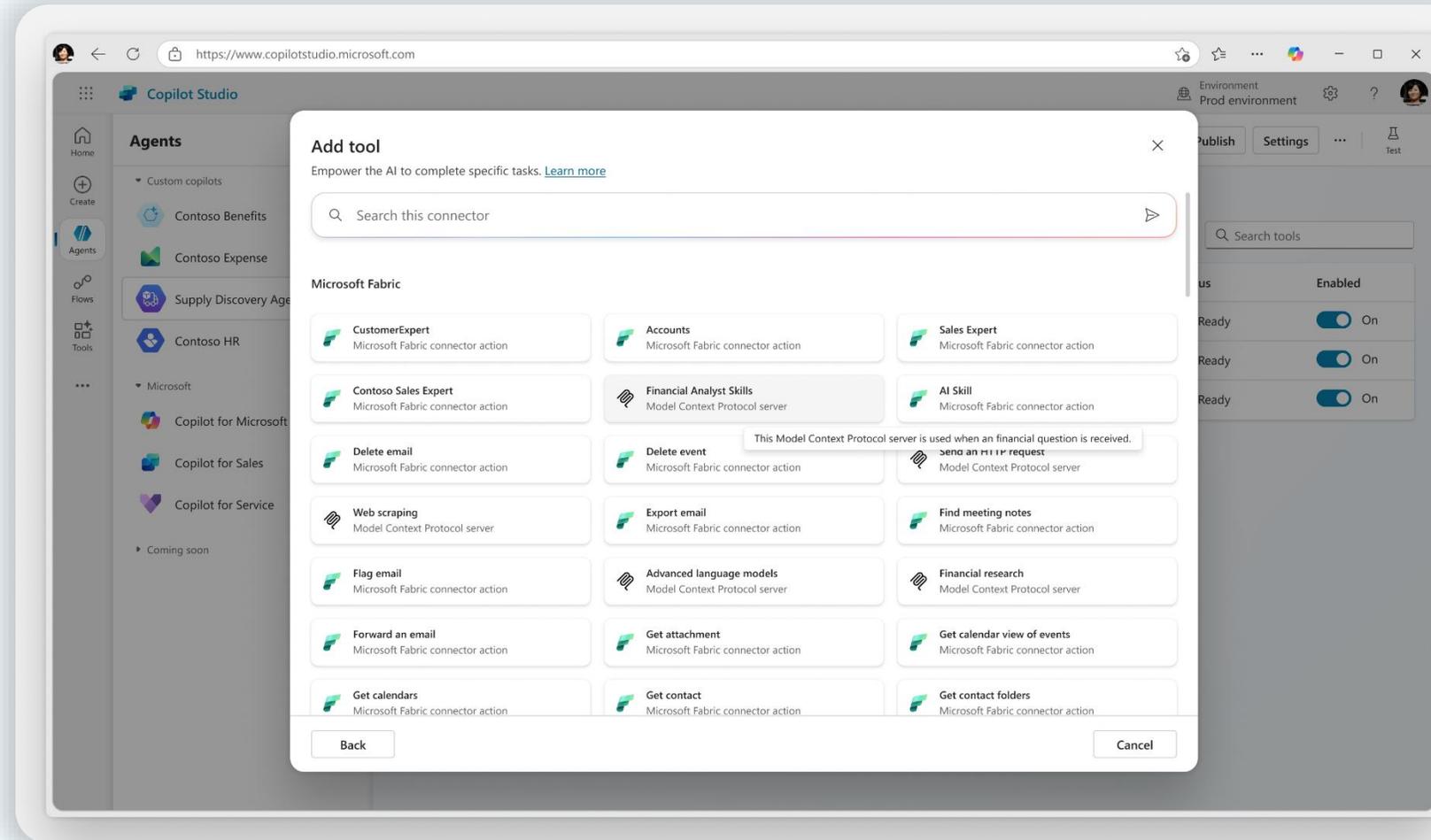
Computer-use tool

Enable your agents to interact with websites, desktop apps, and documents, using AI vision and understanding to execute a broad range of business tasks from data entry and invoice processing to market research and audits.



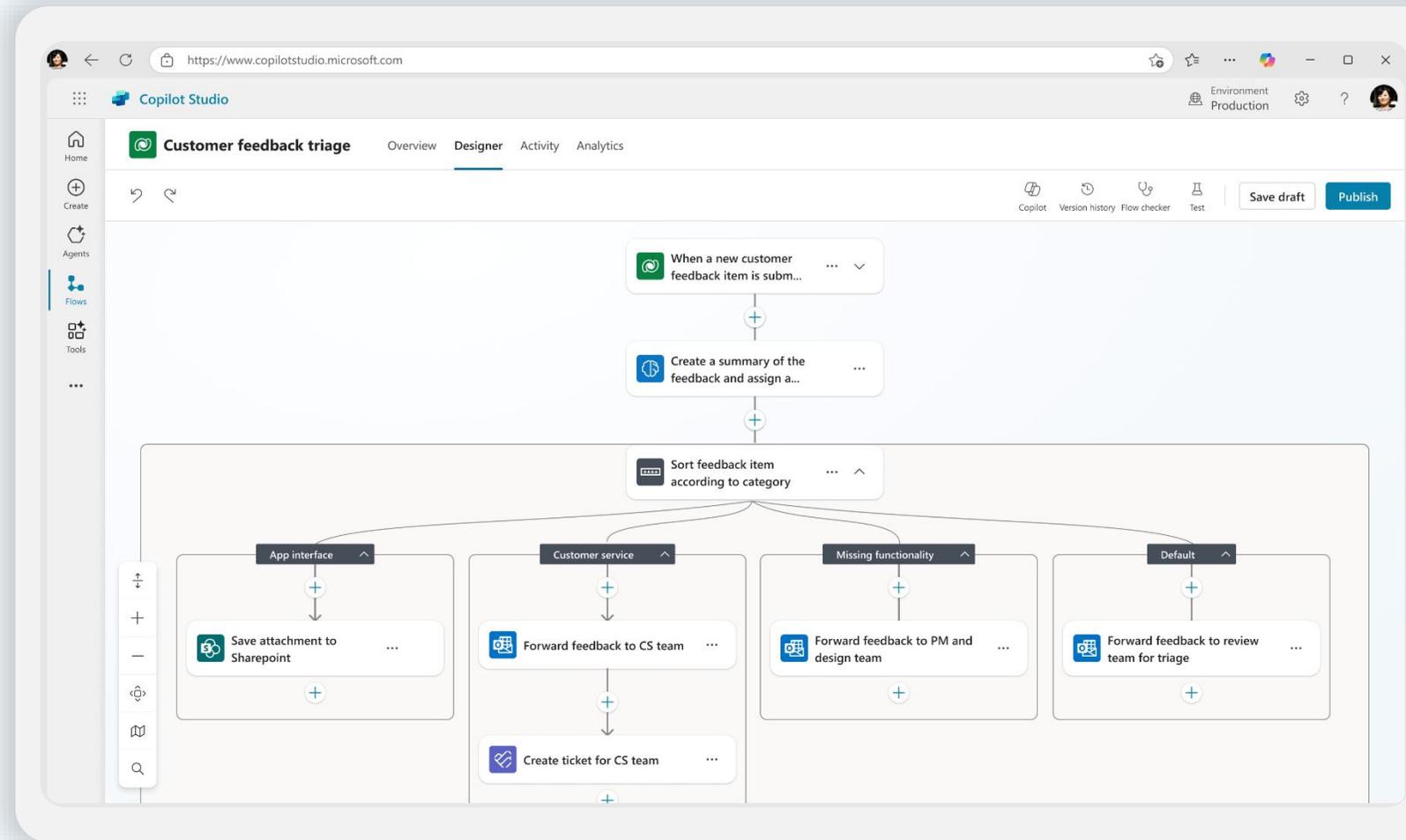
Model-context protocol (MCP)

Connect directly to existing knowledge servers and APIs for automatic updates to actions and knowledge



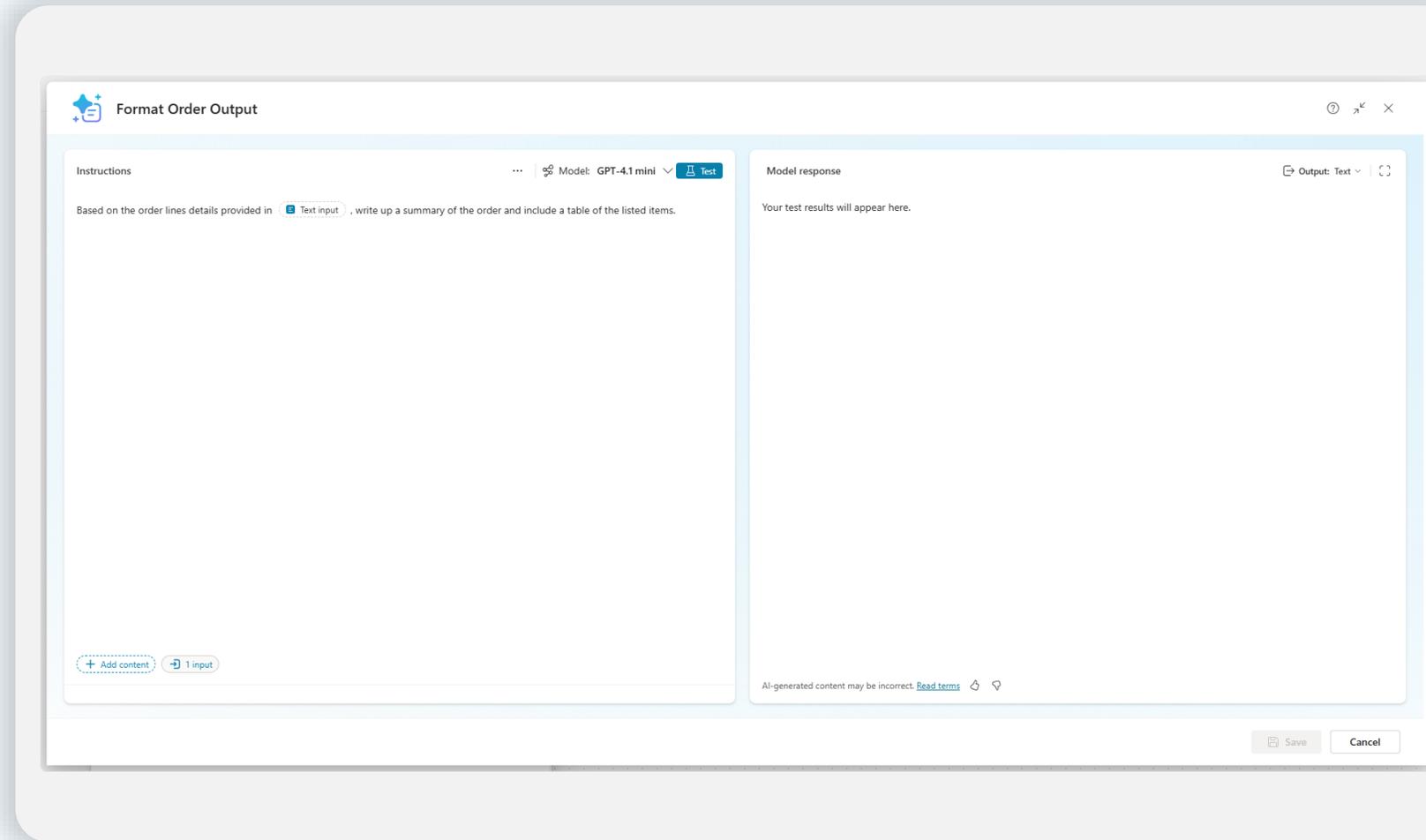
Agent flows

Eliminate repetitive tasks with enterprise-grade automation; build a standalone rules-based workflow or add it to an agent



Prompts

Craft structured instructions with optional input parameters to direct AI models in producing context-aware outputs, retrieving relevant data, and executing defined actions within your workflows



Poll Question #3:

What is your biggest goal or challenge with AI right now?

- Identifying use cases – Figuring out where AI can add value
- Building skills – Training teams to work with AI tools
- Integrating systems – Connecting AI with existing apps and data
- Driving adoption – Getting buy-in and scaling across the company

Autonomous agents

Build agents that plan, complete tasks, and run processes independently, on behalf of an individual, team, or organization

The screenshot displays the Copilot Studio interface for a 'Vendor Invoice agent'. The main activity is titled 'Invoice received' and occurred on 11/24/24 at 10:14 PM. The activity flow consists of the following steps:

- Trigger:** 'New Invoice added to ERP' (1.2s)
- Knowledge:** 'Knowledge sources' (2.8s)
- Connector:** 'Get a list of suppliers from ERP' (0.9s)
- Connected agent:** 'Invoice validator' (4.1s)

The flow concludes with a 'Complete' status. A detailed view of the 'New Invoice added to ERP' trigger is shown on the right, including its description, input, supporting data, and rationale.

Description: Trigger your agent with certain message upon event: When a Business Event occurs.

Trigger input: Use content from ERP notification: Increased Demand in Arizona
Demand in Arizona has risen above forecasted levels.

Supporting data includes:

- Order Volume: Orders in Arizona have increased by 25% over the past 30 days compared to the same period last year.
- Backlog: Current order backlog in Arizona is 15% higher than historical averages.
- Inventory Levels: Inventory turnover in Arizona has accelerated, indicating higher demand.
- Forecast Adjustment: Demand forecast for Arizona has been revised upward by 20% for the next quarter.

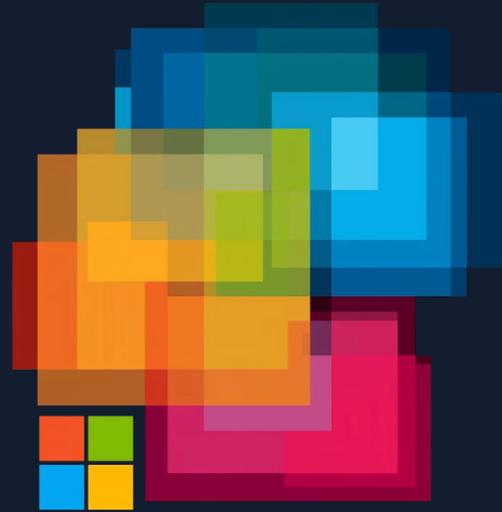
Rationale: This trigger was selected because business event occurred in the background: demand in Arizona rose above forecasted levels. This trigger initiates the Supplier Discovery Agent to start the process of analyzing the market, retrieving supplier data, and ultimately providing a recommendation report to handle the forecasted surge.

Buttons at the bottom of the detail panel include 'Open in Power Automate' and 'Documentation'.

Want to go deeper?

- Fill this form out to setup a session with our specialist team:
<https://forms.office.com/r/G8HEfBzx49>
- Someone will be in touch to schedule a session





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