



Get started with Microsoft 365 Copilot Chat

Practical examples and how-tos for users without a
Microsoft 365 Copilot license



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



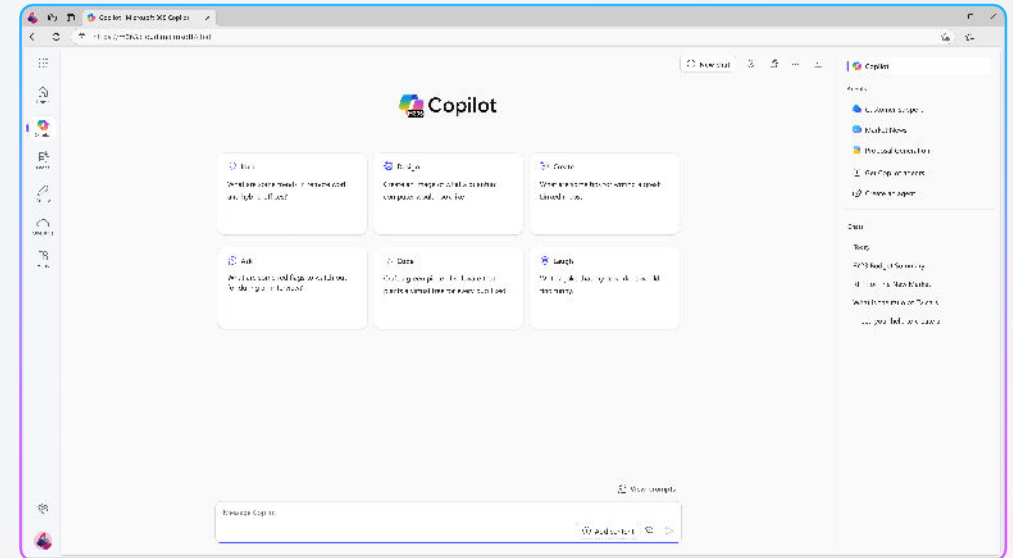
What is Copilot Chat?

Our approved 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:

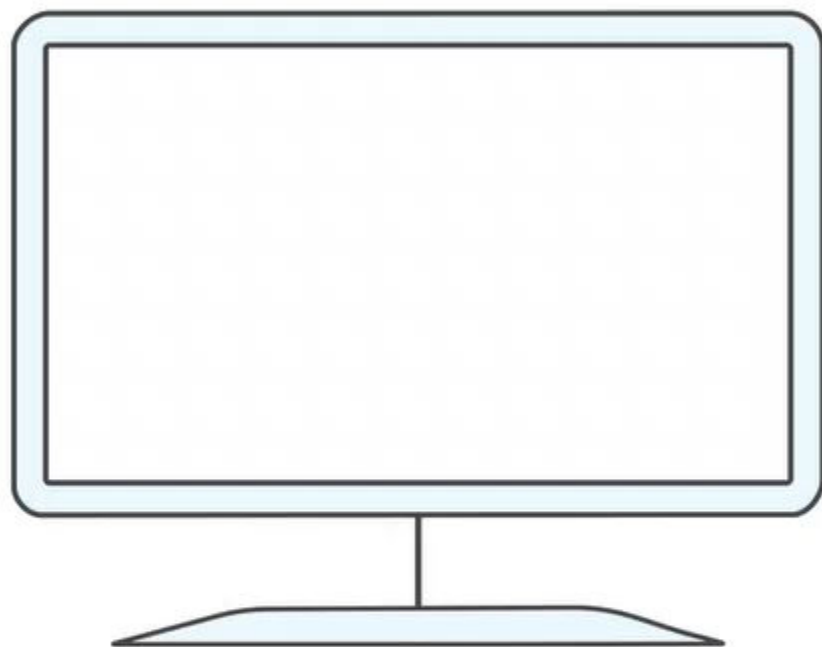
- Upload files to get responses based on information from your work documents, presentations, etc¹.
- Generate images¹ and data visualizations.
- Refine and collaborate on chat responses.
- Connect Copilot Chat to your organization data like team documents and internal SharePoint sites².



Get started by going to M365Copilot.com

¹Image generation and file upload limits apply.

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

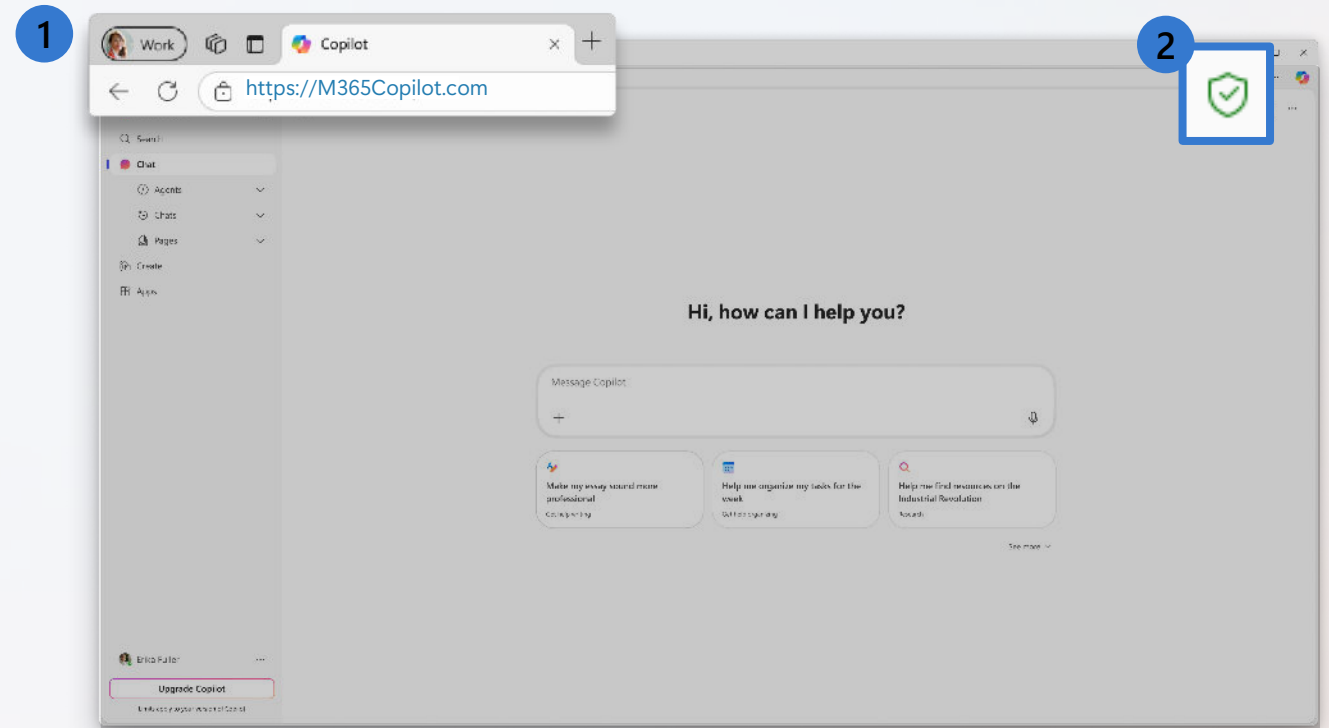


Get started with Copilot Chat

Sign in with your work account

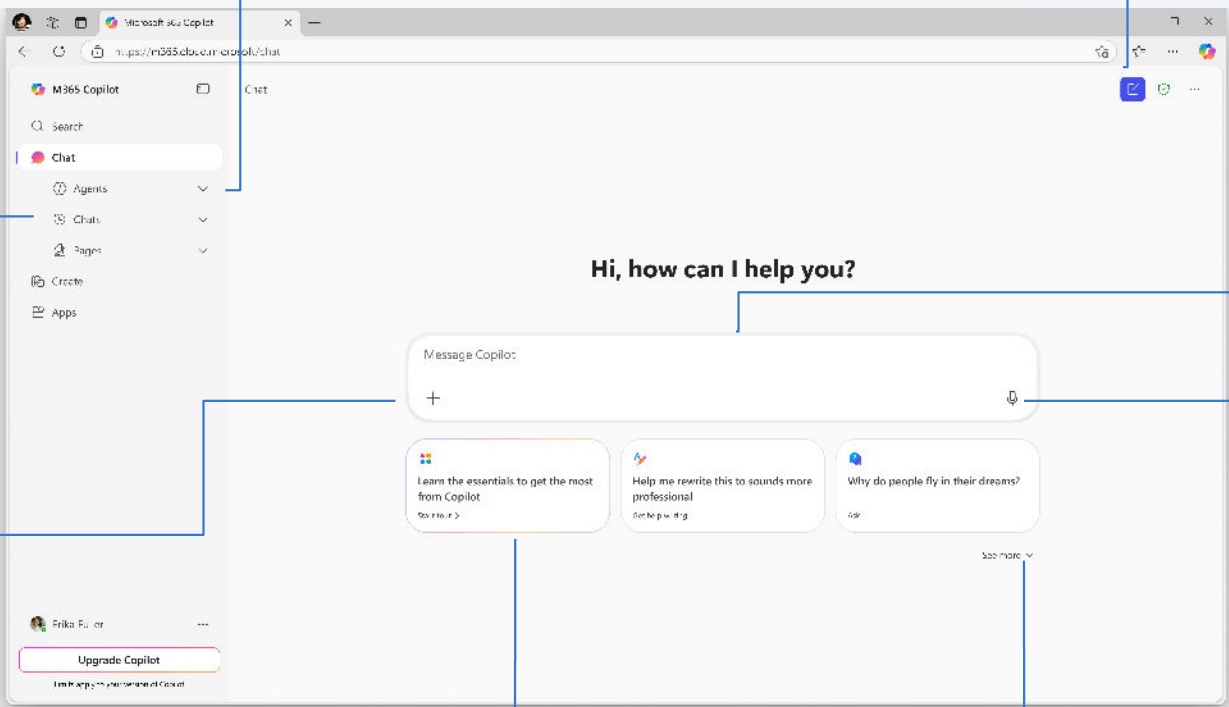
- 1 Navigate to M365Copilot.com on your preferred browser on your device to get to Copilot Chat.
- 2 Ensure you're signed in with your work or school account.

You will know you are successfully signed in to Copilot Chat when you see the green shield icon  next to "New chat"



 If you are not signed in with your work or school account, enterprise data protection does not apply.

Get to know Copilot Chat



Agents
Use existing agents or create new ones¹. Learn more about agents in [slide 17](#)

Chat history
View your past conversations

Add content and agents
Expand to upload files, images or add an agent to chat

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

Prompt box
Start your conversation here

Dictation
Use dictation if you prefer to speak rather than type when you're chatting with Copilot (**coming soon**)

Suggested prompts
Get started with prompt suggestions

Copilot Prompt Gallery
Expand the suggested prompts to view the full Copilot Prompt Gallery, including saved prompts and prompts from your team

¹Agent creation is only available if your organization admin has enabled this capability.

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.

Message Copilot



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.

Learn more



1 microsoft.com

2 contoso.com

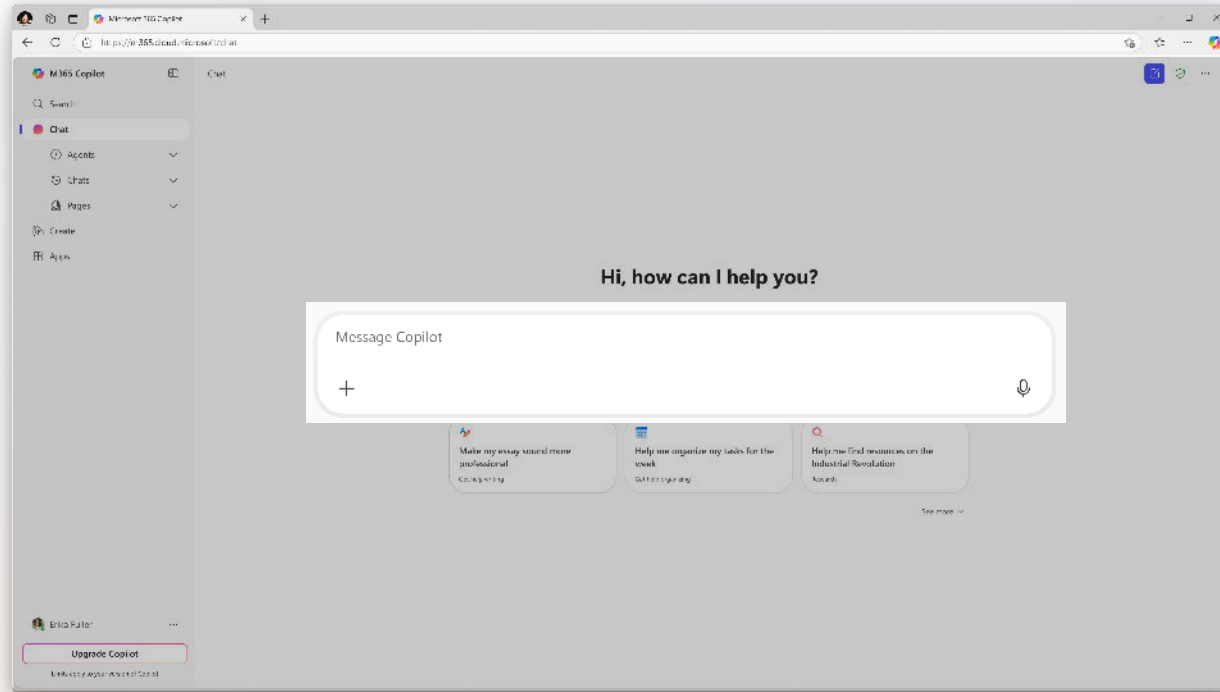


3. Continue the conversation

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?”



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.”*

Get started by entering your prompt in the text box

Writing an effective prompt

Include the right prompt ingredients

To get the best response, it's important to focus on some of the **key elements** when phrasing your Copilot prompts.

Context

Why do you need it and who is involved?

Goal

What responses do you want from Copilot?

Source

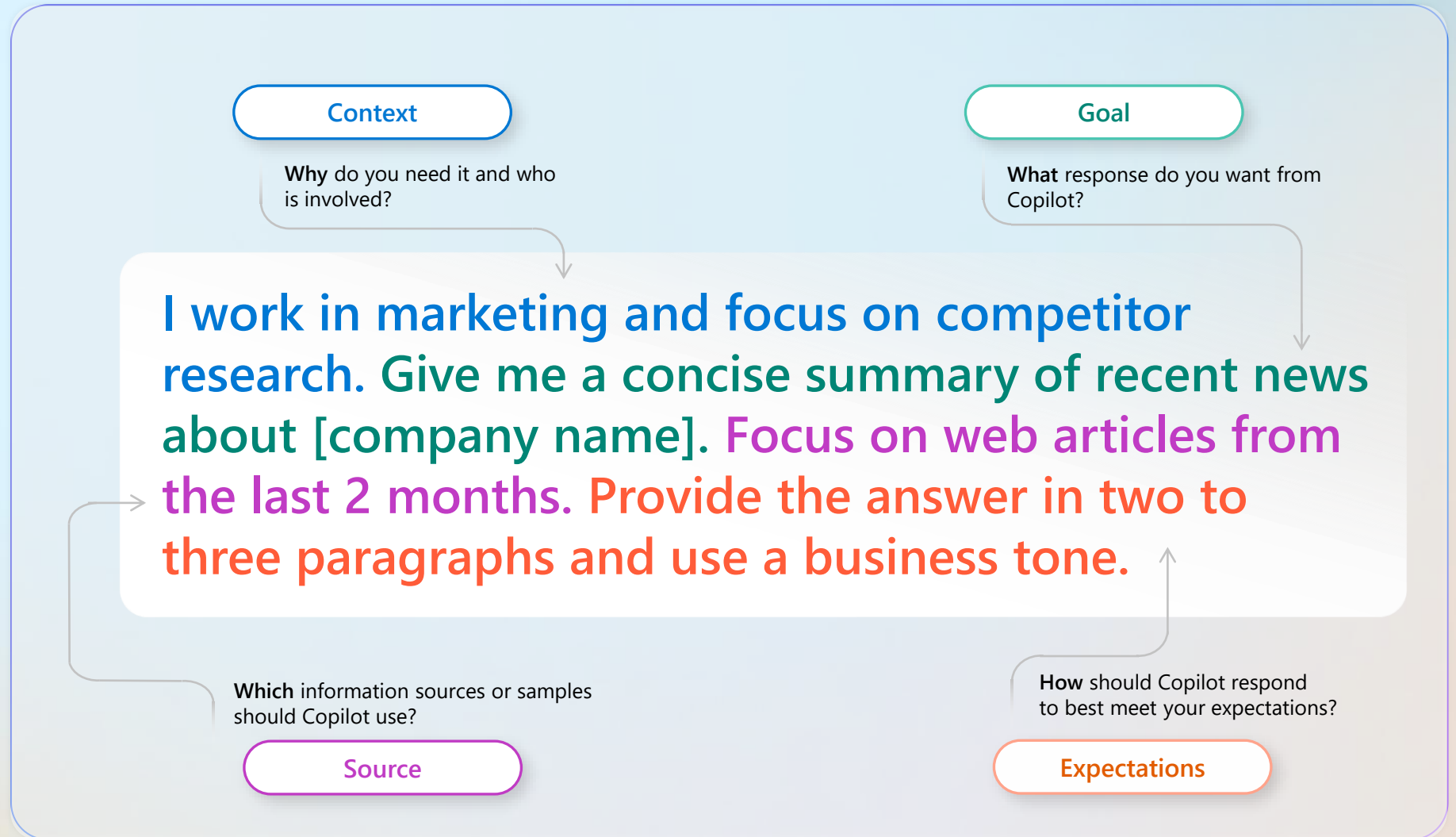
Which information sources or samples should Copilot use?

Expectations

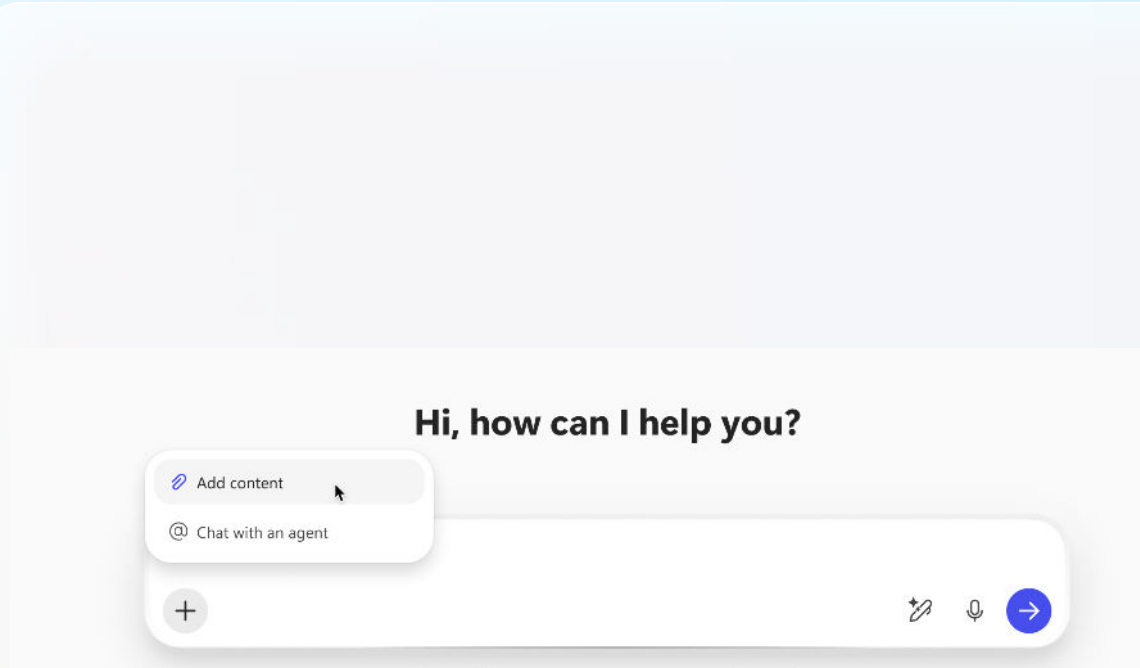
How should Copilot respond to best meet your expectations?

Writing an effective prompt part 2

To get the best response, it's important to focus on some of the **key elements** when phrasing your Copilot prompts.



Upload a file to your prompt

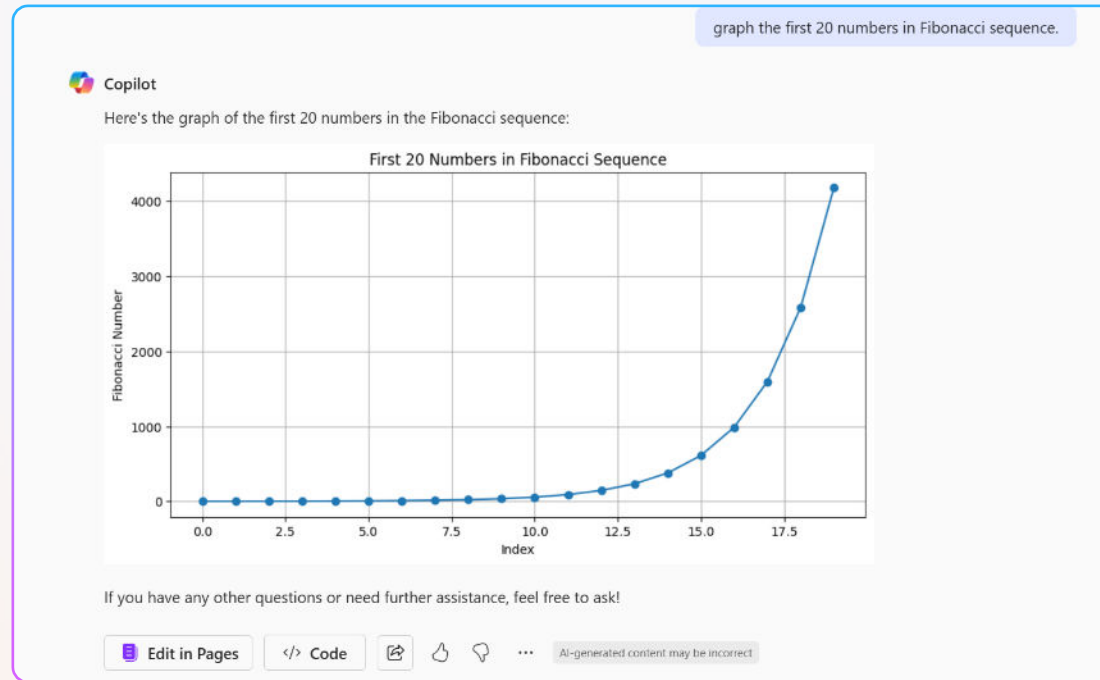


Want Copilot to respond using information from a Word document, PowerPoint deck, or other file? Select the "Add content" button in the Copilot Chat prompt box to upload a file.

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.

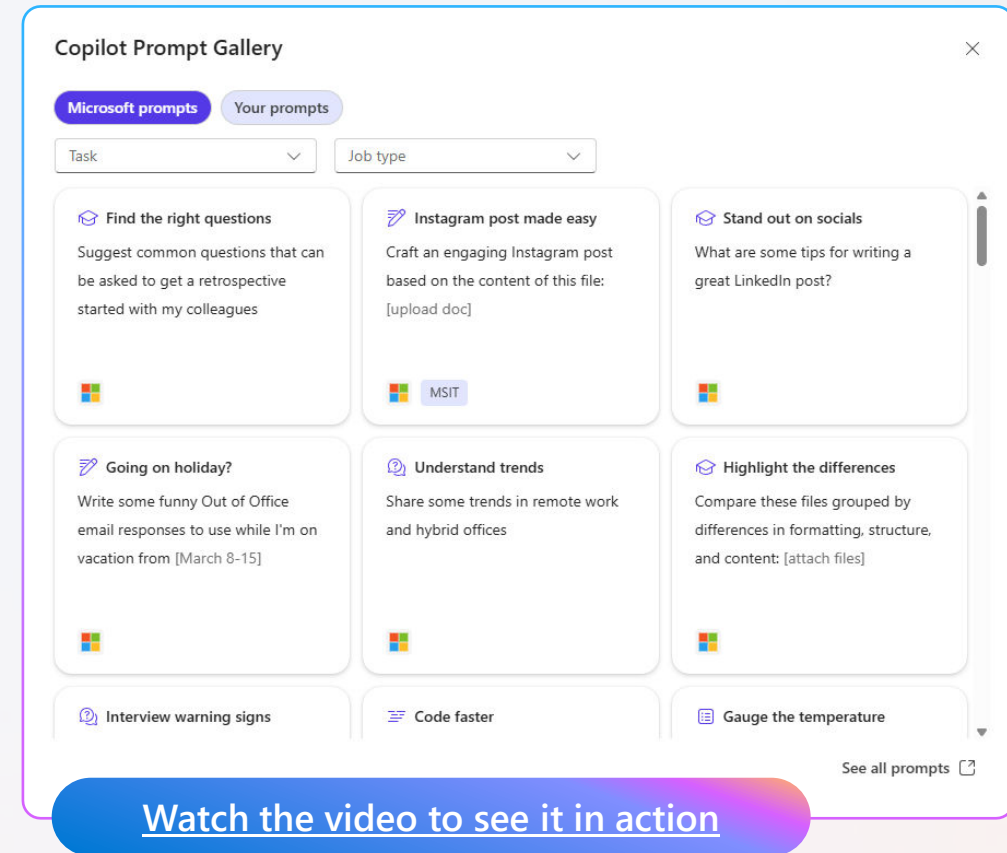
For example, use the prompt: *"Graph the first 20 numbers in Fibonacci sequence"*.

Discover and share Copilot prompts

Copilot Prompt Gallery helps you find prompting inspiration so you can take greater advantage of Copilot in your daily work.

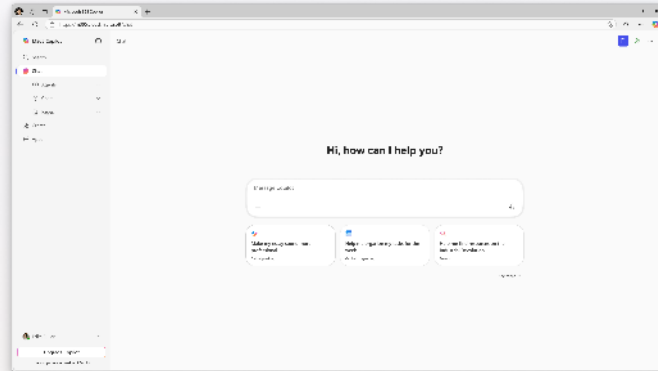
- Explore the curated selection of Copilot prompts
- Save your favorite prompts
- Share your favorite prompts with colleagues
- Find prompting inspiration from others

Access the Prompt Gallery in Copilot Chat by selecting "See more" under the initial prompt suggestions and selecting the Prompt Gallery button at the bottom of the list. Here, you'll see more Copilot prompts and your saved prompts.

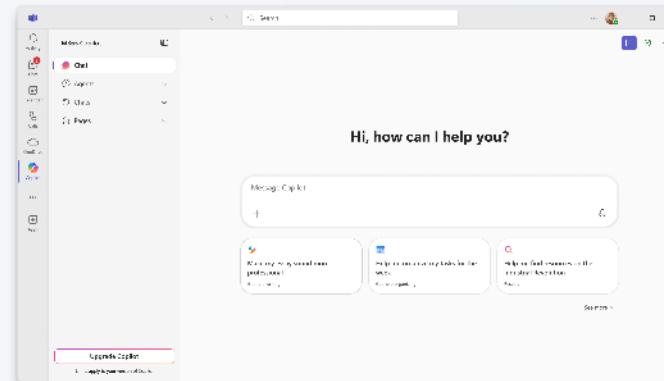


Access Copilot Chat from where you're working

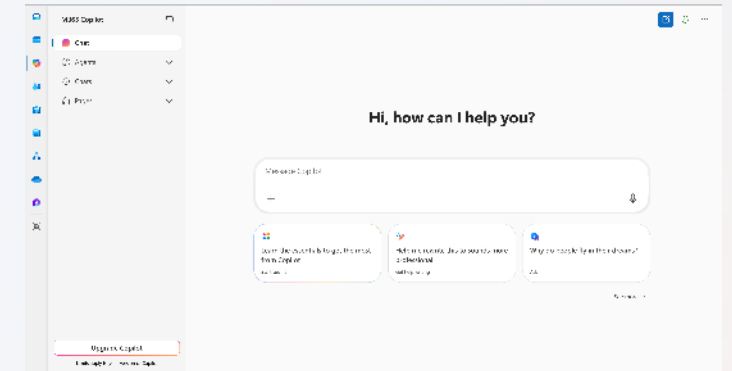
M365Copilot.com



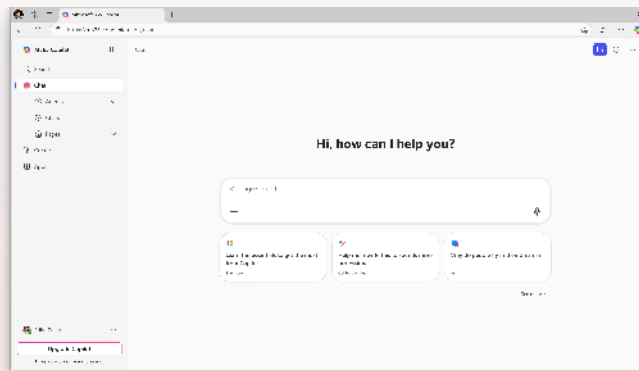
Teams app*



Outlook app*



Microsoft 365 Copilot app*



Edge browser sidebar

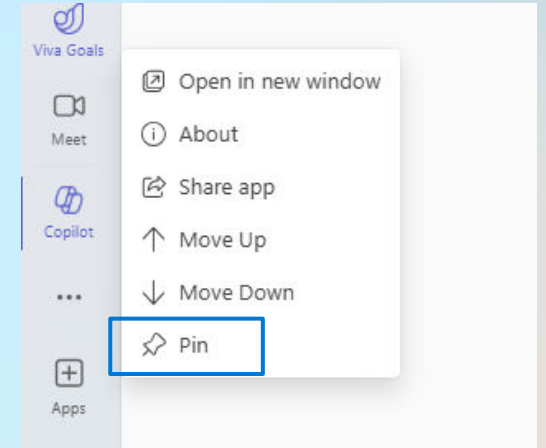
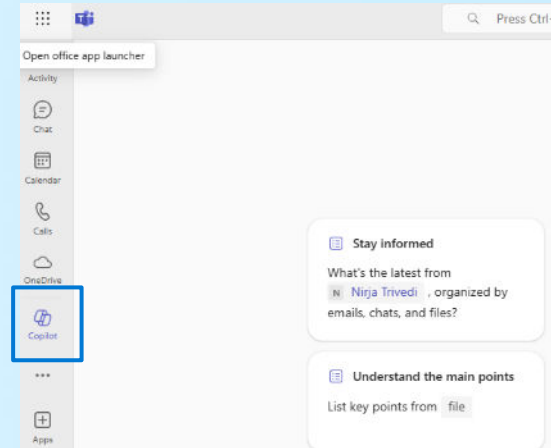
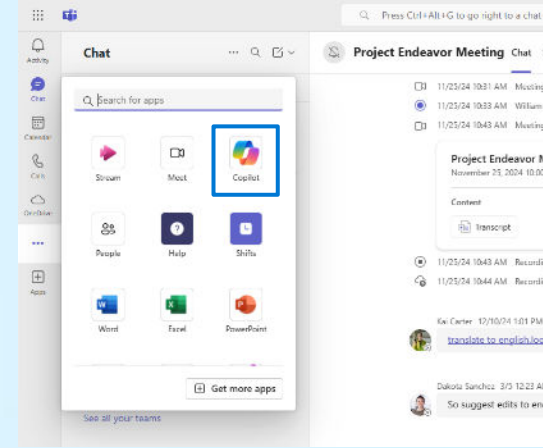
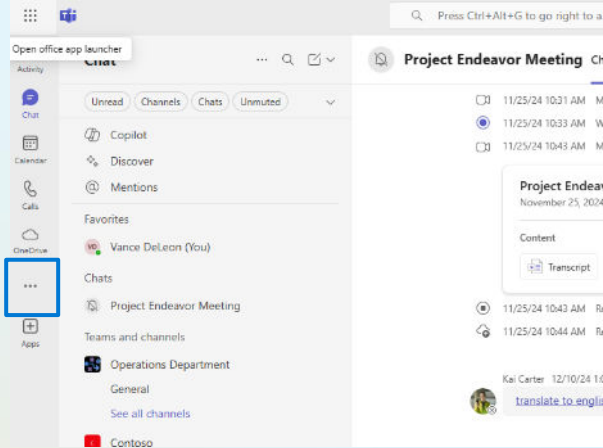


Microsoft 365 Copilot mobile app



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

Pin Copilot Chat in your Teams app



1. Select the ellipses in the left sidebar in the Teams app to open the app library.

2. Select Copilot to open Copilot Chat.

3. Right click on Copilot in the left sidebar in the Teams app.

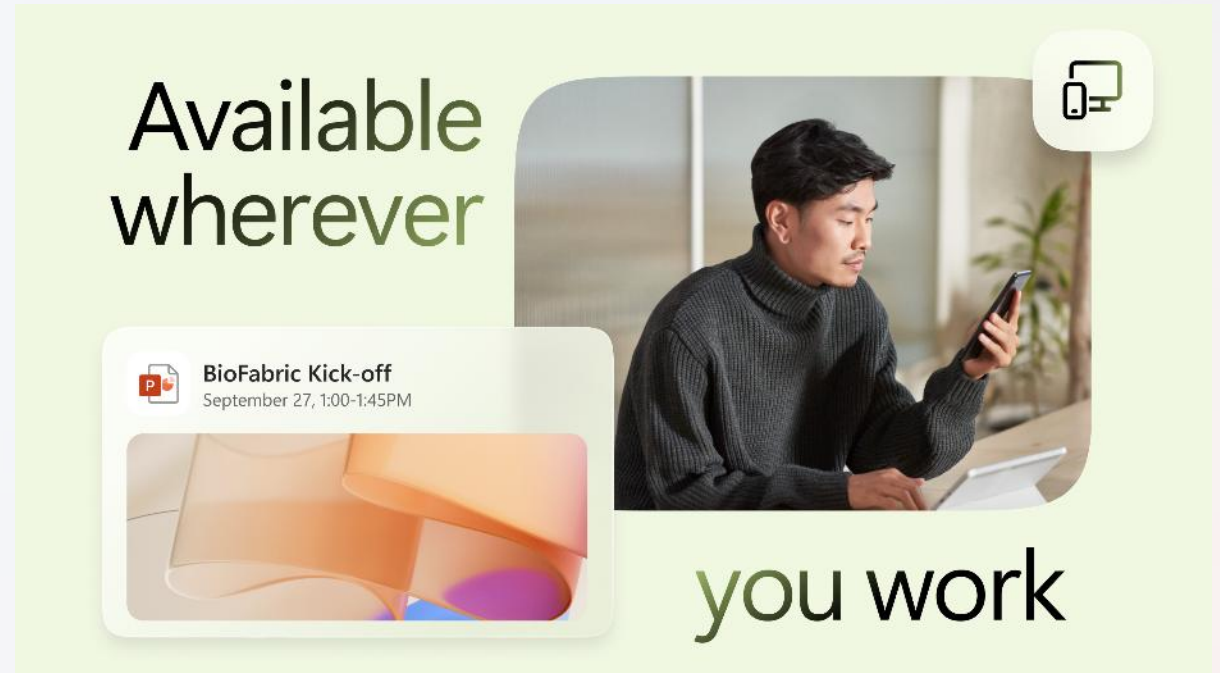
4. Select "Pin" to pin Copilot Chat to the sidebar for easy access.

Use Microsoft 365 Copilot on the go

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



[Download Microsoft 365 Copilot App | Microsoft 365](#)



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!

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 Help & Learning site](#) for short videos and articles on getting started.
- Join the [Microsoft 365 Copilot Community on LinkedIn](#) to get more Copilot Chat tips and product updates and engage with other users.