

Knowledge Management Agent Labs

Overview

Purpose: Configure and validate the Customer Knowledge Management Agent to automatically create knowledge articles from cases and related interactions.

Customer Knowledge Management Agent lets you autonomously turn cases and case-related conversations, emails, and notes into knowledge articles that can support your contact center operations. Learn more in:

Learning Resources:

- [Manage Customer Knowledge Management Agent | Microsoft Learn](#)
- [Review knowledge articles created by the Customer Knowledge Management Agent | Microsoft Learn](#)

Prerequisites

Before you start the journey, ensure you met below prerequisites:

1. Ensure **Dynamics 365 Customer Service** is available.
2. Ensure **Form Fill assistance** is enabled. Navigate to the [Power Platform Admin Center](#) and then follow the instructions below:
 - Go to **Manage > Environments**. Select your environment then click on **Settings > Product > Features**.
 - Find the **AI form fill assistance** and change all the settings from Default to **On** (as shown in the screenshot below).

AI form fill assistance

Allow AI to generate form field suggestions for model-driven apps. [Learn more](#)

Automatic suggestions

On

Smart paste and file suggestions (Production Ready Preview)

On

Form fill assist toolbar

On

- Dynamics 365 knowledge management is configured.

The screenshot shows the Dynamics 365 Copilot Service admin center interface. At the top, there's a navigation bar with the Dynamics 365 logo and the title "Copilot Service admin center". Below the navigation bar is a sidebar on the left containing several sections: Customer support, Support experience, and Productivity. Under Productivity, the "Knowledge" option is highlighted with a red box. The main content area on the right is titled "Knowledge" and contains sections for Knowledge creation, Customer Knowledge Management Agent, Record types, General settings, Categories, and Filters. Each section includes a brief description and a "Learn more" link.

Copilot Service admin center

Knowledge

Allow customer service representatives to create rich, high-quality knowledge articles for self-service, assisted service, and onsite service. This helps expedite issue resolution and improve customer and representative satisfaction and productivity.

Knowledge creation AI Copilot

Let representatives use AI to propose new knowledge based on information from cases and tickets. [Learn more](#)

Customer Knowledge Management Agent AI Copilot

Let AI automatically create new knowledge on a representative's behalf. [Learn more](#)

Record types

Enable record types for which you want to turn on knowledge management. [Learn more](#)

General settings

Configure knowledge management for your representatives and authors. [Learn more](#)

Categories

Categorize your knowledge articles. [Learn more](#)

Filters

Set up standard and custom filters for knowledge articles to help your customers find what they need. [Learn more](#)

General Settings: Your configuration appears as shown in the screenshot below

The screenshot shows the Dynamics 365 Copilot Service admin center with the title "Sandbox". The left sidebar lists various administrative sections like Get started, Customer support, Support experience, Operations, and Categories. The main content area is titled "Knowledge General settings". It includes sections for "Search results display count" (set to 10), "Feedback" (Enable feedback is Yes), "Authoring language" (Organization's UI language is selected), "Language settings" (Other language dropdown), and "Allow users to set default knowledge authoring language" (Yes). Below this is the "Origins allow list" section with an input field containing "https://www.contoso.com/about". The "Knowledge search experience" section includes "Enable suggest as you type" (Yes), "Set search mode as all" (Yes), and "Show recently viewed knowledge articles" (No). The "Global search knowledge configuration" section has an "Enable Kb preview mode from global search" toggle (Yes). A red box highlights the "General settings" title and the "Search results display count" input field.

Categories: This step is optional. If desired, you may establish a parent category (e.g., Stolen) and a child category (e.g., Credit Card Stolen) to organise your knowledge articles more effectively.

The screenshot shows a table view of categories. The columns are "Category Number" and "Title". The rows are:

Category Number	Title
CAT-01007	Credit Card Stolen
CAT-01004	Defects
CAT-01003	Delivery Issues
CAT-01005	Returns and Exchanges
CAT-01006	Stolen
CAT-01002	Support
CAT-01000	Support Portal Issues
CAT-01001	Travel

A red box highlights the first two rows (CAT-01007 and CAT-01006). The "Support Portal Issues" row is highlighted with a grey background.

Filters: Enable search feature

The filter configuration you do will apply on the form-based Knowledge search control, Knowledge search page, and productivity pane-based knowledge search control. By setting Yes, you agree to use the Enable search filters feature and the Power Apps Maker filter configuration will be deactivated. You can enable it anytime by setting No.

Enable search filters Yes

Allow customer service representative to personalize No

Add a new filter and use more options (ellipsis)
to set visibility and preselects.[Learn More](#)

Select filter type ▾

Portal: add the portal URL in the specified format as required for the configuration.

`https://abc.crm.dynamics.com/kb/{kbnum}`

To share knowledge article as URLs, you'll need to first set up an external portal.

Support portal connection
To share knowledge article as URLs, you'll need to first set up an external portal and turn on the setting below.

Use an external portal Yes

URL*
External links for knowledge articles are created in the URL format specified here. Insert {kbnum} as a placeholder in the URL format. It will be replaced by an actual knowledge article number. For example `http://<support portal URL>/kb/{kbnum}`

`https://org31ebd93.crm.dynamics.com/kb/{kbnum}`

Sync knowledge article attachments to portal
Automatically sync knowledge article attachments to notes attachments. Select Yes if you use knowledge article attachments in the portal. Select No if knowledge article attachments are for customer service applications only. [Learn more](#)

Sync attachments to the portal Yes

4. Enable in-app notifications for Customer Service Workspace app to notify about article creation.
 - o From the browser, navigate to <https://make.powerapps.com>
 - o Go to **Apps** > Select the **Copilot Service Workspace** > **Settings** > **Feature** > search for **notification**
Learn more in [Enable in-app notifications for your organization](#).

The screenshot shows the Microsoft Power Apps portal interface. On the left, a navigation sidebar lists various options: Home, Create, Learn, Plans, Apps (which is highlighted with a red box), AI hub, Tables, Flows, Solutions, Connections, More, and Power Platform. Below this is a list of 'Power Platform' items. The main area is titled 'Apps' and displays a card for 'Copilot Service workspace'. The card features a purple icon with a yellow pen-like shape, the text 'Start with a page design', and a sub-instruction 'Select from a list of different designs and layouts to get your app going.' Below the card are three buttons: 'My apps', 'Shared with me', and 'All' (which is selected and highlighted with a purple background). A list of apps follows, with 'Copilot Service workspace' being the last item, also highlighted with a red box. Each app entry includes a small icon, the app name, and a settings gear icon.

The screenshot shows the settings page for the 'Copilot Service workspace' app. The left sidebar has tabs for 'General', 'Features' (which is selected and highlighted with a red box), 'Navigation', and 'Upcoming'. The main content area is titled 'Features' and contains a search bar with the text 'notification'. Below the search bar, a message states 'Some feature settings are inherited from environment settings but can be specified for this app.' Under this message is a section for 'In-app notifications' with the following details: 'Enables the app to poll for new in-app notifications and display those notifications as a toast or within the notification center.' A link 'Learn more' is provided. A toggle switch is set to 'Yes', and a link 'Reset to environment value' is available. At the top right of the content area is a close button ('X').

5. You enabled Copilot to access Dynamics 365 knowledge base. You can utilize the internal knowledge base resources only for generating responses. Learn more in [Configure knowledge sources](#). Your configuration should appear as shown below.

SANDBOX

The screenshot shows the Dynamics 365 Copilot Service admin center. On the left, there's a navigation sidebar with sections like Get started, Customer support, Support experience, and Productivity. The Productivity section is highlighted with a red box. The main content area has a header "Copilot for questions and emails". It displays a message: "The knowledge base is ready and 24 articles are being used. Representatives will now get AI-powered responses with Copilot." Below this, there's a note about productivity and a link to learn more. A section titled "Select features" contains several checkboxes for enabling AI features: "Ask a question", "Help pane - Write an email", "Email sentiments (preview)", "Copilot recommended email templates", and "Contextual email drafting". There's also a note about contextual email drafting and a link to go to Power Apps.

Dynamics 365 | Copilot Service admin center

Save Save and close Refresh

The knowledge base is ready and 24 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](#)

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](#)

Email sentiments (preview): Let customer service representatives view the AI-generated customer sentiment for emails. [Learn more](#)

Copilot recommended email templates: Let customer service representatives use copilot recommended templates for emails. [Learn more](#)

Contextual email drafting: Get help drafting an email, inside the email compose window.
To turn this feature on or off, you need to [go to Power Apps](#). If this feature is on in Power Apps, the settings you choose on this page, like knowledge and others, will apply to it as well.

Contextual email drafting: Get help drafting an email, inside the email compose window.
To turn this feature on or off, you need to [go to Power Apps](#). If this feature is on in Power Apps, the settings you choose on this page, like knowledge and others, will apply to it as well.

Representative access

Representatives added to out-of-the-box experience profiles can use Copilot. To change which representatives can use Copilot, go to [experience profiles](#).

Knowledge sources ⓘ

Include a knowledge base or another type of knowledge source. ⓘ

Use your organization's knowledge base as knowledge source
24 articles in use

Use knowledge sources configured in Copilot Studio (preview) [See preview terms](#)
To configure sources, go to [Copilot Studio](#). Not available for Write an email. [Learn more](#)

Trusted webpages ⓘ

Include trusted webpages as sources. Not available for Ask a question. [Learn more](#)

Web searches are powered by Bing (preview) [See preview terms](#)
By adding a web address, you're allowing Copilot to use Bing. Your search data can be stored and processed outside of your tenant's geographic region or compliance boundary. Your use of Bing is governed by [Microsoft Services Agreement](#) and the [Microsoft Privacy Statement](#).

[+ Add web address](#)

Translation using Copilot

Representatives can choose from a list of languages that your organization has added to Dynamics 365.

Let representatives translate responses using Copilot

Support experience data

Record how representatives are working with the AI Copilot to understand its impact on customer service. Recorded data can be used by your organization to analyze knowledge sources, and to build usage reports.

Record transcripts of representative interactions with Copilot, representative actions, and representative feedback on AI suggestions.

Filters

Set up filters for Copilot using knowledge base fields. [Manage Filters](#)

[View data privacy terms and conditions](#)
[Opt out](#) of this feature.

6. For real-time knowledge creation, you [configured connection references for Customer Knowledge Management Agent flow](#).
7. You [set up pay-as-you-go](#).

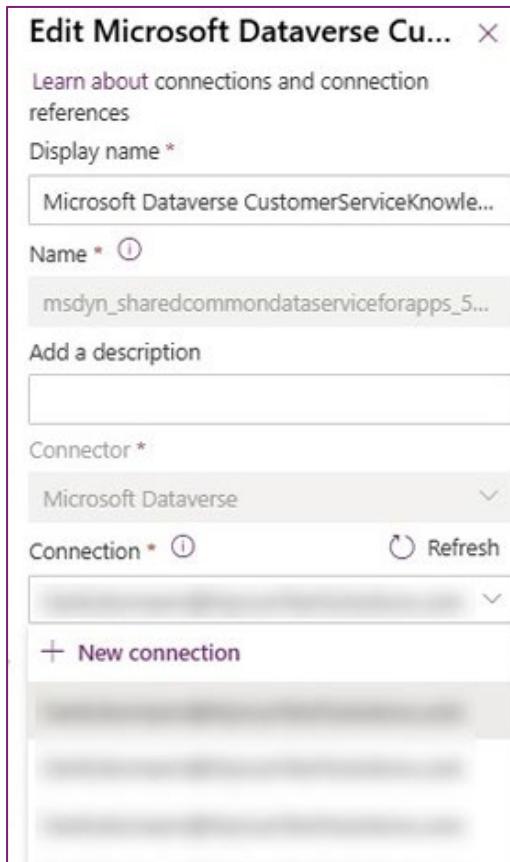
Setup & enable required connections and flows

Several connection references are included to support the automatic creation of knowledge articles. To ensure proper functionality, these connection references must be enabled in the environment. This step is required only once per environment.

Task 1: Set connection references for Knowledge Management Agent flow

1. Sign in to [make.powerapps.com](#) and select your environment.

2. Go to **Solutions** and open the ‘Default Solution’.
3. Under **Objects**, search for and select **Connection References**.
4. Search for the **Microsoft Dataverse CustomerServiceKnowledgeHarvest** connection reference.
 - a. Hover over the reference and select **Edit**.
 - b. In the **Edit** dialog, select **Connection > New connection**. (Note: if you already have a connection, you can use that one)



- c. Search for **Microsoft Dataverse** and select **Create**.
- d. Go to back to **Microsoft Dataverse CustomerServiceKnowledgeHarvest** connection reference.
- e. Select the connection you just created and select **Save**.

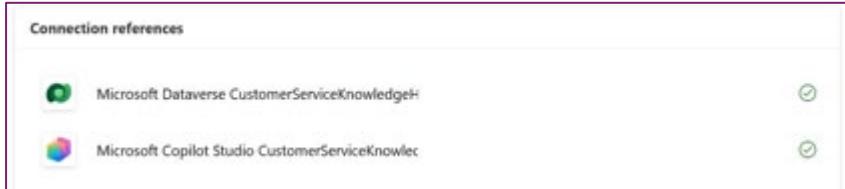
Now, we are going to repeat this process for another connector.

- f. Search for **Microsoft Copilot Studio CustomerServiceKnowledgeHarvest** connection reference.
- g. Repeat step a and b
- h. Search for the **Microsoft Copilot Studio** and select **Create**
- i. Go back to **Microsoft Copilot Studio CustomerServiceKnowledgeHarvest** connection reference.
- j. Select the connection you just created and select **Save**.

Task 2: Turn on the Power Automate flow

The **Knowledge Harvest Trigger Flow V2** is part of the solution used to gather information for creating articles. To enable this functionality, the flow must be activated in the environment.

- In [make.powerapps.com](#), navigate to **Solutions > Default Solution > Objects > Cloud flows**, select **Knowledge Harvest Trigger Flow V2** flow
- Make sure you can see connection reference as below in flow:



- **Turn on** the flow.
- Alternatively, in [Power Automate](#), select your environment. Search for **Knowledge Harvest Trigger Flow V2** in **Cloud flows** and turn it on.

Task 3: Publish the Microsoft Copilot Studio agent

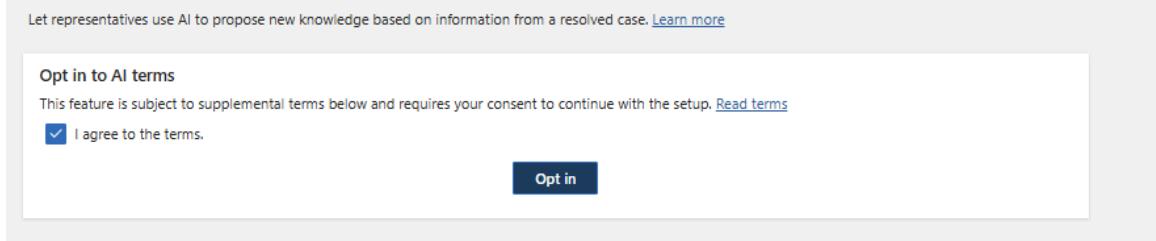
The **CustomerServiceKnowledgeHarvest** agent extracts content from cases to generate knowledge articles. By default, this feature is not enabled in the environment and so you will need to publish it.

1. In [Microsoft Copilot Studio](#), select your environment, and then search for the **CustomerServiceKnowledgeHarvest** agent.
2. If prompted for consent, select Confirm.
3. [Publish the agent](#).

Verify Knowledge Management Setup

Before configuring and using the Knowledge Management Agent, it is necessary to ensure that the baseline knowledge management functionality is set up.

1. Open the **Copilot Service admin Center**.
2. Using the navigation on the left, under **Support experience** select **Knowledge**.
3. Under **Knowledge Creation**, select **Manage**. Opt in to AI terms



4. Under the **Case-based knowledge creation**, ensure both the following are enabled:
 - Let representatives use Copilot to propose new knowledge based on case information during or after resolution.

Case-based knowledge creation

Let representatives use Copilot to propose new knowledge based on case information during or after case resolution. [Learn more](#)

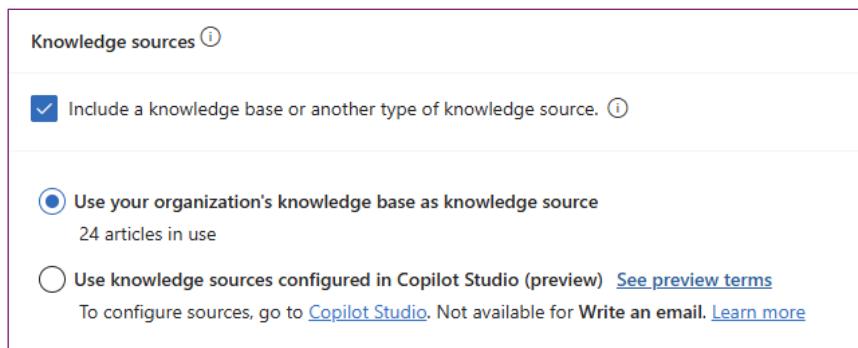
In the case resolution step, keep the option to propose a knowledge article selected by default
A customer service representative can clear this selection if they don't want a knowledge article drafted after case resolution.

5. Select **Save and Close**

Verify Copilot Settings for Knowledge Sources

Ensure Knowledge Sources are configured to use organizations knowledge base.

1. In the **Copilot Service admin center**.
2. Go to **Productivity**.
3. Locate **Copilot for Questions and email**, select **Manage**.
4. Under **knowledge sources**, ensure that below 2 settings are selected:
 - Include a knowledge base or another type of knowledge source
 - Use your organizations knowledge base as knowledge source.



Setup the Knowledge Management Agent

Task 1: Configure the Knowledge Management Agent

1. In Copilot Service admin center, go to **Support experience > Knowledge > Customer Knowledge Management Agent**,
2. Select **Manage**.
3. The **Customer Knowledge Management Agent** page appears.
4. In the **Case** section, locate **Real-time-creation** and select **Copilot use information from current case to create knowledge articles**.

The screenshot shows the 'Real-time creation' section of the 'Customer Knowledge Management Agent' page. It includes a checkbox labeled 'Let Copilot use information from current case to create knowledge articles.' with a link to 'Manage rules'. Below the checkbox is a note: 'Turn on knowledge harvesting for cases to manage rules and settings.'

5. In Case section, select **Manage Attributes**. Ensure that yours matches the image below:

The screenshot shows the 'Manage data - Case' dialog. It has a header 'Manage data - Case' and a sub-header 'Select case data for Copilot to use when drafting knowledge articles.' Below this is a section titled 'What information do you want to include' with a note: 'Edit the default selections to customize the information Copilot will use. Uncheck the item to omit it.' A table lists the data fields:

Include	Description	Record Type	Data Field
<input checked="" type="checkbox"/>	Case Title	maps to	Case
<input checked="" type="checkbox"/>	Case Description	maps to	Description
<input checked="" type="checkbox"/>	Product	maps to	Name
<input checked="" type="checkbox"/>	Subject	maps to	Title
<input checked="" type="checkbox"/>	Incident Resolution	maps to	--
<input checked="" type="checkbox"/>	Email Content	maps to	--
<input checked="" type="checkbox"/>	Conversation Summary	maps to	--
<input checked="" type="checkbox"/>	Case Notes	maps to	Description

6. Select **Save**.

Task 2: Configure rules for real-time article creation

The agent should not create a new article for every closed case. For instance, if an existing knowledge article was used as part of the resolution, creating a new one is unnecessary. Rules will be defined to determine when new articles should be created.

1. On **Customer Knowledge Management Agent** page, go to **Case** section> **Real-time-creation**.
2. Select **Manage rules**.
3. In **Manage Rules** section, select the **Default** rule, and select **Edit**.
4. Add the conditions for related entity as shown in below image and select **Save**.

Default rule

Details

Rule name *

Conditions

Condition name *

Conditions that need to be met before new knowledge articles are created

And

Status Equals Resolved ...

Case Resolution (Case) Contains data ↗ ...

And

Modified On Last x days 1 ...

+ Add

+ Add

This screenshot shows the 'Default rule' configuration page. It has sections for 'Details' (Rule name: Default rule) and 'Conditions'. The 'Conditions' section is expanded, showing a complex logical structure. It starts with an 'And' clause, followed by a condition for 'Status Equals Resolved'. Below that is another 'And' clause containing a condition for 'Case Resolution (Case) Contains data'. A third 'And' clause is partially visible. Each condition is composed of a checkbox, a dropdown for the field, an operator like 'Equals', and a value or range like 'Resolved' or 'Last x days 1'.

5. Select **Automatic article updates (preview)**

Automatic article updates (preview)

- Automatically update existing articles. ⓘ

When enabled, existing knowledge articles will be automatically updated with a new version based on new information found during creation.

Task 3: Configure Article publishing rules

Articles generated automatically may not always be ready for publication, especially during the early stages of implementation. Hence, initially, you may wish a reviewer would verify the content initially to ensure accuracy.

1. In the **Compliance** section, next to **Compliance Status**, select **Compliant**.

Compliance

Set the default compliance status for articles drafted by Customer Knowledge Management Agent.

Compliance Status

2. In **Auto publishing** section, select **Automatically publish compliant articles as soon as they created**.
3. Select **Internal Target Audiences**, for “Who can use automatically published articles?”.

Auto publishing

Automatically publish compliant articles as soon as they're created. ⓘ

Who can use automatically published articles?

Internal target audiences

Internal and external target audiences

4. Select **Save and Close**.

Testing scenario

1. Customer sends an email to request more information about ‘Portal Access and Enrolment Support for Health Insurance’
2. Case will be created against the customer request.
3. Human agent acknowledges the case by sending acknowledgement email.
4. Human agent performs the analysis and adds a **Note** to the Case as below:

Title: Case Analysis

Note Text:

All member enrolment is to be updated in Contoso portal. If customer is logging in for the first time, then customer need to reset password using the link: <https://portal.contoso.in/ForgetPassword.aspx>

Below are the login credentials to submit the online claims, downloading E card for the enrolled members, claim status, Hospital Network status, etc

URL: portal.contoso.in

Username: Username <Employee No>

Password: DDMMYYYY (Employee date of birth)

5. Humane agent, send email to customer with available details as below:

Dear Customer,

Thank you for reaching out to us. We are here to help you understand your health insurance coverage better.

Please continue reading to gain insights into the enrolment, new portal login credentials and other essential information. Kindly reach out to us if you have any further queries that remain unresolved.

If you are logging in for the first time, then you need to reset your password using the link <https://portal.contoso.in/ForgetPassword.aspx>. Below are the login credentials to submit the online claims, downloading E card for the enrolled members, claim status, Hospital Network status, etc

URL: portal.contoso.in

Username: Username <Employee No>

Password: DDMMYYYY (Employee date of birth)

Claim submission Guidelines

You will be able to submit all the previous years and new policy year hospitalization claims by logging into the portal. Please select hospitalization claims for more details

E-card

E-cards for the enrolled members are available in the Contoso portal. Newly enrolled members e-cards will be available after 45 days from the date of joining.

We hope that this information is helpful. Do reach out to us with any further questions or concerns.

Thank you for choosing us as your insurance provider and for entrusting us with the care of you and your loved ones.

Regards,

Support Team

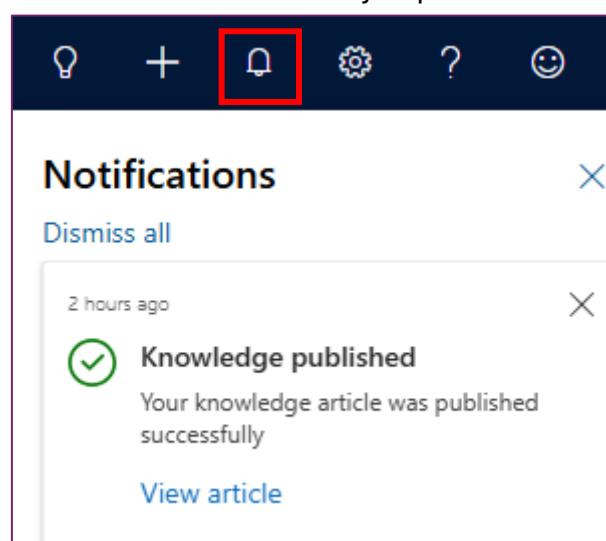
6. Now in Case tab, select **Resolve Case**

7. Select the **Problem Solved** as the category and enter a resolution detail of **Issue resolved**



8. Select the **Resolve** button

9. Once the case is resolved, Knowledge Management Agent will create Knowledge Article and publish it automatically. You can validate it in app notification or in Knowledge Article area in 'Articles created by copilot' view.



Articles created by copilot*		Focused view	Show Chart	+ New	+ New From Template	Delete	Refresh	Visualize this view	...
		Ask about data in this table.		Creation Mode: Copilot		Root Article: No			
	Article Public Number	Title		Status	Representative Revi...	Compliance State	Created On		
	KA-01005	Access and Enrolment Support for Health Insurance Portal		Published	Not Reviewed	Compliant	12/12/2025 12:52		

You do have option to configure the agent to create draft article and keep the option to review it before publishing. For this you need to update the Compliance setting as below:

Compliance

Set the default compliance status for articles drafted by Customer Knowledge Management Agent.

Compliance Status Pending

Now with this setting, once the case is resolved:

1. Go to the case **Timeline**.
2. Select the Suggested actions tab. (This will only appear when there's a suggested action.)

Propose a knowledge article

Review draft

Insight: A knowledge article was drafted based on the information used to resolve this case. Review the draft and submit a proposal.

Are these actions useful?

3. Select **Review draft**.
4. You can review and edit the article draft and can make any rich text edits.
5. Select **Mark as reviewed** (if you have required permission, you can publish the article)
6. Now you can approve and publish the article.