Copilot Studio Business Scenarios

Reference Guide 2026

15 practical enterprise AI agent scenarios with integration details, architecture patterns, governance framework and implementation roadmap.

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Introduction

Copilot Studio is constantly cropping up when we speak to customers, decision makers and project teams but they can never answer what appears to be the critical question-where does it really sit? Most enterprises have the awareness that Microsoft are aggressively pushing AI agents and the difficulty they face is turning that into actionable intent. What business problems are suitable, what does a practical implementation look like, and how do they tie to existing systems? This guide is intended to be read from a solution architecture perspective focusing on what a customer needs to be able to assess, design, and implement Copilot Studio agents in a practical, enterprise context. It considers fifteen scenarios including HR, IT, finance, procurement, sales and operations, detailing in each scenario a full conversation flow, recommended platform, integration points, and governance issues.

What Makes Up a Copilot Studio Agent

As we walk through the 15 business scenarios, let's first examine exactly what constitutes a Copilot Studio agent. Each piece serves a purpose, and it's the synergy between the parts that determines if an agent will actually work, or just provide erratic behaviour.

Instructions

The instructions constitute the agent's personality and behavioural contract – that's the system prompt that establishes the agent's identity, its intended actions and limitations, its appropriate tone, and how to address situations outside of its expertise.

Knowledge Sources

Knowledge sources are the information where agent consult to answer the questions. In Copilot Studio, supports SharePoint Online, public website, uploaded file, Dataverse table and Azure AI Search.

Topics

Topics are the structured conversation paths within the agent. Custom topics handle specific known intents. Generative answers (fallback) handle the long tail of questions that no topic designer could anticipate.

Triggers

Triggers specify how and when an agent will initiate a conversation. User triggered triggers wait for the user to send a message. Automation triggered waits for a separate event occurring externally

Tools, Actions and Connectors

These are what tools the agent uses, and actions, that the agent can take. The action can leverage "beyond" its sources of knowledge and connect to external systems. The primary mechanism for this is the Power Automate flow. Simpler lookups can utilize direct connector actions, and more advanced API platforms can utilize custom plugins via OpenAPI spec.

Channels

Channels tell you where the agent will be present - MS Teams (most prevalent), Webchat widget (in SharePoint or on portal), Teams mobile, email and telephony.

01 HR Policy Assistant

BUSINESS CHALLENGE

Mid- to large-sized HR teams spend hundreds of hours each week answering the same employee questions. Yes, it's all documented. Leave entitlements, reimbursement, travel, benefits…but employees struggle to find these policies, or frankly, don't want to sift through pages and pages of documentation. The result is high-volume, low-complexity work that diverts HR resources away from higher value, strategic projects.

RECOMMENDED PLATFORMS

- Microsoft Copilot Studio
- SharePoint Online
- Microsoft Teams
- Power Automate
- Microsoft Entra ID

KNOWLEDGE SOURCES

- SharePoint HR policy document library
- Employee handbook (SharePoint or OneDrive)
- Benefits and reimbursement guides
- Leave and attendance policy documents

TOPICS

- Leave and attendance policies
- Reimbursement and expense guidelines
- Benefits and healthcare queries
- Travel policy questions
- Onboarding resources

TRIGGERS

User Initiated : employees start the conversation by asking a question in Microsoft Teams.

TOOLS / ACTIONS / CONNECTORS / POWER AUTOMATE FLOWS

- SharePoint connector : retrieves policy documents and knowledge articles
- Power Automate flow : escalates unresolved queries to an HR team member via Teams notification
- Microsoft Entra ID : validates employee identity and tenant membership

ENTERPRISE INTEGRATIONS

- Workday : leave balance and employee profile lookup
- SAP SuccessFactors : HR master data and entitlement queries
- BambooHR : employee record lookup for smaller organisations

EXAMPLE USER QUESTIONS

- "How many days of annual leave do I have remaining?"
- "What is the process for claiming medical expenses?"
- "Where can I find the remote working policy?"
- "Who do I contact if I need to apply for parental leave?"

CONVERSATION FLOW

1. Employee sends a question through the HR Assistant in Microsoft Teams.
2. Copilot Studio identifies the intent and matches it to the relevant policy topic.
3. The agent retrieves the relevant section from the SharePoint knowledge source and summarises the answer.
4. If leave balance is requested, a Power Automate flow queries the HR system (Workday or SAP SuccessFactors) and returns the current balance.
5. The agent presents the answer with a reference link to the full policy document.
6. If the question cannot be resolved, the agent offers to raise a query with the HR team and sends a Teams notification to the HR mailbox.

BUSINESS VALUE

- Significant reduction in repetitive HR queries handled by HR team members
- Consistent, policy-aligned answers regardless of time zone or working hours
- Faster resolution for employees without waiting for HR availability
- HR capacity redirected to higher-value strategic activities

SECURITY AND GOVERNANCE CONSIDERATIONS

- Ensure SharePoint document library permissions restrict access to current employees only
- Use Microsoft Entra ID authentication to verify the user before surfacing personalised HR data
- Apply data loss prevention policies to prevent employee personal data from appearing in agent responses
- Audit logs should capture all agent interactions for compliance review

ARCHITECTURE SUMMARY

Employee interaction takes place via a Copilot Studio agent published to Microsoft Teams. General policy queries are handled through knowledge lookup on SharePoint. Individual requests (e.g. Leave balance, employee information) are routed to power automate flows which trigger Workday or SAP SuccessFactors APIs. All queries which cannot be resolved are flagged by a notification sent to the HR team via Teams. Authentication is handled via Microsoft Entra ID.

02 IT Helpdesk Agent

BUSINESS CHALLENGE

IT departments are inundated by thousands of similar support issues monthly. Many are password resets, VPN fixes, software installs or network printing which are known and solvable solutions. All of these need technician attention, however basic. An AI could take the call from beginning to end and even log into ITSM.

RECOMMENDED PLATFORMS

- Microsoft Copilot Studio
- Microsoft Teams
- SharePoint Online
- Power Automate
- Microsoft Entra ID

KNOWLEDGE SOURCES

- SharePoint IT knowledge base (troubleshooting guides, FAQs)
- ServiceNow knowledge articles
- Internal IT documentation library

TOPICS

- Password and account access issues
- VPN and network connectivity
- Hardware and software requests
- Printer and peripheral troubleshooting
- Microsoft 365 application support
- Incident logging and status tracking

TRIGGERS

User Initiated : employee raises a support request through the IT Helpdesk agent in Microsoft Teams.

TOOLS / ACTIONS / CONNECTORS / POWER AUTOMATE FLOWS

- SharePoint connector : retrieves knowledge articles and troubleshooting documentation
- Power Automate flow : creates incidents in ServiceNow via REST API
- Power Automate flow : queries ServiceNow for incident status using incident ID
- Microsoft Entra ID : authenticates the employee and enriches the incident record with user details

ENTERPRISE INTEGRATIONS

- ServiceNow : incident creation, update and status retrieval
- Jira Service Management : alternative ITSM platform for engineering-led organisations
- Zendesk : customer-facing IT support environments
- Freshservice : SMB and mid-market ITSM integration

EXAMPLE USER QUESTIONS

- "My VPN keeps disconnecting. How do I fix it?"

- "I cannot log in to my account. It says my password has expired."
- "Can you raise a ticket for my laptop screen not working?"
- "What is the status of my incident INC0045982?"

CONVERSATION FLOW

7. Employee reports an issue through the IT Helpdesk agent in Teams.
8. Copilot Studio identifies the issue category and searches the SharePoint knowledge base for matching troubleshooting steps.
9. The agent presents a guided resolution. If the employee confirms the issue is resolved, the conversation ends without creating a ticket.
10. If the issue is unresolved, the agent collects a brief description and severity level, then triggers a Power Automate flow to create an incident in ServiceNow.
11. The flow returns the incident ID and estimated response time to the employee.
12. The employee can return later to check status by providing the incident ID.

BUSINESS VALUE

- Reduction in ticket volume through automated self-service resolution
- Faster resolution times for common issues
- Consistent incident logging with complete user context
- IT team capacity freed for complex, high-priority issues

SECURITY AND GOVERNANCE CONSIDERATIONS

- ServiceNow API credentials must be stored in Azure Key Vault, referenced by Power Automate using managed identity
- Restrict agent permissions in ServiceNow to incident create and read operations only — avoid write access to configuration items
- Audit all agent-created incidents with a source tag (e.g. "Copilot Studio") for reporting and quality review
- Validate user identity through Entra ID before allowing status queries on existing incidents

ARCHITECTURE SUMMARY

The IT Helpdesk agent is published to Microsoft Teams and deployed to all employees. Knowledge retrieval runs against the SharePoint knowledge base. Incident creation and status retrieval are handled by Power Automate flows that call the ServiceNow REST API. Entra ID provides authentication and user enrichment. Incident records created by the agent are tagged for tracking and SLA measurement.

03 Employee Onboarding Assistant

BUSINESS CHALLENGE

Onboarding tasks and the location of information can become challenging for new employees when the process is broken up, as is the case when there are forms to complete on one system, training materials in a different system, and an IT equipment requisition to be made out through yet another channel. By providing a single journey, the onboarding assistant centralises the process and eases the workload for HR, IT and line managers all at the same time.

RECOMMENDED PLATFORMS

- Microsoft Copilot Studio
- Microsoft Teams
- SharePoint Online
- Power Automate
- Microsoft Forms
- Microsoft Entra ID

KNOWLEDGE SOURCES

- SharePoint onboarding portal and new employee guides
- Company policy documents
- Organisational structure documentation
- Training schedules and learning paths

TOPICS

- Welcome and orientation guidance
- IT equipment and access requests
- Mandatory training and compliance requirements
- Benefits enrolment and HR processes
- Team and manager introductions
- Policies and company values

TRIGGERS

Automated — a Power Automate flow initiates the onboarding agent conversation when a new employee record is created in the HR system. The agent sends a welcome message to the employee's Teams account on their first day.

TOOLS / ACTIONS / CONNECTORS / POWER AUTOMATE FLOWS

- Power Automate flow : monitors HR system for new employee records and triggers the onboarding sequence
- Power Automate flow : submits IT equipment requests to the IT service desk
- Microsoft Forms : collects initial employee preferences and setup requirements
- SharePoint connector : surfaces onboarding documents and training resources
- Adaptive Cards : presents task checklists and guided steps within Teams

ENTERPRISE INTEGRATIONS

- Workday or SAP SuccessFactors : new hire trigger and employee profile data
- ServiceNow : IT equipment provisioning requests
- LinkedIn Learning or Viva Learning : training content integration

EXAMPLE USER QUESTIONS

- "What do I need to complete in my first week?"
- "How do I request my laptop and accessories?"
- "Where can I find the mandatory compliance training?"
- "Who is my IT contact for access issues?"

CONVERSATION FLOW

13. On day one, the new employee receives a welcome message from the Onboarding Assistant in Teams.
14. The agent presents a personalised checklist of first-week tasks based on the employee's role and department.
15. The employee can ask any question about policies, processes or logistics and receive answers sourced from the SharePoint onboarding library.
16. Equipment and access requests are submitted through the agent, which triggers a Power Automate flow to create service requests in ServiceNow.
17. The agent surfaces mandatory training links and tracks completion status.
18. After 30 days, the agent sends a check-in message to gather feedback on the onboarding experience.

BUSINESS VALUE

- Faster time to productivity for new employees
- Consistent onboarding experience regardless of location or department
- Reduced volume of first-week questions to HR and IT teams
- Improved new hire satisfaction and engagement scores

SECURITY AND GOVERNANCE CONSIDERATIONS

- Onboarding documents should be scoped to the employee's role — avoid surfacing content from unrelated departments
- Equipment requests should route through an approval flow before reaching the IT provisioning team
- Personal data collected during onboarding must comply with regional data residency and privacy requirements

ARCHITECTURE SUMMARY

A Power Automate flow monitors the HR system for new employee records and initiates the onboarding conversation via the Copilot Studio agent in Teams. The agent guides the employee through a personalised checklist using Adaptive Cards, retrieves content from SharePoint, submits service requests to IT, and tracks task completion. Check-in messages are scheduled through Power Automate at the 30-day mark.

04 Leave Management Assistant

BUSINESS CHALLENGE

The most frequent queries to HR departments are those related to asking employees what their leave balances are and to ask if leave has been approved and on what date, and what their leave entitlement is. All of these are straightforward requests but account for a large chunk of HR's time when employees are expected to make a formal request for this information which has to be answered manually within a large organization. With a leave management assistant, each employee has direct access to their leave entitlement and data.

RECOMMENDED PLATFORMS

- Microsoft Copilot Studio
- Microsoft Teams
- Power Automate
- Microsoft Entra ID
- Dataverse (optional, for local leave request records)

KNOWLEDGE SOURCES

- SharePoint leave policy documentation
- HR system leave type reference data

TOPICS

- Leave balance enquiries
- Leave application status
- Leave type entitlements
- Leave application guidance

TRIGGERS

User Initiated : employee asks a leave-related question in the agent.

TOOLS / ACTIONS / CONNECTORS / POWER AUTOMATE FLOWS

- Power Automate flow : queries leave balance from Workday or SAP SuccessFactors via REST API
- Power Automate flow : retrieves pending leave request status
- SharePoint connector : surfaces leave policy documentation

ENTERPRISE INTEGRATIONS

- Workday : leave balance and request status retrieval
- SAP SuccessFactors : HR leave management module
- Dynamics 365 HR : for Microsoft-native HR environments

EXAMPLE USER QUESTIONS

- "How much annual leave do I have left?"
- "Has my leave request for 14 July been approved?"
- "Can I carry over unused leave to next year?"
- "What is the difference between sick leave and personal leave?"

CONVERSATION FLOW

19. Employee asks about leave balance in the Teams agent.

20. The agent authenticates the employee via Entra ID and triggers a Power Automate flow to query the HR system.
21. The leave balance is returned and displayed in a structured Adaptive Card showing leave type, entitlement, taken and remaining days.
22. If the employee asks about an existing leave request, the agent queries the HR system for the request status and returns the result.
23. Policy questions are resolved through SharePoint knowledge retrieval.

BUSINESS VALUE

- Employees get immediate answers without contacting HR
- HR team freed from repetitive balance and status queries
- Reduced volume of leave-related email to managers and HR
- Consistent, accurate responses drawn directly from the source HR system

SECURITY AND GOVERNANCE CONSIDERATIONS

- Leave balance data is personal — the agent must authenticate the user and return only their own data
- API calls to Workday or SAP SuccessFactors should use service accounts with read-only access to the leave module
- Store no leave data in Dataverse unless a defined retention and deletion policy is in place

ARCHITECTURE SUMMARY

The agent is deployed in Microsoft Teams. All leave data queries are handled through Power Automate flows that call the HR platform (Workday or SAP SuccessFactors) API directly. Policy questions are answered through SharePoint knowledge retrieval. No leave data is persisted within the Copilot Studio environment.

05 Travel Request Assistant

BUSINESS CHALLENGE

Current travel authorization is primarily a paper process or an email trail which leads to slow, inconsistent and an un auditable system. Staff waste valuable time chasing approval and finance can never get a full travel history before the actual travel occurs.

RECOMMENDED PLATFORMS

- Microsoft Copilot Studio
- Power Apps
- SharePoint Online
- Power Automate
- Microsoft Teams

KNOWLEDGE SOURCES

- SharePoint travel policy documentation
- Expense claim guidelines
- Approved supplier and booking reference information

TOPICS

- Travel request submission
- Approval status enquiry
- Travel policy guidance
- Expense claim process

TRIGGERS

User Initiated : employee initiates a travel request or query through the agent.

TOOLS / ACTIONS / CONNECTORS / POWER AUTOMATE FLOWS

- Power Automate flow : submits the travel request to a SharePoint list and triggers a manager approval through Teams Adaptive Cards
- Power Automate flow : queries SharePoint for approval status by request ID
- SharePoint connector : stores travel records and retrieves policy documentation
- Outlook connector (optional) : sends confirmation emails to the employee upon approval

ENTERPRISE INTEGRATIONS

- SAP Concur : travel and expense management integration
- Dynamics 365 Finance : travel cost allocation and budget checking
- Corporate travel booking platforms : deep link to booking after approval

EXAMPLE USER QUESTIONS

- "I need to submit a travel request for a client visit in Sydney next week."
- "Has my travel request been approved?"
- "What is the daily meal allowance for international travel?"
- "How do I claim expenses after returning from a trip?"

CONVERSATION FLOW

24. Employee requests a new travel request through the agent in Teams.
25. The agent collects destination, travel dates, purpose and estimated cost through a guided conversation.
26. A Power Automate flow creates the travel request in SharePoint and sends an approval card to the employee's manager in Teams.
27. Upon manager approval or rejection, the employee receives an automated Teams notification with the outcome.
28. If the employee asks about policy, the agent retrieves the relevant section from the SharePoint travel policy document.

BUSINESS VALUE

- Faster, consistent travel approval process
- Complete digital audit trail for every travel request
- Reduced follow-up emails between employees and managers
- Finance teams gain visibility into travel commitments before travel occurs

SECURITY AND GOVERNANCE CONSIDERATIONS

- Travel requests should only be viewable by the submitting employee, their manager and the finance team
- Budget threshold rules should be enforced — high-value travel may require additional approval tiers
- SharePoint list permissions must be configured to prevent cross-employee data access

ARCHITECTURE SUMMARY

The agent collects travel request details conversationally and stores them in a SharePoint list via Power Automate. Approval notifications are sent to managers through Teams Adaptive Cards. Status queries are resolved by the agent querying the SharePoint list. Policy questions are answered through SharePoint knowledge retrieval.

06 Knowledge Management Assistant

BUSINESS CHALLENGE

Large enterprise companies hold huge quantities of documents (SOP's, tech docs, project histories, policy documents etc.). In most instances these documents cannot be found. Staff either don't know where to look or they eventually abandon their search and ask other colleagues. This causes avoidable knowledge bottlenecks.

RECOMMENDED PLATFORMS

- Microsoft Copilot Studio
- SharePoint Online
- Azure AI Search
- Microsoft Teams
- Microsoft 365 Copilot (optional, for Microsoft Graph grounding)

KNOWLEDGE SOURCES

- SharePoint document libraries across all departments
- Standard operating procedures
- Technical architecture documentation
- Compliance and audit policies
- Project documentation archives

TOPICS

- Document search and retrieval
- Process and procedure guidance
- Policy clarification
- Technical reference queries

TRIGGERS

User Initiated : employee submits a knowledge query through the agent.

TOOLS / ACTIONS / CONNECTORS / POWER AUTOMATE FLOWS

- SharePoint connector : direct knowledge source for Copilot Studio
- Azure AI Search connector : enables semantic search across larger document repositories
- Power Automate flow : logs unanswered queries for knowledge gap analysis and content improvement

ENTERPRISE INTEGRATIONS

- Azure AI Search : semantic search across SharePoint and external repositories
- Confluence : for organisations using Atlassian for knowledge management
- ServiceNow Knowledge Base : ITSM knowledge integration

EXAMPLE USER QUESTIONS

- "Where is the standard change request template?"
- "What is our data retention policy for project emails?"
- "Can you find the architecture decision record for the CRM migration project?"

- "What are the approved vendors for cloud hosting services?"

CONVERSATION FLOW

29. Employee submits a knowledge query through the agent in Teams.
30. Copilot Studio performs a semantic search against SharePoint and Azure AI Search.
31. The agent returns a summarised answer with a citation link to the source document.
32. If multiple relevant documents are found, the agent presents a ranked list with brief descriptions.
33. If no relevant document is found, the agent logs the query to a SharePoint list for the knowledge management team to review.

BUSINESS VALUE

- Significant reduction in time employees spend searching for information
- Surfaces underused documentation that already exists
- Identifies knowledge gaps through unanswered query logging
- Reduces informal knowledge transfer dependency on specific individuals

SECURITY AND GOVERNANCE CONSIDERATIONS

- The agent must respect SharePoint permission inheritance — users should only see documents they are authorised to access
- Azure AI Search must be configured with security trimming to enforce user-level access control
- Confidential document libraries should be explicitly excluded from the agent knowledge scope

ARCHITECTURE SUMMARY

Copilot Studio is configured with SharePoint as the primary knowledge source and Azure AI Search as the semantic search layer. User identity is passed to both systems to enforce permission-trimmed results. Unanswered queries are logged to SharePoint via Power Automate. The agent is published to Teams and optionally to the company intranet as a web widget.

07 Invoice Status Assistant

BUSINESS CHALLENGE

Finance groups receive a constant stream of internal and supplier queries regarding invoice payment status. Invoices that require quick payment need to access the ERP system which is not everyone has access to. An invoice status assistant provides secure, non-ERP login self-service access for invoice payment data to appropriate users in real-time.

RECOMMENDED PLATFORMS

- Microsoft Copilot Studio
- Dynamics 365 Finance
- Power Automate
- Dataverse
- Microsoft Teams

KNOWLEDGE SOURCES

- SharePoint accounts payable process documentation
- Invoice approval workflow guides

TOPICS

- Invoice approval status
- Payment schedule enquiries
- Invoice dispute guidance
- Accounts payable process queries

TRIGGERS

User Initiated : finance team member or authorised stakeholder queries invoice status.

TOOLS / ACTIONS / CONNECTORS / POWER AUTOMATE FLOWS

- Power Automate flow : queries Dynamics 365 Finance or SAP for invoice status by invoice number
- Power Automate flow : retrieves payment schedule for approved invoices
- Dataverse connector : accesses local invoice records if maintained outside ERP

ENTERPRISE INTEGRATIONS

- SAP S/4HANA : accounts payable and invoice management
- Oracle ERP Cloud : finance and procurement integration
- Dynamics 365 Finance : native Microsoft ERP integration

EXAMPLE USER QUESTIONS

- "What is the approval status of invoice INV-20240891?"
- "When is the payment for supplier XYZ scheduled?"
- "Why has this invoice been on hold for two weeks?"
- "How do I raise a dispute for an incorrect invoice?"

CONVERSATION FLOW

34. Finance team member asks about an invoice by number or supplier name.

35. Copilot Studio triggers a Power Automate flow that queries the ERP system for the matching invoice record.
36. The flow returns invoice status, approval history and scheduled payment date.
37. The agent presents this information in a structured Adaptive Card.
38. If the invoice is on hold, the agent explains the hold reason returned by the ERP and provides process guidance for resolution.

BUSINESS VALUE

- Faster resolution of invoice queries without requiring ERP access for all stakeholders
- Reduced workload on accounts payable teams
- Improved supplier satisfaction through faster, accurate status updates
- Consistent process guidance for dispute and escalation queries

SECURITY AND GOVERNANCE CONSIDERATIONS

- Invoice data access must be restricted to authorised finance roles — use Entra ID group membership to control agent access
- ERP API credentials should use a service account with read-only access to accounts payable data
- Do not surface payment account details or banking information through the agent

ARCHITECTURE SUMMARY

The agent is deployed to Microsoft Teams and restricted to finance team members through Entra ID group-based access. Invoice queries trigger Power Automate flows that call the ERP REST API. Results are returned in Adaptive Cards. Process documentation is retrieved from SharePoint. No financial data is persisted within Copilot Studio.

08 Procurement Assistant

BUSINESS CHALLENGE

Procurement teams manage high volumes of purchase orders, vendor queries and supplier management activities. Employees outside the procurement team frequently need visibility into order status or vendor information but lack direct system access. An AI procurement assistant bridges that gap without requiring ERP access for every stakeholder.

RECOMMENDED PLATFORMS

- Microsoft Copilot Studio
- Dynamics 365 Supply Chain Management
- Power Automate
- Microsoft Teams

KNOWLEDGE SOURCES

- SharePoint procurement policy documentation
- Approved vendor register
- Purchasing threshold and authorisation guidelines

TOPICS

- Purchase order tracking
- Vendor lookup and contact details
- Procurement policy guidance
- Approval threshold queries

TRIGGERS

User Initiated : employee or procurement team member queries order or vendor information.

TOOLS / ACTIONS / CONNECTORS / POWER AUTOMATE FLOWS

- Power Automate flow : queries SAP S/4HANA or Dynamics 365 for PO status by order number
- Power Automate flow : retrieves vendor contact and status information
- SharePoint connector : retrieves procurement policy documentation

ENTERPRISE INTEGRATIONS

- SAP S/4HANA : purchase order management and vendor master data
- Oracle Procurement Cloud : alternative ERP integration
- Dynamics 365 Supply Chain Management : native Microsoft integration

EXAMPLE USER QUESTIONS

- "What is the current status of purchase order PO-45123?"
- "Has the order for supplier Contoso Electronics been shipped?"
- "Who is the approved contact for Vendor ID V00289?"
- "What is the procurement approval limit for my department?"

CONVERSATION FLOW

39. Employee queries a purchase order number or vendor in the agent.

40. The agent triggers a Power Automate flow to retrieve the relevant record from the ERP system.
41. PO status, expected delivery date and current approval stage are returned and displayed via Adaptive Card.
42. Vendor contact queries retrieve the approved vendor details from the vendor master.
43. Policy questions are resolved through SharePoint knowledge retrieval.

BUSINESS VALUE

- Reduced volume of procurement status emails between departments and the procurement team
- Faster access to vendor and order information for non-ERP users
- Consistent policy guidance for purchasing decisions

SECURITY AND GOVERNANCE CONSIDERATIONS

- Vendor banking and payment account details must be excluded from agent responses
- ERP access should be limited to read operations on order and vendor master data
- Procurement agent access should be scoped to employees with a legitimate business need

ARCHITECTURE SUMMARY

The procurement agent is deployed to Teams with role-based access controlled through Entra ID. Order and vendor queries trigger Power Automate flows calling the ERP REST API. Policy and guideline content is served from SharePoint. Results are displayed in Adaptive Cards with links to source records where appropriate.

09 Customer Support Agent

BUSINESS CHALLENGE

Customer support teams face rising ticket volumes, increasing customer expectations and pressure to reduce cost per interaction. Many customer queries are repetitive and can be resolved without human intervention when an agent has access to the right product knowledge and customer record data.

RECOMMENDED PLATFORMS

- Microsoft Copilot Studio
- Dynamics 365 Customer Service
- Power Automate
- Microsoft Teams (internal escalation)

KNOWLEDGE SOURCES

- Product documentation and FAQ library
- Support resolution knowledge base
- Service terms and returns policy

TOPICS

- Order and account status enquiries
- Product troubleshooting
- Returns and refund process
- Service complaint handling
- Ticket creation and escalation

TRIGGERS

User Initiated : customer submits a support query through the web portal or Teams channel.

TOOLS / ACTIONS / CONNECTORS / POWER AUTOMATE FLOWS

- Power Automate flow : creates a support case in Dynamics 365 Customer Service or Salesforce
- Power Automate flow : retrieves existing case status by case number
- Dynamics 365 connector : queries customer account and order history
- Escalation flow : routes unresolved conversations to a live agent with full conversation context

ENTERPRISE INTEGRATIONS

- Salesforce Service Cloud : CRM and case management for Salesforce organisations
- Zendesk : customer support platform integration
- Freshdesk : SMB and mid-market support integration

EXAMPLE USER QUESTIONS

- "Where is my order? I have not received it yet."
- "I want to return a product I purchased last week."
- "My device stopped working after the last update. How do I fix it?"
- "Can you tell me the status of case CS-00492?"

CONVERSATION FLOW

44. Customer initiates a conversation through the support portal or Teams channel.
45. The agent identifies the query intent and attempts to resolve it using the knowledge base.
46. If the query requires account-specific data, the agent authenticates the customer and queries the CRM system.
47. If the query cannot be resolved autonomously, the agent creates a support case and provides the customer with the case reference number.
48. Complex or escalated cases are transferred to a live agent with the full conversation transcript and customer context passed through.

BUSINESS VALUE

- Reduced cost per support interaction through automated resolution
- Faster first response times for common queries
- Consistent brand and policy-aligned responses at scale
- Human agents receive fully contextualised escalations, reducing handle time

SECURITY AND GOVERNANCE CONSIDERATIONS

- Customer authentication must occur before any account-specific data is retrieved
- Personal customer data must be handled in compliance with applicable privacy legislation
- Conversation transcripts containing personal data should be retained only for the minimum required period
- The agent must not offer commitments (refunds, replacements) that exceed defined business rules

ARCHITECTURE SUMMARY

The customer support agent is deployed through a web portal or Teams channel. Knowledge-based queries are resolved through the product knowledge base. Account-specific queries trigger Power Automate flows calling Dynamics 365 or Salesforce APIs. Escalations transfer the conversation to a live agent with full context. Case creation and status retrieval are handled through Power Automate.

10 Project Management Assistant

BUSINESS CHALLENGE

Project managers and team members spend considerable time aggregating status updates, identifying overdue tasks and tracking open risks across multiple projects. When project data is spread across Planner, Jira, SharePoint and email, assembling a current picture requires manual effort that a connected AI assistant can eliminate.

RECOMMENDED PLATFORMS

- Microsoft Copilot Studio
- Microsoft Planner
- Project Online (optional)
- SharePoint Online
- Microsoft Teams
- Power Automate

KNOWLEDGE SOURCES

- SharePoint project documentation and risk registers
- Project charter and scope documents
- Meeting minutes and decision logs

TOPICS

- Task status and overdue items
- Risk and issue tracking
- Sprint progress queries
- Project milestone status
- Resource allocation queries

TRIGGERS

User Initiated : project team members query the agent for project status or task information.

TOOLS / ACTIONS / CONNECTORS / POWER AUTOMATE FLOWS

- Microsoft Planner connector : retrieves tasks by assignee, due date and status
- Power Automate flow : queries Jira Cloud API for sprint tasks, open bugs and assigned issues
- Power Automate flow : retrieves Azure DevOps work items for engineering teams
- SharePoint connector : retrieves project documentation and risk register entries

ENTERPRISE INTEGRATIONS

- Jira Cloud / Jira Data Center : software development and agile project management
- Azure DevOps : engineering sprint management and work item tracking
- Smartsheet : optional project portfolio management integration

EXAMPLE USER QUESTIONS

- "What tasks are assigned to me this week?"
- "Which risks are still open on the ERP migration project?"
- "How many story points are remaining in the current sprint?"
- "Has the Phase 2 milestone been completed?"

CONVERSATION FLOW

49. Project team member asks for a task or status summary in the agent.
50. The agent identifies the project context and the relevant system (Planner, Jira or Azure DevOps).
51. A Power Automate flow queries the appropriate platform and returns the relevant tasks, risks or milestone data.
52. Results are displayed in a structured Adaptive Card with task names, assignees, due dates and status.
53. Overdue items are highlighted. The agent can send a reminder notification to the relevant assignee if instructed by the project manager.

BUSINESS VALUE

- Faster project status visibility without manual report compilation
- Proactive identification of overdue tasks and open risks
- Consolidated view across Planner, Jira and Azure DevOps in a single conversation
- Reduced time spent in status meetings

SECURITY AND GOVERNANCE CONSIDERATIONS

- Jira and Azure DevOps API credentials should use scoped service accounts with read-only permissions
- Project data should be filtered by the requesting user's project membership — avoid returning cross-project data to users without access
- Reminder notifications require explicit manager approval before being sent to team members

ARCHITECTURE SUMMARY

The project management agent is deployed in Teams. Task queries against Planner are handled through the native connector. Jira and Azure DevOps queries are triggered through Power Automate flows using REST API calls. Project documentation and risk registers are retrieved from SharePoint. Results are presented in Adaptive Cards with direct links to the source system.

11 ServiceNow Incident Management Agent

BUSINESS CHALLENGE

Many organisations run ServiceNow as their enterprise ITSM platform but find that employees are reluctant to log incidents directly in the portal. The result is IT issues going unreported or being communicated informally through chat or email. A Copilot Studio agent deployed in Teams removes the friction from incident creation while ensuring every issue is formally recorded.

RECOMMENDED PLATFORMS

- Microsoft Copilot Studio
- ServiceNow
- Microsoft Teams
- Power Automate
- Microsoft Entra ID

KNOWLEDGE SOURCES

- ServiceNow Knowledge Base articles
- SharePoint IT support documentation

TOPICS

- Incident creation
- Incident status tracking
- IT troubleshooting guidance
- Change request status

TRIGGERS

User Initiated : employee reports an IT issue through the agent in Microsoft Teams.

TOOLS / ACTIONS / CONNECTORS / POWER AUTOMATE FLOWS

- Power Automate flow : creates an incident in ServiceNow via REST API (POST /api/now/table/incident)
- Power Automate flow : retrieves incident status by incident number (GET /api/now/table/incident/{sys_id})
- Power Automate flow : updates incident with additional details if provided
- ServiceNow custom connector (optional) : for organisations requiring deeper ServiceNow integration

ENTERPRISE INTEGRATIONS

- ServiceNow ITSM : incident, change and problem management
- Microsoft Entra ID : user identity enrichment for incident records
- Azure Monitor : optional automated alert-to-incident creation for infrastructure events

EXAMPLE USER QUESTIONS

- "My Outlook keeps crashing whenever I open an attachment."
- "Can you log a ticket for me? My laptop screen has a flickering issue."
- "What is the status of my incident INC0045982?"
- "Has the change for the VPN upgrade been approved?"

CONVERSATION FLOW

54. Employee describes an IT issue in plain language through the Teams agent.
55. Copilot Studio identifies the issue type and category, then attempts to resolve it using the ServiceNow Knowledge Base or SharePoint documentation.
56. If the issue cannot be self-resolved, the agent confirms the employee wants to log an incident.
57. A Power Automate flow creates the incident in ServiceNow, populating category, description and caller details from the Entra ID profile.
58. The flow returns the incident number, assigned team and expected response time to the agent.
59. The employee is informed they will receive a Teams notification when the incident is updated.

BUSINESS VALUE

- Increased incident logging compliance — employees log issues through a familiar Teams interface
- Faster incident creation with pre-populated user context
- Reduction in informally reported issues that bypass the ITSM process
- Consistent incident categorisation and priority assignment

SECURITY AND GOVERNANCE CONSIDERATIONS

- ServiceNow API account should use OAuth 2.0 with scoped access limited to incident and change read/create operations
- Store OAuth credentials in Azure Key Vault and reference them in Power Automate using a managed identity
- Agent-created incidents should be tagged with a source value (e.g. "Copilot Studio") for SLA and quality reporting
- Prevent the agent from modifying existing incidents beyond adding notes — escalation and resolution actions should remain with the IT team

ARCHITECTURE SUMMARY

The agent is deployed in Teams organisation-wide. Initial responses are generated from the ServiceNow Knowledge Base and SharePoint. Incident creation is handled by a Power Automate flow calling the ServiceNow Table API. User details are enriched from Entra ID. Incident ID and assigned team details are returned to the employee in a Teams Adaptive Card. Status queries call the ServiceNow API directly.

12 Salesforce Sales Assistant

BUSINESS CHALLENGE

Sales teams spend a disproportionate amount of time navigating CRM systems to retrieve information they need for calls, meetings and forecasting. A Salesforce-connected assistant gives sales representatives instant access to opportunity data, account details and pipeline summaries without leaving the Teams environment.

RECOMMENDED PLATFORMS

- Microsoft Copilot Studio
- Salesforce Sales Cloud
- Power Automate
- Dataverse (optional)
- Microsoft Teams

KNOWLEDGE SOURCES

- SharePoint sales playbooks and product documentation
- Salesforce Knowledge Base articles (optional)

TOPICS

- Opportunity pipeline queries
- Account and contact lookup
- Deal closing forecasts
- Lead status enquiries
- Sales process guidance

TRIGGERS

User Initiated : sales representative queries CRM data through the agent.

TOOLS / ACTIONS / CONNECTORS / POWER AUTOMATE FLOWS

- Salesforce connector (Power Automate) : queries opportunities, accounts and contacts
- Power Automate flow : retrieves open opportunities by stage, owner or close date
- Power Automate flow : looks up account details and recent activity
- SharePoint connector : retrieves sales playbooks and competitive guidance

ENTERPRISE INTEGRATIONS

- Salesforce Sales Cloud : opportunity, account, contact and lead management
- Salesforce Service Cloud : cross-functional customer context
- LinkedIn Sales Navigator : optional enrichment for account intelligence

EXAMPLE USER QUESTIONS

- "Show me all open opportunities closing this month."
- "What is the current stage of the Contoso Enterprise deal?"
- "Who is the primary contact for account Northwind Traders?"
- "How many deals do I have in the proposal stage?"

CONVERSATION FLOW

60. Sales representative asks a pipeline or account question in Teams.

61. Copilot Studio identifies the Salesforce data required and triggers the appropriate Power Automate flow.
62. The flow queries Salesforce via the connector and returns the relevant records.
63. Results are displayed in an Adaptive Card with opportunity name, stage, value, close date and account owner.
64. If the representative asks a process or playbook question, the agent retrieves the relevant content from SharePoint.

BUSINESS VALUE

- Sales representatives spend less time navigating Salesforce and more time in customer conversations
- Faster pipeline reviews and forecast updates
- Consistent access to sales playbooks and process guidance
- Mobile-friendly CRM access through Teams without opening the Salesforce UI

SECURITY AND GOVERNANCE CONSIDERATIONS

- Salesforce connector authentication should use per-user OAuth — not a shared service account — to enforce Salesforce object-level security
- Sensitive deal financials should be restricted by Salesforce role hierarchy, ensuring the agent respects existing CRM permissions
- Do not cache or store Salesforce data in Dataverse unless a defined synchronisation and expiry policy is in place

ARCHITECTURE SUMMARY

The sales assistant is deployed in Microsoft Teams, scoped to the sales team. Salesforce queries are handled through Power Automate using the Salesforce connector with per-user OAuth authentication. SharePoint provides sales enablement content. Results are displayed through Adaptive Cards. No Salesforce data is persisted in the Copilot Studio environment.

13 SAP Finance and Procurement Assistant

BUSINESS CHALLENGE

SAP environments are powerful but notoriously complex for non-finance users to navigate. Employees who need basic finance or procurement information — PO status, invoice approval stage, budget availability — often cannot access SAP directly or find the relevant transaction code. A Copilot Studio assistant surfaces this data in plain language without requiring SAP GUI access.

RECOMMENDED PLATFORMS

- Microsoft Copilot Studio
- SAP S/4HANA
- Power Automate
- Microsoft Teams
- Azure API Management (recommended for SAP API governance)

KNOWLEDGE SOURCES

- SharePoint SAP process documentation
- Finance policy and procurement guidelines

TOPICS

- Purchase order status and approval stage
- Invoice payment status
- Budget availability queries
- Vendor master data lookup
- Goods receipt confirmation

TRIGGERS

User Initiated : finance or procurement team member queries SAP data through the agent.

TOOLS / ACTIONS / CONNECTORS / POWER AUTOMATE FLOWS

- Power Automate flow : calls SAP S/4HANA OData APIs to retrieve PO status
- Power Automate flow : queries invoice approval status and payment schedule
- Power Automate flow : retrieves vendor master data by vendor ID
- Azure API Management : acts as a governance and throttling layer between Power Automate and SAP APIs

ENTERPRISE INTEGRATIONS

- SAP S/4HANA : OData RESTful APIs for procurement and finance modules
- SAP SuccessFactors : employee and HR data integration
- SAP Concur : travel and expense management

EXAMPLE USER QUESTIONS

- "What is the status of purchase order PO-450123?"
- "Has the invoice from Vendor V00342 been approved for payment?"
- "What is the remaining budget for cost centre CC-1090 this quarter?"
- "Has the goods receipt been confirmed for PO-450088?"

CONVERSATION FLOW

65. Employee queries a PO number, invoice reference or cost centre through the Teams agent.
66. Copilot Studio identifies the query type and triggers the relevant Power Automate flow.
67. The flow calls the SAP S/4HANA OData API through Azure API Management.
68. The response is parsed and returned as a structured Adaptive Card showing the relevant SAP record details.
69. For policy or process questions, SharePoint documentation is retrieved.

BUSINESS VALUE

- Reduces SAP GUI access requirements for non-specialist users
- Faster access to finance and procurement data across the organisation
- Reduces the volume of internal emails to the finance and procurement teams
- Consistent, governed access to SAP data through a managed API layer

SECURITY AND GOVERNANCE CONSIDERATIONS

- SAP OData API access should be controlled through Azure API Management with OAuth 2.0 and rate limiting
- Service accounts used for SAP API calls must follow SAP authorisation object restrictions — read-only access to relevant modules only
- Sensitive financial data (bank details, cost centre structures) should be excluded from agent responses
- All SAP API calls should be logged in Azure API Management for audit and compliance

ARCHITECTURE SUMMARY

The SAP assistant is deployed in Teams with access restricted to finance and procurement roles via Entra ID groups. Power Automate flows call SAP S/4HANA OData APIs routed through Azure API Management. Results are returned as Adaptive Cards. SharePoint provides process and policy documentation. Azure API Management provides governance, logging and rate limiting for all SAP API calls.

14 Jira Project Assistant

BUSINESS CHALLENGE

Software development teams using Jira often context-switch between their development tools and Jira to check assigned tasks, sprint progress and bug status. A Copilot Studio agent deployed in Teams removes that friction, giving developers and product managers immediate access to Jira data in the same environment where they collaborate.

RECOMMENDED PLATFORMS

- Microsoft Copilot Studio
- Jira Cloud or Jira Data Center
- Power Automate
- Microsoft Teams

KNOWLEDGE SOURCES

- SharePoint engineering team documentation
- Confluence (if used alongside Jira for project documentation)

TOPICS

- Sprint task and story status
- Bug and defect tracking
- Issue assignment queries
- Backlog and priority queries
- Sprint velocity and completion status

TRIGGERS

User Initiated : developer or project manager queries Jira data through the agent.

TOOLS / ACTIONS / CONNECTORS / POWER AUTOMATE FLOWS

- Power Automate flow : calls Jira Cloud REST API to retrieve issues assigned to the current user
- Power Automate flow : queries the current sprint board for in-progress and to-do items
- Power Automate flow : retrieves bug/defect list filtered by priority and status
- Power Automate flow : creates a new issue in Jira if instructed by the user

ENTERPRISE INTEGRATIONS

- Jira Cloud : issue, sprint and project management via REST API
- Jira Data Center : on-premises or private cloud Jira deployment
- Confluence : project documentation and decision records (optional)
- GitHub or Azure DevOps : cross-platform development tool integration

EXAMPLE USER QUESTIONS

- "What bugs are assigned to me in the current sprint?"
- "How many story points are remaining in Sprint 42?"
- "Show me all critical issues in the Payment Gateway project."
- "Has the issue PROJ-1089 been moved to Done?"

CONVERSATION FLOW

70. Developer asks for their assigned tasks or sprint status in the Teams agent.
71. Copilot Studio identifies the query type and triggers the relevant Power Automate flow.
72. The flow calls the Jira REST API using the user's authentication context and returns the matching issues.
73. Results are displayed in an Adaptive Card with issue key, summary, priority, status and assignee.
74. If the developer wants to log a new issue, the agent collects the title, type and priority, then triggers a Power Automate flow to create it in Jira and returns the issue key.

BUSINESS VALUE

- Developers spend less time navigating Jira UI for routine status checks
- Sprint progress is accessible to all stakeholders in Teams without Jira access
- Quick issue creation from Teams reduces context switching
- Product managers get consolidated sprint summaries on demand

SECURITY AND GOVERNANCE CONSIDERATIONS

- Jira API authentication should use per-user OAuth tokens — not a shared service account — to enforce Jira project-level permissions
- Issue creation through the agent should be limited to configured projects — prevent accidental issue creation in production or restricted boards
- Jira API credentials must not be stored in plain text within Power Automate flows — use Azure Key Vault references

ARCHITECTURE SUMMARY

The Jira assistant is deployed in Teams and scoped to engineering and product teams. All Jira queries use Power Automate flows calling the Jira REST API with per-user OAuth. Results are displayed in Adaptive Cards with direct Jira deep links. Issue creation triggers a Power Automate flow that creates the record in Jira and returns the issue key to the conversation.

15 Azure Operations Assistant

BUSINESS CHALLENGE

Cloud operations teams monitor large Azure environments that generate continuous streams of alerts, resource health events and performance data. When an on-call engineer needs to quickly assess the state of production systems without navigating multiple Azure Portal dashboards, a conversational agent connected to Azure Monitor and Log Analytics dramatically reduces the time to situational awareness.

RECOMMENDED PLATFORMS

- Microsoft Copilot Studio
- Azure Monitor
- Azure Resource Graph
- Log Analytics
- Power Automate
- Microsoft Teams

KNOWLEDGE SOURCES

- SharePoint runbook and incident response documentation
- Azure architecture and resource topology documentation

TOPICS

- Azure VM and resource health status
- Active alerts and critical incidents
- Log Analytics query results
- Resource availability and performance metrics
- Incident response runbook guidance

TRIGGERS

User Initiated (on-demand) or Automated — Azure Monitor alert rule fires and sends a proactive notification to the Teams operations channel through a Power Automate flow.

TOOLS / ACTIONS / CONNECTORS / POWER AUTOMATE FLOWS

- Power Automate flow : queries Azure Resource Graph API for resource health and availability
- Power Automate flow : retrieves active Azure Monitor alerts filtered by severity and resource group
- Power Automate flow : runs parameterised Log Analytics KQL queries and returns results
- Azure Monitor alert rule : triggers a Power Automate flow that sends a proactive Adaptive Card to the ops Teams channel

ENTERPRISE INTEGRATIONS

- Azure Monitor : alerts, metrics and resource health
- Azure Resource Graph : resource inventory and topology queries
- Log Analytics : KQL-based log queries for diagnostics and performance analysis
- ServiceNow : optional automatic incident creation from critical Azure alerts

EXAMPLE USER QUESTIONS

- "Show me the health status of all production virtual machines."
- "Are there any active critical alerts in the Production-RG resource group?"
- "What errors appeared in the App Gateway logs in the last two hours?"
- "Which VMs in the East Asia region are currently stopped?"

CONVERSATION FLOW

75. On-call engineer asks for a resource health summary in the Teams operations channel.
76. Copilot Studio identifies the query type and triggers the relevant Power Automate flow.
77. The flow queries Azure Resource Graph for the specified resource group and returns health status for each resource.
78. Active alerts are retrieved from Azure Monitor filtered by severity (Critical, Error, Warning).
79. Results are displayed in an Adaptive Card with resource name, health state, last updated time and active alert count.
80. If a specific diagnostic is needed, the agent accepts a KQL query or a plain-language log request and returns Log Analytics results.
81. For automated alerts, the Power Automate flow sends a proactive Adaptive Card to the operations Teams channel when a Critical alert fires.

BUSINESS VALUE

- Faster situational awareness for on-call engineers during incidents
- Reduced time navigating Azure Portal dashboards during outage response
- Proactive alert notifications in Teams reduce mean time to detect
- Runbook guidance surfaced in context accelerates incident resolution

SECURITY AND GOVERNANCE CONSIDERATIONS

- Azure Resource Graph and Monitor API calls must use managed identity with Reader role scoped to the relevant subscriptions — avoid Owner or Contributor permissions
- Log Analytics query results may contain sensitive application data — restrict agent access to specific workspaces and log tables
- Proactive alert notifications should be sent to a monitored Teams channel, not to individual engineers, to maintain team awareness and audit trail
- If integrating with ServiceNow for automated incident creation from alerts, implement deduplication logic to prevent duplicate incidents

ARCHITECTURE SUMMARY

The operations agent is deployed to a dedicated Teams channel used by the cloud engineering team. Azure Monitor alert rules trigger Power Automate flows for proactive notifications. On-demand queries are handled by Power Automate flows calling Azure Resource Graph, Azure Monitor and Log Analytics APIs using managed identity. Runbook documentation is retrieved from SharePoint. Adaptive Cards display structured operational data with deep links to the Azure Portal.