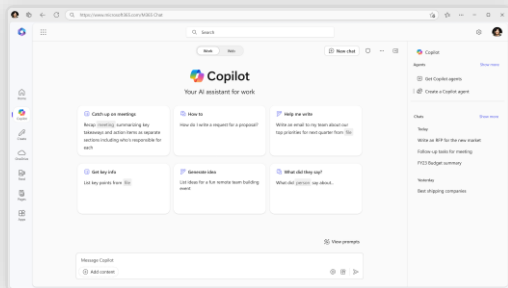


How to build agents in Copilot Chat using the Copilot Studio agent builder



Unlock the value of your organization's content with agents **designed by you.**

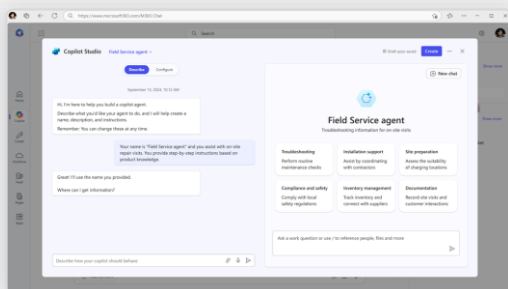
Using the Copilot Studio agent builder experience available directly in Copilot Chat, you can quickly give Microsoft 365 Copilot access to new knowledge and skills – and transform how work gets done.



Step 1

Access agents in Copilot Chat

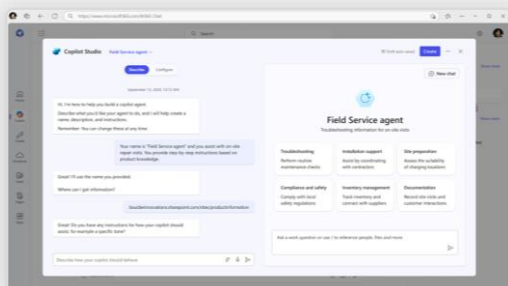
Open Copilot Chat and navigate to "Create an agent" in the right pane. The right pane is where you will find your latest chats and can access the ability to add and create your own agents.



Step 2

Define your agent's purpose

Using the lightweight Copilot Studio experience, Copilot will guide you through the creation process for building an agent. First, describe what you would like your agent to do and identify a name for your new agent.



Step 3

Add your organization's data

Connect your agent to any necessary data sources. This could be your organization's SharePoint sites/documentation, organization approved graph connectors and public websites.

The screenshot displays the CapScribe Field Service agent interface. At the top, there's a navigation bar with a search icon and a 'Search' button. Below this, the main header area includes the 'CapScribe' logo, the title 'Field Service agent', and a 'New case' button. A secondary 'New case' button is also visible on the right. The central content area is titled 'Field Service agent' and features a 'New case' button. Below this, there's a section for 'Field Service agent' with a 'New case' button and a 'New case' button. The interface is designed for creating and managing field service cases, including adding notes, attachments, and scheduling appointments.

The screenshot shows the Copilot Studio interface for a new chat session. On the left, the 'Details' panel is visible, containing the following information:

- Name:** Field Service agent
- Description:** Troubleshooting information for on-site visits
- Instructions:**

You should provide me with step-by-step instructions for Field agents by using information from the product catalog. You can also make recommendations based on previous chat sessions and Field agent requests. Please direct the user to the help center if you are asked anything that is not related to the Field Service technical support agent.
- Knowledge:**

Use the knowledge base to help you with this. You can go to your field or visit the knowledge base using the button below to get updates.

The main chat area on the right displays the 'Field Service agent' header, a list of capabilities, and a text input field with a send button.

Field Service agent
Troubleshooting information for on-site visits

- Troubleshooting**
Resolve common equipment issues
- Configuration and safety**
Comply with local safety regulations
- Inventory management**
Track inventory and connect with suppliers
- Documentation**
Access the latest and custom instructions

Ask a new question or to influence previous, filter and more

The screenshot displays the Cognite Studio interface for a 'Field Service agent'. The left sidebar shows the 'About' tab, which includes a 'Name' field set to 'Field Service agent', a 'Description' field set to 'Transforming information for on-site visits', and an 'Instructions' section. The main content area on the right features the 'Field Service agent' header with a green gear icon, followed by a list of four cards: 'Troubleshooting' (with a link to 'Troubleshooting information for on-site visits'), 'Site preparation' (with a link to 'From the world of changing locations'), 'Compliance and safety' (with a link to 'Comply with local safety regulations'), and 'Inventory management' (with a link to 'Track inventory and connect with suppliers'). A 'Documentation' card is also visible, linked to 'Report data and customer service requests'. At the bottom, there is a 'Knowledge' section with a 'Feedback' button and a 'Report' button.

The screenshot shows the Google Cloud console interface. A modal dialog box is centered on the screen, titled "Agent successfully created". The dialog contains the following text: "Agent has been created successfully. You can now use the agent to monitor your application. Click on the agent name to view the agent details." Below this text is a "Done" button. In the background, the "Agents" page is visible, showing a table with one agent listed: "agent-1234567890" with a status of "Ready".

The screenshot shows a Microsoft Teams chat interface. The chat title is "Technical Product Forum". The chat history shows a conversation where "Cristina" asks for a grant proposal, and "Robert" responds with a link to a document. The chat also shows a list of participants on the left and a search bar at the top.

You can now @mention your agent or ask it questions directly in Copilot Chat, saving you valuable time to focus on your most important tasks.