

Step-by-Step Guide: Setting Up Customer Intent Agent in Dynamics 365 Customer Service

Introduction

The **Customer Intent Agent** uses generative AI to automatically discover customer intents from past interactions and build an intent library that enhances both **self-service** and **assisted-service** experiences.

- In **self-service**, it helps Copilot agents identify intents, ask contextual questions, and find solutions from the knowledge base.
- In **assisted service**, it detects intents in real time, summarizes key details, and suggests next steps and solutions for representatives.

This enables faster, more personalized, and efficient customer support.

Prerequisites:

- Dynamics 365 Customer Service environment with chat channel enabled and configured, along with Microsoft Copilot studio bot connected to it.
- Microsoft Copilot studio message capacity assigned to the environment.
- A user having Microsoft Copilot studio license for authoring Microsoft Copilot studio agent
- System administrator role on the environment.
- Knowledge article available & published with details about impact of cancelling a credit card, alternatives to offer to customers.
- Chat channel workstream is configured. (We have steps in the doc below if not already done)
- Assign Omnichannel Administrator, Omnichannel representative & supervisor roles for setup based on user role.

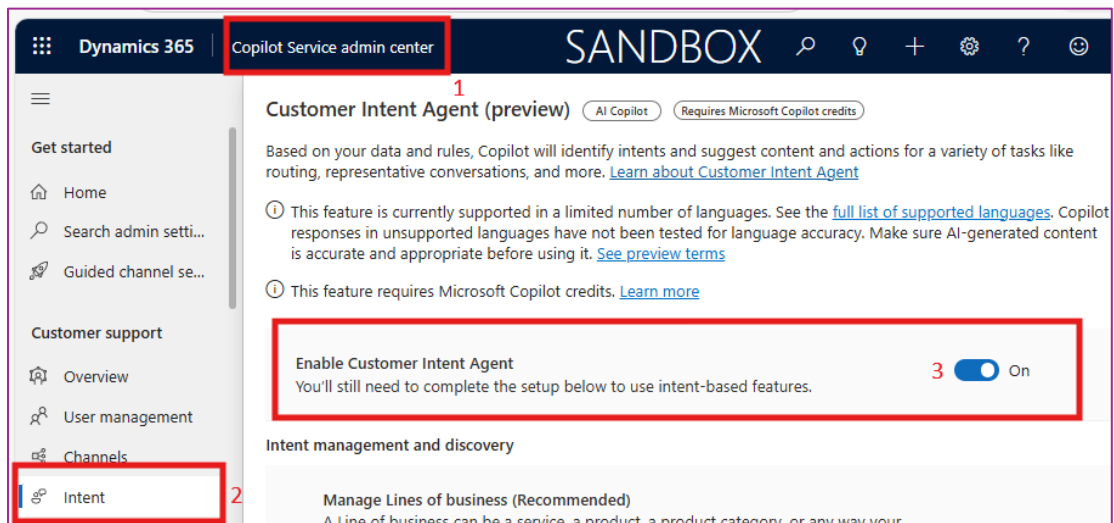
Scenario

Credit card cancellation use cases for both assisted and self service scenarios.

Configuration

Step 1: Enable Customer Intent Agent

- In the site map of Copilot Service admin center, select Intent under Customer support.
- On the Customer Intent Agent page that appears, enable the Turn on Customer Intent Agent toggle. This may take up to 15 mins to take effect.



Step 2: Enable Configure Line of business, intent library and intent

- **Create Line of business**
 - Click on Manage to Add Line of business

- Click on “Add Line of business”, provide name and description and click on add to create a Line of business for “Cards”

Add line of business ×

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

Name *

Description *

Add **Cancel**

- **Create intent and map it to knowledge article**

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

Dynamics 365 Copilot Service admin center **SANDBOX**

Customer Intent Agent AI Copilot Requires Microsoft Copilot credits

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](#)

① 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 terms](#)

① This feature requires Microsoft Copilot credits. [Learn more](#)

Enable Customer Intent Agent
You'll still need to complete the setup below to use intent-based features. On

Intent management and discovery

- Manage Lines of business (Recommended)**
A Line of business can be a service, a product, a product category, or any way your company organizes and supports its business activities. [Learn about lines of business](#) **Manage >**
- Manage Intent discovery settings (Optional)**
This step is where you run the AI model on selected data sources like cases and conversations, so it can identify intent groups and related intents. [Learn about intent discovery](#) **Manage >**
- Manage intents**
Intent helps understand the reason for which a customer has initiated a service request. [Learn more about intents](#) **Manage >**
- Manage intent groups**
Intent groups categorize related intents that are associated with a particular line of business. [Learn more about intent groups](#) **Manage >**

- Create a new intent by providing the details below

←

Save

Save and close

Refresh

Customer Intent Agent > Manage intents >

Intent details

Name*

Credit card - Cancellation request

Review status*

Approved

▼

Intent group

Select intent group

▼

Line of business*

Cards

▼

Autonomous support

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

- Add below Attributes for the above created intent –

Name 1	Frequency (max)	Frequency (30 days)	Frequency (1 yr)	Runtime Usage
Ask reason of cancellation	0	0	0	Use, always
Explain impact	0	0	0	Use, always
Validate last 4 digits	0	0	0	Use, always

- In the Resource section for the created intent, associate knowledge article as solution for the intent. Sample knowledge article for the cancellation advisory is in the appendix.

Resource (Optional)

Specify a resource for this intent ⓘ

AI agents will use the selected resource when responding to customers about this intent.

Dynamics 365 knowledge articles

Help content from your knowledge base

☒

Tools

Tools help systems connect and enable data flow or actions

☐

Custom AI agents

Choose the custom AI Agent you want to use (Used by Case Management Agent only)

☐

+ Add

Solution (Optional)

Remove solution

Change solution type

Solution type: Associate knowledge articles

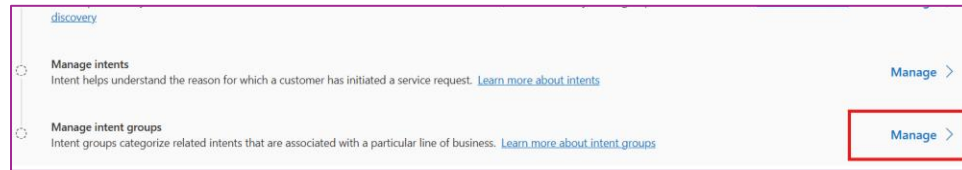
+ Add

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

- Create intent groups

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



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

A screenshot of the 'New intent group' form. The form has a title bar with a close button (X). On the left is a sidebar with two steps: 'Define intent group' (selected with a blue dot) and 'Add intents' (grey dot). The main area is titled 'Define intent group' and contains four fields: 'Intent group name *' with the value 'Credit Card', 'Description' with the text 'This intent group consolidates all the intent related to Credit Card', 'Line of business *' with a dropdown menu showing 'Card', and 'Review status *' with a dropdown menu showing 'Approved'. At the bottom right are two buttons: 'Next' (blue) and 'Cancel' (white).

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

Define intent group

Add intents

Define intent group

Intent group name *

Description

Line of business *

Review status *

New intent group : Credit Card

Define intent group

Add intents

Intents for Credit Card

1 intent selected

+ Add

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

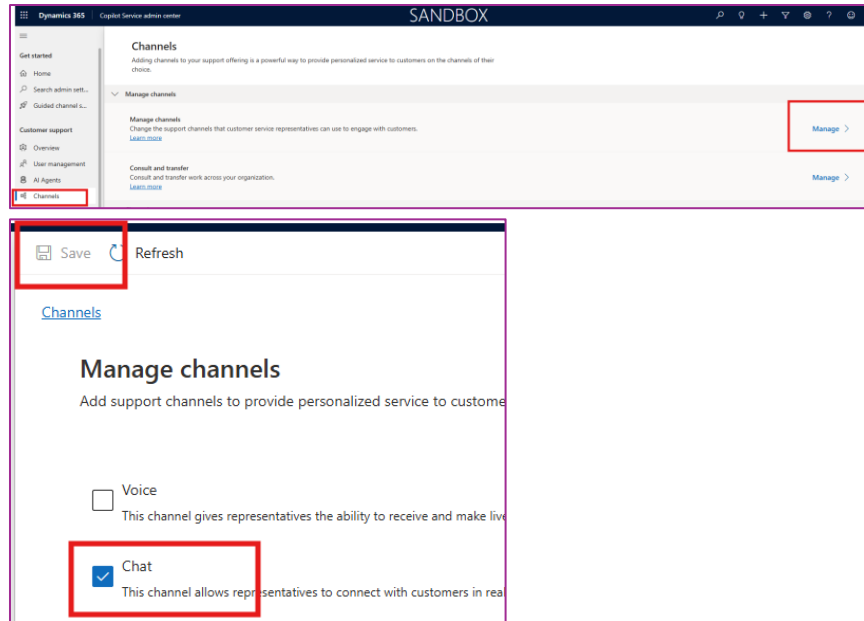
Back

Add

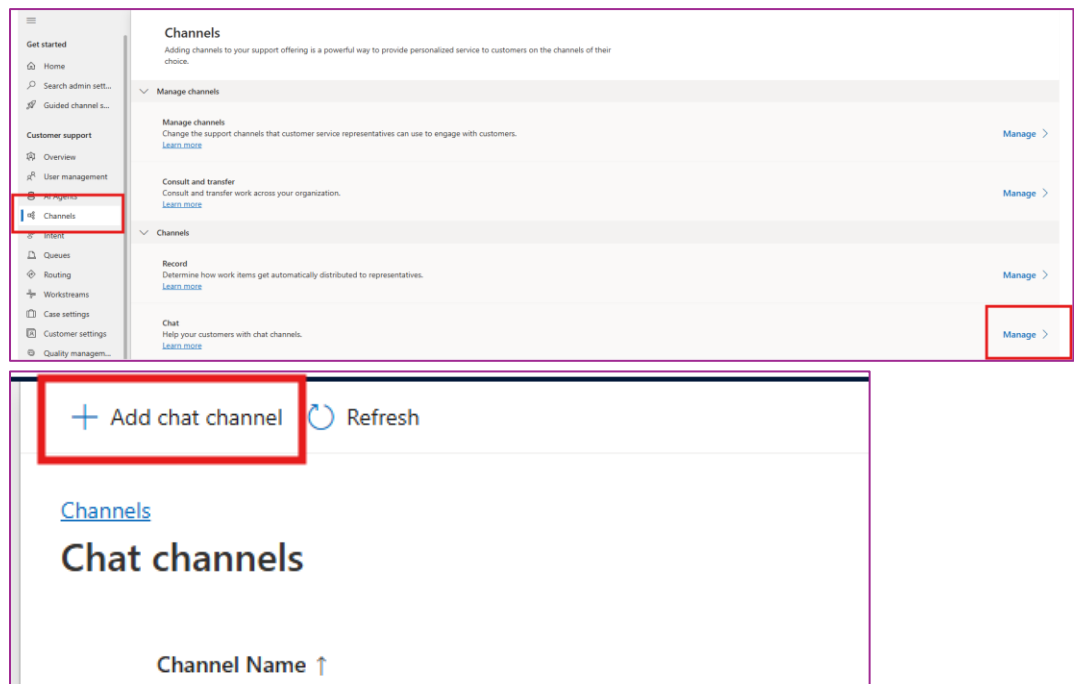
Cancel

Step 3: Set up Chat workflow

- Confirm Chat workflow setup ready. If not, follow below steps:
 - Go to Copilot Service Admin center -> Customer Support -> Channels-> Manage Channels -> Manage -> Enable Chat-> Save (this will take 5-10 minutes to enable)



- Now add a new chat channel- Got to Channels-> Chat -> Add chat channel



- In the chat setup wizard provide chat channel name, click next.
chat channel name: Agent workshop chat

Dynamics 365 | Copilot Service admin center

Live chat setup

- General Configuration**
- Workstream details
- Color Settings
- Header
- Chat widget
- Behaviors
- User features
- Notifications
- Review and finish
- Success

General Configuration

Channel details

Name *

Enter a name

Text field cannot be empty

Language *

English - United States

Type *

Messaging

Channel *

Chat

Window Size and Position

Window Size *

☒ Default

☐ Compact

☐ Custom

Width

360

Height

560

Position *

Bottom right

Distance From Corners

Window Position *

☐ Right

☒ Bottom

Amount

Back Next

- Provide Workstream name, keep default settings as is and click next
Workstream name: Agent workshop chat workstream

Workstream details

☒ Create new workstream ☐ Add to existing workstream

Name *

☐ Persistent chat (let customers send chats anytime) ⓘ
Unlike live chats, in "persistent" chats, the customer and representative don't need to be online at the same time.

Work distribution mode

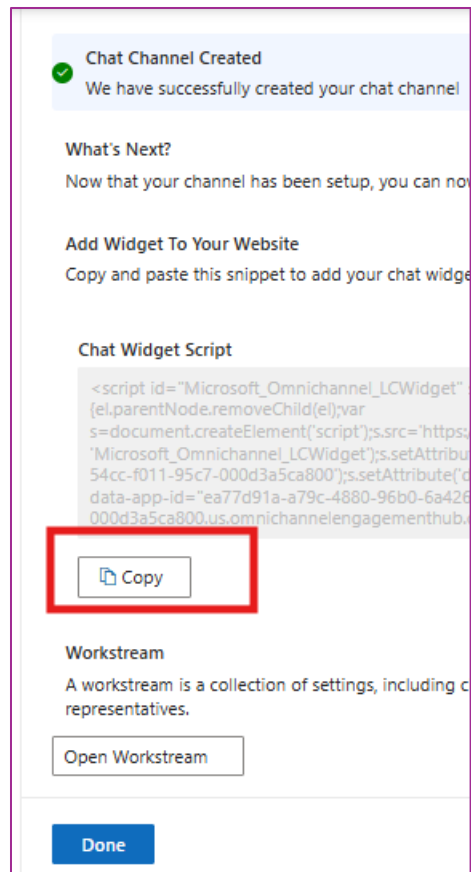
Push
Incoming conversations will be assigned to representatives automatically based on their skills and availability. You can also allow picking of open work items that go unassigned.

Fallback queue ⓘ *

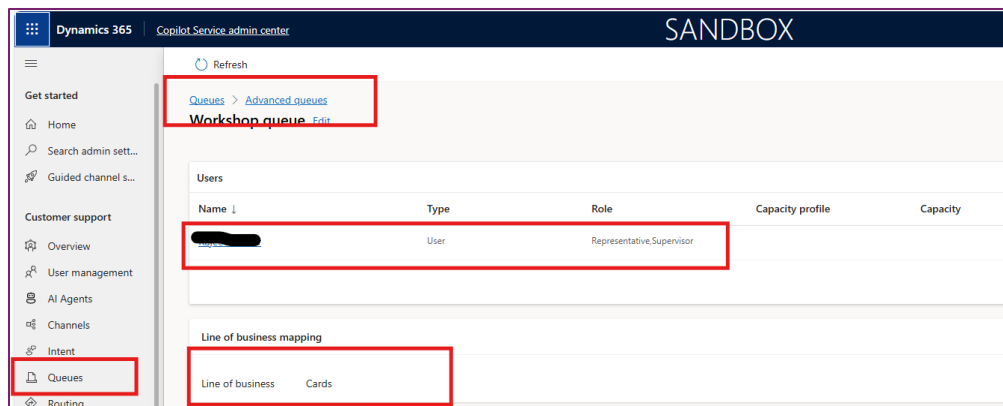
Create new
A new queue will be created. You must add users to the new queue for work to be assigned.

Back Next

- Follow the wizard, keep all default settings and Create channel.



- Create workstream queue [Copilot Service Admin Center->Customer Support->Queues->Advanced Queues->Manage -> Add new]. Add your user in the users list for the queue. Make sure to map the intent line of business in the line of business mapping section as below.



- Use the above queue in workstream routing rules and setup as below highlighted - [Open the workstream [Copilot Service Admin Center->Customer Support -> Workstreams-> select your workstream]

[Workstreams](#)

Agent workshop chat workstream [Edit](#)

Agent workshop chat

Language: English - United States

Chat widget: [Copy Chat Widget Script](#)

Behaviors: Customer wait time

User features: File attachments, Customer notifications, Conversation transcripts, Voice and video calls

< 1 of 1 channels >

Routing rules [Learn more](#)

Work classification (optional)
Add detailed information to incoming work items with classification rules. This allows for more precise routing and assignment. [Learn more](#)

Route to queues
Create rules to send incoming work items to the right queues. If there are no matching queues available based on your routing rules, we will send work to your fallback queue, bypassing any overflow settings for that queue. [Learn more](#)

① Fallback queue: [Default messaging queue \(All users\)](#) [Edit](#)

Rule hit policy: Hit-all [Edit](#)

Ruleset name	Type	Description
Workshop queue	Logical - Decision list	

Step 5: Setup experience profile

- Before enabling Experience profile, validate and enable Copilot for questions and emails by following –

Copilot Service Admin Center -> Support Experience -> Productivity -> Copilot for questions and emails and enable [Ask a question] & Help pane.

Dynamics 365 | **Copilot Service admin center** | **SANDBOX**

[Save](#) [Save and close](#) [Refresh](#)

✓ The knowledge base is ready and 2 articles are being used. Representatives will now get AI-powered responses with Copilot.

[Productivity](#) > Copilot for questions and emails

Copilot for questions and emails

Let customer service representatives get AI-powered help with answering questions and drafting emails, copilot recommended email templates and AI-generated email sentiments. Select knowledge sources used for Copilot responses. [Learn more](#)

① 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. [Read terms](#).

Select features

By using Copilot features powered by Azure OpenAI, you agree that data may be stored and/or processed outside of your geographic region, compliance boundary, or national cloud instance. [Learn more](#)

☒ **Ask a question:** Let representatives chat with AI. [Manage prompt](#)

Custom instructions: Provide custom instructions for copilot to follow when responding to users.

0/5000 maximum characters

☒ **Help pane - Write an email:** Get help drafting an email in the help pane. [Manage data](#)

- Copilot Service Admin Center -> Support Experience -> Workspace -> Experience Profiles -> Create new.

Create a new experience profile

Name *

Agent Workshop Profile

Unique name *

agent_WorkshopProfile

The unique name must include a prefix + name in this format: prefix_name.
The prefix must include:


- Only alphanumeric characters
- 2-8 characters

The name portion can be any length, but can't include spaces.

Description

Create

- Next steps of channel setup and settings will be done on the Experience profile page.
 - Add your user to the profile
 - Enable channels

Channel providers		 Edit
All active channels	On	
Third party voice channel providers	---	

Channel providers

Omnichannel and Unified Routing

All active channels

Every channel you have set up with Omnichannel and Unified Routing will be included in this profile. [Learn more](#)

On

Third party voice channel providers

Add an independent voice channel to this profile. [Learn more](#)

Select channel provider

+ Create channel providers

Save and close

Cancel

- Enable Copilot pane for the profile – Goto Copilot AI features in the profile and click on productivity pane settings -> Enable Copilot and save.

Service admin center

SANDBOX

+ Add entity session template

Inbox

Name

Record type

Closed work items

Case, Voicemail, Conversation

My work items

Case, Email, Voicemail, Conversation

Open work items

Case, Email, Voicemail, Conversation

Suggested actions

Case

4 of 4

Channel providers

All active channels

Third party voice channel providers

Copilot AI features

Copilot help pane

Turn on the Copilot help pane to make help pane features available.

productivity pane settings

Ask a question

Disabled

Intent-based suggestions (preview)

Disabled

Write an email — help pane

Disabled

Summaries

Case summary

On

Live conversation summary

On

Inbox views

Suggested actions view

On

Knowledge creation

Case-based knowledge creation

On

Productivity pane

When the Productivity pane is on, you can customize it by choosing productivity tools. [Learn more](#)

Productivity pane

On

Default Mode

Collapsed

Productivity tools

Copilot

Get AI-powered help with solving customer issues. [Learn more](#)

Copilot On

Timeout Rules

CSR override for timeout rules. [Learn more](#)

Timeout Rules Off

Teams chats

Use Microsoft Teams to seamlessly collaborate on records. [Learn more](#)

Teams chats Off

Agent scripts

Give step-by-step instructions to help minimize human error and provide consistent service. [Learn more](#)

Agent scripts Off

Smart assist

Make intelligent recommendations of knowledge articles, similar cases, and more based on real-time context. [Learn more](#)

Smart assist Off

Knowledge search

Let users search for relevant knowledge articles. [Learn more](#)

Knowledge search Off

Join a Teams call

Allow agents to invite customers to calls on Microsoft Teams. [Learn more](#)

Join a Teams call Off

Save and close

Cancel

- Enable Intent-based suggestions

My work items Case, Email, Voicemail, Conversation

Open work items Case, Email, Voicemail, Conversation

Suggested actions Case

4 of 4

Copilot AI features Edit

Copilot help pane

Ask a question On

Intent-based suggestions (preview) On

Write an email — help pane On

Summaries

Case summary On

Live conversation summary On

Inbox views

Suggested actions view On

Knowledge creation

Case-based knowledge creation On

Knowledge harvesting

Knowledge harvesting on case resolution On

Autonomous case creation and update

From conversations On

Form fill assistance for cases

During case creation from conversation On

During case creation from email On

During case resolution On

Manage which Copilot AI features are available to customer service representatives with this experience profile.

Copilot help pane

☒ Ask a question

☒ Intent-based suggestions (preview)

☒ Write an email — help pane

To manage these settings at the organization level, go to [Copilot for questions and emails settings](#).

Summaries

☒ Case summary

☒ Live conversation summary

To manage summaries at the organization level, go to [summaries settings](#).

Inbox views

☒ Suggested actions view

Knowledge creation

☒ Case-based knowledge creation

To manage knowledge creation at the organization level, go to [knowledge creation settings](#).

Knowledge harvesting

☒ Knowledge harvesting on case resolution

To manage knowledge harvesting from case at the organization level, go to [knowledge harvesting from case settings](#).

Autonomous case creation and update

☒ From conversations

To manage this feature at the organization level, go to

Save and close Cancel

Step 6: Create a conversation rule for Credit card line of business.

Go to Intent in Copilot Service admin app -> Intent -> **Manage Lines of business**

Add below conversation rule by clicking on add new rule.

Create 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 *

Credit card chat

Line of business *

Cards

Work Item

Conversation

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

☐ Work stream Equals Agent workshop chat workflow

+ Add

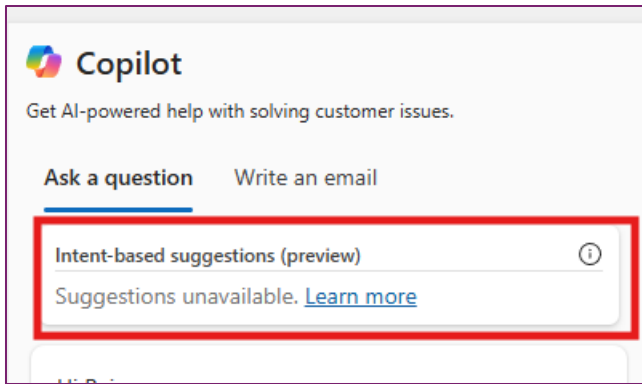
☐ Apply to historical data

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

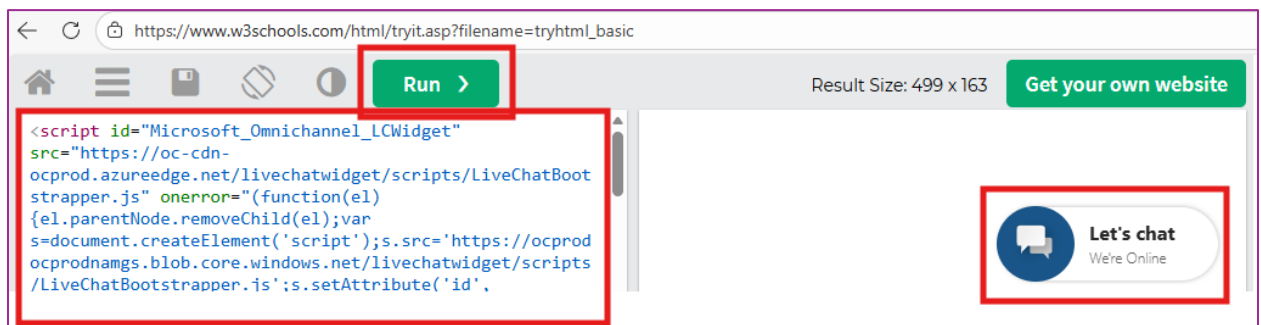
Create Cancel

Steps – Scenario testing [Assisted support]

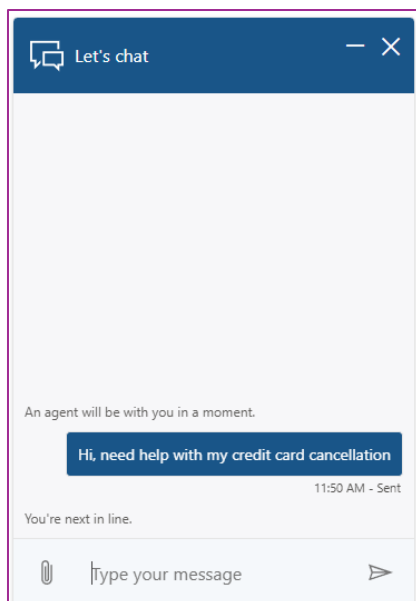
- Go to Copilot Service Workspace
- Based on above steps configured – we should see the Intent Based suggestions section in copilot pane



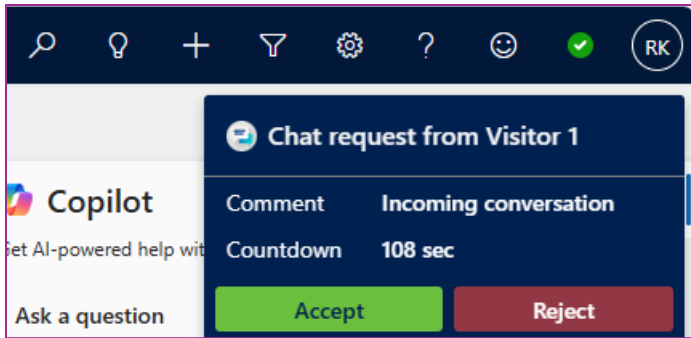
- Open the chat widget hosted in external site. For our testing we have used [W3Schools Tryit Editor](https://www.w3schools.com/html/tryit.asp?filename=tryhtml_basic) Here paste copied chat widget script which was saved at final step of chat channel setup.



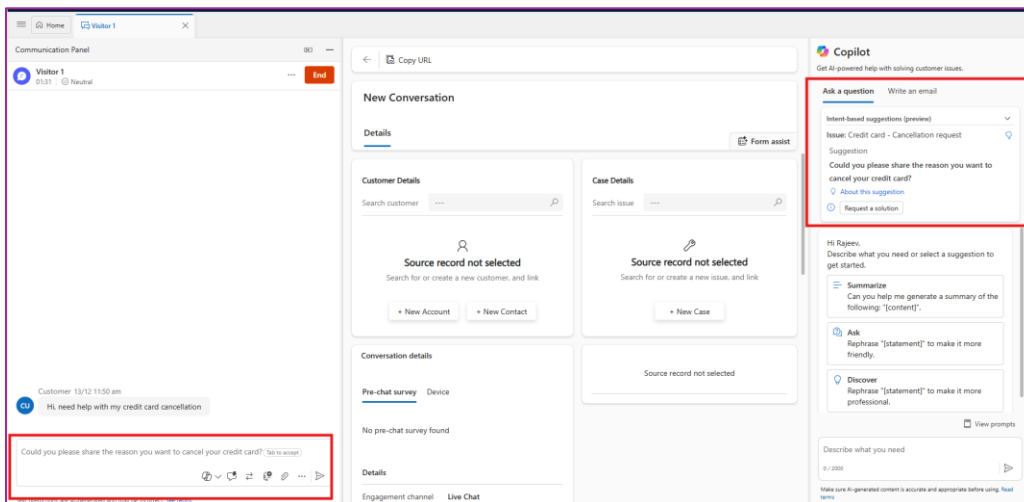
- Start chat from the chat widget and ask for help:



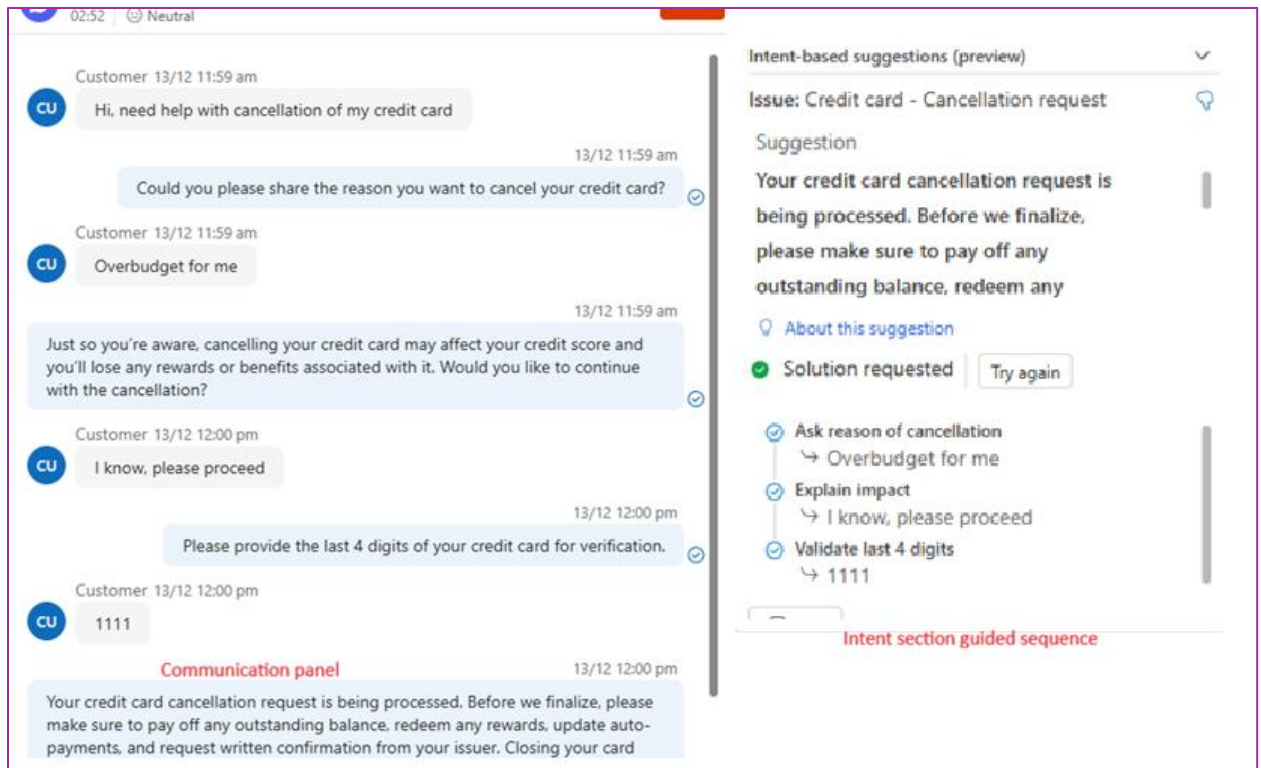
- The support representative will receive an incoming chat conversation request



- After accepting the request, the intent agent will assess and suggest next steps based on identified intent.



- During conversations based on identified intent, the intent agent will suggest next steps/queries to be raised based on the attributes configured with that identified intent. Based on the knowledge source this will be help the representative with possible solutions whenever asked.

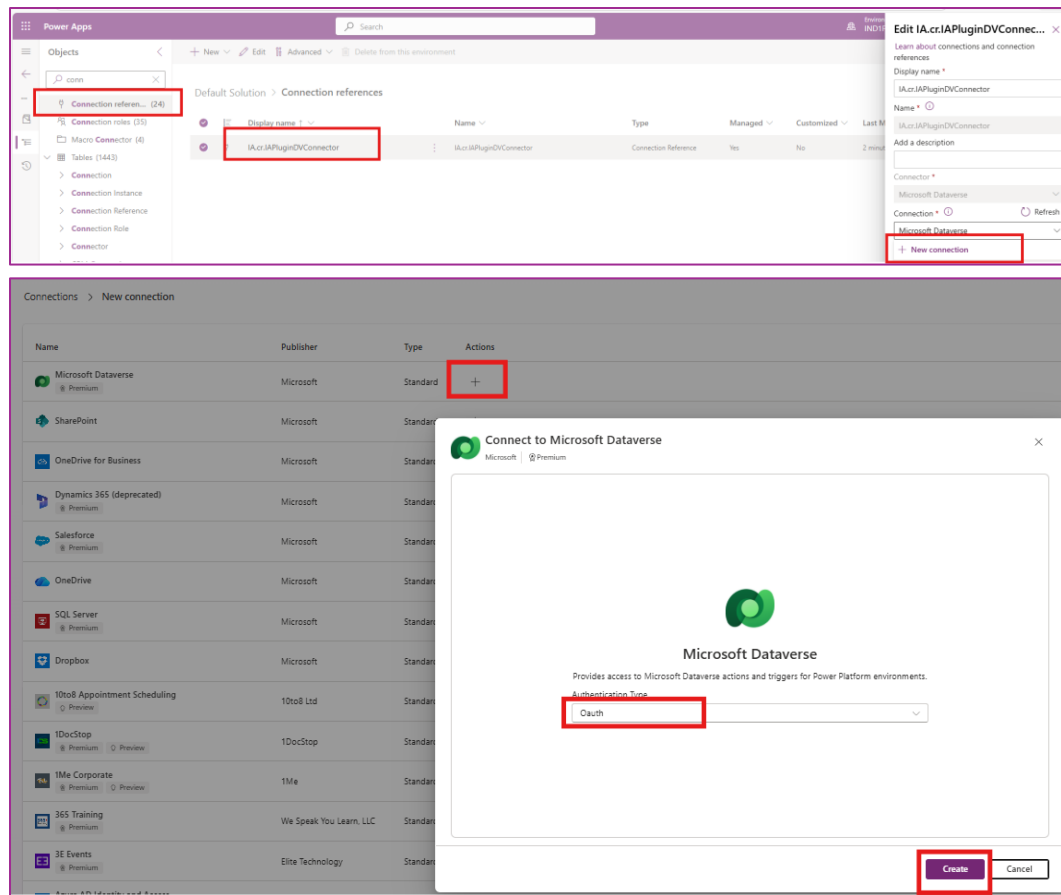


Steps – Self Service

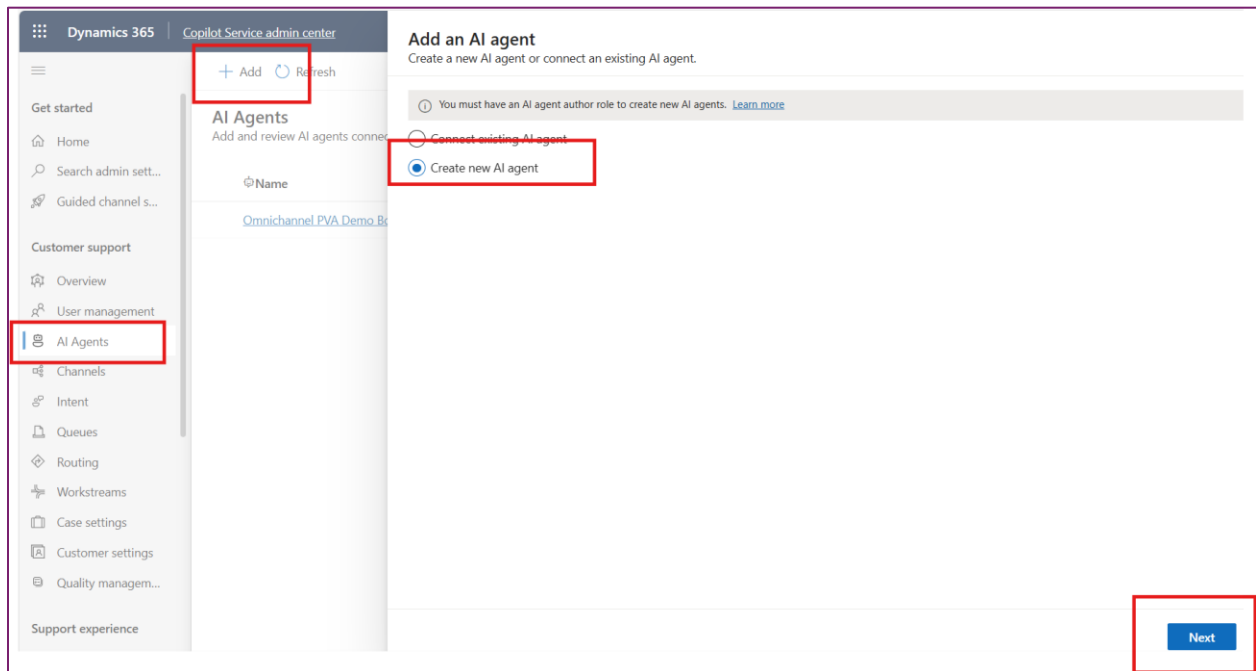
In addition to the above configuration in case Self Service setup, we will configure a copilot agent and integrate the intent agent as a component in that copilot agent. By integrating intent agent and using this as chat bot will drive the self serve conversation and land to service representatives when the conversation can't be managed by the agent. To setup this mode, please follow the instructions below:

Step 1: Add connection reference

- Sign in to make.powerapps.com and select your environment.
- Go to **Solutions > Default Solution > Objects > Connection References**.
- Search for the **IA.Cr.IAPluginDVConnector** connection reference.
- Create a connection to **Microsoft Dataverse**, and ensure the authenticating user has administrator privileges.



Step 2: Set up Copilot agents for intent management



[← Back](#)

Create a basic AI agent

Specify the name and language for your AI agent. AI agents you create are also saved in Microsoft Copilot Studio.

Name *

CSAgentForIntentWorkshop

Language *

English

☐ Add voice to AI agent




Create

[+ Add](#) [↻ Refresh](#)

[🔍 Search AI agent](#)

AI Agents

Add and review AI agents connected to your omnichannel environment for transfers to customer service representatives. Disconnect an AI agent to stop transfers from that AI agent. [Learn more](#)

 Name	Type	Published on	Modified on	Workstreams	Queues	Owner	Voice Status	Chat Status
CSAgentForIntentWork...	Copilot	never	few seconds ago			Rajeev Ku...	 Disabled	 Connected

+ Add

↺ Refresh

🔌 Disconnect

⚙️ Manage type

AI Agents

Add and review AI agents connected to your omnichannel environment for that AI agent. [Learn more](#)

🔍 Name	Type	Published on	Modified on
✓ CSAgentForIntentWor...	Copilot	never	few second

CSAgentForIntentWorkshop

Type

Uses predefined topics
IVR and AI capabilities, based on topics that are predefined in Copilot Studio

Uses AI-generated intents

Preview

An intent based agent that is able to reason

Channel ⓘ

☒ Digital only

☐ Voice only

Guidelines - Digital intent agent

1

Digital intent agents can use intents and actions that are setup both in this workspace and/or in Copilot Studio.

2

After setting up intents, please configure your intent agent at the workstream or queue level.

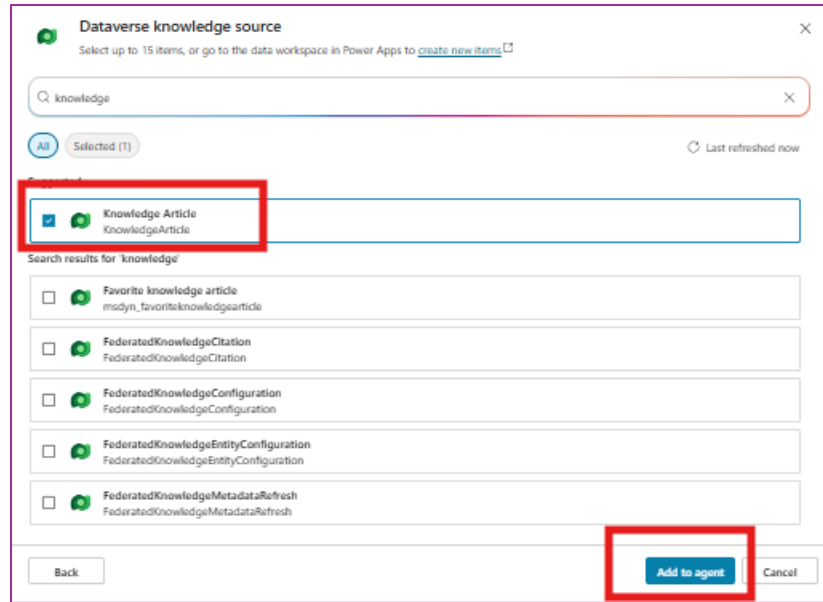
3

Digital intent agents are to be connected to digital only workstreams and/or queues. Cross channel intent agents will not work at this time.

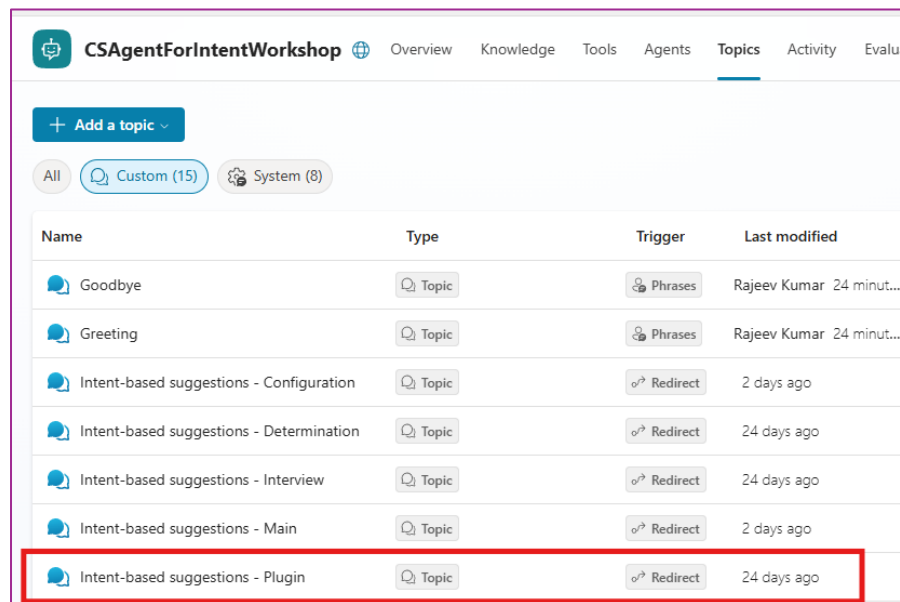
Save

Cancel

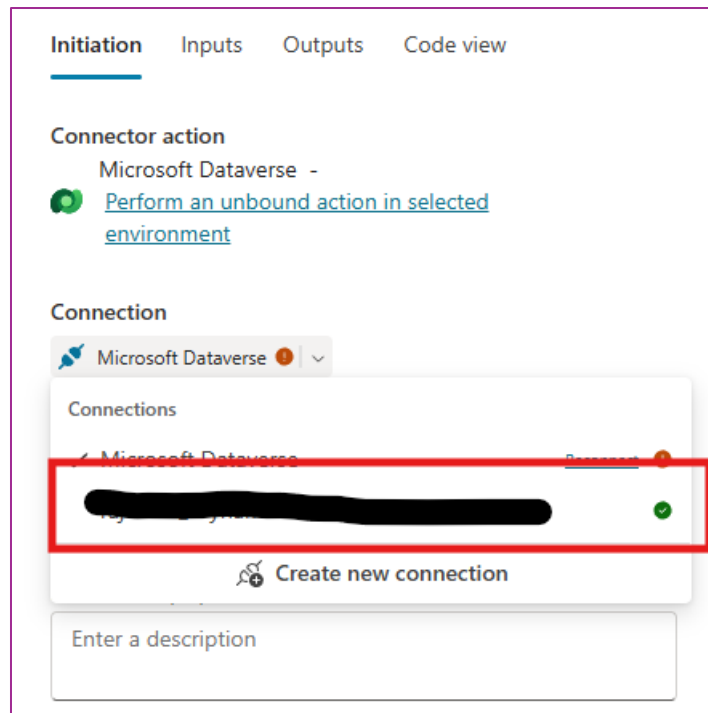
- Once saved, click on the agent name from the agent list. This will redirect to the Copilot Studio and opens the agent for configuration.
- Add Knowledge source related to Credit card cancellation guide



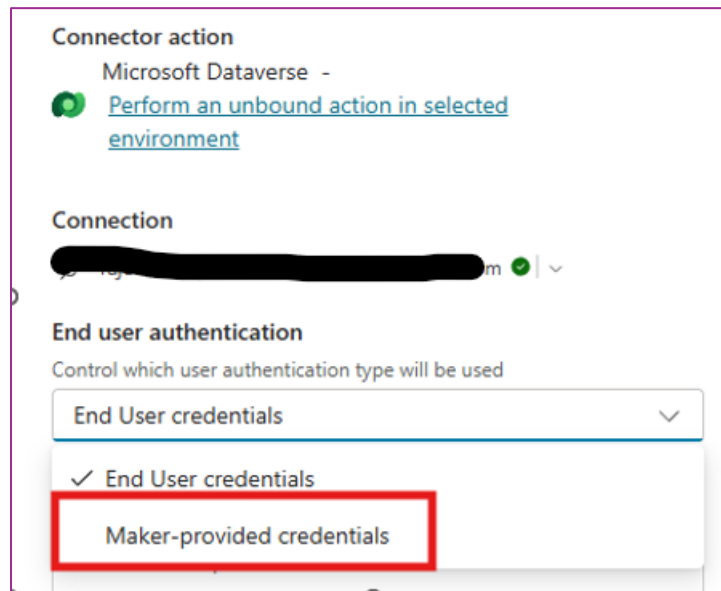
- Go to Topics -> Open Intent-based suggestions - Plugin



- Click on ellipses (...) in the Perform an inbound action -> Click Properties -> Select your authentication connection.



- In the [End user authentication] field select [Maker-provided credentials]. Save the changes.




- Click on publish from the top right corner of the Copilot Studio -> Acknowledge the authentication alert and continue to publish from

confirmation popup

Publish this agent

Review and verify your agent's settings, then publish it with the channels you selected.

 Review the following before publishing: 1 item ^

Your agent does not require end user authentication [Authentication settings](#)

Allowing anonymous end users to chat with your agent allows anyone to access content added to your agent. [Learn more](#)


☐ **Force newest version**

Force the newest version for ongoing chats in persistent channels like Microsoft Teams.

This ensures users in Teams receive your latest updates right away — but may disrupt any active conversations currently in progress.

[Publish](#) [Cancel](#)

- [Routing to intent topic] – The agent topic “Intent-based suggestions - Main” needs to be routed to get intent based suggestions. For this lab, we will force the intent agent routing by using a multi option input.
 - Go to Greetings topic and add a question with multiple options like below

 [Edit](#)

Phrases
 Good afternoon
 Good morning
 Hello
 Hey
 Hi

+

Question Text ...

Hello there, which category you need help...

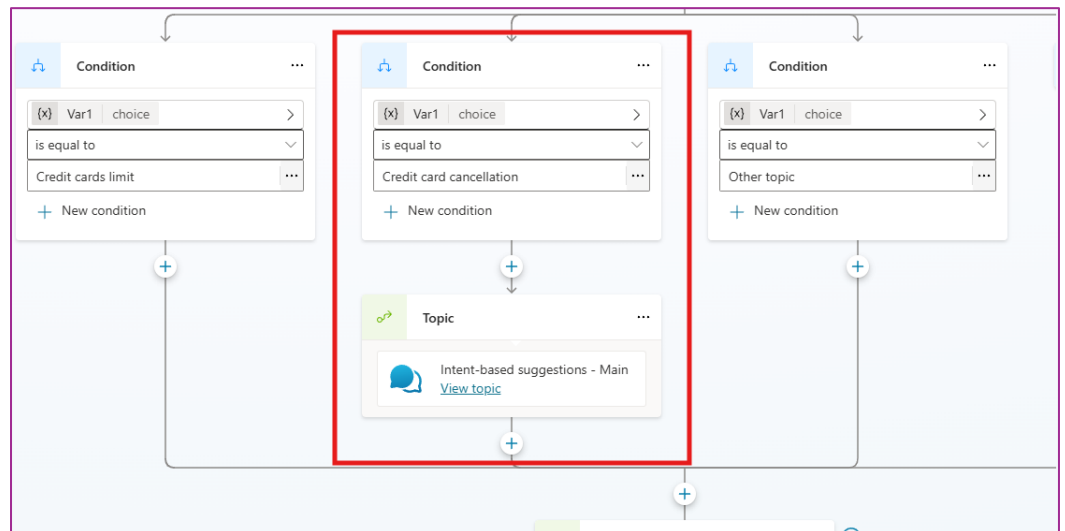
Identify
☐ Multiple choice options >

Options for user

+ New option

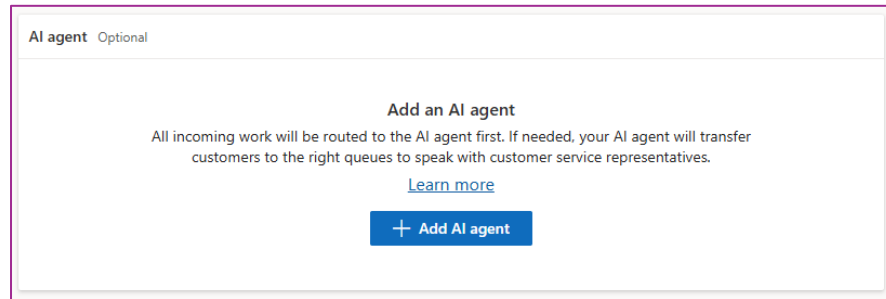
Save user response as

- Route to Intent suggestions [Intent-based suggestions - Main] for cancellation option to test the intent-based interaction behavior.



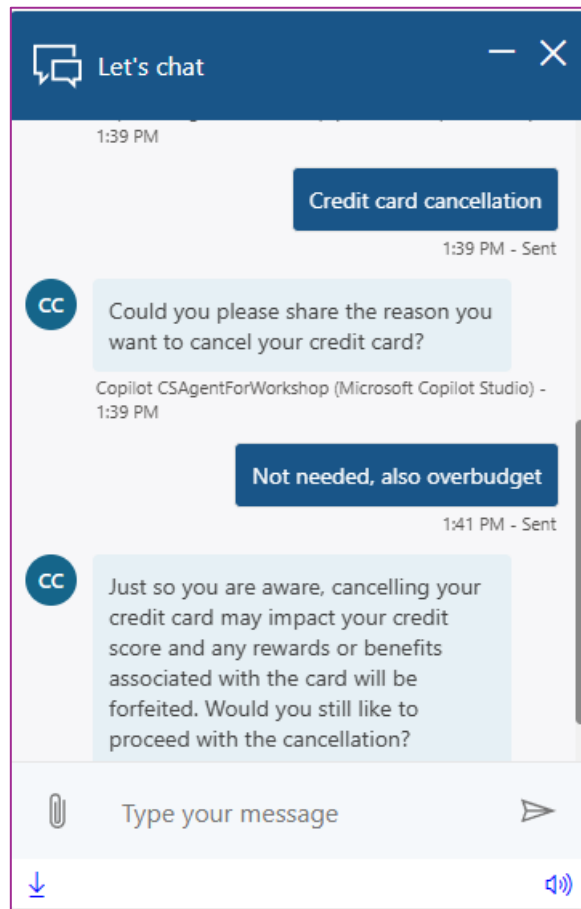
- Save and publish the agent

- Add this agent in the chat workstream [Copilot Service Admin Center->Customer Support -> Workstreams-> Select your workstream]

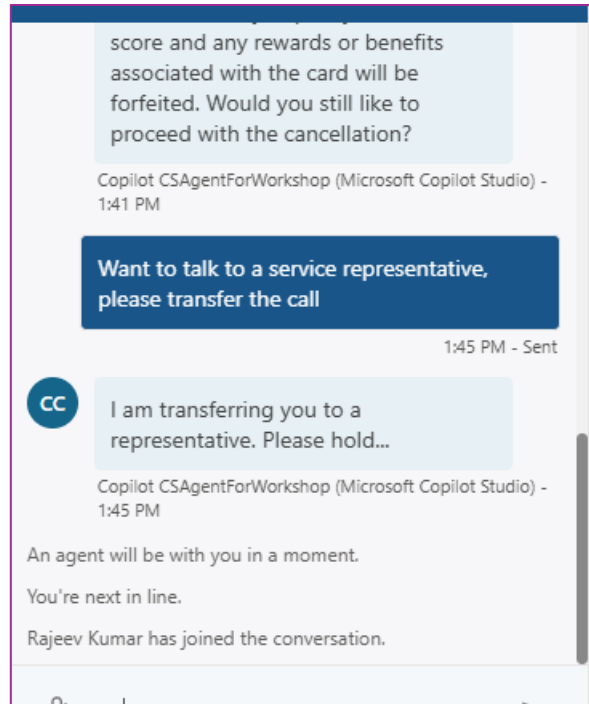


Steps – Scenario testing

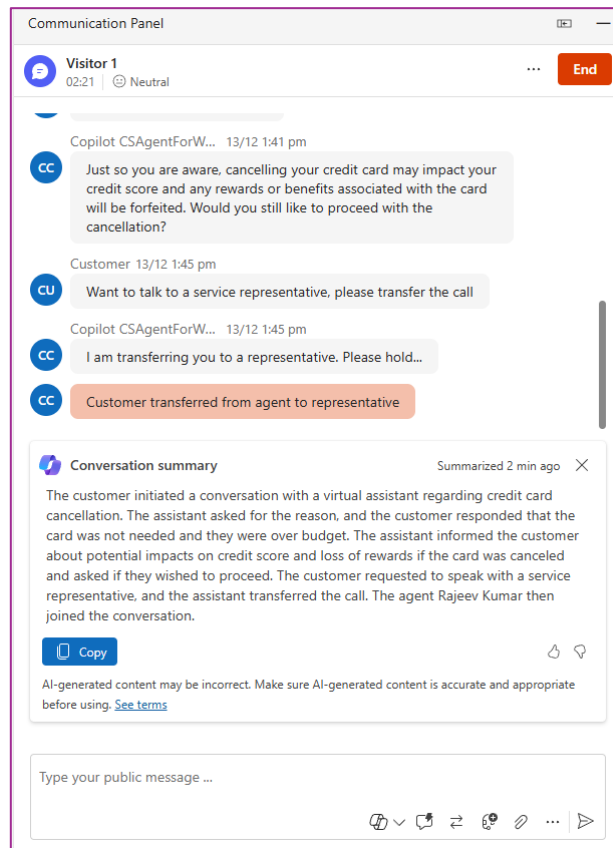
- Launch the chat widget.
- The conversation session will be started by AI agent. As configured, responding with Hi & selecting card cancellation option triggers the intent based communication as below:



- If the customer wants a detailed conversation, the AI agent will route the communication to a live agent like below:



- The Service rep will see below summarized contextual conversation details with summary



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.

The screenshot shows a web-based editor for a knowledge article titled "Credit Card Cancellation - Unsaved". The interface includes a top navigation bar with "English - United States" and "Published" status. Below this is a process flow bar with "New Process" (Active for 21 days), "Author (21 D)", "Review", and "Publish". The main content area is titled "CONTENT" and has tabs for "Content", "Summary", "Analytics", and "Related". A "Form assist" button is visible. The editor is in "Designer" mode, showing a rich text editor with a toolbar. The text content is as follows:

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.