

Build your first agent in Microsoft 365 Copilot

Eight simple steps to create, share, and use an agent that works the way you do

Why build your own agent?

Copilot is powerful out of the box. But when you need consistent behavior, access to specific work knowledge, or help with a focused task, building an agent gives you more control. With Agent Builder, anyone can create an agent directly in Microsoft 365 Copilot—no technical setup required.



The screenshot shows the Microsoft 365 Copilot app interface. The left pane contains a sidebar with various options: New chat, Search, Library, Create, Frontier, Agents, Researcher, Analyst, Message center Assistant, Feedback Executive Summary, Executive Engagement Report, TechWeb SPO Hub agent, New agent (which is highlighted with a red box), and All agents. The main pane has a title 'Get your tasks done faster with an agent' and a sub-section 'Create a project status agent to keep my stakeholders updated'. It includes a text input field with placeholder 'Add content' and a 'Try it' button.

The screenshot shows the Microsoft 365 Copilot app interface. The left pane contains a sidebar with various options: New chat, Search, Library, Create, Frontier, Agents, Researcher, Analyst, Message center Assistant, Feedback Executive Summary, Executive Engagement Report, TechWeb SPO Hub agent, New agent (which is highlighted with a red box), and All agents. The main pane has a title 'Get your tasks done faster with an agent' and a sub-section 'You help me create executive-ready engagement reports for my customer, Contoso. Using provided emails, meetings, chats, and notes, generate a concise executive summary that captures key communications, customer requests, open questions, commitments, and pending actions. Highlight progress, risks, and next steps clearly and objectively. Write in a polished, leadership-friendly tone, avoid jargon, do not invent information, and call out gaps or unknowns explicitly.' It includes a text input field with placeholder 'Add content' and a 'Try it' button.

The screenshot shows the Microsoft 365 Copilot app interface. The left pane contains a sidebar with various options: New chat, Search, Library, Create, Frontier, Agents, Researcher, Analyst, Message center Assistant, Feedback Executive Summary, Executive Engagement Report, TechWeb SPO Hub agent, New agent (which is highlighted with a red box), and All agents. The main pane has a title 'Would you like to add specific files, SharePoint links, or additional knowledge sources for' and a search bar. Below the search bar is a list of files and SharePoint links: 'HR Admin & Payroll Policies - Contoso' (Mariana Prudencio sent July 1st, 2020), 'Contoso Talent Management Policies Manual' (Mariana Prudencio sent July 21st, 2020), 'Contoso Coffee supplier meeting 2' (Opened by you November 21st, 2024), 'Recruiting Policies - Contoso' (Mariana Prudencio sent July 11th, 2020), and 'Comp & benefits manual - Contoso' (Mariana Prudencio sent July 11th, 2020). It includes a text input field with placeholder 'Add relevant files about Contoso / Start typing to search' and a 'Try it' button.

Step 1

Start creating your agent

Open the [Microsoft 365 Copilot](#) app and select New agent from the left pane. The left pane is where you'll find your recent chats, built-in agents, and the option to create a new agent of your own.

Step 2

Describe the purpose of your agent

Describe your agent's purpose in your own words. Agent Builder will ask clarifying questions and suggest refinements to help define how your agent should behave.

Tip: Think about a task you repeat often or answers you want Copilot to give consistently.

Step 3

Add your organization's data

Connect your agent to the information it should use, such as Teams chats, meeting transcripts, email, SharePoint sites, files, approved third-party connectors, and public websites. You can add knowledge directly in the Describe pane, or switch to Configure for more options.

New chat
Search
Library
Create
Frontier
Agents
Researcher
Analyst
Message center Assistant
Feedback Executive Summary
Executive Engagement Report...
TechWeb SPO Hub agent
New agent
All agents
Apps

Configure Try it

Capabilities

Create documents, charts, and code Analyze data, graph math equations, and create code snippets, Word, Excel, and PowerPoint files

Create images Create visual aids like images and art in response to user prompts

Suggested prompts

Title Message

Weekly Summary Request Generate an executive summary for Contoso using this week's em...

Open Actions Highlight List all pending actions and commitments from recent customer c...

Step 4

Choose what your agent can do

Switch to the Configure tab to define what your agent can do. You can enable capabilities such as generating Word, Excel, or PowerPoint files, analyzing data, writing code, and creating images when prompted.

New chat
Search
Library
Create
Frontier
Agents
Researcher
Analyst
Message center Assistant
Feedback Executive Summary
Executive Engagement Report...
TechWeb SPO Hub agent
New agent
All agents
Apps

Configure Try it

Instructions

Purpose
Create executive-ready engagement reports for Contoso, summarizing key interactions and action items using customer communications and notes.

General Guidelines
- Write summaries in a polished, leadership-friendly tone.
- Avoid jargon and do not mention information.
- Clearly call out gaps or unknowns.
- Highlight communications, requests, open questions, commitments, and pending actions objectively.

Skills
- Synthesize information from emails, meetings, chats, and notes.
- Identify and summarize:
- Key communications
- Customer requests
- Open questions
- Commitments and pending actions
- Progress, risks, and next steps
- Flag missing or unclear details.

Step-by-Step Instructions

Step 5

Review, edit, and test your agent

In the Configure tab, finalize your agent by reviewing its description and instructions and adding details such as an icon, connected knowledge sources, or starter prompts. When everything looks right, test your agent using the test pane on the right or the Try it tab.

New chat
Search
Library
Create
Frontier
Agents
Researcher
Analyst
Message center Assistant
Feedback Executive Summary
Executive Engagement Report...
TechWeb SPO Hub agent
New agent
All agents

Configure Try it

Template: None

Details

Name: Contoso Report Agent

Description
Creates polished, concise executive engagement summaries for Contoso using provided emails, meetings, chats, and notes. Highlights key communications, customer requests, open questions, commitments, and pending actions. Reports include progress, risks, next steps, and gaps or unknowns, using a leadership-friendly tone.

Instructions

Step 6

Publish your agent

When you're finished editing and reviewing your agent, select Create to complete the agent-building process.

New chat
Search
Library
Create
Frontier
Agents
Researcher
Analyst
Message center Assistant
Feedback Executive Summary
Contoso Report Agent
Executive Engagement Report...
New agent
All agents
Apps

Configure Try it

Share "Contoso Report Agent"

This agent is available to:

Anyone in your organization
User permissions for knowledge The agent will only respond with knowledge that each user has access to. This includes SharePoint, Microsoft Teams chats, and emails. [Learn more about agent responses](#)

Specific users in your organization
 Only you

Copy this link: https://m365.cloud.microsoft.com/chat/?lId=1_8986342a-740d-f61b...

Instructions

Purpose
Create executive-ready engagement reports for Contoso, summarizing key interactions and action items using customer communications and notes.

Step 7

Share your agent

Access your agent privately by default after creation. You can choose to share it using a link with specific team members, groups, or across your organization.

New chat
Search
Library
Create
Frontier
Agents
Researcher
Analyst
Message center Assistant
Feedback Executive Summary
Contoso Report Agent
Executive Engagement Report...
New agent
All agents

Contoso Report Agent
Created by Mariana Prudencio

Message Copilot
+

Weekly Summary Request
Generate an executive summary for Contoso using this week's em...
Open Actions Highlight
List all pending actions and commitments from recent customer c...
Risk and Progress Update
Summarize progress and risks from recent engagements wi...

Step 8

Use your agent

Access your agent from the left pane, or @mention it in Copilot to start a conversation.

Your agent applies its instructions and knowledge automatically—helping you work faster and stay focused.