

AUTOMATE **Advanced** 60 MIN · UPDATED 2026-09-30

Deploy a field-service diagnostics agent.

Build a Copilot Studio agent that cross-references equipment manuals, service history, and telemetry to help technicians diagnose issues and order the right parts on the first visit.

MICROSOFT 365

SharePoint

Teams

WORKS WITH

Copilot Studio

Business Outcome

Fewer repeat truck rolls because technicians arrive with the right diagnosis and parts the first time.

Workflow Steps

Step 1: Consolidate the grounding sources

SharePoint

Bring equipment manuals, past service tickets, and any telemetry exports into a SharePoint library the agent can query together — the value here is cross-referencing all three, not just searching manuals.

Step 2: Build the diagnostic agent

Copilot Studio

In Copilot Studio, configure the agent to take a machine ID and symptom description, then return a ranked list of likely causes with the specific manual section and past ticket it's drawing on for each.

PROMPT

Machine ID PX-4471 is showing an intermittent E-04 fault and unusual vibration during startup. Based on the manual and this unit's last three service tickets, what are the most likely causes, ranked, and what parts would I need for each?

Step 3: Connect a parts recommendation

Copilot Studio

Have the agent map its top diagnosis to the specific part number and check current inventory status, so the technician knows before the visit whether to order ahead.

Step 4: Log every diagnosis against the actual outcome

SharePoint

Add a simple required field to the technician's close-out form — which ranked cause actually turned out to be correct — and feed completed tickets back into the SharePoint service history library the agent reads from. Skipping this step is the single easiest way for this agent to quietly stop improving.

✓ Check the work

- Compare the agent's top-ranked diagnosis to the technician's actual finding on a sample of visits — track the hit rate.
- Confirm cited manual sections and past tickets actually say what the agent claims before a technician relies on them.
- Watch for the agent recommending parts that don't match the specific model/variant of the equipment.



Expected Outcome

A Teams-accessible agent technicians can query in the field that returns a likely diagnosis, supporting evidence, and a parts recommendation.

Want help rolling this out across your team? **Go to Liminals.Tech** ■