



# Get started with Microsoft 365 Copilot Chat



# Here's what you'll learn in this deck:

- What Copilot Chat is and how it's different from other AI chat tools
- How to use Copilot Chat
- What agents are in Copilot Chat and how to use them
- Example Copilot Chat prompts





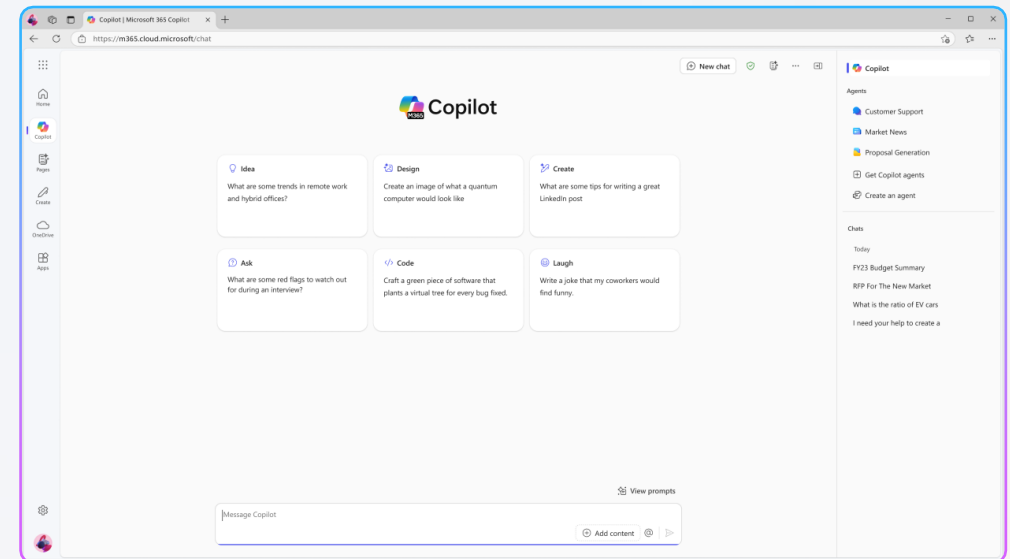
# What is Copilot Chat?

# The Fulcrum Group's preferred AI chat tool

**Microsoft 365 Copilot Chat is an AI chat tool built specifically for work.** It uses the latest AI models and data from the web to answer your questions, generate content and ideas, and find information. It also protects your data so information from your chat conversation does not get exposed to the public.

In addition, with Copilot Chat you can:

- Upload files to get responses based on information from your work documents, presentations, etc<sup>1</sup>.
- Generate images<sup>1</sup> and data visualizations.
- Refine and collaborate on chat responses.
- Connect Copilot Chat to your organization data like team documents and internal SharePoint sites<sup>2</sup>.



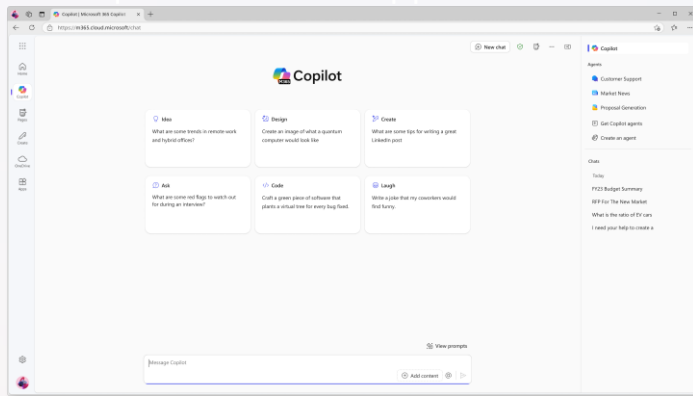
Get started by going to [M365Copilot.com](https://M365Copilot.com)

<sup>1</sup>Image generation and file upload limits apply.

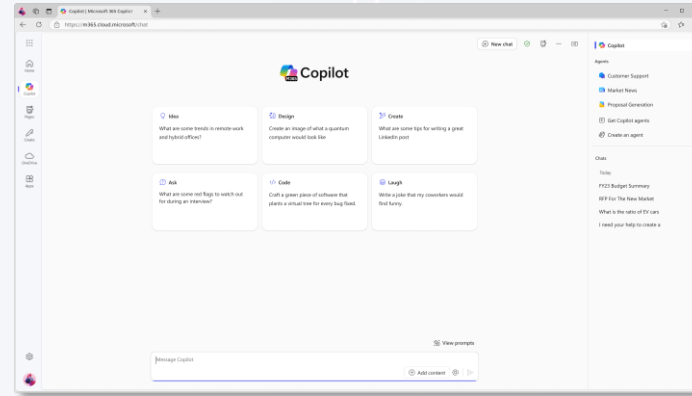
<sup>2</sup>Connecting Copilot Chat to your organization data is only available if your organization admin has enabled this capability.

# Access Copilot Chat from where you're working

M365Copilot.com



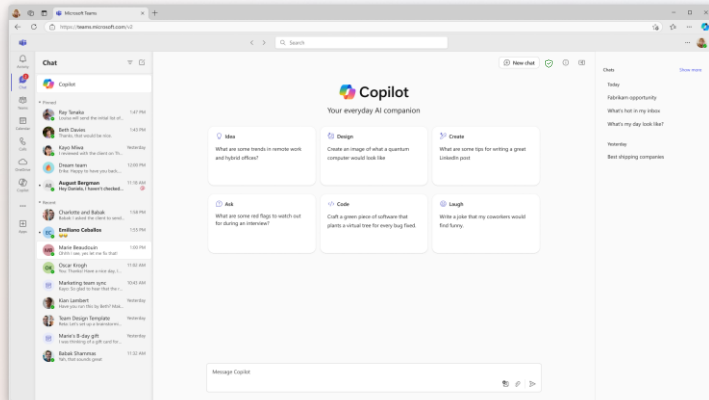
Microsoft 365 Copilot app\*



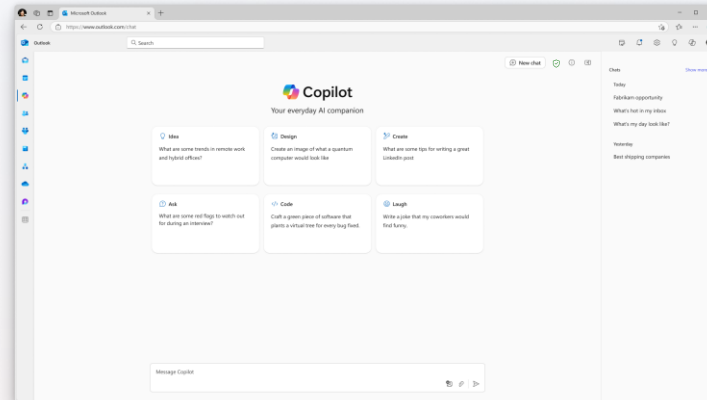
Edge browser sidebar



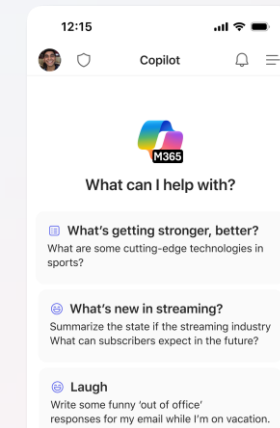
Teams app (Coming soon)\*



Outlook app (Coming soon)\*



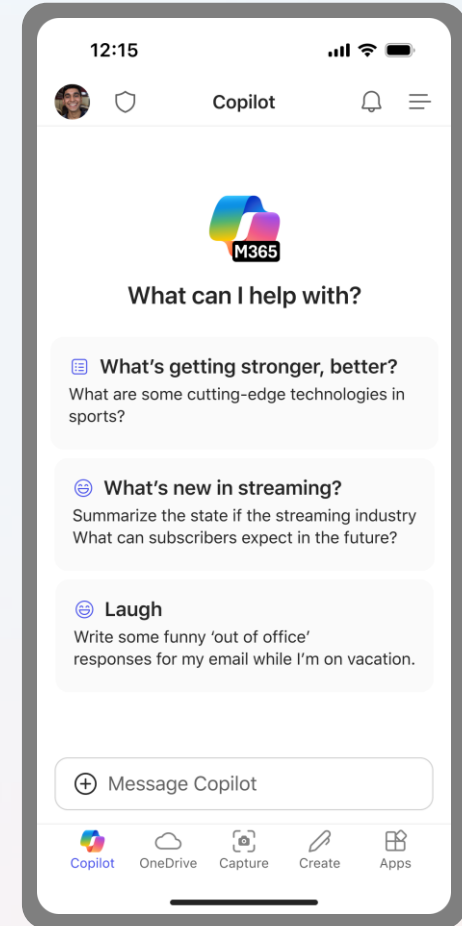
Microsoft 365 Copilot mobile app



\*Ensure Copilot is pinned to your left navigation across Teams, Outlook, and the Microsoft 365 app.

# Use Copilot Chat on the go

Download the Microsoft 365 Copilot mobile app and sign in with your work or school account to access Copilot Chat



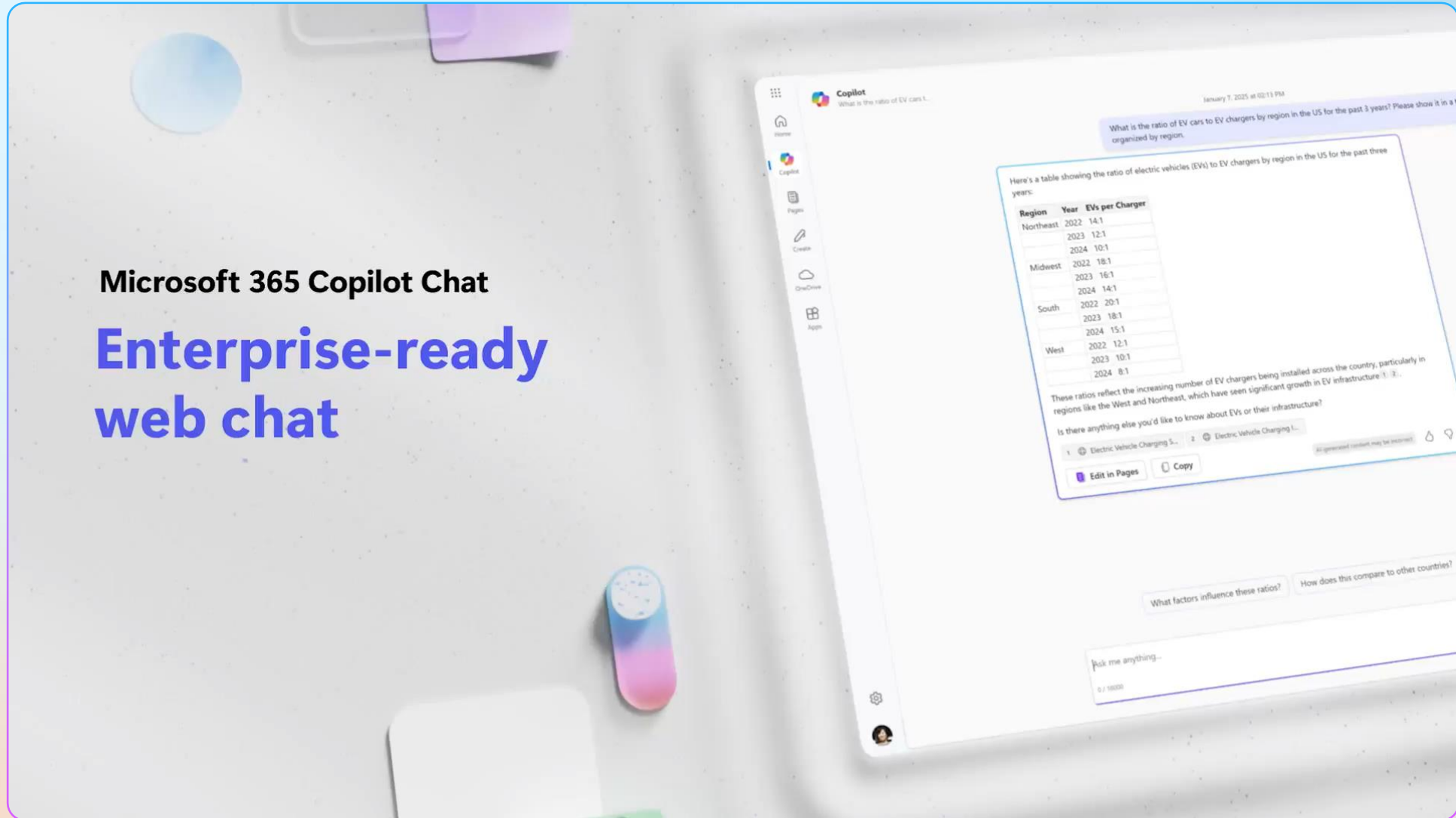


# Get started with Copilot Chat

# Video: Copilot Chat


Microsoft 365 Copilot Chat

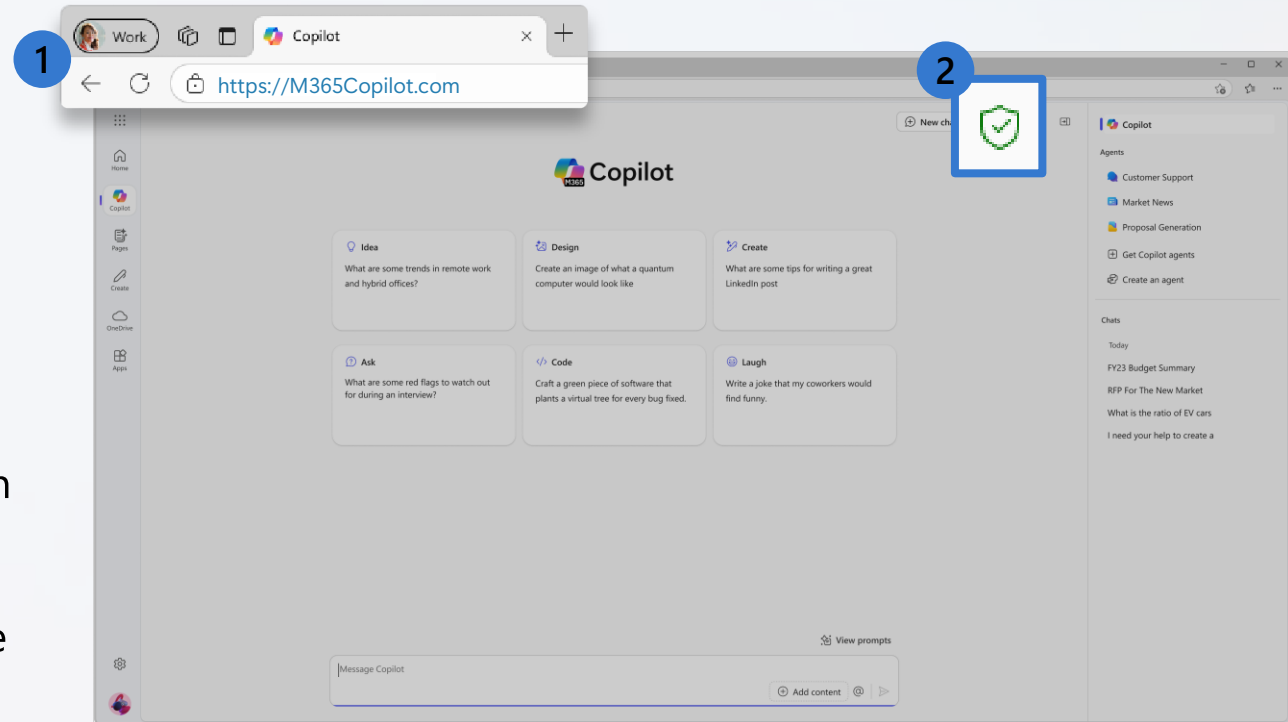
Enterprise-ready  
web chat



# Sign in with your work account

- 1 Navigate to [M365Copilot.com](https://M365Copilot.com) on your preferred browser on your device to get to Copilot Chat.
- 2 Ensure you're signed in with your work account.

You will know you are successfully signed in to Copilot Chat when you see the green shield icon  next to "New chat" and the Microsoft 365 Copilot icon at the top of the page.



 If you are not signed in with your work account, Enterprise Data Protection does not apply.

# Get to know Copilot Chat

Start at

[M365Copilot.com](https://m365copilot.com)

Here is a visual tour of Copilot Chat:

**Suggested prompts**  
If you're not sure what to ask, try or modify a sample prompt!

**Prompt box**  
Start your conversation here.

**Upload files**  
If you'd like Copilot to source responses from information in specific files, add them here.

**Chat with an agent**  
Add an agent to your Copilot prompt to chat with it.

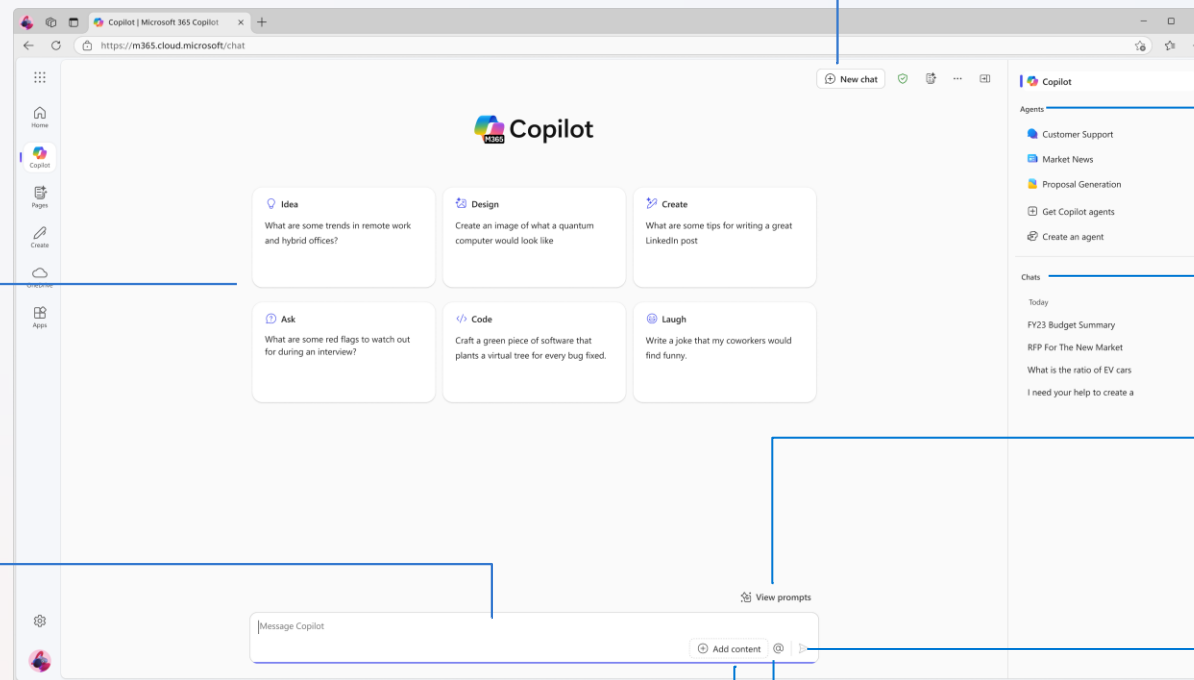
**Start a new chat button**  
Clear your past chat and start a new conversation.

**Agents**  
Use existing agents or create new ones<sup>1</sup>. Learn more about agents in [slide 17](#).

**Recent chats**  
Return to a previous chat to continue the conversation

**Copilot Prompt Gallery**  
View additional prompt suggestions, including saved prompts.

**Send your prompt!**



# How to chat in 3 steps



## 1. Enter your prompt

Enter your detailed prompt in the text box at the bottom. If you would like Copilot to source information from any reference files, you can upload them in your prompt by selecting the "Add content" button.



## 2. Check sources

Copilot Chat is transparent about the sources of its information. See these sources listed underneath the answer. Vet these sources and validate your answers.

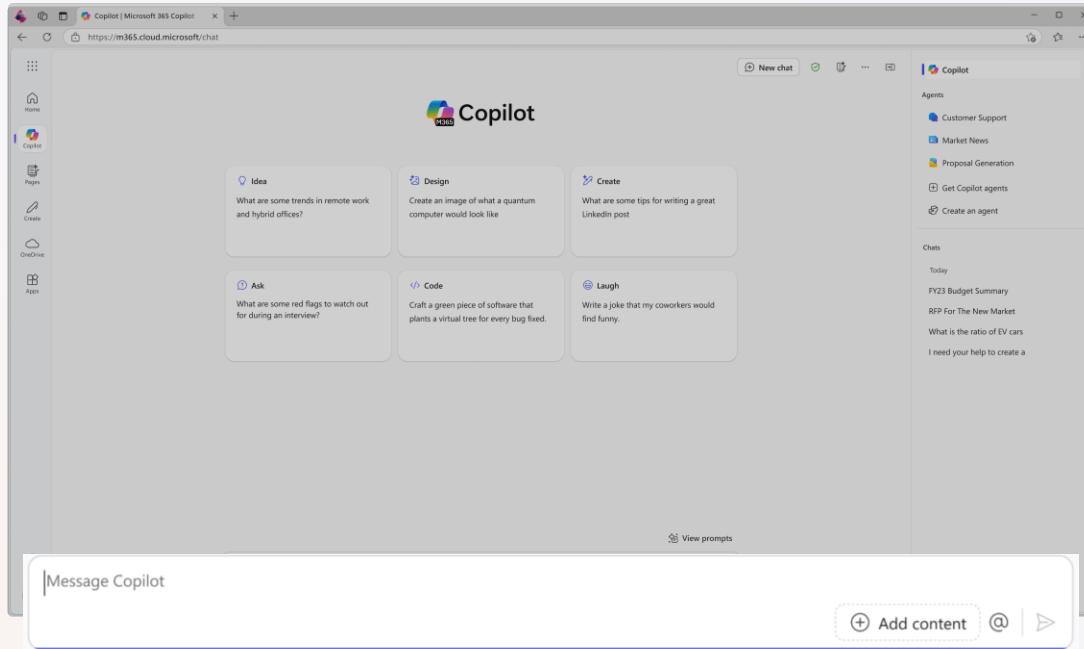


## 3. Continue the conversation

You can ask follow-up questions as you would in a conversation. You can refine the answer too.

For example, try "Write a shorter answer" or "Give me more detail." You can also select suggested prompts.

# What is a “prompt?”



Get started by entering your prompt in the text box

Prompts are how you have a conversation with Copilot

Use plain but clear language and provide context like you would with an assistant.

Enter your first prompt in the text box at the bottom of your screen, like *“Draft a cold call email to a customer.”*

# What makes an effective prompt?



## Less Effective

- × Vague
- × Just a few words
- × No context on preferred output

**Example:** *Summarize news about [company name].*

The recap may be more vague than desired, or in a format that you were not seeking.



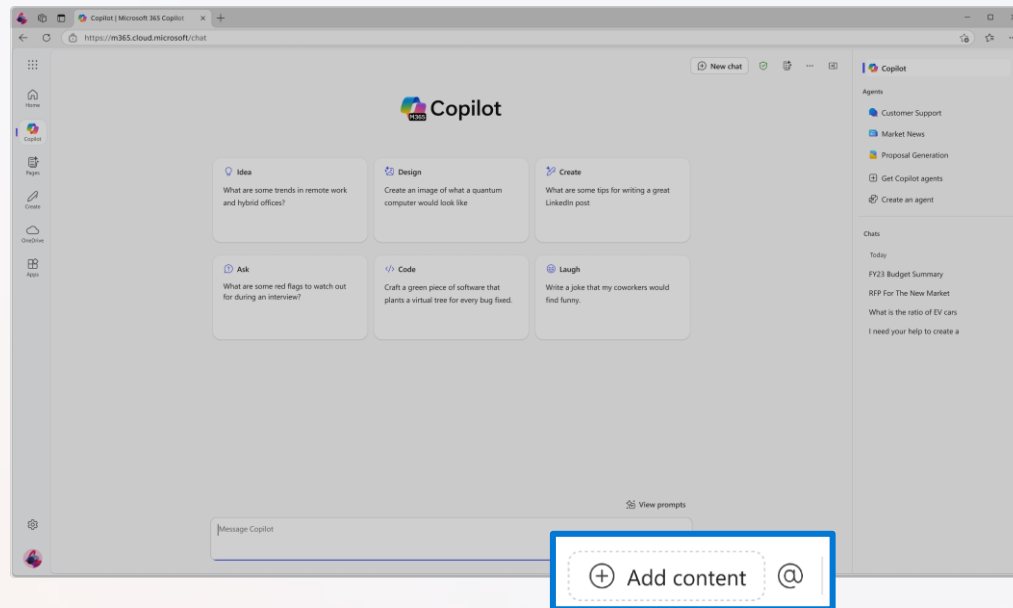
## More Effective

- ✓ Specific and detailed
- ✓ In full sentences, with instructions
- ✓ States the tone, purpose, preferred format, etc.

**Example:** *I work in marketing and focus on competitor research. Give me a concise summary of recent news about [company name]. Focus on announcements about new product lines. Provide the answer in two to three paragraphs and use a business tone.*

But there are no 'wrong' prompts because **natural, conversational language is welcome.**  
Experiment away!

# Upload a file to your prompt

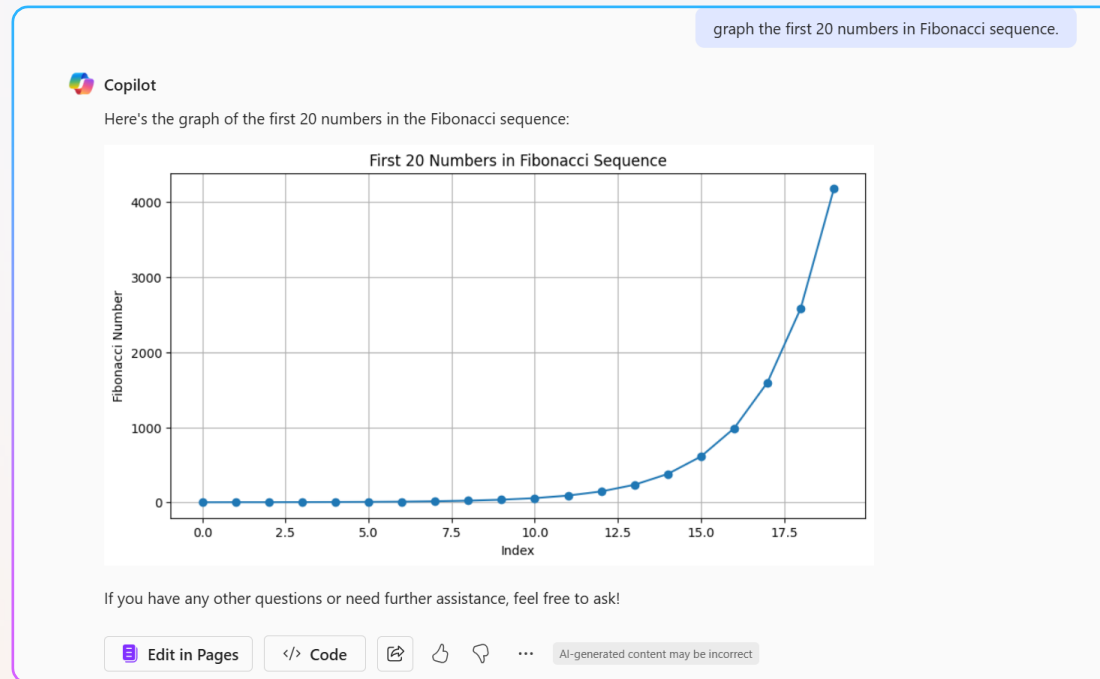


Want Copilot to respond using information from a Word document, PowerPoint deck, or other file? Select the “Add content” button in the Copilot Chat prompt box to upload a file.

*Example prompt: Summarize this document in 5 bullet points. <attach file>*

Note: Copilot Chat supports uploads of Word documents, PowerPoint decks, Excel spreadsheets, images, and PDFs.

# Use Copilot Chat to visualize data



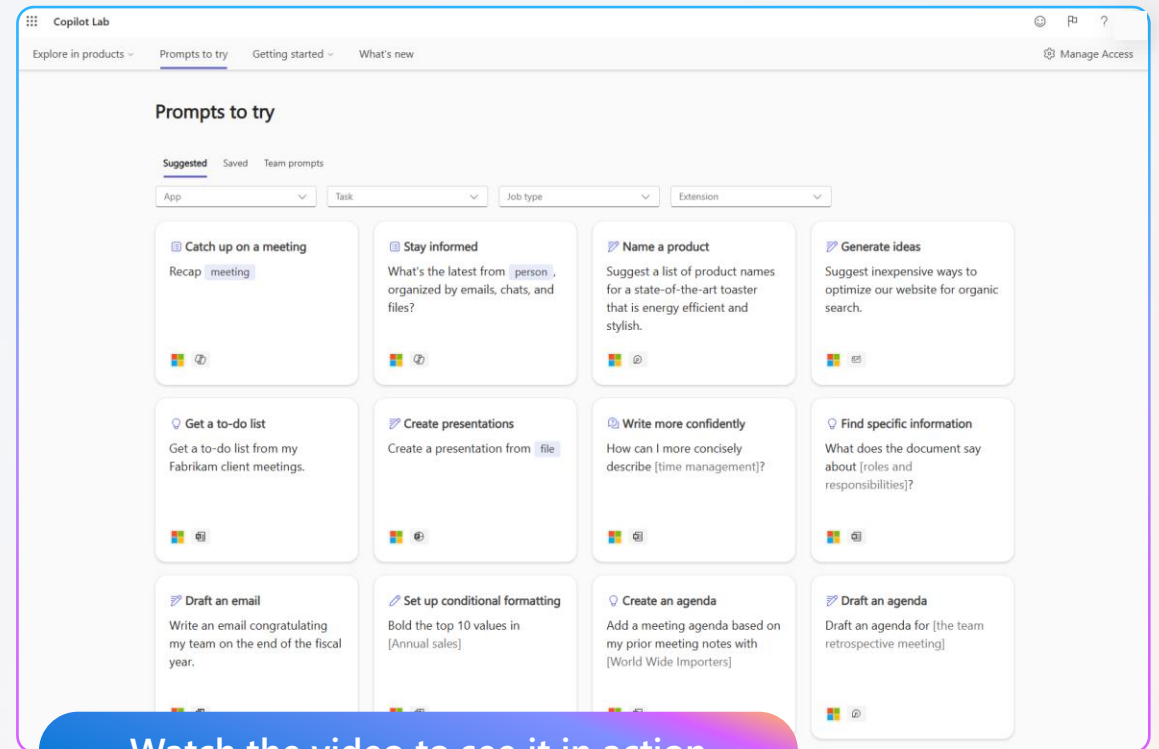
Copilot Chat has built-in capabilities to graph and visualize data as it's relevant to your prompt.

For example, use the prompt: *"Graph the first 20 numbers in Fibonacci sequence"*.

# Discover and share Copilot prompts

**Copilot Prompt Gallery** (formerly known as Copilot Lab) helps you find prompting inspiration so you can take greater advantage of Copilot in your daily work.

- Explore the curated selection of Copilot prompts
- Save your favorite prompts
- Share your favorite prompts with colleagues
- Find prompting inspiration from others

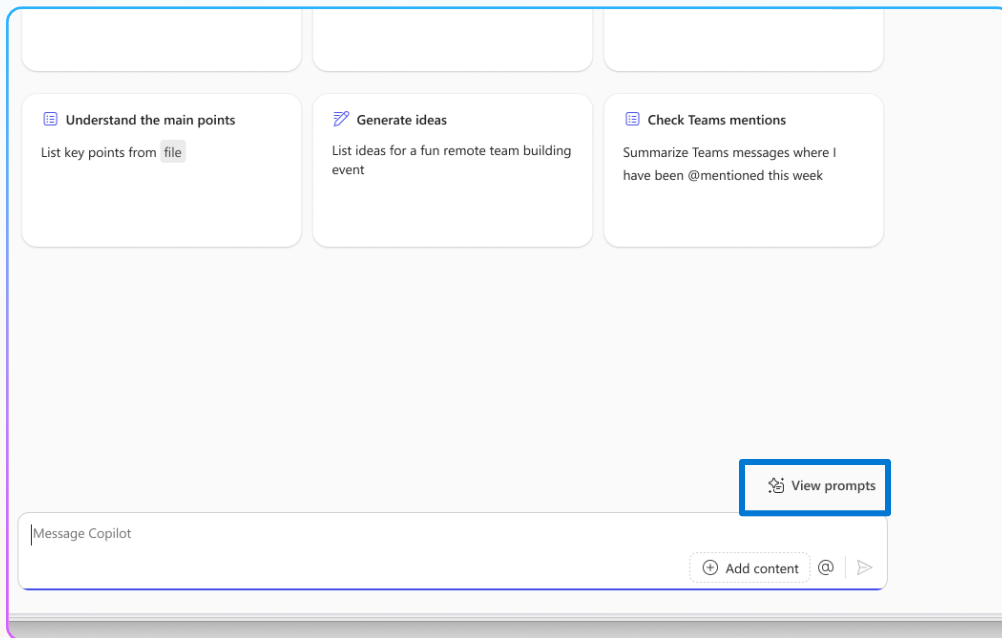


[Watch the video to see it in action](#)

# Navigating to the Copilot Prompt Gallery

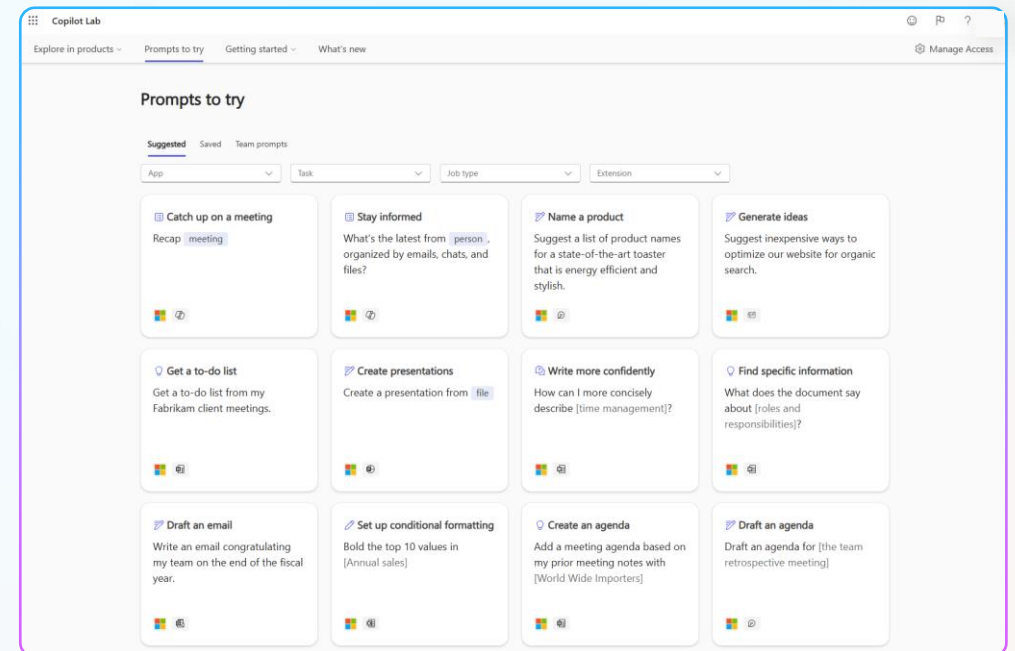
## In-product experience

Select “View prompts” next to the Copilot prompt box. Here, you’ll see suggested Copilot prompts and your saved prompts.



## Prompt Gallery website

Go to [aka.ms/Prompts](https://aka.ms/Prompts) to access the full Prompt Gallery experience. Here, you can find relevant Copilot prompt examples using the filters, view prompts that you and your team saved, and share useful prompts.






# Automate tasks and processes with agents

Agents use AI to make Copilot Chat even more personalized and intelligent for your daily work. Agents automate repetitive tasks and processes – think of them like apps for Copilot. Copilot Chat comes with a set of agent templates to get started with, or you can create custom agents for your own needs<sup>1</sup>.

**Get started with agent templates** by selecting “Get agents” in the right-side pane of Copilot Chat. Search for a specific template or browse the library.

Agents from Microsoft to try today:

<p><b>Prompt coach</b></p>  <p>Create effective Copilot prompts</p>	<p><b>Idea coach</b></p>  <p>Get brainstorming assistance</p>	<p><b>Writing coach</b></p>  <p>Refine your writing</p>	<p><b>Career coach</b></p>  <p>Get personalized career advice and action plans</p>	<p><b>Learning coach</b></p>  <p>Learn about topics and refine your skills</p>
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Besides the agents from Microsoft, your organization may have created agents for you to use as well. You can view these in the “Built for your org” section in the agent library.

<sup>1</sup>Agent creation is only available if your organization admin has enabled this capability.

# Automate tasks and processes with agents

Create a custom agent by selecting “Create an agent” in the right-side pane of Copilot Chat<sup>1</sup>. Describe what you’d like your agent to do or select “Configure” to further customize it. Creating an agent allows you to connect Copilot Chat to your organization’s shared data<sup>2</sup> to further unlock productivity – for example, you can connect the agent to a team SharePoint site and ask the agent questions about team documents.

Top ways to use custom agents:

## Automate contract reviews



Create an agent to identify key clauses, ensure compliance with legal standards, assess potential risk, explain clauses, and summarize lengthy contracts.

## Assist new hires with onboarding



Create an agent to greet new team members, assist them with technical issues, answer questions, and provide helpful resources.

## Review resumes



Create an agent to analyze resumes stored in a SharePoint library, compare them with job criteria, score candidates, and answer questions about candidates.

## Retrieve research materials



Create an agent that connects to a SharePoint link with research documents so you can quickly find relevant information.

## Get answers about company policies



Create an agent to get answers about company policies such as time off, remote work, benefits, workplace conduct, and health and safety.

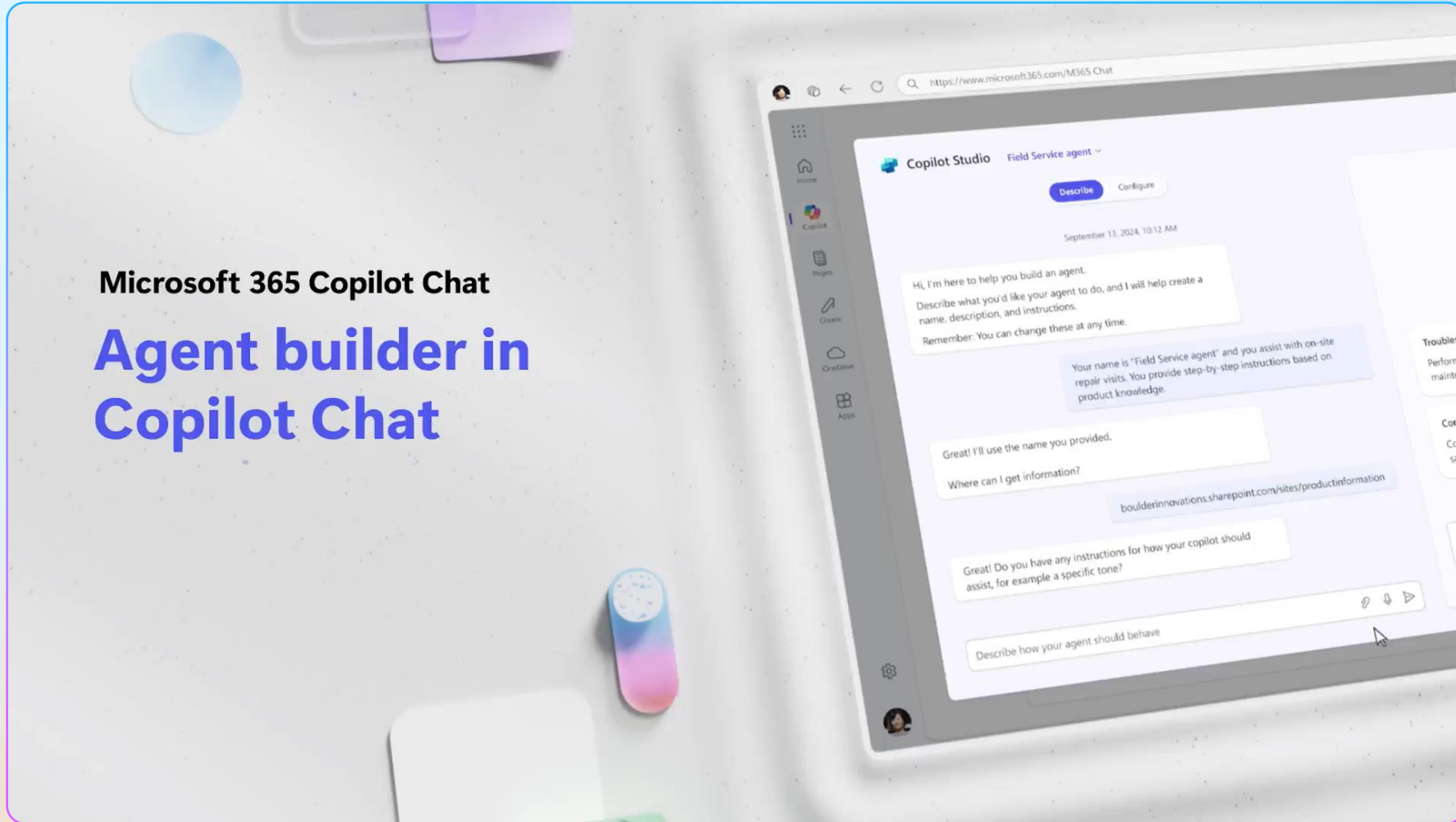
<sup>1</sup>Agent creation is only available if your organization admin has enabled this capability.

<sup>2</sup>Shared data includes SharePoint files and data from your organization’s Microsoft Graph connectors. [Learn more about Microsoft Graph connectors.](#)

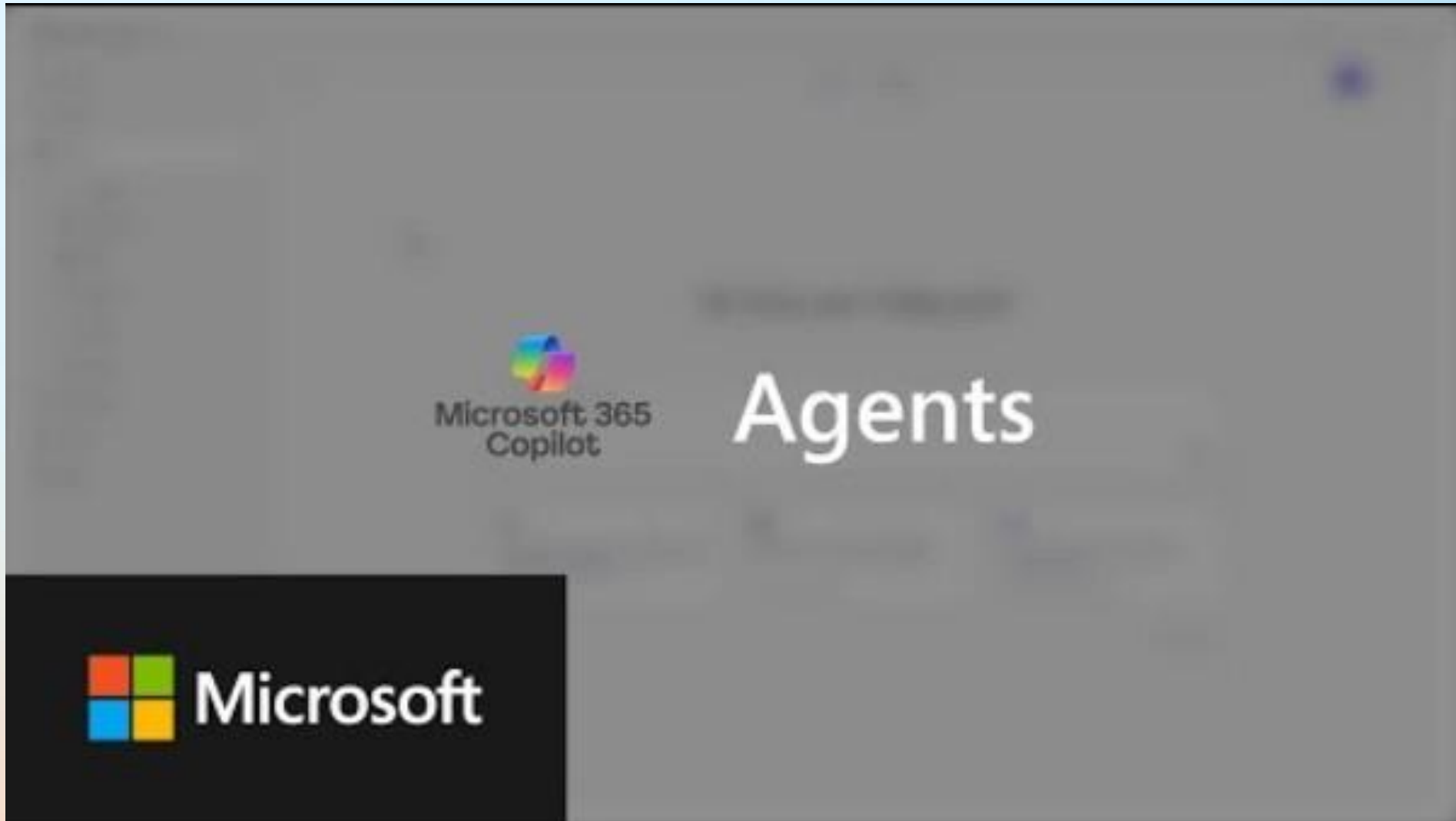
# Video: Create an agent

Microsoft 365 Copilot Chat

Agent builder in  
Copilot Chat



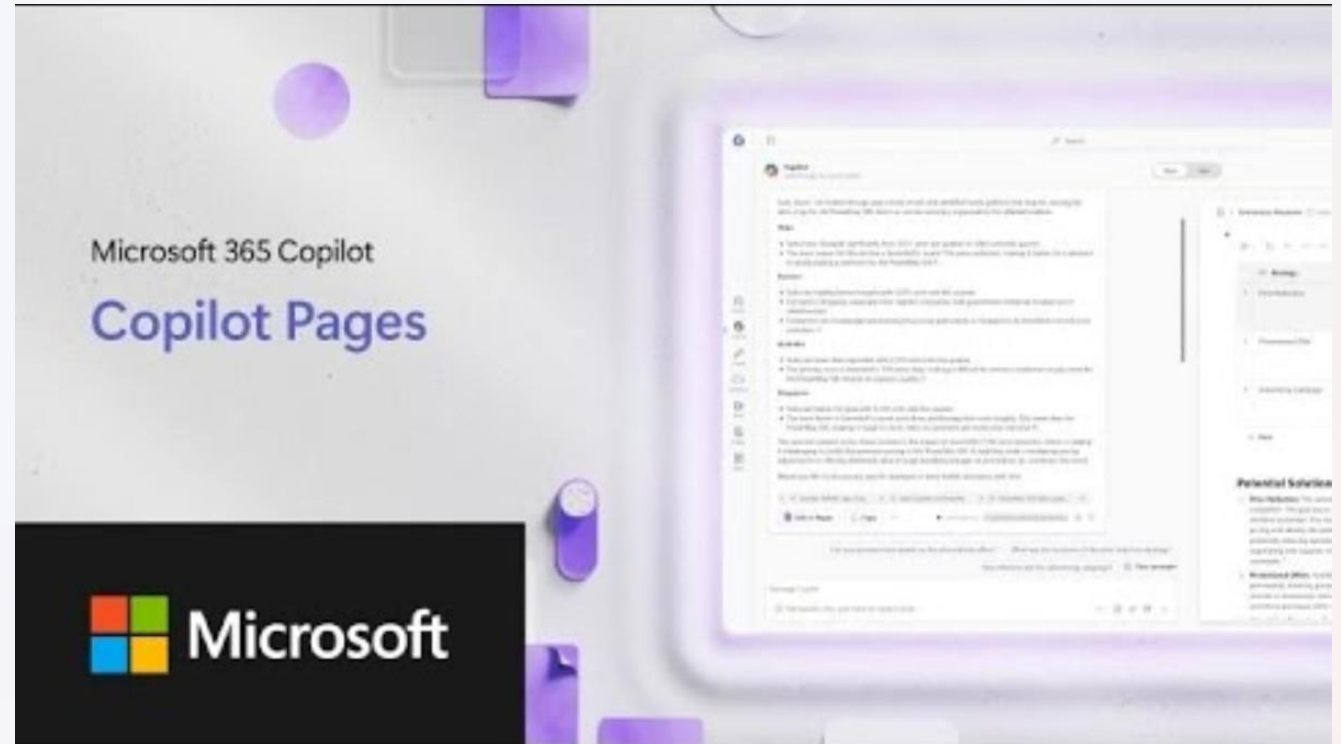
# Video: Researcher and Analyst



# Edit and collaborate on Copilot responses with Copilot Pages

Did you know that you can format, fine-tune, and collaborate on Copilot responses directly in Copilot Chat?

With Copilot Pages, Copilot Chat becomes your workspace – so you don't have to jump between surfaces to get a project done. Watch the video to see it in action!



Video



# Copilot Chat prompt examples

# Get the answers you need to move forward

*Get hiring tips*

How can I evaluate an interview candidate's soft skills?

*Summarize a file*

Summarize this document in 5 bullet points. <attach file>

*Start your research*

How have world literacy rates changed in the past 30 years?

*Calculate the answer quickly*

At \$X per unit, how many units to break even if costs are \$Y

*Reach a broader audience*

How do you say [thank you for your time] in Japanese?

*Discover synonyms*

What are some other words for [exciting]?

*Understand trends*

Share some trends in remote work and hybrid offices

*Retrieve buried info*

What are the deadlines mentioned in this file? <attach file>?

*Boost your knowledge*

Help me learn about [topic]. Provide 2 analogies & files to dig in.

*Highlight the differences*

Compare these two paragraphs grouped by differences in formatting, structure, and content: [paste content]

*Monitor your PR*

Give me a concise summary of recent news about [company]

*Stay on top of tech advances*

Summarize the main points of the latest research on AI

*Make informed decisions*

Create a table that compares top-selling office printers

*Make your code better*

Optimize and fix this code: [insert code]

# Brainstorm and draft content quickly

*Co-create with Copilot*

Ask me 3 questions to help me draft an email about [OKRs]

*Going on holiday?*

Write some funny Out of Office email responses.

*Make it stand out*

Suggest a few email subjects for the following email: [body]

*Generate ideas*

List ideas for a fun remote team building event

*Put info in a table*

Organize the world's most valuable companies into a table

*Visualize the data*

Create an image of a bar chart demonstrating growth

*Track changes over time*

Create a line chart showing the relationship between...

*Start a conversation*

Suggest ways to break the ice with my new colleague.

*Jump-start a draft*

Create an FAQ based on this file <attach file>

*Draft an introduction*

Write a compelling intro paragraph for this speech <attach file>

*Make it better*

Improve my writing in: <attach file>

*Disagree gracefully*

Provide a convincing counterargument to the following: [paste content]

*Rally the team*

Draft an exciting email ... using <attach files>

*Get started on a plan*

Draft a business plan based on [idea]



## Microsoft 365 Copilot Chat

# Congratulations!

At The Fulcrum Group, Inc., we want you to grow your skills in AI. We encourage you to keep exploring Copilot Chat with the resources below:

- Check out the [Copilot Prompt Gallery website](#) for more learning videos and prompt examples.
- Join the [Microsoft 365 Copilot Community on LinkedIn](#) to get more Copilot Chat tips and product updates and engage with other users.
- Login into our training portal for some AI training, including Copilot. <https://forms.fulcrumgroup.net/Training>
- Copilot Academy from Microsoft <https://forms.fulcrumgroup.net/CopilotAcademy>



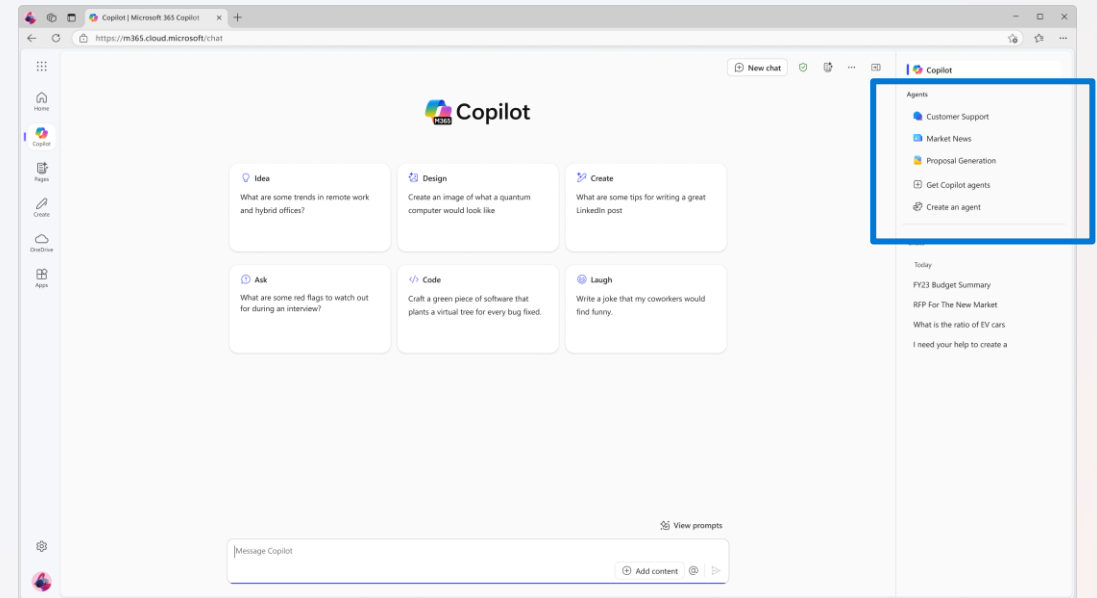
# Additional resources

# Copilot Chat replaces Microsoft Copilot

Copilot Chat offers the chat experience you're familiar with along with some added features like using and creating agents<sup>1</sup> to connect Copilot Chat to your shared organization data<sup>2</sup>.

Other changes:

- Access the Copilot Chat web app from the new URL: [M365Copilot.com](https://m365copilot.com)
- The app icon has changed from the purple and blue icon to the rainbow icon with a "M365" tag.



<sup>1</sup>Agent creation is only available if your organization admin has enabled this capability.

<sup>2</sup>Shared data includes SharePoint files and data from your organization's Microsoft Graph connectors. [Learn more about Microsoft Graph connectors.](#)

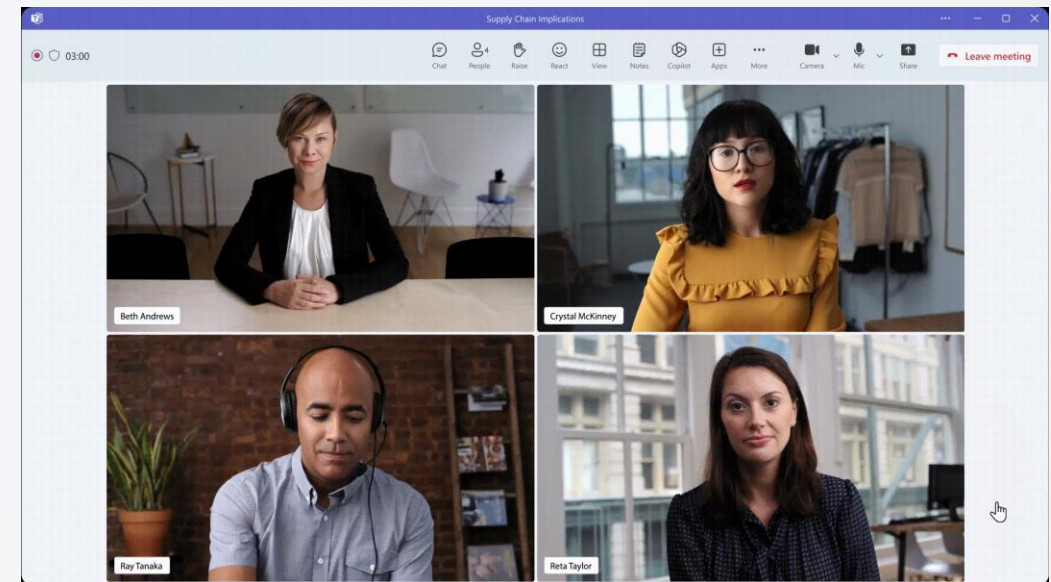
# Did you know you could do more with Microsoft 365 Copilot?

## Microsoft 365 Copilot is more than just Copilot Chat.

With a full Microsoft 365 Copilot license, you'll have access to additional Copilot capabilities in the Microsoft 365 apps you use regularly, like:

- Recapping a meeting in Teams
- Revising an email in Outlook
- Revising a document in Word
- Creating a PowerPoint presentation from an outline
- Formatting Excel spreadsheets

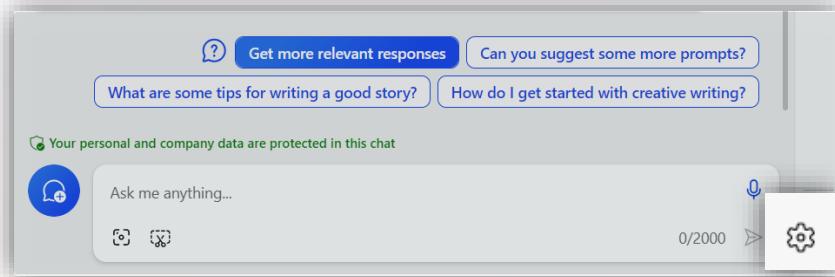
If you'd like to learn more about how you can get access to the full Microsoft 365 Copilot experience, reach out to your fractional CIO or contact our Sales to discuss 817-337-0300 or [sales@fulcrumgroup.net](mailto:sales@fulcrumgroup.net).



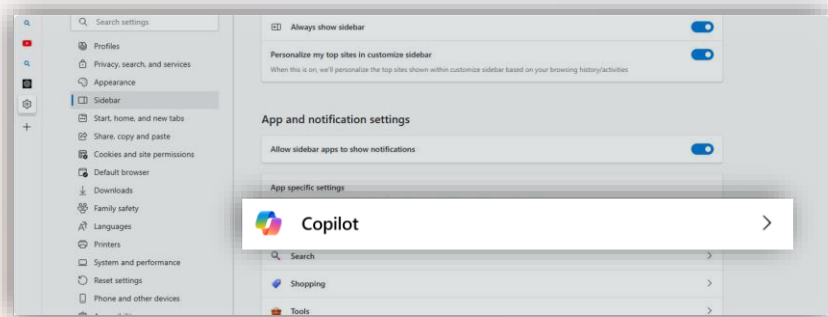
# If Edge sidebar cannot “read” an open PDF or webpage, you may need to change your settings

Follow these steps to enable Copilot Chat to “read” the open PDF or webpage

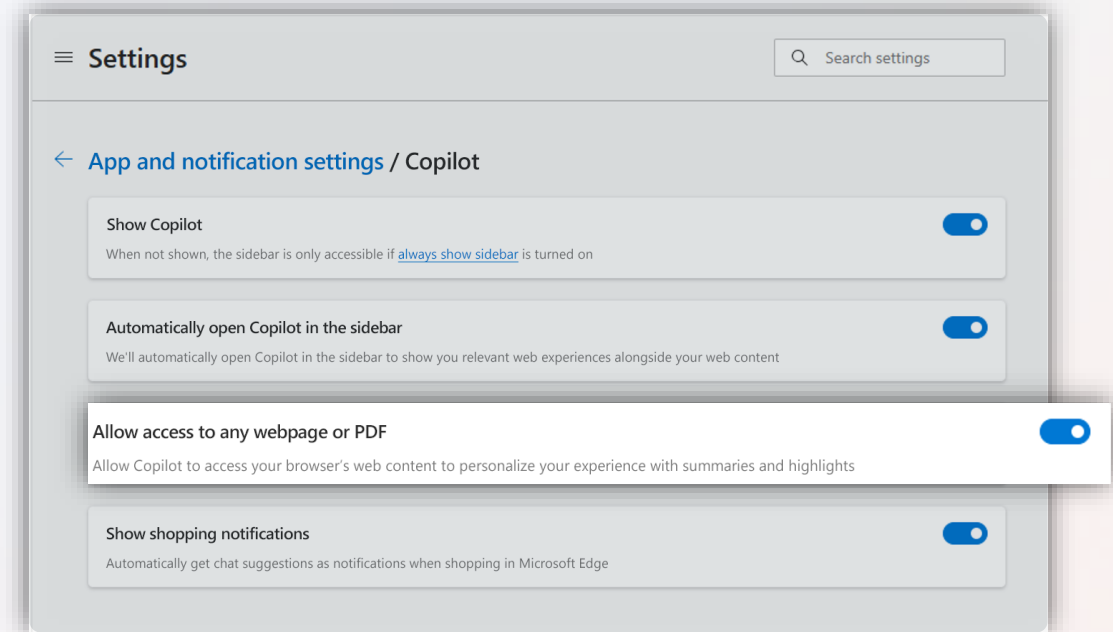
- 1 First, select the gear icon at the bottom right of the Edge sidebar



- 2 Select “Copilot” within the list of apps



- 3 Enable the “Allow access to any webpage or PDF” setting switch (see below)



# FAQ

## **Why is data protection important when using AI chat tools at work?**

Company data and intellectual property are crucial to our competitive advantage. The problem with using generative AI without enterprise data protection is that prompts or content you generate can be exposed to the public as part of another answer. That's where Copilot Chat comes in: it's protected with enterprise data protection, so what you put in and get out is not used to train the underlying AI model. Our company data stays safe.

## **How do I know I'm using Copilot Chat with Enterprise Data Protection?**

You'll know you're using Copilot Chat with Enterprise Data Protection if you see a green shield icon next to the "New chat" button.

## **Can I trust the answers generated when using AI?**

Copilot Chat aims to base all its responses on reliable sources, but AI can make mistakes, and third-party content on the internet may not always be accurate or reliable. Copilot will sometimes misrepresent the information it finds. This is why Copilot is transparent and shows the sources of information behind its answers. Always check the sources before making decisions or taking actions based on

# FAQ Continued

## **What can Copilot Chat access when I use it?**

Copilot Chat leverages the latest web information to respond to your prompts. It does not have access to data from your device or your organization's information. You will need to use an agent to access work data. When using Copilot Chat in the Microsoft Edge sidebar, you can grant it permission to view content on your current page to generate summaries. However, Copilot Chat will not access or use other browser data, such as your browser history.

## **Are there limits for how much I can use Copilot Chat?**

As with other AI tools, there are limits to how many turns (prompts and responses) you can do per chat conversation and per day. If you reach those limits, you will be notified within the experience.

# Any Questions?

## **The Fulcrum Group, Inc.**

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