PRIVCO AI INTEGRATION · SETUP GUIDE

Add PrivCo to Microsoft Copilot Studio

Your Copilot Studio maker adds PrivCo as a tool in an agent in your own Microsoft tenant. People then ask that agent about private companies, financials, funding, deals and executives, in the test pane or wherever your organization publishes it.

Last reviewed 13 October 2026. Steps follow each vendor's documentation as of that date; menus change, so contact support@privco.com if a step looks different.

Before you start

On the PrivCo side

- A PrivCo List Builder or Power account. The AI integration is not included with Researcher.
- Your PrivCo email and password.

On your side

- A Microsoft Copilot Studio licence and maker access to the agent you want to extend.
- Generative orchestration turned on for that agent.
- A Power Platform data policy that allows the connector. Ask your Power Platform admin if you are not sure.

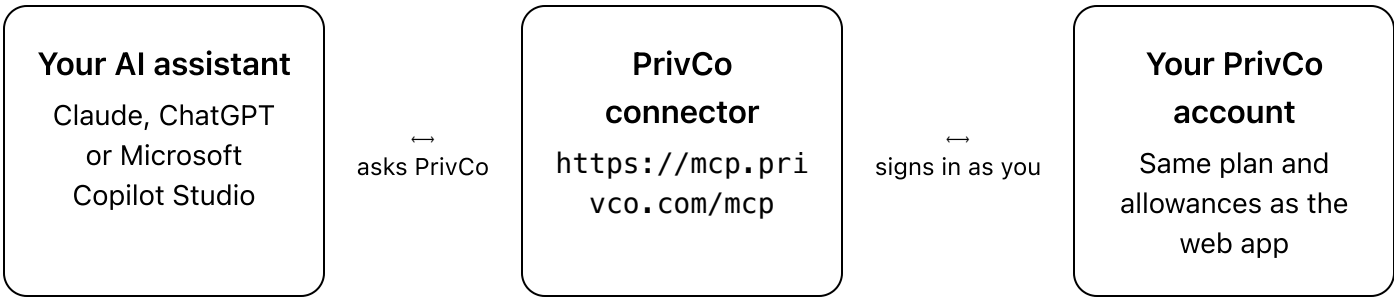
Microsoft Copilot Studio, not the Copilot app. The consumer Microsoft Copilot app has no option to add MCP servers. PrivCo works in agents built in Microsoft Copilot Studio, which your organization can publish to Microsoft Teams and Microsoft 365 Copilot.

PrivCo server address

`https://mcp.privco.com/mcp`

How it connects

Your AI tool talks to PrivCo through the PrivCo connector, signed in as you. You connect once; after that the AI tool calls PrivCo whenever a question needs it.



The setup at a glance

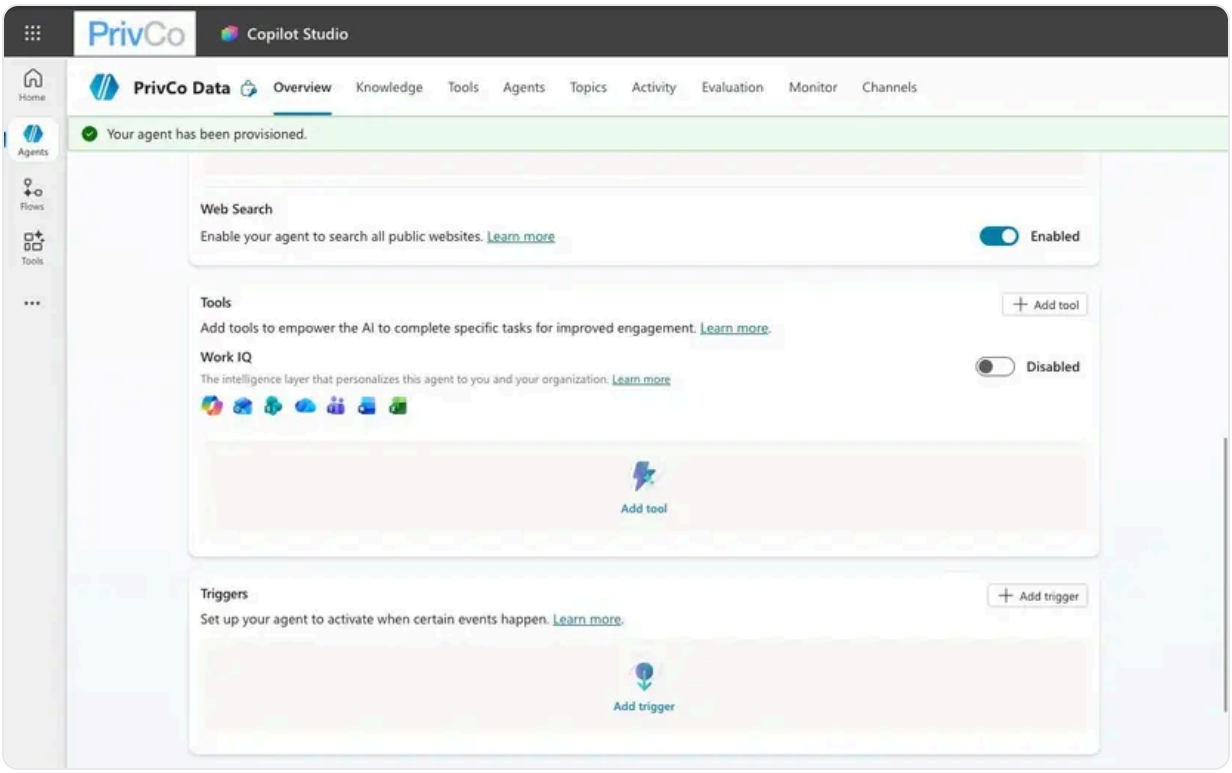
1. Open your agent in Copilot Studio
2. Add a new tool
3. Choose Model Context Protocol
4. Enter the PrivCo details
5. Set authentication to OAuth 2.0 with dynamic discovery
6. Create a connection and sign in to PrivCo
7. Add the tool to the agent
8. Test in the test pane
9. Publish the agent

Steps

Add PrivCo to your agent

1. **Open your agent in Copilot Studio**

   Open Copilot Studio and select the agent that should use PrivCo.



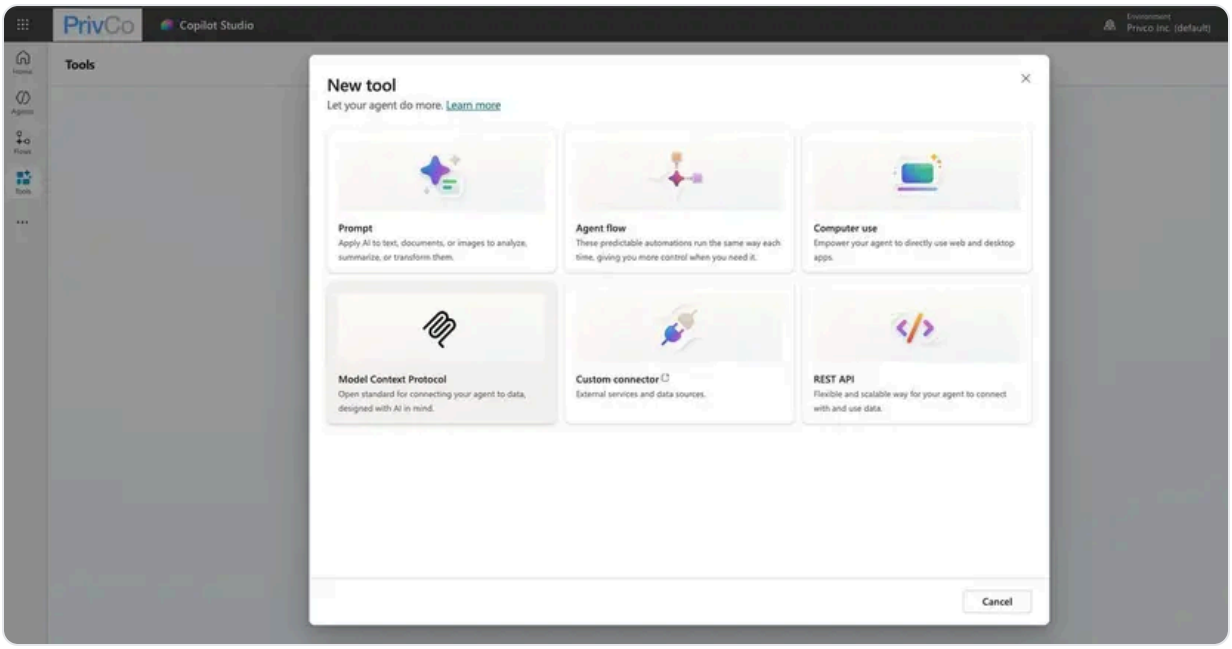
An agent's Overview, with the Tools card and Add tool.

2 Add a new tool

Go to **Tools**, click **Add a tool**, then **New tool**.

3 Choose Model Context Protocol

Select **Model Context Protocol**.



New tool: choose Model Context Protocol.

4

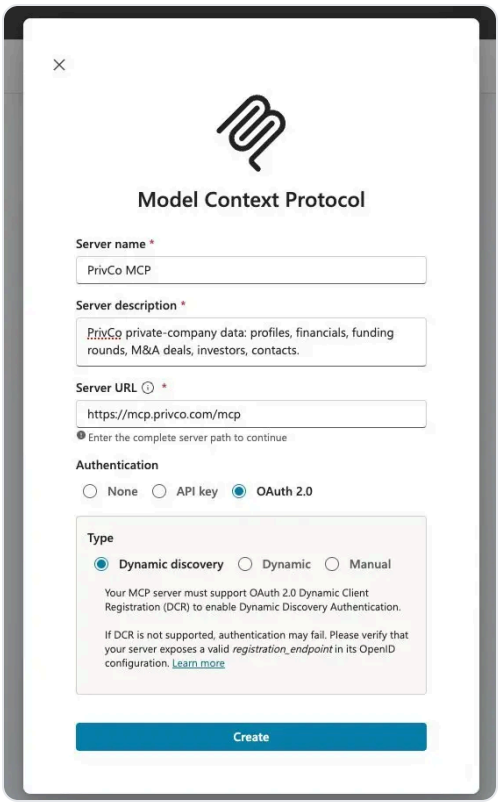
Enter the PrivCo details

- Server name: **PrivCo**

  Server description:

  “Private company financials, funding, deals and executives from PrivCo”

  Server URL: **`https://mcp.privco.com/mcp`**



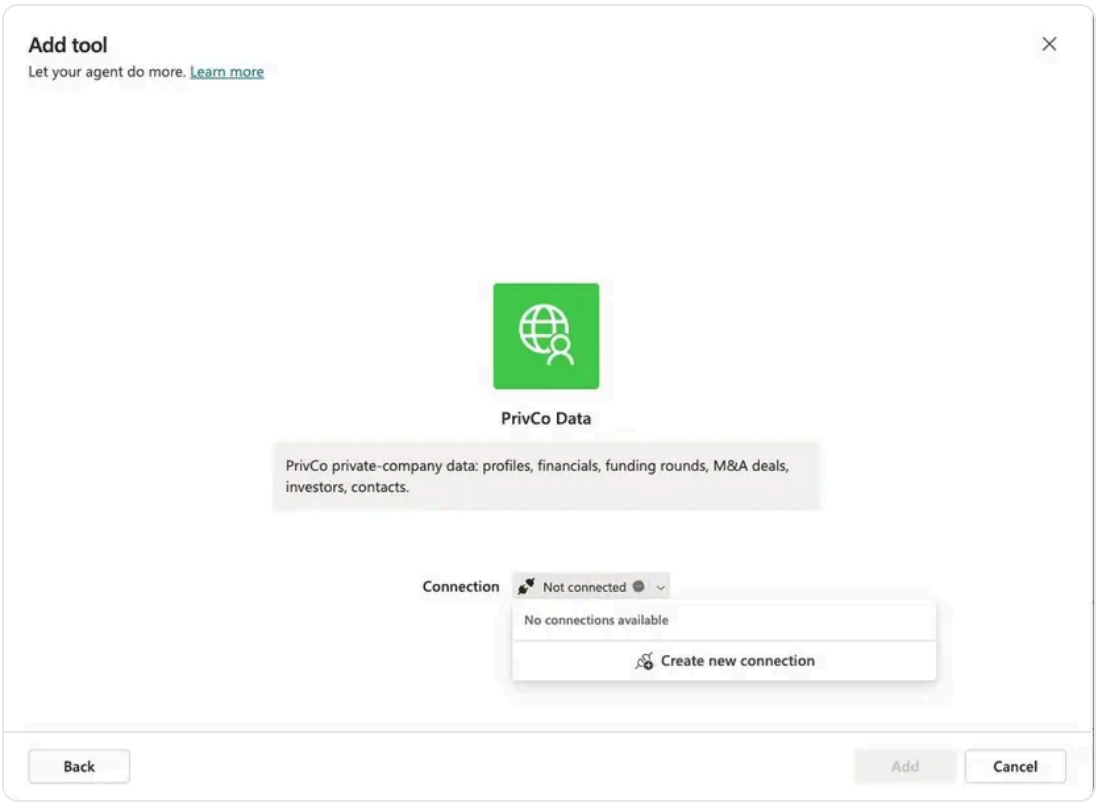
The Model Context Protocol panel: server name, description and URL, then OAuth 2.0 with Dynamic discovery.

5 **Set authentication to OAuth 2.0 with dynamic discovery**

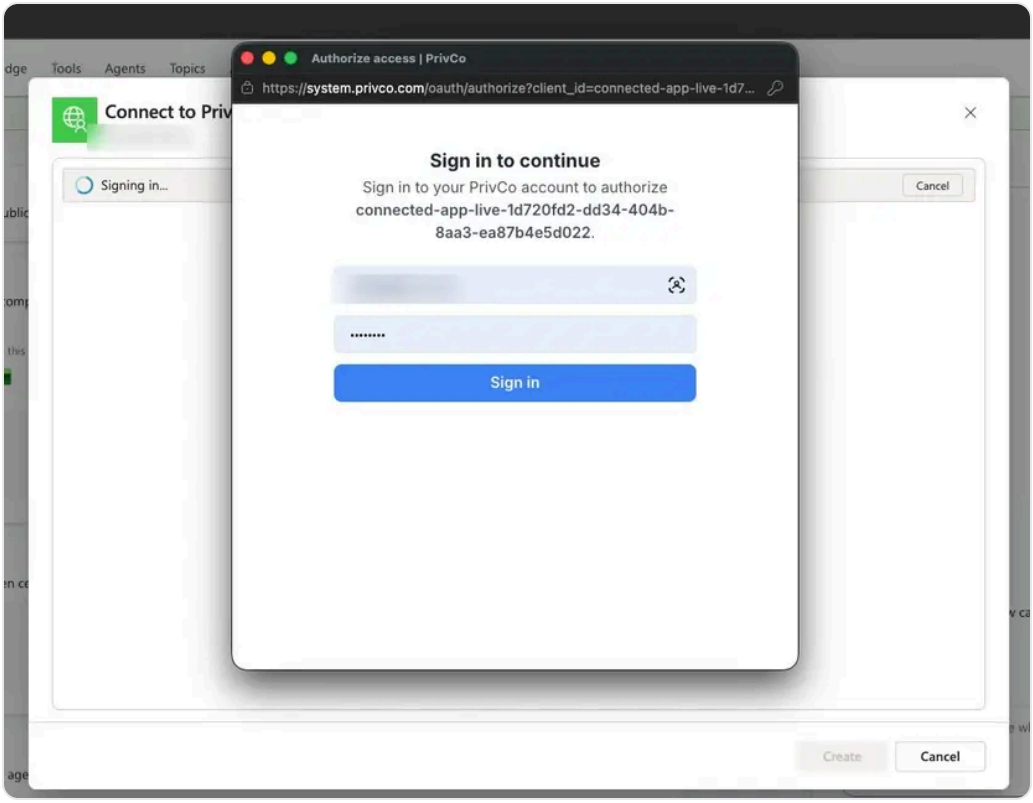
Under **Authentication**, choose **OAuth 2.0** and the type **Dynamic discovery**, then click **Create**.

6 **Create a connection and sign in to PrivCo**

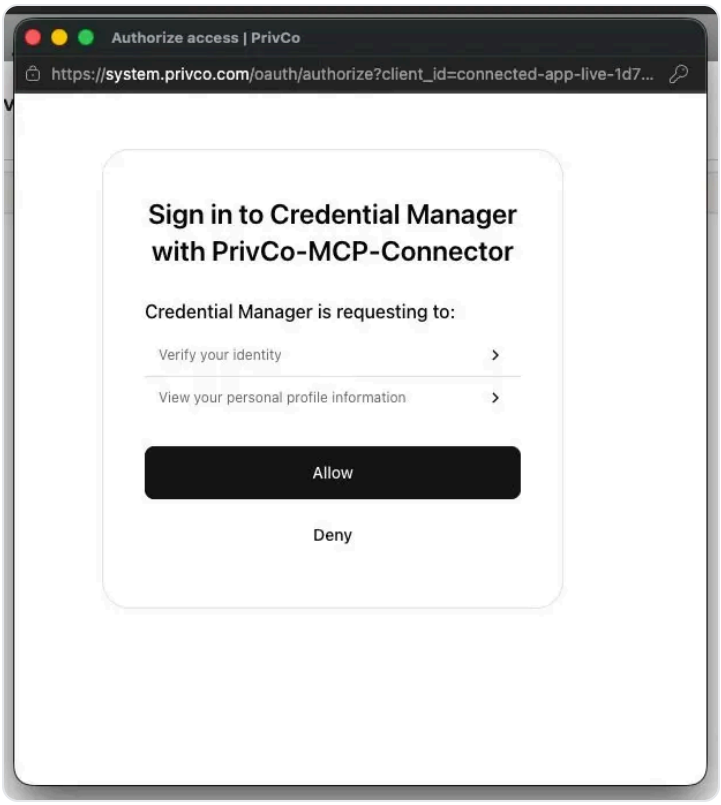
Choose **Create a new connection**. A PrivCo sign-in page opens: sign in with your PrivCo email and password, then click **Allow**.



Connection → Create new connection.



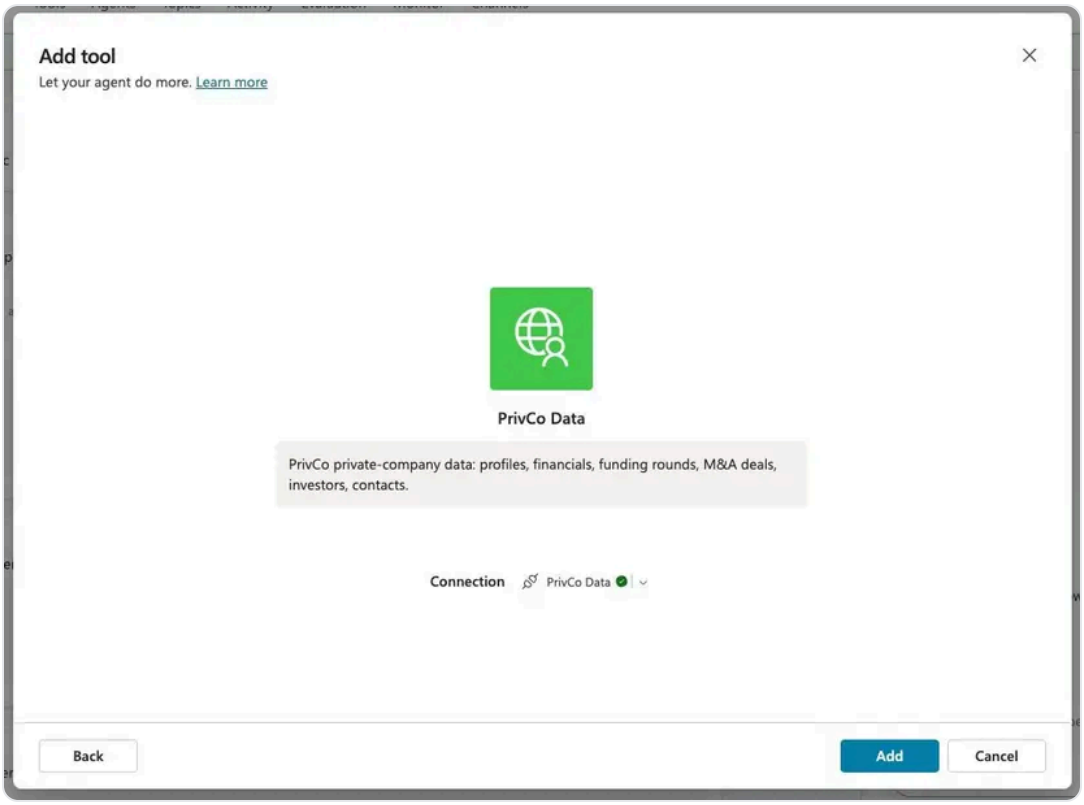
The PrivCo sign-in page opens in a pop-up.



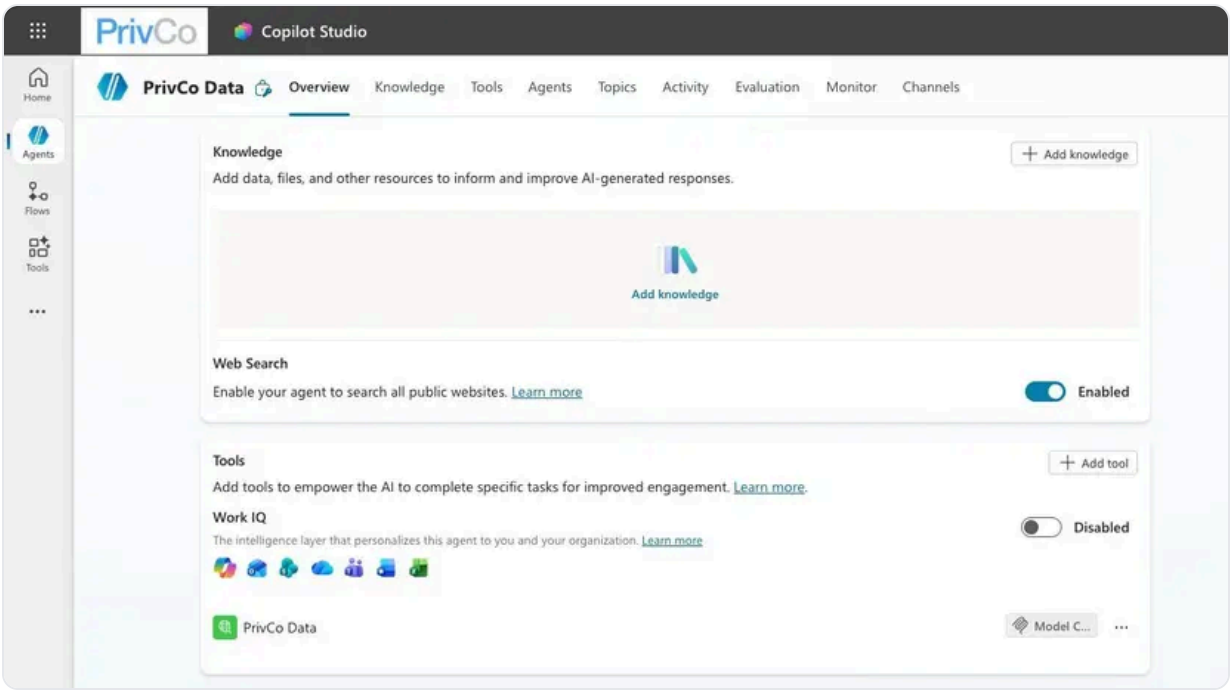
Approve access: click Allow.

7 Add the tool to the agent

Click **Add to agent**.



The PrivCo tool with its connection ready: click Add.



PrivCo listed under the agent's Tools.

8 **Test in the test pane**

Ask a question in the agent's test pane (see “First prompt to try” below) and check that the agent calls PrivCo.

9 **Publish the agent**

Publish to Microsoft Teams or Microsoft 365 Copilot according to your organization's policy.

First prompt to try

Using PrivCo, find the five largest private food manufacturing companies in Wisconsin by revenue, with each company's estimated revenue and founding year.

You should see the AI tool call PrivCo, then answer with figures from the PrivCo profile. AI tools can make mistakes, so check important figures on the PrivCo company profile.

What to ask next

Using PrivCo, show multi-year revenue estimates and the executive team for the largest of those companies.

Using PrivCo, find private logistics companies in Illinois with 200 to 1,000 employees and list the CFO for each.

Using PrivCo, which private companies in Florida and Georgia raised funding in the last 90 days?

More examples by role: privco.com/ai-integration

Your allowance

- The AI integration counts the unique company profiles opened each month: **100** on List Builder and **500** on Power (adjustable on Power).
- Searches, matching and lists do not use profiles. Opening the same company again in the same month does not count again.
- Revealing an email, phone number or LinkedIn profile uses a contact credit. The AI tool asks you before it does.
- When the allowance is used up, the AI tool shows a clear message. It resets each month.
- If your account also has the PrivCo data API, the two share one allowance.

Troubleshooting

The PrivCo sign-in page keeps coming back

Sign out of PrivCo at system.privco.com, sign back in, then connect again. If it still loops, close the tab, open a new chat and repeat the connection step.

The AI tool says PrivCo needs a paid subscription

Your PrivCo plan does not include the AI integration. It is included with List Builder and Power; see privco.com/pricing.

The AI tool says the monthly allowance is used up

Your account has opened its monthly number of company profiles. Searches still work, and the allowance resets next month. Power customers can ask support@privco.com to adjust it.

The AI tool answers without using PrivCo

Mention PrivCo in the question. Check that the PrivCo tool is added to the agent and enabled, and that generative orchestration is turned on.

The connection is blocked by a data policy

Your Power Platform admin needs to allow the connector in the data policy for the environment that holds the agent.

For IT and admins

- The maker adds PrivCo once, in your own tenant. Publishing to Teams or Microsoft 365 Copilot follows your organization's usual approval process.
- Requirements: a Copilot Studio licence, generative orchestration on for the agent, and a Power Platform data policy that allows the connector.
- PrivCo accounts are for one person each. In the tool's connection settings, choose **End user credentials** so that each person who uses the agent signs in with their own PrivCo List Builder or Power account, rather than sharing the maker's.
- Each person signs in with their own PrivCo account on PrivCo's sign-in page and approves access. No API key is stored in the AI tool.
- All 17 PrivCo tools read data only. PrivCo does not train models on your prompts; your AI provider's settings control training, so turn model-training options off if your policy requires it.
- To turn the AI integration off for a user, email support@privco.com.

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