Recast

Copilot Integration Prerequisites

Last Modified on 2026-11-27

- **Application Workspace**: An active zone with API access available and network reachability from Power Automate.
- **API credential:** A client secret and the generated client-secret username from **Manage** > **System** > **API Access**.
- **Power Platform:** A Microsoft Dataverse environment (not Dataverse for Teams) and permission to create/publish an agent flow.
- **Copilot Studio:** Permission to create, configure, test, publish, and share agents.
- **End users:** Appropriate Microsoft Copilot access and permission to use the shared agent.
- **Governance:** Approval for the HTTP endpoint, connector combination, data loss prevention policies, and intended audience.

Security Considerations Before Starting

- Decide on the minimum set of datasets the agent is allowed to return.
- Choose whether the agent is for administrators only or for a broader end-user audience.
- Store the secret only in the secure authentication fields of the HTTP action or in an approved secret-management pattern. Never paste it into agent instructions, prompts, descriptions, variables, or responses.
- Set an expiration date that matches your credential-rotation policy. The Application Workspace secret value is displayed only once.
- Confirm that agent transcripts, flow run history, and returned payloads meet your organization's data handling requirements.