

# Case Management Agent Lab in Dynamics 365 Customer Service

## Introduction

The Case Management Agent in Dynamics 365 Customer Service uses generative AI to automate key parts of the case lifecycle—such as creating cases from customer conversations (chat, voice, or email), updating case details in real time, and suggesting or executing follow-up and closure actions. It reduces manual data entry, improves case accuracy, accelerates resolution time, and enhances customer and agent experience. Administrators can configure which fields the AI predicts, which channels it operates on, and whether actions are autonomous or agent-approved. Overall, it drives greater service efficiency and consistency by streamlining high-volume case operations.

[Use Case Management Agent to create and update cases | Microsoft Learn](#)

[Use Case Management Agent to resolve cases \(preview\) | Microsoft Learn](#)

[Use autonomous follow-up and closure of cases | Microsoft Learn](#)

## Prerequisites:

- User permissions need for configuration:
  - A user having Microsoft Copilot studio license for authoring Microsoft Copilot studio agent
  - A user with System administrator role on the environment
  - A user with Customer Service Representative role on the environment and should have Dynamics 365 Customer Service license.
- Environment setup:
  - Microsoft Copilot studio message capacity assigned to the environment.
  - Enable [AI form fill assistance](#) in the Power Platform admin center application. (Environment > Settings> Feature)
  - Enable [Move data across regions for Copilots and generative AI features](#) in the Power Platform admin center application as applicable.
  - Enable audit history on environment & case table.
  - Environment should have Dynamics 365 Customer service along with unified routing enabled.

- Dynamics 365 Customer Service configurations:
  - Queues & teams set up — create Card Closure Team queue and team.
  - A mailbox is configured to receive email. Automatic record create & update rules are setup to create case based on incoming email. [Set up rules to automatically create or update records | Microsoft Learn](#)
  - Mailbox should be enabled for the Customer Service Representative
  - Knowledge base (KB) article for card cancellation advisory ready and published. Refer to appendix section for sample content.
- Case Management Agent configurations:
  - Application registration in [Microsoft Entra](#) along with secret. Perform the steps to [register a single-tenant application registration](#) and [Create a client secret](#).
  - Email of Shared mailbox. Go to [Microsoft 365 admin center](#) and do the steps 1 through 4 in [Create a shared mailbox](#). Copy the email ID of the shared mailbox.

## Scenario: Credit Card Cancellation

### Step 1: Customer Request

- A customer sends an email to the bank requesting cancellation of their credit card.

### Step 2: Automated Case Creation

- The system automatically creates a case in Dynamics 365 Customer Service.
- Key fields (Customer Name, Card Number, Request Type) are populated using AI extraction from the email.
- The case is routed to the **Card Closure Team** based on detected intent.

### Step 3: Pre-Cancellation Advisory

- AI Agent prepares a draft Pre-Cancellation Advisory Email using a predefined template.
- A human agent reviews and sent the email to customer outlining implications of card cancellation (e.g., outstanding dues, impact on linked services).

### Step 4: Customer Confirmation

- The customer acknowledges the advisory and confirms the request to proceed with card cancellation.

## Step 5: AI-Assisted Closure

- The AI agent sends a **confirmation email** stating the card has been cancelled.
- The email also requests the customer's confirmation to close the case.

## Step 6: Case Closure

- Upon receiving the customer's confirmation, the AI agent automatically closes the case and updates the status in the system.

# Configurations

## Step 1: Configure global settings

Perform the following steps using user having system administrator rights in the environment.

### a) Create an application user in Power Platform admin center

The application user you create in Power Platform admin center is used to receive and send responses. Perform the following steps:

1. Sign in to [Power Platform admin center](#) and perform the steps in [Create an application user](#) to create a new application user.
2. Assign the Customer Service Representative role to the application user.

The screenshot displays the Power Platform admin center interface. The main pane shows a list of application users under the path 'Environments > CustomerServiceAgents > Settings > Application users'. The list includes columns for Name, App ID, and a status icon. The user '# CustomerServiceAgent - CaseAgent' is highlighted with a green checkmark.

Name	App ID
Copilot Omnichannel PVA Demo Bot (Microsof...	8a8ba3e9-d6cf-4eac-b870-cdcd20f37529
# Portals-CustomerServiceAgentWebsite	e286c705-03da-40dd-9cb5-dc517649068a
Microsoft Flow	0eda3b13-ddc9-4c25-b7dd-2f6ea073d6b7
Power Apps Checker Application	c9299480-c13a-49db-a7ae-cdfe54fe0313
Microsoft Forms Pro	19dd5b37-d116-48cb-90d2-4aa56696cba1
# CustomerServiceAgent - CaseAgent	c50eb271-e0b2-4b16-bf25-7806ab13e2e2

The right-hand pane shows the 'Details' for the selected user '# CustomerServiceAgent - CaseAgent'. It includes fields for Name, Microsoft Entra ID app name, App ID, State, and Security roles(1). The Security roles table shows the role 'Customer Service Representative' with a 'Direct' type and 'org3c2ab132' business unit.

Name	Type	Business unit
Customer Service Representative	Direct	org3c2ab132

**b) Assign a shared mailbox to the application user**

1. Set the shared mailbox id to the email ID as email address to application user created in step a)

**c) Connect and authenticate connection references**

1. In [Power Apps](#) select **Solutions** and then select **Default Solution**.
2. In the **Objects** pane, search for and select **Connection References**. The list of existing connection references appears.
3. Select **Case Processing Agent CDS Connection** or **Case Management Agent CDS Connection**.
4. In the **Edit Case Processing Agent CDS Connection** or **Case Management Agent CDS Connection** pane that appears, do the following steps:
  1. Select **New connection** from the **Connection** dropdown. The **New connection** page appears in a new tab. Perform the following steps:
    1. Search and select **Dataverse**.
    2. Select OAuth as the authentication type and then select **Create**.
    3. In the pop-up, select the admin account to authenticate the connection.
    4. After the connection is created, the status of the connection reference changes to **Connected**.
5. In the **Edit Case Processing Agent CDS Connection** pane, from the **Connection** dropdown, select the admin connection that you created.
6. Repeat the steps to authenticate the **Case Management Agent MCS Connection** connection reference. Make sure to select **Microsoft Copilot Studio** instead of **Dataverse** when you're creating a new connection.
7. For **Microsoft Copilot Studio for Sales** or **Microsoft Dataverse CDS Connection**, in the edit pane that appears, the admin id appears in the **Connection** dropdown. Select the admin ID. You don't have to create a new connection.

You may have to repeat step 7 for all the **Microsoft Dataverse CDS Connections** available in the environment.

**d) Enable flows**

In Power Automate, make sure that the **Invoke case management agent** and **Call custom agent** flows are enabled. Learn more in [Turn on a flow](#).

#### e) Add connection references in Copilot Studio

In Copilot Studio, perform the following steps:

1. Select **Agents** and then select **Case Management Agent**.
2. In the Case Management Agent page, select **Publish**.
3. In the Case Management Agent page, do the steps to [View connections on the Connection Settings page](#). **Microsoft Dataverse** and **Call custom agent** appears on the **Manage connections** page.
  1. For Dataverse, add a new connection reference using service principal authentication to establish the identity and authorization framework for Case Management Agent. Perform the following steps:
    - Select **Connect** for **Microsoft Dataverse**.
    - On the page that appears, select ... > **Add new connection**.
    - Select Service Principal as the authentication type.
    - Specify the **Client ID**, **Client Secret**, and **Tenant ID** of the application user created for case management agent.
  2. For **Call custom agent**, you can use the **OAuth** authentication.
    - Select **Connect** for **Call custom agent**.
    - On the page that appears, select ... and then select the admin connection.
    - Select **Submit**. After the connection is created, the status of the connection reference changes to **Connected**.

#### f) Set an application user for the case management agent

Select the application created in step a) and click on save.

##### Set an application user for the case management agent

Select an application user to be used to send and respond to customer emails and own autonomous cases. If the user you configured in the above steps does not appear, try refreshing these settings.

Application user \*

# CustomerServiceAgent - Case... ▾

## g) Enable follow up and closure Power Automate flows

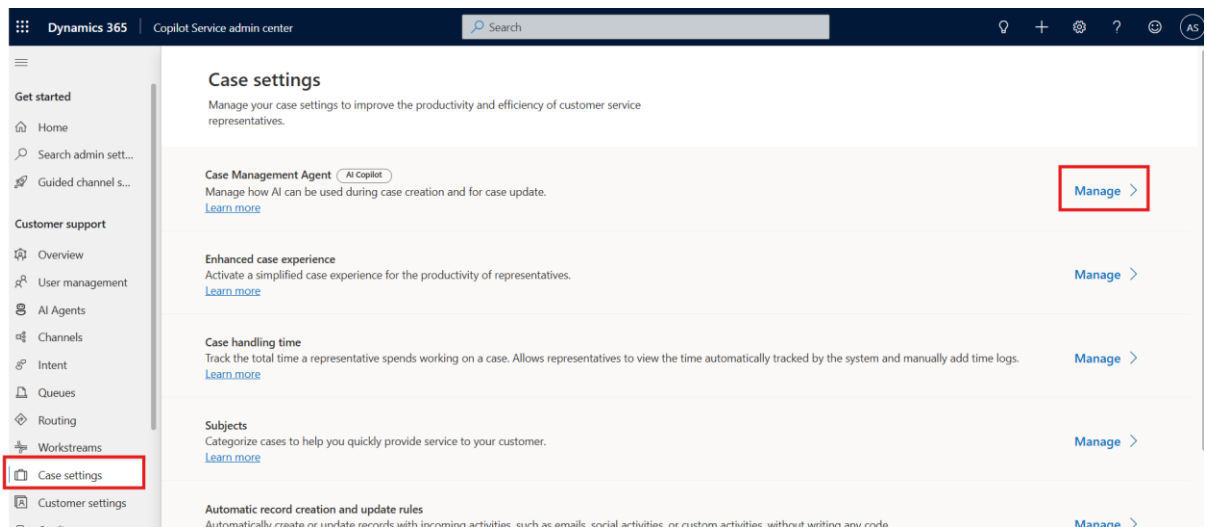
In Power Apps, make sure that the **CSCaseClosure Agent Flow**, **CSCaseFollowup Agent flow**, and **CSCaseClosure Representative Flow** are connected to Microsoft Dataverse and Microsoft Copilot Studio.

1. Navigate Default solution
2. In **Objects**, search for and select **Cloud flows**. The default Cloud flows in the organization are displayed.
3. Select edit for each of **CSCaseClosure Agent Flow**, **CSCaseFollowup Agent flow**, and **CSCaseClosure Representative Flow**. The connection status of the flow should be **Connected**.

## Step 2: Auto update case field

In Copilot Service admin center, configure the AI agent to predict and update case fields after a conversation ends or when processing an incoming email.

1. In **Customer support**, select **Case settings**.
2. On the **Case settings** page, select **Manage** for **Case Management Agent**.



3. On the **Case Management Agent** page, select **Case creation and update with autonomous AI assistance**.


[Case settings](#)

## Case Management Agent AI Copilot Pay-as-you-go


Manage how AI can be used during case creation and for case update. [Learn more](#)

ⓘ This feature is currently supported in a limited number of languages. See the [full list of supported languages](#). Copilot responses in unsupported languages have not been tested for language accuracy. Make sure AI-generated content is accurate and appropriate before using it. [See preview terms](#)

**Global settings**  
Configure and select the application user, copilot recommended template, and default email template for case management.




 **Manage**

**Case creation and update with autonomous AI assistance (preview)**  
Manage how AI can be used during case creation and for case update.

 **Manage**

**Case Resolution**  
Manage how AI can be used for case resolution.

- In the page that appears, in **Case update by AI agent (any channel)**, select **Create**. Specify the following information:

 Save  Save and close  Refresh

[Case settings](#) > [Case Management Agent](#) > Case creation and update (preview)

## Case creation and update (preview) AI Copilot Pay-as-you-go

Set up how AI agents create and update cases based on customer service interactions. [Learn More](#)






ⓘ This feature is currently supported in a limited number of languages. See the [full list of Supported Languages](#). Copilot responses in unsupported languages have not been tested for language accuracy. AI-generated content may be incorrect [Read preview terms](#)

**Case update by AI agent (any channel)**

Use rules to define how AI agents should update existing cases. These rules can apply to cases created from any customer service channel at your organization

☒ Allow AI agent to override human edits during autonomous updates.

**Case update rules**

 **Create**  Delete  Activate  Deactivate  Refresh

Order	Rule	CreatedOn	Status
-------	------	-----------	--------

- A unique name for the rule. “Rules for email origin”
- Conditions for the AI agent to apply the rule. Configure rule for executing it only for cases from email origin.
- Fields in **Fields for AI prediction** that the agent predicts and updates when the conversation ends or from an incoming email. Select priority and sentiment fields for prediction.
- Click on **Save**

←

Save

Delete

Refresh

Edit rule - Unsaved

11/3/2025 11:55 PM

Active

Rules for case update with AI assistance

Rule

Details

Rule name \*

Rules for email origin

Define conditions

Condition that must pass to continue (pass if blank)

And

☐

Origin

Equals

Email

...

+ Add

Specify fields for AI prediction when this condition is met

Default fields for AI prediction aren't removable within a rule and are common to all rules. To edit the default fields list, please return to the main page .

Fields for AI prediction

Priority

Sentiment

Select more fields

## Step 3: Enable Configure Line of business, intent library and intent

### a) Turn on Customer Intent agent

In Copilot Service admin center, go to intent and Turn on Customer Intent Agent.

Dynamics 365

Copilot Service admin center

Search

Get started

Home

Search admin sett...

Guided channel s...

Customer support

Overview

User management

AI Agents

Channels

Intent

Customer Intent Agent (preview)

AI Copilot

Requires Microsoft Copilot Studio messages

Based on your data and rules, Copilot will identify intents and suggest content and actions for a variety of tasks like routing, representative conversations, and more. [Learn about Customer Intent Agent](#)

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This feature requires Microsoft Copilot Studio messages. [Learn more](#)

Turn on Customer Intent Agent

You'll still need to complete the setup below to use intent-based features.

On

Intent discovery insights

View data analytics and other insights about intent discovery.

Intent insights

Intent discovery

### b) Create Line of business

1. Click on Manage to Add Line of business

2. Click on “Add Line of business”, provide name and description and click on add to create a Line of business for “Card”

#### Add line of business

Add line of business which helps you better organize intents, user groups, etc. [Learn more.](#)

Name *	Card
Description *	This line of business for cards related service requests

Add

Cancel

3. Create case rules for cards line of business.

#### Edit rule

Specify the details and conditions for the selected line of business. The rule will apply only to new work items unless you check the box to apply it to historical data as well. [Learn more about intent family rules](#)

##### Rule Name \*

Card Case rules

##### Line of business \* ⓘ

Card

##### Work Item

Case



##### Conditions

Avoid conditions that overlap with other rules. For example: If a case is already associated with another line of business due to a previous rule, this new rule will not be applied to that case. Each work item can be used for one line of business during intent discovery.

And	Origin	Equals	Email	...
	Case Title	Contains	card	...
+ Add				

☐ Apply to historical data ⓘ

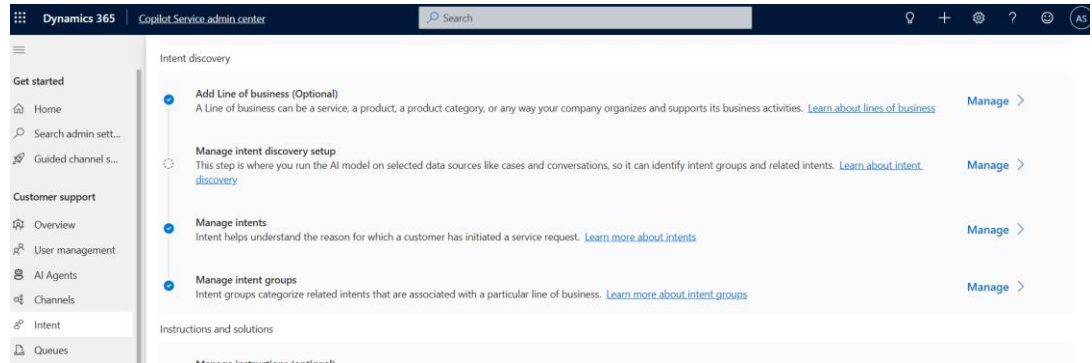
We'll use data from the past two months to run the historical intent discovery. This can take up to six hours.

Save and close

Cancel

### c) Create intent and map it to knowledge article

1. In Copilot Service admin center, go to intent and click on manage link of “Manage intents”



## 2. Create a new intent by providing below details

← Save Save and close Refresh

[Customer Intent Agent \(preview\)](#) > [Manage intents](#) >

**Intent details**

Name\* Credit Card Cancellation – Pre-Canc...

Intent group Select intent group ▼

Line of business\* Card ▼

Review status\* Approved ▼

Autonomous support ☒ Yes, let AI agents autonomously respond to customers about this intent

**Intent instructions (optional)**

- Provide intent instructions by click on edit instructions of newly created intent and add the instructions below as shown in the screenshot:  
 “When this intent is triggered, create a draft email for the customer using the knowledge article content related to Credit Card Cancellation. The email should:
  - Share the important pointers customers should consider before proceeding with credit card cancellation.
  - Use the knowledge article content as-is, without modifying or paraphrasing the information.
  - End the email by advising the customer to contact Customer Support if they still wish to proceed with the cancellation after reviewing the provided information.”

## Credit Card Cancellation – Pre-Cancellation Advisory Email

**Intent details**

Card  
Line of business | Source

Admin edited

Name\*Credit Card Cancellation – Pre-Canc...

Intent groupCredit Card

Line of business\* Card

Review status\*Approved

Autonomous support☒ Yes, let AI agents autonomously respond to customers about this intent

**Intent instructions (optional)**

EditDelete

When this intent is triggered, create a draft email for the customer using the knowledge article content related to Credit Card Cancellation. The email should:

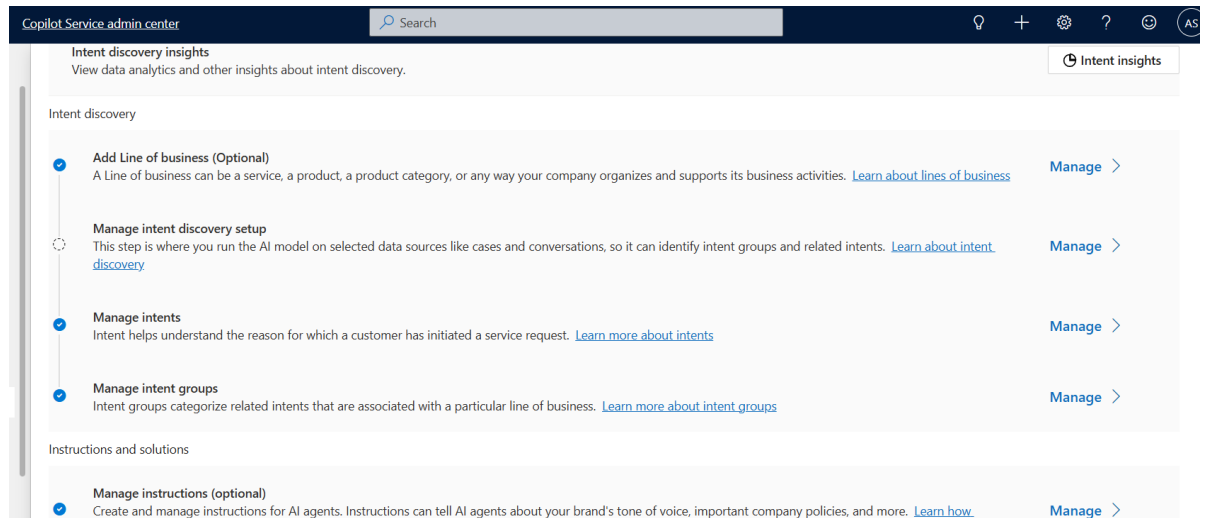
1. Share the important pointers customers should consider before proceeding with credit card cancellation.
2. Use the knowledge article content as-is, without modifying or paraphrasing the information.
3. End the email by advising the customer to contact Customer Support if they still wish to proceed with the cancellation after reviewing the provided information.

4. Associate knowledge article as solution for the intent. Sample knowledge article for the cancellation advisory email is in the appendix.

Solution (Optional)							Remove solution	Change solution type
Solution type: Associate knowledge articles							+ Add	Delete
<input type="checkbox"/>	Public number	Article title	Language	Article status	Minor ver...	Major ver...	Modified on	
<input type="checkbox"/>	KA-01000 (1)	Credit Card Cancellation	English	Published	0	1	11/07/2025 01:19:12 PM	

### d) Create intent groups

1. In Copilot Service admin center, go to intent and click on manage link of **Manage intent groups**.



2. Fill Intent group name, description, line of business as shown in below screenshot and click on next

**New intent group** ×

Define intent group

Add intents

**Define intent group**

Intent group name \*  
Credit Card

Description  
This intent group consolidates all the intent related to Credit Card

Line of business \*  
Card

Review status \*  
Approved

Next

Cancel

3. Select the intent created in above step and then click on add to create new intent group.

## New intent group : Credit Card



Define intent group

Add intents

Intents for Credit Card

1 intent selected

+ Add

Search intents

✓	Name ↑	Intent group	Intent source	Review status
✓	Credit Card Cancellation – Pre-C	Credit Card	Admin edited	Approved

Back

Add

Cancel

## Step 4: Set up case resolution

1. Select **Manage** for **Case Management Agent** in **Case settings**. The **Case Management Agent** page appears.

Intent-based routing

✓ Create user groups  
User groups are used for routing work items. [Learn more about user groups](#)

✓ Add user groups to intent groups  
Each user group can support multiple intent groups. This step is required only if you want to route and assign conversations via user groups. [Learn more about adding user group to intent groups](#)

✓ Assign queues to lines of business  
You can assign existing queues to support specific lines of business. [Learn about queues](#)

✓ Assign workstream to lines of business  
You can assign existing workstreams to support specific lines of business. [Learn about workstreams](#)

✓ Line of business specific configuration  
Configure fallback user groups, enable intent based routing and manage all configs related to lines of business. [Learn more about Line of business specific configuration](#)

Manage >

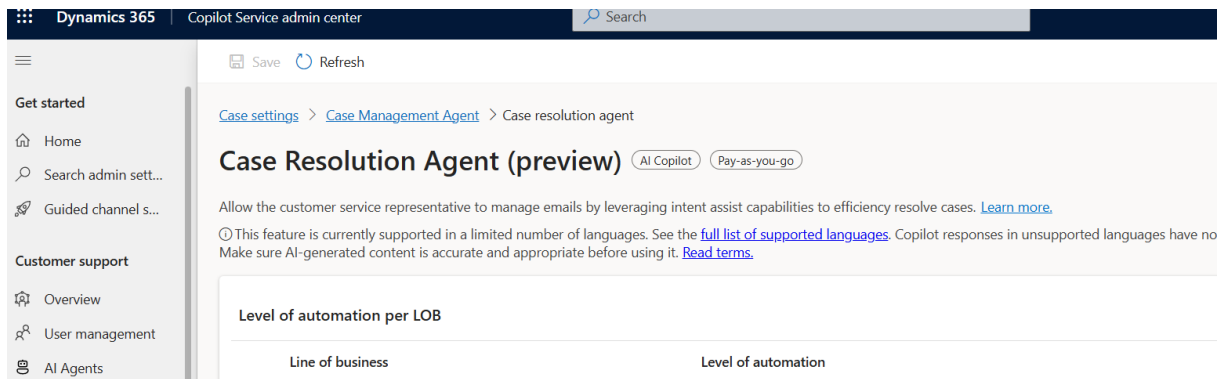
Manage >

Manage >

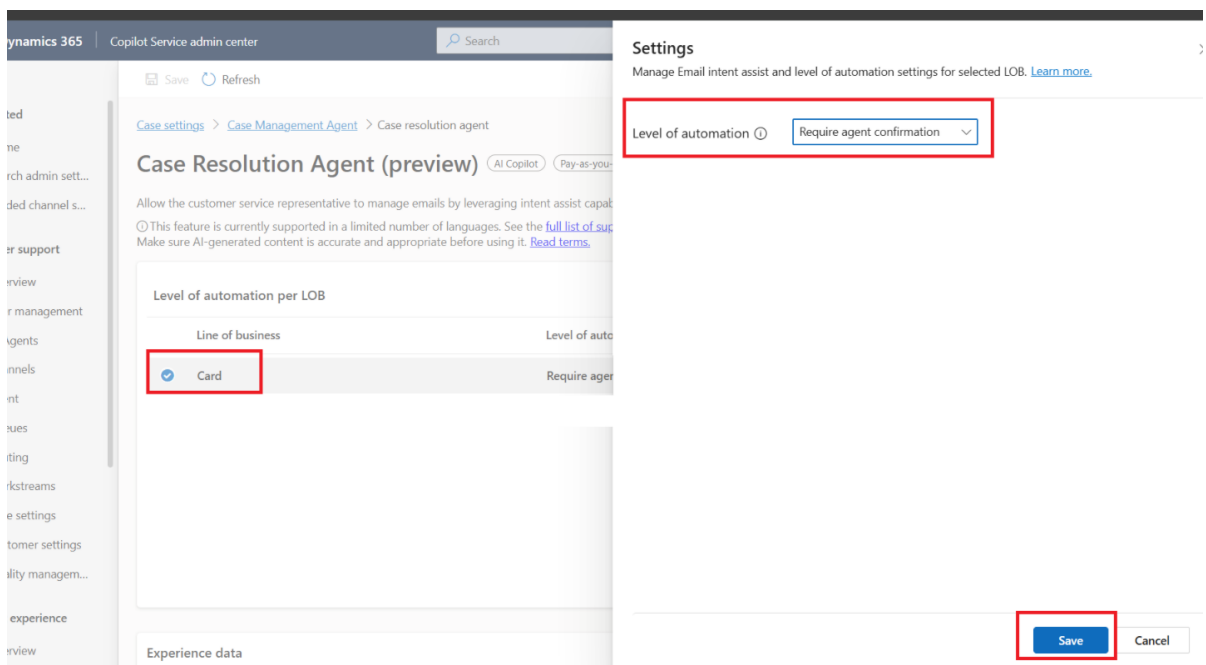
Manage >

Manage >

2. Select **Manage** for **Case Resolution**. The Case Resolution Agent page appears.



3. In **Level of automation per LOB**, the lines of business you configured in the Customer Intent Agent appear. Select value as **Require agent confirmation**.



## Step 6: Set up case follow up & closure

1. Select **Case settings** in **Customer support**. The **Case settings** page appears.
2. On the **Case settings** page, select **Manage** for **Case Management Agent**.
3. On the **Case Management Agent** page, select **Autonomous case follow-up and closure**.
4. On the page that appears, select **Turn on the case follow-up and closure automation**.
5. Select **Add** to create a new rule for case follow-up and closure.
6. In **Rules**, specify the following information.

- **Provide rule name and conditions** for the rule to run.

Last Thirty Days - Saved

9/25/2025 10:40 PM  
CreatedOn

Active  
Status

Details

Rule name \*

Last Thirty Days

Conditions

Condition name \*

Follow-up for cases in L...

Condition that must pass to continue (pass if blank)

And

☐

Modified On

Last x days

30

...

+

Add

- **Select Level of automation** and Fields the agent should refer to when drafting the follow-up emails. This is optional.

Settings

Level of automation

Require human confirmation

Add a confirmation step for agents before sending follow-up emails to customers or marking cases as resolved.

☒

Full automation

Allow Copilot to send follow-up emails and resolve cases automatically

☐

Attributes for reference

Follow-up emails (optional)

Choose the data for Copilot to refer to when drafting the follow-up emails.

Data

Case Title

×

Case Number

×

Description

×

Customer

×

- **Provide below details for follow up configuration:**

- **Status Reason:** The status reason that triggers a follow-up action as a suggestion to the representative.
- **Number of follow-ups:** The number of follow-up emails the agent must send without a response from the customer before resolving a case. The application considers the email sent by the service representative without a response from the customer as the first follow-up.
- **Follow-up wait times:** The duration between follow-up emails.

- **Follow-up email templates:** Select **Edit** to specify the email templates that the AI agent must use to send emails for follow ups.
- Click on **Save**.

Follow-up

Follow-up trigger

Define the status reason that will trigger a follow-up as a suggested action to the representative.

Status Reason \*

Waiting for Details

Number of follow-ups

The first follow-up is the reply to the customer's last message by the representative, awaiting customer's response.

Number of follow-ups \* ⓘ

3 times

Follow-up wait times

Specify how long to wait after each follow-up, before sending the next follow-up.

After first follow-up \*

48 hours

After second follow-up \*

48 hours

After final follow-up \* ⓘ

24 hours

## 7. On the **Case follow-up and closure** page, select the rule and then select **Activate**.

Case settings > Case Management Agent

Case follow-up and closure (preview) AI Copilot

Let customer service representatives choose when and how much to automate case follow-ups and closures with Copilot. They'll get suggested follow-up actions in their case timeline, and more. [Learn more](#)

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☒ Turn on the case follow-up and closure automation

Rules

Order

Rule name

Condition name

Status

1

[Last Thirty Days](#)

Follow-up for cases in last 30 days

Active

Edit

Delete

Activate

Deactivate

Add

## Steps for scenario testing

- a) Customer sends an email to credit card cancellation mailbox to cancel credit card on priority.  
Sample email body:

“I want to cancel my credit card. Please do the needful and treat it as high priority request.”

- b) Case will be created and priority of the case will be set to high. Case will be routed to Card Closure Team queue.
- c) Human agent (a user with customer service representative) of Card Closure Team queue open up case and review the draft email created for Pre-Cancellation Advisory created by AI agent and sent it to customer
- d) Customer acknowledges and provides confirmation to proceed with credit card cancellation.
- e) Human agent draft email and send to customers saying credit card is cancelled and ask for confirmation to close the case and update case status to waiting for confirmation
- f) Case is closed once customer provides confirmation about case closure.

## Appendix

- A) Sample knowledge article content for sending advisory email for credit card cancellation.

Before you proceed, please consider the following important points:

1. If you have an outstanding balance, your account will continue to incur fees and charges, and you will still receive a monthly Statement of Account. Your minimum amount due will be the statement closing balance.
2. Any remaining installment balance will be billed in full on your next statement, along with an acceleration fee of 5% of the remaining principal amount or \$300.00, whichever is higher. This will be part of your outstanding balance.
3. Billers enrolled in the Auto-Charge Facility will no longer be paid by your Credit Card. For utility billers enrolled directly with the merchant, please coordinate with them for disenrollment.
4. Rewards Points: Any earned rewards points will be forfeited. Transferring rewards points from your canceled card to another active Credit Card account is not allowed.
5. Reactivation: You can reactivate your card within six (6) months from the cancellation date.

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Before you proceed, please consider the following important points:

Background Color

1. If you have an outstanding balance, your account will continue to incur fees and charges, and you will still receive a monthly Statement of Account. Your minimum amount due will be the statement closing balance.
2. Any remaining installment balance will be billed in full on your next statement, along with an acceleration fee of 5% of the remaining principal amount or \$300.00, whichever is higher. This will be part of your outstanding balance.
3. Billers enrolled in the Auto-Charge Facility will no longer be paid by your Credit Card. For utility billers enrolled directly with the merchant, please coordinate with them for disenrollment.
4. Rewards Points: Any earned rewards points will be forfeited. Transferring rewards points from your canceled card to another active Credit Card account is not allowed.
5. Reactivation: You can reactivate your card within six (6) months from the cancellation date.