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Flow, Think, Act: Intelligent Automation with Copilot Studio

Connect rules, AI-assisted extraction and human approvals in practical business workflows.

FA-0834 · 1 day

Automation, RPA & Power Platform · Agentic & Generative AI

Build rule-based and AI-assisted workflows for vendor onboarding, document routing, receipt extraction and human approvals.

Introduction

Every organisation has an inbox that works harder than it should. Vendor details arrive in a single sentence, in a signature block, or buried in a forwarded thread three replies deep. Receipts pile up as phone photos and scanned PDFs. Attachments land in one place when they belong in five. Someone has to read, copy, paste, chase and approve, and that someone is usually a skilled person doing unskilled work.

Rule-based automation handles predictable triggers, conditions and actions. Unstructured emails, receipts and documents often require additional extraction and validation before their contents can be used reliably in a workflow.

Microsoft Copilot Studio combines event-driven workflows with AI actions that can extract and classify information. Participants validate structured outputs and retain human judgement where needed. Agent Builder in Microsoft 365 Copilot supports knowledge-grounded assistants, while Copilot Studio provides broader tools, connectors and workflow integration.

This course is built around a running story that participants will recognise from their own work: onboarding vendors, routing documents and processing claims. Participants build each piece hands-on, first without AI to see what rules alone can achieve, then with intelligence to see what changes. Along the way they learn to judge when AI genuinely earns its place, and when a simple rule is cheaper, faster and more predictable.

Learning outcomes

By the end of this course, participants will be able to:

- Distinguish between Copilot Studio workflows, Copilot Studio agents and Agent Builder agents, and select the right tool for a given task
- Build event-driven workflows triggered by incoming emails and file uploads
- Route and organise email attachments automatically using rule-based logic
- Use prompt actions to extract structured information from unstructured emails and documents
- Classify incoming emails and perform basic data cleaning within a workflow
- Write extracted data to structured stores such as Excel, SharePoint lists or Dataverse
- Design human-in-the-loop approval processes through Microsoft Teams
- Extract key fields from receipts and PDF documents
- Build a knowledge-grounded agent using Agent Builder in Microsoft 365 Copilot
- Connect a Copilot Studio agent to a workflow so it can take action on request
- Apply sound testing, cost awareness and governance practices to intelligent automation

Prerequisites

- Working experience using Outlook, Microsoft Teams, SharePoint and Excel in day-to-day work
- A laptop with a current web browser
- Unrestricted internet access
- A Microsoft 365 work account, a provisioned Copilot Studio environment, maker permissions, approved connectors and sufficient licensing or capacity for the exercises.

Training outline

1. The Copilot Studio Landscape

1. Workflows, agents and apps
2. Agent Builder in Microsoft 365 Copilot
3. Autonomous automation versus AI-driven automation
4. Copilot Credits and consumption awareness

2. Workflow Fundamentals

1. Triggers, actions and conditions
2. Variables and dynamic content

3. Testing and run history

   Rule-based attachment routing

   1. Email-triggered workflows
   2. Saving and organising attachments into folders

3. Adding Intelligence with Prompts

1. The prompt action
2. Writing prompts for structured output
3. Extracting information from unstructured emails
4. Email classification
5. Basic data cleaning and validation
6. Writing to Excel, SharePoint lists and Dataverse

4. Human-in-the-Loop Approvals

1. Approval processes through Microsoft Teams
2. Status updates and record tracking
3. Handling incomplete submissions

5. Intelligent Document Processing

1. File-triggered workflows
2. Receipt data extraction
3. PDF information extraction
4. Handling low-confidence results

6. Agent Builder in Microsoft 365 Copilot

1. Agent instructions and behaviour
2. Knowledge sources
3. Testing and sharing agents
4. Capabilities and limitations

7. Copilot Studio Agents and Workflows Together

1. Copilot Studio agents
2. Workflows as agent tools

3. Conversation-triggered automation

8. Operational Best Practices

1. Choosing between rules, prompts and agents
2. Testing and troubleshooting
3. Cost management
4. Governance and security considerations

Disclaimer

This course outline is provided as a general guideline only and does not constitute a binding commitment to any specific content, sequence, tools, platforms or duration of individual topics. The trainer reserves the right to amend, reorder, expand, condense or replace any part of the content, including the data storage platforms, connectors and features demonstrated, as he deems appropriate to suit participant needs, platform availability or changes in product functionality, without prior notice. Any such changes are made in good faith with the aim of delivering the most relevant and effective learning experience.

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