

dakota marketplace

Dakota Marketplace in Microsoft Copilot Studio

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Questions? Contact support@dakota.com | dakota.com

Connect Dakota Marketplace in Microsoft Copilot Studio

This guide shows you how to connect Dakota Marketplace to an agent you build in your own Microsoft Copilot Studio environment. Setup takes about 15 minutes. Once it's connected, you can ask questions in plain language and the agent answers with Dakota Marketplace data (firms, contacts, funds, deals, news and more) using your own Marketplace login.

Connection details at a glance

Server URL: <https://marketplace-mcp.dakota.com/mcp>

Authentication: OAuth 2.0, then Dynamic discovery

Sign-in: your Dakota Marketplace username and password

1 Before you start

Make sure you have the following:

- **Access to Microsoft Copilot Studio** with permission to create agents in an environment. If you're not sure, ask your IT or Power Platform admin.
- **An active Dakota Marketplace login.** The agent only returns data your Marketplace account can see.
- **Permission to use custom MCP servers.** Some organizations block custom connectors with Power Platform data policies. If you hit a data policy error, your admin will need to allow the Dakota Marketplace connector.
- **Copilot Studio capacity.** Conversations with your agent use your organization's Copilot Studio credits, not Dakota's.

2 Create your agent

1. Go to copilotstudio.microsoft.com and sign in with your work account.
2. Pick the environment you want to build in, using the environment selector at the top of the page.
3. Select **Create**, then **New agent**. If Copilot Studio opens a chat-based setup, skip it and go straight to configuring the agent.
4. Enter a **Name**, such as Dakota Marketplace Assistant.
5. Enter a **Description**, such as: Answers questions about allocators, investment firms, contacts, funds, deals and industry news using Dakota Marketplace data.
6. In **Instructions**, paste the recommended instructions from section 5.

7. Select **Create**.
8. Open the agent's **Settings** and make sure **generative orchestration** is turned on. MCP tools only work with generative orchestration. New agents usually have it on already.

Copilot Studio's menus change from time to time, so a label may look slightly different from what's shown here.

3 Add the Dakota Marketplace MCP server

1. In your agent, open the **Tools** page.
2. Select **Add a tool**, then **New tool**.
3. Select **Model Context Protocol**. The MCP setup wizard opens.
4. Fill in the server details (see the table below).
5. Under authentication, select **OAuth 2.0**, then **Dynamic discovery**.
6. Select **Create**, then **Next**.
7. In the **Add tool** dialog, select **Create a new connection**. When the sign-in window opens, sign in with your **Dakota Marketplace username and password**.
8. Select **Add to agent**.

Field	What to enter
Server name	Dakota Marketplace
Server description	Dakota Marketplace private markets intelligence: allocator and investment firm profiles, contacts, fund strategies, holdings, transactions, institutional searches, public plan minutes, Form ADV and Form D filings, job changes, fundraising news and venue recommendations.
Server URL	https://marketplace-mcp.dakota.com/mcp

You won't need a client ID or secret

Dynamic discovery lets Copilot Studio register itself with the Dakota Marketplace sign-in service automatically. If the sign-in window doesn't appear, allow pop-ups for copilotstudio.microsoft.com and try again.

4 Test your agent

1. Open the **Test** pane in Copilot Studio.
2. Ask a simple question, for example: Find family offices in New York that invest in private equity.
3. If the agent asks you to connect or sign in, follow the prompt and use your Dakota Marketplace credentials.

4. You should see Dakota Marketplace results within a few seconds. Questions that need several lookups can take longer.
5. To confirm the agent used Dakota Marketplace, check the test pane's activity view for Dakota Marketplace tool calls.

5 Recommended agent instructions

Copy the text below into your agent's **Instructions** field. It keeps answers grounded in Dakota Marketplace data and makes results easier to read. You're welcome to adjust the tone or format for your team.

You are Dakota Marketplace Assistant. You help investment professionals research the private markets using Dakota Marketplace data: institutional allocators, investment firms, contacts, fund strategies, holdings, transactions, institutional searches (mandates), public plan minutes, Form ADV and Form D filings, job changes, fundraising news, and Dakota venue recommendations.

How to answer

- Use the Dakota Marketplace tools for every question about firms, people, funds, deals, filings, news, events or venues. Do not answer these from general knowledge.
- Follow each tool's built-in guidance. Look up exact filter values with `get_lookup_values`, and call `get_output_fields` before any tool that returns a list of records.
- If a request is ambiguous (geography, firm type, size or asset class), make a sensible first attempt, then offer to refine it.
- If a search returns nothing, say so and retry once with broader filters (for example a metro area instead of a city, or a broader asset class).

How to present results

- Start with a one-sentence summary, including the total number of matches when the tool provides it.
- Show records in a table with a few useful columns (such as name, type, location, AUM or title).
- When more results are available, say so and ask before fetching the next page.
- Never invent firms, people, figures, emails or phone numbers. Report only what the tools return, and note that the data comes from Dakota Marketplace.

Sign-in and access

- If a tool says sign-in is required, ask the user to sign in with their Dakota Marketplace username and password, then retry the same request.
- Only share data returned for the signed-in user.

6 Starter prompts

Try these to exercise different parts of Dakota Marketplace. You can also add them to your agent's **suggested prompts** so they show up as one-click buttons.

Title	Prompt	Data it uses
Pensions in private credit	Find public pension funds in the Midwest that invest in private credit.	Accounts
Family office decision-makers	Who are the CIOs at family offices in the San Francisco Bay Area?	Contacts
Fundraising news	Summarize this month's private equity fundraising news.	News
Open buyout funds	Which firms have private equity buyout funds that are open and fundraising now?	Fund strategies
Recent deals	List closed software buyout transactions from 2026.	Transactions
Job moves	Who has joined (Firm Name) this year?	Job changes

7 Share in Teams or Microsoft 365 Copilot

1. Select **Publish** in Copilot Studio.
2. Go to **Channels**, select **Teams and Microsoft 365 Copilot**, and add the channel.
3. Share the agent with colleagues. Your Teams admin may need to approve it first.
4. Each person signs in with **their own** Dakota Marketplace credentials the first time the agent uses the tool.

Colleagues need their own active Marketplace account to access the MCP Connector.

Keep sign-ins personal

Set the Dakota Marketplace tool to use each end user's credentials, not yours, so everyone uses their own Marketplace login. Don't share a single Marketplace account across your team.

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Troubleshooting

What you see	Likely cause	What to do
You can't find New tool or Model Context Protocol	You don't have permission to build agents in this environment, or MCP isn't available there.	Confirm you have maker access, try a different environment, or ask your Power Platform admin.
An error mentions a data policy when you add the tool or chat	Your organization's Power Platform data policy blocks custom connectors or MCP servers.	Ask your admin to allow the Dakota Marketplace connector in that environment's data policy.
The sign-in window doesn't open, or closes right away	Your browser is blocking pop-ups.	Allow pop-ups for copilotstudio.microsoft.com, then select Create a new connection again.
Sign-in fails with your Marketplace credentials	The username or password is wrong, or the Marketplace account isn't active.	Confirm you can log in to Dakota Marketplace directly, then contact the Dakota Customer Success team at membership@dakota.com
The agent answers without Dakota data, or says it can't reach Marketplace	Generative orchestration is off, the tool isn't added, or the instructions are missing.	Turn on generative orchestration, check that Dakota Marketplace appears under Tools, and paste the recommended instructions.
"This agent is currently unavailable. It has reached its usage limit."	Your organization's Copilot Studio capacity (Copilot Credits) has run out. The test pane can keep working even when published channels are blocked.	Ask your admin to add Copilot Studio capacity or pay-as-you-go billing for the environment.
You're asked to sign in again, or see an authorization error after it worked before	Your connection to Dakota Marketplace expired.	Open Tools, select Dakota Marketplace, and reconnect using your Marketplace login.
No results, or fewer than expected	The filters are too narrow.	Broaden the question: use a metro area instead of a city, a broader asset class, or ask "how many" first.
The response is slow or times out	The question needs several lookups in a row.	Split it into smaller questions and try again.