

Microsoft Copilot Studio Licensing Guide



September 2025

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Using This Guide

Use this guide to understand licensing for Microsoft Copilot Studio, Copilot Studio agents, and related agent solutions across Power Platform, Microsoft 365 and Dynamics 365.

This guide does not supersede, or replace any of the [Microsoft Product Terms](#) legal documentation covering use rights.

For help determining the right technology solution for any given organization, including the license requirements for a specific product or scenario, consult with your Microsoft account team or a Microsoft Certified Partner.

For more information on Copilot Studio product and program licensing visit the [Microsoft Central Licensing Hub](#). Customers in the United States, can contact Microsoft Sales directly at (800) 642-7676. For international queries, refer to the list of Microsoft Customer Service phone numbers available [here](#).

All pricing is USD ERP and subject to change. All subscription pricing listed is per month, billed annually. Please see [Pricing | Microsoft Copilot Studio](#) for actual pricing.

What's new in this licensing guide

See the Change log in Appendix E, for minor changes effective September 2025.

Users should take care to always use the latest version of the licensing guide for the most up-to-date information. The latest internal version of this guide can be found [here](#). Microsoft reserves the right to review or update this document at any time without notice.

How to Buy Microsoft Copilot Studio

As users interact with Copilot Studio agents, or agents perform tasks on behalf of users, they consume Copilot Credits. Copilot Credits are the common currency across Copilot Studio capabilities and are available via the Copilot Studio pay-as-you-go meter and the Copilot Studio Copilot Credit pack subscription license.

1. Microsoft Copilot Studio pay-as-you-go meter

The Copilot Studio pay-as-you-go meter enables customers to postpay based on the number of Copilot Credits consumed in a billing month. This meter allows for flexibility, scalability and seasonality with no interruptions due to overages.

2. Microsoft Copilot Studio Copilot Credit pack subscription license

Copilot Credits are also offered through the Copilot Studio Copilot Credit pack subscription license. A quantity of subscriptions should be purchased for the expected number of Copilot Credits that will be consumed by the tenant in a month.

It is strongly recommended that customers who choose the subscription license also set up the Copilot Studio pay-as-you-go meter in case of any overages.

There are three ways to buy Microsoft Copilot Studio.

- **Microsoft Partners**

For customers in need of a fully-managed and tailored Copilot Studio solution, [connect with a partner](#).

- **Microsoft Sales**

For customers who want to learn more about Copilot Studio, discuss use cases or get pricing information, reach out to [Microsoft Sales](#) or call Microsoft Sales at (800) 642-7676.

- **Microsoft Online**

The Microsoft Copilot Studio Copilot Credit pack subscription can be set up [here](#).

The Microsoft Copilot Studio pay-as-you-go meter can be set up [here](#).

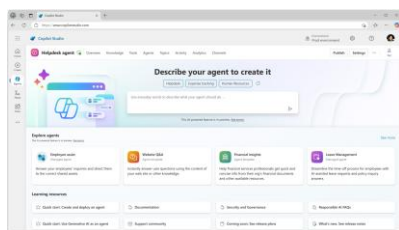
This table outlines three primary purchasing channels, all offering flexible subscription lengths and support models.

Overview of purchasing options

	Microsoft Partners	Microsoft Sales	Microsoft Online
Subscription length	Monthly / Annual / Multi-Year	Monthly / Annual / Multi-Year	Monthly / Annual / Multi-Year
Customer support	Industry specific	Account specific	Product specific
Eligibility	All customers	Managed accounts	All customers
Implementation	Customized support	Upon request	Independently managed
Scale	Department / Enterprise-wide	Enterprise-wide	Department / Enterprise-wide

[Learn more](#) about how to buy from Microsoft.

Microsoft Copilot Studio



Service Overview

Copilot Studio is a comprehensive conversational AI platform that empowers users to build, customize and deploy agents using natural language or a graphical interface. With Copilot Studio, users can easily design, test, and publish agents tailored to specific needs for internal or external scenarios across your industry, department, or role. For technical details please visit: aka.ms/copilotstudio.

Licensing Overview

Copilot Studio provides the ability to create and deploy agents. As users interact with Copilot Studio agents or agents perform tasks on behalf of users, they consume Copilot Credits. Copilot Credits are the common currency across Copilot Studio capabilities and are available via the Copilot Studio pay-as-you-go meter and the Copilot Studio Copilot Credit pack subscription.

Additionally, the Microsoft 365 Copilot User Subscription License (USL) includes limited Copilot Studio use rights. For a comprehensive overview of these entitlements, please refer to the summary of Summary of Copilot Studio table in this licensing guide.

Copilot Credits

Copilot Credits are a measure of the time and effort required for an agent to retrieve information and respond to prompts and any actions/custom skills the agent uses. The number of credits decremented for each response or action is dependent on the complexity of the task completed by the agent.

1. Copilot Studio pay-as-you-go meter

The Copilot Studio pay-as-you-go meter enables organizations to postpay based on the actual number of Copilot Credits consumed by agents in a billing month. No up-front license commitment is required, allowing organizations to scale usage and ensure business continuity for mission critical business processes with flexibility, scalability, seasonality and no interruptions due to overages.

- **Pricing:** \$0.01/Copilot Credit
- **Meter Definition:** The Copilot Studio pay-as-you-go meter counts the total number of Copilot Credits consumed by agents.

Copilot Studio pay-as-you-go meter offer summary

SKU Description	Microsoft Copilot Studio Pay As You Go Copilot Credit
License type	Per environment via billing plan
Meter name	Copilot Studio Pay As You Go Copilot Credit

- **Building and Managing agents:** A Copilot Studio Author role is required for users to build and manage agents when Copilot Studio is licensed via pay-as-you-go. To grant access, navigate to Settings and update the Copilot Author setting in the [Power Platform](#)

Admin Center (PPAC). There, you can assign a security group, and only members of that group will have access to Copilot Studio.

- **Role required:** Copilot Studio Author role
- **Pricing:** \$0

2. Copilot Studio Copilot Credit pack subscriptions

Copilot Credits are also offered through the Copilot Studio Copilot Credit pack subscription license. Credit packs should be purchased for the anticipated number of Copilot Credits that will be consumed by a tenant in a month.

- **Pricing:** \$200 per pack/month
- **Capacity:** 1 credit pack = 25,000 Copilot Credits
For additional capacity, it is recommended to sign up for the pay-as-you-go meter to ensure business continuity. Copilot Credit consumption won't be counted against the pay-as-you-go meter until credit pack entitlements have been exhausted.

Copilot Studio Copilot Credit Pack Subscription Offer Summary

SKU Name	Microsoft Copilot Studio
License type	Per Tenant
1 Copilot Studio Copilot Credits Pack	25,000 Copilot Credits per month

- **Building and Managing agents:** A Copilot Studio User License (\$0) is required for each user building and managing agents with Copilot Studio. We recommend acquiring the tenant license and user license(s) as part of a single transaction to simplify onboarding to Copilot Studio.
 - **License required:** Copilot Studio User License
 - **Pricing:** \$0
 - **Recommendation:** Acquire the tenant license and user licenses as a single transaction to simplify onboarding to Copilot Studio.

For Copilot Studio Billing Rates, please see [Billing rates and management](#).

Summary of Copilot Studio

	Microsoft Copilot Studio pay-as-you-go meter	Microsoft Copilot Studio Copilot Credit pack subscriptions	Copilot Studio use rights with Microsoft 365 Copilot
Plans	RECOMMENDED MOTION Copilot Studio \$0.01 per Copilot Credit	Copilot Studio \$200 per credit pack/month	Copilot Studio in Microsoft 365 Copilot \$30 per user/month
Included Copilot Credits ¹	Pay-as-you-go ²	25,000 Copilot Credits ³	Unlimited ^{4*}
Generative AI	●	●	Limited ^{4*}
Create and publish your own agents and agent flows anywhere	●	●	
Create and Publish your own agents and plugins to extend Microsoft 365 Copilot			●
The output you create is...	Your own agent	Your own agent	Your own agent ⁵
Power Automate cloud flows as actions in agents		● ⁶	
Standard Power Platform connectors	●	●	●
Premium and Custom Power Platform connectors	●	●	●
On premises and cloud services data transfer for Power Platform Connectors	●	●	●
Dataverse for Copilot Studio	● ⁷	● ⁷	● ⁷
Managed Environments	● ⁸	● ⁸	● ^{8, 9}
Available channels to publish your agents/plugins	External channels (e.g., External Web, FB, WhatsApp etc.) Internal Channels (e.g., Internal Web, Teams, etc.)	External channel (e.g., External Web, FB, WhatsApp etc.) Internal Channels (e.g., Internal Web, Teams, etc.)	Microsoft 365 experience

1. Customers will be charged according to the consumption of Copilot Credits, the common currency across Copilot Studio capabilities. Copilot Credits are the measure of time and effort required to retrieve information and respond to prompts or actions taken by an agent.

2. The Copilot Studio pay-as-you-go meter enables you to postpay based on the actual number of credits consumed in a month.

3. Copilot Credits are offered via prepaid Copilot Studio Copilot Credit pack subscription licenses. 1 credit pack = 25,000 Copilot Credits.

4. Interactive use of classic answers, generative answers, tenant graph grounding and agent actions by authenticated Microsoft 365 Copilot users, in Microsoft 365 apps and services, will be included at no additional cost. Microsoft 365 apps and services include: Word, Excel, PowerPoint, Outlook, Exchange, SharePoint, OneNote, OneDrive, Microsoft Stream, Microsoft Bookings, Microsoft Access, Viva Engage, Viva Insights, Microsoft Lists, Microsoft Forms, Sway, Visio, Microsoft Planner, Microsoft To Do, Microsoft Loop, Clipchamp, M365 Copilot Chat, and Teams.

5. Agents built on Copilot Studio, for Teams, SharePoint and Microsoft 365 Copilot, are included with the Microsoft 365 Copilot user license at no additional charge.

6. Cloud flow usage of up to 250,000 Power Platform Requests per day at the tenant level is included as part of the Copilot Studio Copilot Credits pack subscription. Cloud flows do not consume Copilot Credit capacity.

7. Dataverse for Copilot Studio default capacities: Dataverse Database 5 GB, Dataverse File 20 GB, Dataverse Log 2 GB. Additional Database, File and Log subscription capacity can be purchased in increments of 1 GB.

8. Please see [Managed Environments](#) for licensing details.

9. Managed Environments is enabled only for features related to Copilot Studio.

* Microsoft reserves the right to update the limits as the product evolves, and new usage patterns emerge.

Subscription pricing is per month, billed annually.

Tracking Copilot Credit Consumption and Entitlements

Copilot Studio Agent Usage Estimator (preview)*

Use the [Copilot Studio Agent Usage Estimator](#) to forecast your agent's Copilot Credit consumption volume.

**The Copilot Studio estimator is not a binding offer nor a guarantee of the final cost or availability of the product. This estimate should be regarded only as guidance and not incorporated into a contractual agreement. The actual amount of Copilot Credit consumption and associated cost may vary depending on the region, availability, workload usage, number of users, and other factors. You may contact your Microsoft representative before making any customer recommendations or purchase decisions. Microsoft reserves the right to modify or discontinue the Copilot Studio estimator at any time without notice.*

Copilot Studio Agent Activity Map

When Copilot Studio agents are tested, all agent activity is visible in the [activity map](#) including agent actions such as triggers, topics, Power Platform connectors, and agent flows. The activity map shows a visual representation of the plan that was generated. An activity map is generated for every session, which begins when an agent starts a conversation or is triggered by an external event.

Viewing Usage Details

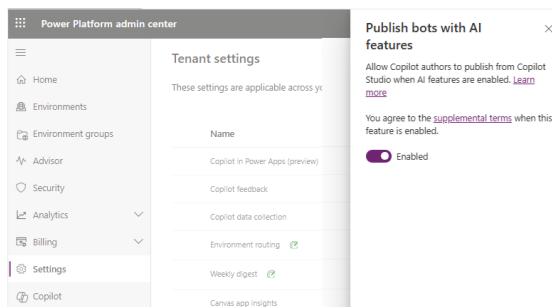
Customer admins can view their organization/tenant level usage details in PPAC in the Billing > License > Copilot Studio > Summary tab.

Controlling How Agents are Shared

Organizations can control and limit how agents are shared in their tenant by applying the Editor and Viewer permission assignments to individuals who need to access Copilot Studio, and then configuring the permissions for who can share with whom. The sharing limits for agents are configured as a Managed Environments control in the Power Platform admin center.

Disabling Agents

To disable agent publishing, admins can use the Power Platform admin center to turn off the ability to publish agents that use generative AI features for a tenant.



Capacity enforcement

All Copilot Studio purchased capacity is enforced monthly and unused Copilot Credits do not carry over month to month. Customers exceeding purchased capacity should adjust their purchase quantity per standard Microsoft terms to remain in compliance. Comprehensive monitoring, reporting, and alerting

mechanisms will be instituted to assist customers with managing Copilot Studio capacity. Technical enforcement (including service denial) will result for usage that is over the purchased capacity.

Dataverse for Copilot Studio

Microsoft Dataverse is a secure, scalable, and cloud-based data platform that enables users to store, manage, and model business data used in applications across the Microsoft ecosystem. It is the foundational data layer for the Microsoft Power Platform, including Copilot Studio, Power Apps, Power Automate, Power BI, and it also underlies Dynamics 365 applications. Furthermore, Dataverse allows integration with Outlook and SharePoint. [Learn more.](#)

Dataverse default and accrued subscription capacity entitlements

Copilot Studio default subscription capacity leverages the same tenant and infrastructure and will accrue across one tenant. Every tenant with a Copilot Studio license receives default capacity.

Copilot Studio capacity per tenant	Default per tenant
Dataverse Database capacity	5 GB
Dataverse File capacity	20 GB
Dataverse Log capacity	2 GB

Copilot Studio, Power Apps, Power Automate, Power Pages and Dynamics 365 Sales, Customer Service, and Field Service applications leverage the same tenant and infrastructure. Dataverse capacity (Dataverse Database, Dataverse File, and Dataverse Log) is accrued across the tenant and shared among relevant application workloads.

There are additional Microsoft subscriptions beyond Power Platform that grant Dataverse capacity entitlements. Please see [this page](#) for details related to Project for the web, as well as the [Dynamics 365 Licensing Guide](#) for information related to other entitlements.

Dataverse capacity types and purposes

Dataverse	Purposes
Database	Stores and manages table definitions and data
File	Stores attachments to notes or emails in Power Apps, Dynamics 365 Sales, Customer Service, and Field Service applications. These include documents, image files, videos, PDF files and other crucial files needed in an organization.
Log	Records table and column data changes over time for use in analysis and reporting purposes. Log capacity is designed to help organizations meet their auditing, compliance, and governance policies.

The first Power Apps or Power Automate or Copilot Studio or Power Pages or Dynamics 365 Sales, Customer Service, and Field Service subscription provides the one-time default capacity entitlement for the tenant. For example, if a new customer purchases Power Apps Premium, the tenant will receive 10 GB of default Dataverse Database capacity. Additional subscriptions do not add to the tenant's default capacity.

When additional subscriptions are added to the tenant, additional Dataverse capacity may *accrue* to the tenant.

Example: Assume that a new customer purchases 10 Power Apps Premium licenses and 20 Power Apps per app licenses. The total tenant wide pooled capacity will be as follows (note 1 GB = 1,024MB):

Default and Accrued Capacity Allocation	Default/tenant	Accrued/10 Enterprise USL	Total Tenant wide capacity
Dataverse Database capacity	10 GB	$10 \times 250\text{MB} + 20 \times 50\text{MB} = 3.5\text{GB}$	$10\text{GB} + 3.5\text{GB} = 13.5\text{GB}$
Dataverse File capacity	20 GB	$10 \times 2\text{GB} + 20 \times 400\text{MB} = 28\text{GB}$	$20\text{GB} + 28\text{GB} = 48\text{GB}$
Dataverse Log capacity	2 GB	NA	2GB

Managed Environments

Managed Environments is included with the following Power Platform standalone¹ licenses and pay-as-you-go meters. Once enabled, all active usage in the environment will require one of these standalone licenses or pay-as-you-go meters.

- Power Apps and Power Automate standalone licenses
- Copilot Studio standalone license
- Power Apps per app pay-as-you-go meter² and Copilot Studio pay-as-you-go meter
- Copilot Studio for Microsoft 365 Copilot license (only for features related to Copilot Studio)
- Dynamics 365 Premium, Enterprise, and Team Members standalone licenses

¹ Standalone licenses refers to full Power Apps, Power Automate and Copilot Studio licenses and does not include the limited Power Apps and Power Automate use rights the come with select Dynamics 365 licenses.

² The Power Apps per app pay-as-you-go meter satisfies the prerequisite that all active Power Apps usage in the environment requires standalone licenses or meters. However, this meter covers Power Apps usage only; any Power Automate flow usage must be covered by standalone Power Automate licenses.

Please review [Power Platform Managed Environments](#) for details.

Security and Governance

Copilot Studio follows a number of security and governance controls and processes, including geographic data residency, data loss prevention (DLP), multiple standards certifications, regulatory compliance, [environment routing](#), and regional customization. See the [Geographic data residency in Copilot Studio](#) document for information and details on how data is handled in Copilot Studio.

Data processing and license agreements

The Copilot Studio service is governed by your commercial license agreements, including the [Microsoft Product Terms](#) and the [Data Protection Addendum](#). For the location of data processing, refer to the [geographical availability documentation](#).

Compliance with standards and practices

The [Microsoft Trust Center](#) is the primary resource for Power Platform compliance information. Learn more at [Copilot Studio compliance offerings](#).

Data loss prevention and governance

Copilot Studio has an extensive set of [Data Loss Prevention features](#) to help you manage the security of your data, along with [Power Platform policies](#).

Additionally, to further govern and secure Copilot Studio using generative AI features in your organization, you can:

- Disable agent publishing:
 - Your admin can use the Power Platform admin center to turn off the ability to publish agents that use generative AI features for your tenant. PPAC > Settings > Tenant Settings > Publish bots with AI features.
- [Disable data movement across geographic locations](#) for Copilot Studio generative AI features outside the United States.
- Use the Microsoft 365 admin center to [govern the conversational and AI actions and agents that show in Microsoft 365 Copilot](#).

Copilot Studio supports securely accessing customer data using [Customer Lockbox](#).

Additional Resources

Copilot Studio Trial

Sign-up for a free trial of Microsoft Copilot Studio [here](#).

Copilot Studio Pricing Page

Copilot Studio pricing information is located [here](#).

Copilot Studio Service Support

The benefits included in the [Subscription Support Plan](#) are applicable for customers who license Copilot Studio solutions via MOSP, EA, MPSA, EAS, and EES. Learn more about Copilot Studio support [options](#):

- [Professional Direct Support for Dynamics 365 and Power Platform](#)
- [Unified Support](#) (for enterprise solutions)

SKU Name	Description	Price/month*	Licensed
Professional Direct Support for Dynamics 365 and Power Platform	ProDirect Support Subs Per User for D365 and Power Platform	\$9	User

*Billed annually

Customer must acquire enough Professional Direct Support licenses to cover each Power Platform and Dynamics 365 license on its agreement, up to a maximum of 250 licenses.

Appendix A: Multiplexing and Licensing Requirements for External Users

Multiplexing

Hardware or software that a Customer uses to:

- pool connections or reduce the number of Operating System Environments (OSEs), devices, or users a Product directly manages,
- reduce the number of devices or users that directly or indirectly access or use a Product,
- or access data a Product itself processes or generates.

Multiplexing does not reduce the number of Licenses of any type that Customer needs.

For additional information about multiplexing refer to the [Microsoft Multiplexing Overview](#).

Licensing Requirements for External Users

External users must be appropriately licensed to access Power Platform services and data. External Users means users that are not (a) employees of Customer or its Affiliates, (b) contractors or agents that typically work for Customer or its Affiliates for more than 30 hours on average per week, or (c) contractors or agents that typically work onsite for Customer or its Affiliates on each working day.

Applicable licensing includes:

- An appropriate Power Platform User SL
- Power Pages Authenticated or Anonymous users/website capacity licenses
- Accessing via Power Automate per flow or Power Automate Process licenses
- Limited capabilities included with Dynamics 365, Microsoft/Office 365, or Windows licenses. (See summary of Power Apps, Power Automate and Power Pages tables in the [Power Platform Licensing Guide](#) for details.)

Information on external guest user access is available [here](#).

Appendix B: Text & Generative AI Tools Capabilities

AI Builder capability	Copilot Studio/AI Tools features
Prompt using LLM models (basic)	Text and generative AI tools (basic)*
Prompt using LLM models (standard)	Text and generative AI tools (standard)*
Prompt using LLM models (premium)	Text and generative AI tools (premium)*
Custom document processing model	Content processing tools
Invoice processing	Content processing tools
Receipt processing	Content processing tools
Identity document reader	Content processing tools
Business card reader	Content processing tools
Object detection	Content processing tools
Text recognition	Text and generative AI tools (basic)
Sentiment analysis	Text and generative AI tools (basic)
Language detection	Text and generative AI tools (basic)
Key phrase extraction	Text and generative AI tools (basic)
Prediction (scheduled)	Text and generative AI tools (basic)
Prediction (real time)	Text and generative AI tools (basic)
Text translation	Text and generative AI tools (standard)
Entity extraction (prebuilt)	Text and generative AI tools (standard)
Entity extraction (custom)	Text and generative AI tools (standard)
Category classification (custom)	Text and generative AI tools (standard)

*[Learn more about Copilot Studio/AI Tools features and Copilot Credit consumption rates.](#)

Agent Flow Actions

Agent flows are predefined sequences of flow actions that enable automation of repetitive tasks quickly, without requiring agent reasoning and orchestration at each step. Agent flows can be triggered manually, by other automated events or agents, or based on a schedule.

An agent flow consists of a trigger and at least one action. A *trigger* is an event that starts a flow. Triggers can be instant (manually run on demand) or based on a schedule, or they can happen in response to other events. An *action* is a task that an agent flow performs.

Content processing tools are only available in agent flows. These AI capabilities include the following.

- Custom document processing model
- Invoice processing
- Receipt processing
- Identity document reader
- Business card reader
- Object detection

Every action an agent flows executes consumes Copilot Studio capacity. Capacity usage can be monitored in PPAC > Billing > Licenses > Copilot Studio, review the Agent flow actions used by each flow.

Calculating capacity usage when a flow is run as an action in an agent:

- Classic orchestration: When a flow is run from a topic, one Classic answer plus the agent flow actions are consumed.
- Generative orchestration: When a flow is run using generative orchestration, one Agent action plus the agent flow actions are consumed.
- When a flow is run from the agent's embedded test chat, either from a topic or as a generative action, only the agent flow actions are consumed. The direct credits in the test chat don't count toward capacity consumption.

If a Power Automate cloud flow already performs the desired function, it can be converted to an agent flow. This conversion enables management within Copilot Studio and shifts capacity usage from Power Automate billing to Copilot Studio. The flow remains accessible from Power Automate.

Appendix C: Offers in Paid Public Preview

Agents Activities and AI Tools

*See disclaimer

Code Interpreter

Code Interpreter in Copilot Studio enables agents to run code for advanced analytics and data visualization. Now agents can run Python code from user simple natural language prompts using advanced LLM models, offload data processing advanced analytics and data visualization generation to agents and scale generated code to other agents to automate business processes that have advanced data analysis needs. [Learn more](#).

Bring Your Own Model (BYOM) to Copilot Studio

Access the [catalog](#) of 1900+ models from Azure AI Foundry Models within Copilot Studio to use in prompts and for answers/summarization, giving makers the ability to use their preferred model for scenario specific tasks or agents. [Learn more](#).

Multi-Agent Orchestration in Copilot Studio

This capability allows agents built in Copilot Studio, Azure Agent Service and M365 Agents SDK to exchange data and work together, distributing work across multiple steps to deliver more comprehensive experiences. [Learn more](#).

Dynamics 365 Agents in Paid Public Preview

*See disclaimer

As part of Microsoft's ongoing investment in generative AI, this guide highlights the availability of agents built with Copilot Studio, now offered in Paid Public Preview.

These agents are designed to accelerate time to value and are configured to scale operational efficiency and elevate customer experiences across roles and functions. Collectively these agents learn to address emerging issues, uncover new knowledge, and automate manual processes to boost business efficiency and reduce costs. [Learn more](#).

To use Microsoft-built agents in Dynamics 365, users must first be licensed for one of the following respective Dynamics 365 applications.

- Dynamics 365 Customer Service
- Dynamics 365 Contact Center
- Dynamics 365 Field Service
- Dynamics 365 Sales
- Dynamics 365 Business Central
- Dynamics 365 Enterprise Resource Planning (ERP)

Dynamics 365 Customer Service and Contact Center

- **Case Management Agent** - The Case Management Agent streamlines the case management process of creating cases, updating details and following up with customers to ensure timely closures, reduce handling time and minimize errors. [Learn more.](#)
- **Customer Intent Agent** – The Customer Intent Agent uses generative AI to autonomously discover intents in your contact center instance. It analyzes past interactions between customer service representatives (service representatives or representatives) and customers to create an intent library that enhances dynamic conversations. [Learn more.](#)
- **Customer Knowledge Management Agent** – The Customer Knowledge Management Agent autonomously transforms turn cases and case-related conversations, emails, and notes into knowledge articles that support contact center operations. [Learn more.](#)

Dynamics 365 Field Service

- **Scheduling Operations Agent** - The Scheduling Operations Agent for Dynamics 365 Field Service equips dispatchers with an agent to optimize technician schedules as conditions change throughout the day. [Learn more.](#)

Dynamics 365 Sales

- **Sales Qualification Agent** - The Sales Qualification Agent in Dynamics 365 Sales is an AI assistant that automates the manual aspects of lead qualification. [Learn more.](#)
- **Sales Research Agent** - The Sales Research Agent enables the use of natural language to start a dialog with data or pick from AI-suggested topics. This dialog helps facilitates a deeper understanding of sales performance across a team, territory, and product portfolio. [Learn more.](#)

Dynamics 365 Business Central

- **Sales Order Agent** - The Sales Order Agent uses AI to analyze customer requests received via email, locate the customer in Business Central, and engage in multi-turn email conversations to clarify requests if important details are missing or more choices are available. It also checks and informs the customer about the availability of the items they're looking for and follows up with a sales quote. [Learn more.](#)

Dynamics 365 Enterprise Resource Planning (ERP)

- **Account Reconciliation Agent** - With the Account Reconciliation Agent, users can deliver timely, compliant financial statements with fewer manual fixes. The agent accelerates the period-end close by matching ledger entries, flagging discrepancies, and recommending resolution steps. [Learn more.](#)
- **Supplier Communication Agent** - The Supplier Communications Agent takes charge of supplier interactions, acting instantly on supplier emails, chasing missing order confirmations and delayed shipments. By closing the loop on every critical supplier touchpoint, the agent slashes rush charges, prevents costly disruptions, and protects margins. [Learn more.](#)
- **Time and Expense Agent** – [Learn more.](#)
 - **Time** – This feature helps to ensure timely, accurate capture of project hours by prompting employees to log time with smart reminders and context. It enhances billing accuracy, payroll, and visibility into project performance. [Learn more.](#)
 - **Expenses** - This feature simplifies and automates the process of managing employee or worker expenses in an organization. It reduces manual effort by

processing receipts, creating expense lines, and generating expense reports with minimal user intervention. [Learn more](#).

- **Approvals** - The approvals feature of the Time and Expense Agent uses the text of policy documents to determine how submitted time, expense, and material records should be classified. It streamlines the approval process for time, expense and material transactions. [Learn more](#).

***Disclaimer**

These previews are subject to the terms applicable to Previews as detailed in the relevant sections of the [Microsoft Product Terms](#), the [Supplemental Terms of Use for Microsoft Power Platform and Dynamics 365 Preview for Online Services](#), and the [Microsoft Products and Services Data Protection Addendum](#).

Microsoft reserves the right to change the pricing, business models, or services (including but not limited to branding, features, functionality, and availability) at any time in its discretion prior to GA without prior notice.

Appendix D: Terminology

Application Program Interface (API): Any form of application programming interface that provides access to a Microsoft service and any associated tools, including sample code that enables interactions with Microsoft's services, and documentation that Microsoft makes available under these TOU, and includes all elements, components, and executables of such API.

Connectors: In Power Platform, connectors mean the 1200+ prebuild data connectors to use within Power Platform solutions. These can be used within plugins when being used with M365 Copilot.

- **Standard Connector:** Data sources within the Microsoft 365 ecosystem. Examples: Excel, Outlook, SharePoint, LinkedIn. A list of standard connectors is located [here](#).
- **Premium Connector:** Business systems beyond Microsoft 365. Examples: DocuSign, Zendesk, Jira Software.
- **Custom Connector:** To support more tailored scenarios, users can build custom connectors with their own triggers and actions. These connectors are function-based; data is returned based on calling specific functions in the underlying service. **Example:** Services that are not available as prebuilt connectors.
- **On-premises Connector:** Accesses on-premises data using a gateway. **Example:** Microsoft SQL Server.

Copilot: Copilot is an intelligent assistant that uses generative AI and LLMs to assist humans with complex cognitive tasks.

Dataverse: Dataverse lets you store and manage data that is used by business applications.

Desktop flow: A feature in Power Automate targeting the RPA market by enabling legacy apps to be automated via GUI vs API.

- Processes executed via desktop flows can be contained within a broader API-based automation scenario or exist standalone.

Flow (definition of flow within app context): For both triggers and actions, flows included within an embedding application can connect:

- To any data source within the use rights of the embedding application
- Directly with the embedding application (via built in trigger/action)

Generative AI: Generative AI broadly describes AI models that can produce human-like content in the form of text, images, code and other types of media or data in response to a user-entered prompt.

Generative AI applications are built on top of large language models (LLMs) and foundation models.

- Large language models (LLM) is a type of AI model that is trained on massive datasets. LLMs are a subset of generative AI. LLMs can be used for understanding natural language and generating content like text (ex: GPT-4o).
- **Foundation models** are large ML models pre-trained with the intention that they are to be fine-tuned for more specific language understanding and generation tasks. These models are utilized to discern patterns within the input data.

After these models have completed their learning processes, together they generate statistically probable outputs when prompted and they can be employed to accomplish various tasks, including:

- Image generation based on existing ones or utilizing the style of one image to modify or create a new one.
- Speech tasks such as transcription, translation, question/answer generation, and interpretation of the intent or meaning of text.

GPTs: Generative Pretrained Transformers (GPTs) are custom versions of GPT models that can be tailored to specific areas, tasks or personas using specific instructions, knowledge and any combination of skills.

LLM: Large language models (LLM) is a type of AI model that is trained on massive datasets. LLMs are a subset of generative AI. LLMs can be used for understanding natural language and generating content like text (ex: GPT-4o).

RAG Retrieval: Retrieval-Augmented Generation (RAG) is a process that enables AI models to retrieve relevant information from a knowledge source and incorporate it into generated text.

Robotic Process Automation (RPA): A market for process automation that encompasses the use of an application's graphical user interface (GUI), where a user records a series of steps/actions/tasks for the automation technology to then perform as a process by repeating directly in the GUI.

RPA robot or "bot": A GUI-based process running on a desktop or virtualized environment.

- **Attended bot:** Triggered by an explicit user action on their workstation, i.e., a local or remote desktop
 - Must operate concurrently with the user on the same workstation
 - Can run more than one discrete process, but each process must be serialized to run sequentially
- **Unattended bot:** Runs autonomously without requiring user actuation
 - Can be deployed on a local or remote desktop, or other virtualized environment
 - Can run more than one discrete process; each process must be serialized to run sequentially
 - Concurrent instances of a singular process require an additional unattended bot for each instance

Tables: A set of records used to store data. Tables let users model business data for use within an organization's business applications. Examples of tables: Account, Contact, Lead, Opportunity.

- **Standard tables:** Dataverse provides business tables, out of the box, which represent most commonly used tables across business applications. **Examples:** Account, Appointment, Contact, Email, etc.
- **Custom tables:** Tables that are created by the customer/partner for a specific business need. For example, type of machine is not a standard table, so it can be created as a custom table.
- **Restricted tables:** Tables that requires a Dynamics 365 license for full access. Examples: Case, SAL, Knowledge Articles. For list of restricted tables click [here](#).
- **Complex tables:** These are tables that use complex server-side business logic. Any table (whether standard or custom) becomes complex once the customer/partner associates the table with the custom business logic. Example: any table that uses a real-time workflow or code plug-in.

Tools: Tools are the building blocks that enable your agent to interact with external systems. You can extend the capabilities of your custom agent by adding one or more tools. Tools can be used by your agent to respond to users automatically, using generative orchestration. You can also call tools explicitly from within a topic using Classic Orchestration. [Learn more](#).

- **Prebuilt connectors:** Choose from a selection of preset connections to thousands of popular APIs from both Microsoft and third-party services. (Standard and Premium)
- **Custom connectors:** Define a connection to a custom service or system to enable custom tool options using Power Platform Connectors.
- **Agent flows:** Define an agent flow, including one or more actions to be carried out by the flow.
- **Prompts:** Single turn model-based prompt that can reference knowledge you provide.
- **REST API connections:** Representational State Transfer Application Programming Interface (REST-API) is a way for different software systems to communicate over the internet using standard HTTP methods like GET, POST, PUT, and DELETE.

Appendix E: Change Log

Page(s)	Topic	Change	Action	Date
Various	Messages	Update	Copilot Studio messages renamed to Copilot Studio Copilot Credits	September 2025
Various	GPT model names	Update	Removed references to specific GPT model names	September 2025
Various	Accessibility	Update	Licensing guide accessibility updated	August 2025
N/A	Billing Rates	Update	Billing Rates now referenced in Billing rates and management .	July 2025
10	Cloud flows	New	Cloud flows - Power Platform Requests limits added	June 2025

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