

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 agent & supervisor roles for setup based on user role.

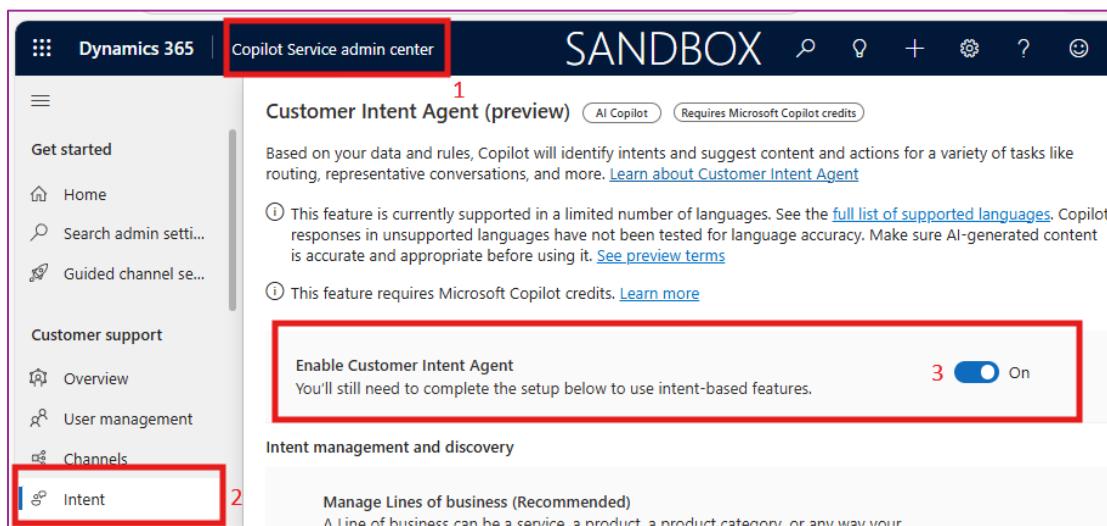
Scenario

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

Configuration

Step 1: Enable Customer Intent Agent

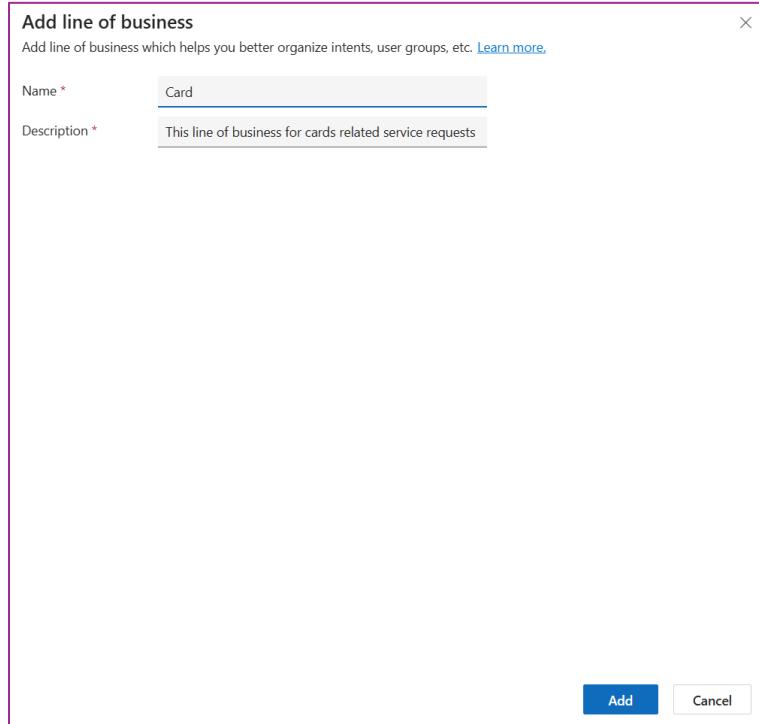
- In the site map of Copilot Service admin center, select Intent under Customer support.
- On the Customer Intent Agent page that appears, enable the Turn on Customer Intent Agent toggle. This may take up to 15 mins to take effect.



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

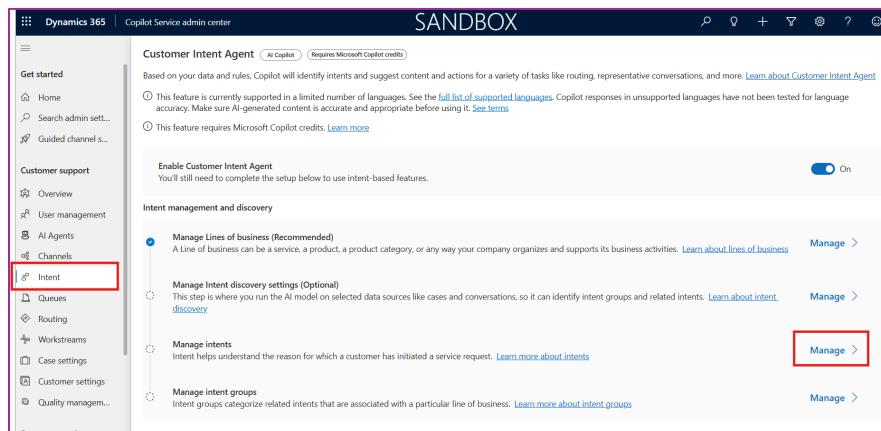
- **Create Line of business**
 - Click on Manage to Add Line of business

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



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

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



- Create a new intent by providing the details below

Intent details

Name*	Credit card - Cancellation request
Review status*	Approved
Intent group	Select intent group
Line of business*	Cards
Autonomous support	<input checked="" type="checkbox"/> Yes, let AI agents autonomously respond to customers about this intent

- Add below Attributes for the above created intent –

Name ↑	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 [\(1\)](#)

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

Dynamics 365 knowledge articles <input checked="" type="radio"/>	Tools <input type="radio"/>	Custom AI agents <input type="radio"/>
Help content from your knowledge base	Tools help systems connect and enable data flow or actions	Choose the custom AI Agent you want to use (Used by Case Management Agent only)

[+ Add](#)

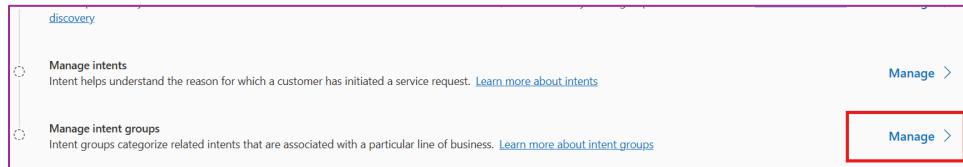
Solution (Optional)

Solution type: Associate knowledge articles

Public number	Article title	Language	Article status	Minor ver...	Major ver...	Modified on
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

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	

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

The screenshot shows two sequential steps in the Microsoft Copilot Service Admin center:

Step 1: Define intent group

This screen allows you to define a new intent group. The fields are as follows:

- Intent group name ***: Credit card
- Description**: Intent group to manage credit card related queries
- Line of business ***: Cards
- Review status ***: Approved

Step 2: New intent group : Credit Card

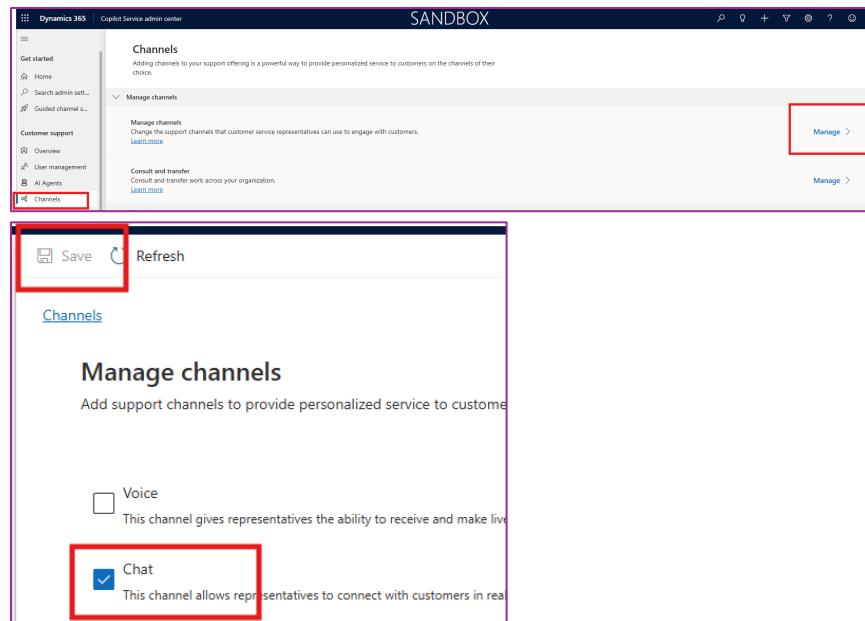
This screen lists the intents added to the 'Credit Card' intent group. The table shows:

	Name ↑	Intent group	Intent source	Review status
<input checked="" type="checkbox"/>	Credit Card Cancellation – Pre-C...	Credit Card	Admin edited	Approved

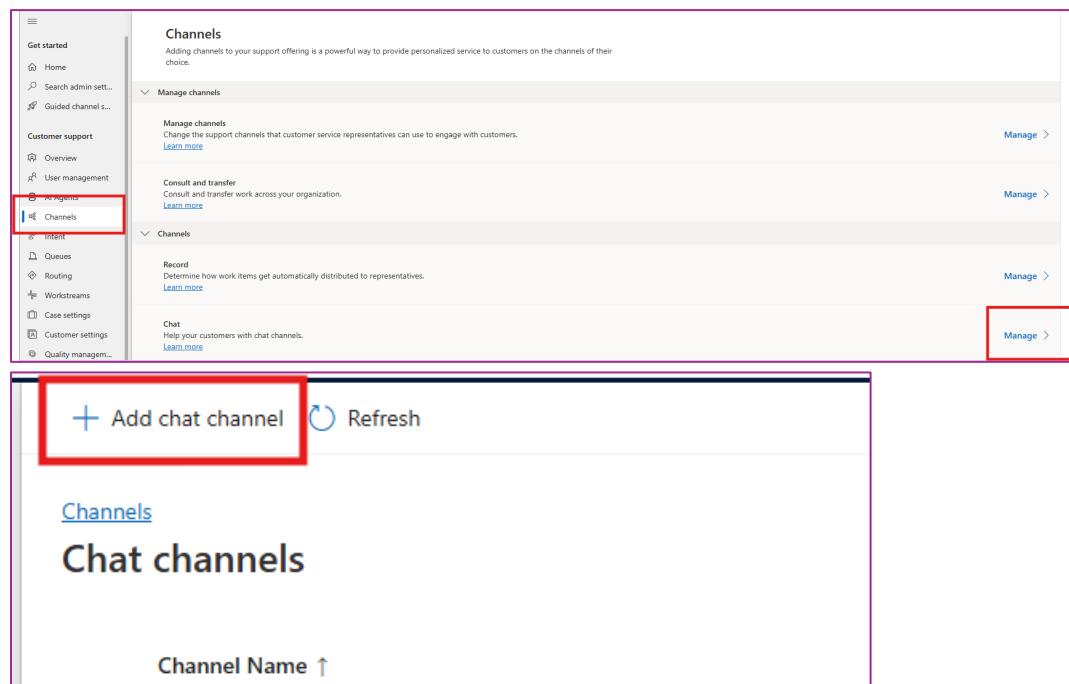
At the bottom, there are 'Back', 'Add', and 'Cancel' buttons.

Step 3: Set up Chat workstream

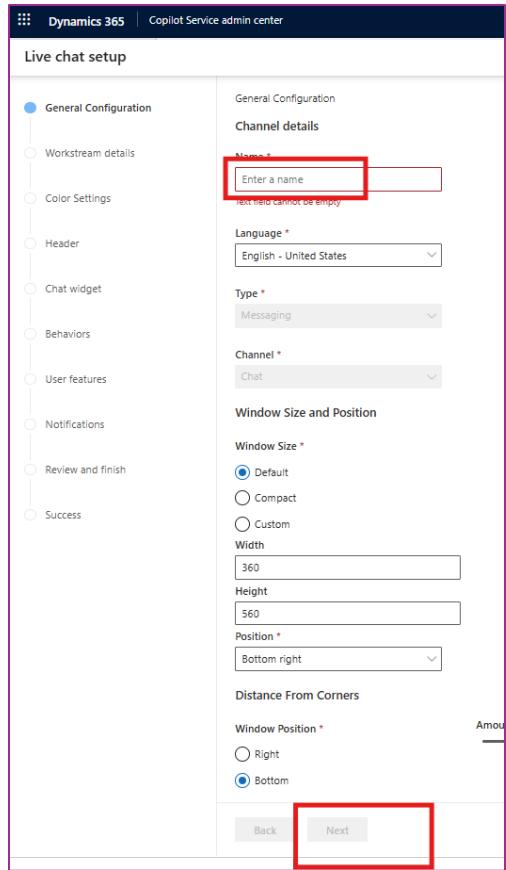
- Confirm Chat workstream setup ready. If not, follow below steps:
 - Go to Copilot Service Admin center -> Customer Support -> Channels-> Manage Channels -> Manage -> Enable Chat-> Save (this will take 5-10 minutes to enable)



- 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



- 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 availability. This mode also allows picking of open work items that go unassigned.

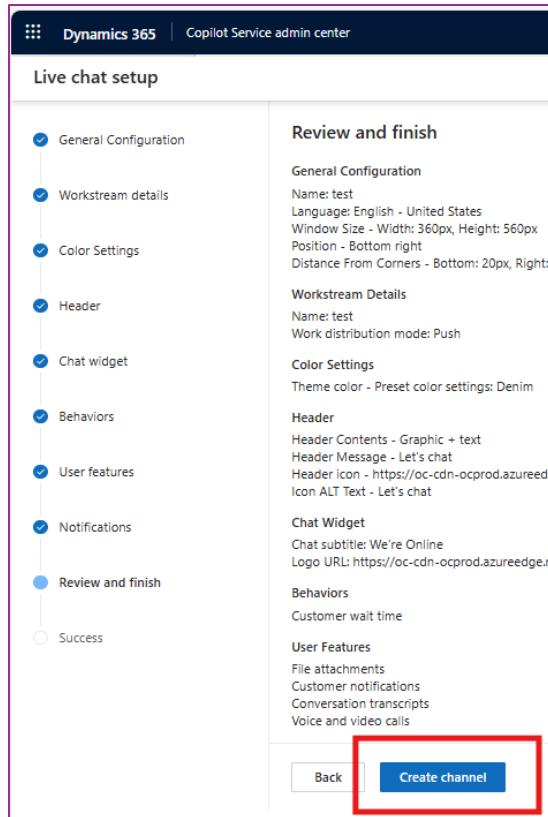
Fallback queue *

Create new

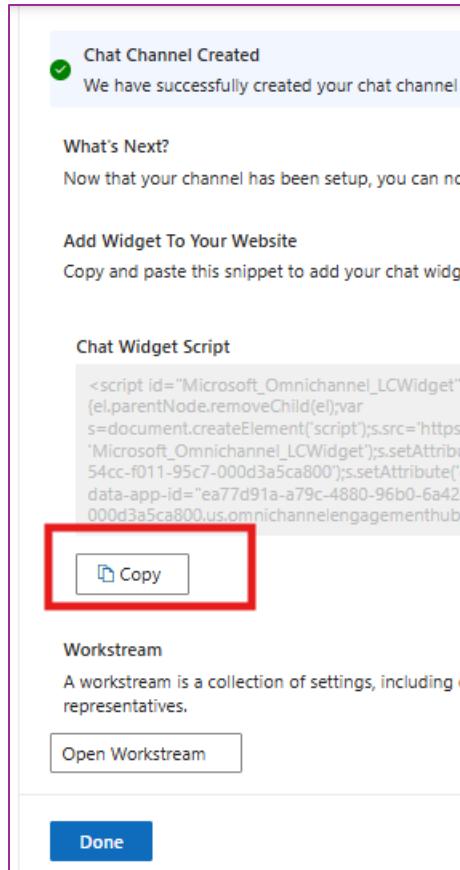
A new queue will be created. You must add users to the new queue for work to be assigned to them.

Back **Next**

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



- Once the channel is created, copy the widget script from the last screen.
Keep this handy to be used during testing.



- 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.

Dynamics 365 Copilot Service admin center

SANDBOX

Get started

Queues > Advanced queues

Workshop queue

Users

Name	Type	Role	Capacity profile	Capacity
[REDACTED]	User	Representative, Supervisor		

Line of business mapping

Line of business	Cards

Queues

- 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]

The screenshot shows the Dynamics 365 Workstreams interface for the 'Agent workshop chat workstream'. The top navigation bar has tabs for Chat, Channel, and Message Type. The main content area includes sections for Chat widget (with a 'Copy Chat Widget Script' button), Behaviors (Customer wait time), and User features (File attachments, Customer notifications, Conversation transcripts, Voice and video calls). Below these are tabs for Language (English - United States) and Behaviors (Customer wait time). A 'Routing rules' section is expanded, showing a 'Work classification (optional)' note and a 'Route to queues' section. Under 'Route to queues', there's a 'Fallback queue' set to 'Default messaging queue (All users)' and an 'Edit' button. A 'Rule hit policy' section shows 'Hit-all' and an 'Edit' button. A 'Ruleset name' table lists 'Workshop queue' as a 'Logical - Decision list'. At the bottom, there are back and forward navigation arrows.

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.

The screenshot shows the Copilot Service Admin Center interface under the 'Sandbox' tab. The left sidebar includes 'User management', 'AI Agents', 'Channels', 'Intent', 'Queues', 'Routing', 'Workstreams', 'Case settings', 'Customer settings', 'Quality management', 'Support experience' (with 'Overview', 'Workspaces', 'Productivity', and 'Knowledge' sub-options), and 'Copilot for questions and emails'. The 'Copilot for questions and emails' section is highlighted with a red box. The main content area shows a message: 'The knowledge base is ready and 2 articles are being used. Representatives will now get AI-powered responses with Copilot.' Below this is a 'Productivity' section with a red box around it. The 'Select features' section contains a checkbox for 'Ask a question: Let representatives chat with AI.' (also highlighted with a red box) and a 'Custom instructions' text area. At the bottom, another red box highlights a checkbox for 'Help pane - Write an email: Get help drafting an email in the help pane.'

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

Create a new experience profile

Name *

Unique name *

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

- Only alphanumeric characters
- 2-8 characters

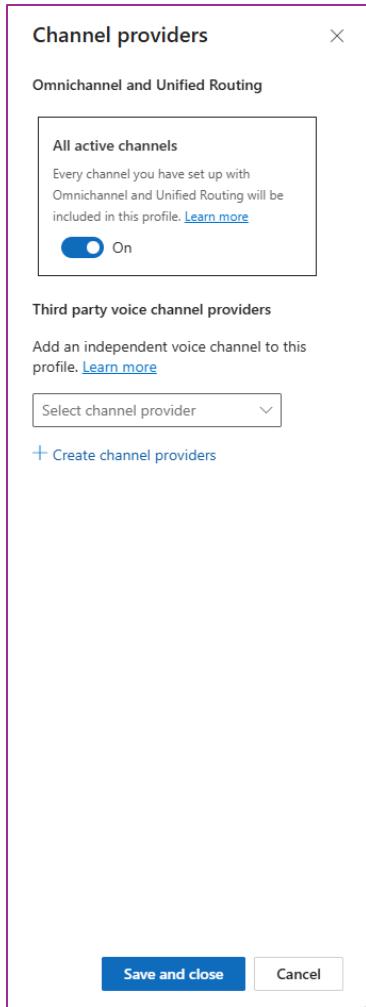
The name portion can be any length, but can't include spaces.

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



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

Section	Setting	Status
Copilot AI features	Copilot help pane	<input checked="" type="checkbox"/> Turn on the Copilot help pane in productivity pane settings
	Ask a question	<input type="radio"/> Intent-based suggestions (preview)
Productivity pane	Copilot	<input checked="" type="checkbox"/> Copilot On
	Smart assist	<input checked="" type="checkbox"/> Smart assist Off

- Enable Intent-based suggestions

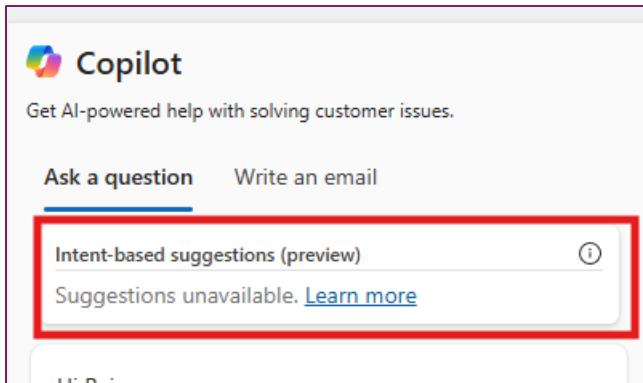
Step 6: Create a conversation rule for Credit card line of business.

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

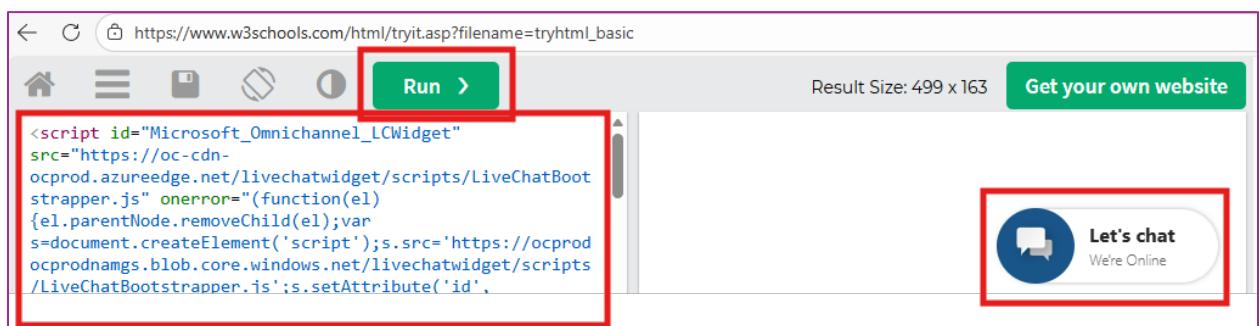
Add below conversation rule by clicking on add new rule.

Steps – Scenario testing [Assisted support]

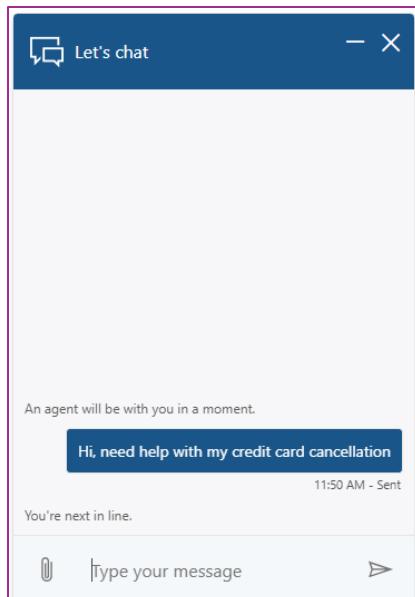
- Go to Copilot Service Workspace
- Based on above steps configured – we should see the Intent Based suggestions section in copilot pane



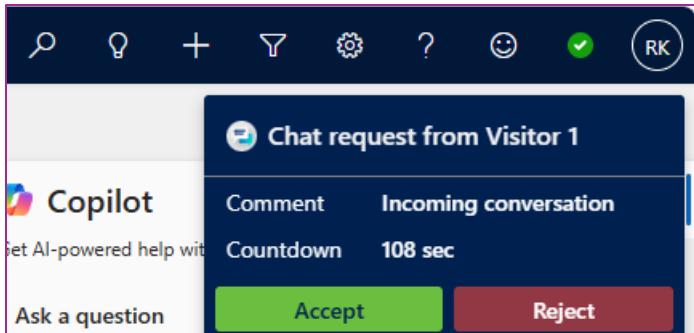
- Open the chat widget hosted in external site. For our testing we have used [W3Schools Tryit Editor](#). Here paste copied chat widget script which was saved at final step of chat channel setup.



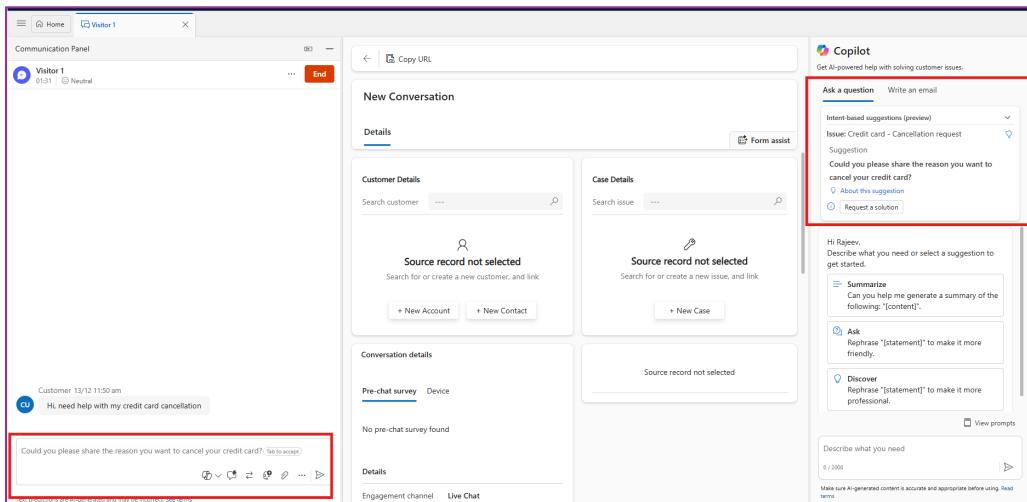
- Start chat from the chat widget and ask for help:



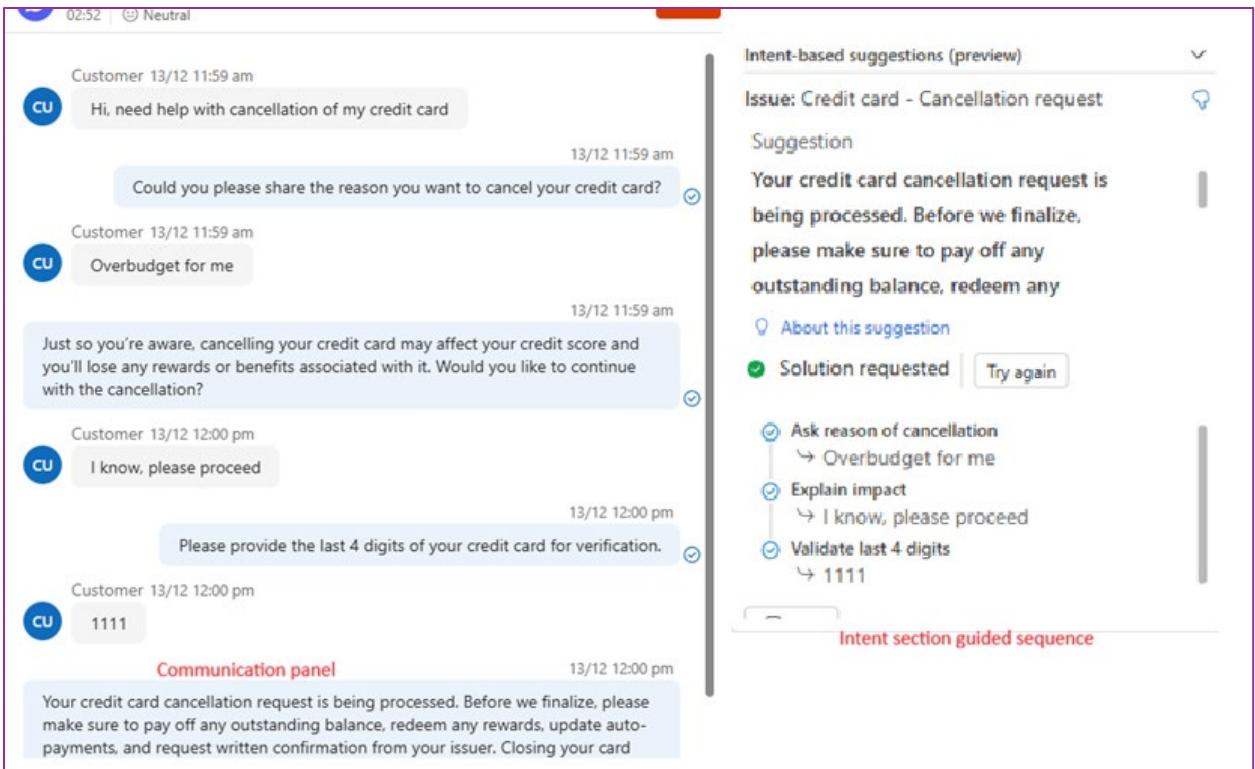
- The support representative will receive an incoming chat conversation request



- 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.

The screenshot shows two overlapping windows from the Microsoft Power Apps platform.

Top Window: Default Solution > Connection references

- Left sidebar: Objects, Search bar, Advanced, Delete from this environment.
- Table header: Name, Type, Managed, Customized, Last Modified.
- Items: Connection roles (35), Macro Connector (4), Tables (1443), **(A)cr:APIPluginDVConnector** (selected and highlighted with a red box).
- Right pane: Edit IA.cr:APIPluginDVConnector dialog with fields: Display name * (IA.cr:APIPluginDVConnector), Name * (IA.cr:APIPluginDVConnector), Description, Connector (Microsoft Dataverse), Connection (Microsoft Dataverse), and a New connection button.

Bottom Window: Connections > New connection

- Table header: Name, Publisher, Type, Actions.
- Items: Microsoft Dataverse, SharePoint, OneDrive for Business, Dynamics 365 (deprecated), Salesforce, OneDrive, SQL Server, Dropbox, 10to8 Appointment Scheduling, iDocStop, IMe Corporate, 365 Training, 3E Events.
- Right pane: Connect to Microsoft Dataverse dialog with fields: Authentication type (OAuth selected and highlighted with a red box), and Create and Cancel buttons.

Step 2: Set up Copilot agents for intent management

The screenshot shows the Dynamics 365 Copilot Service admin center interface.

Left Sidebar:

- Dynamics 365
- Get started: Home, Search admin settings, Guided channel s...
- Customer support: Overview, User management, **AI Agents** (selected and highlighted with a red box), Channels, Intent, Queues, Routing, Workstreams, Case settings, Customer settings, Quality management...
- Support experience

Right Content Area: Add an AI agent

Buttons: + Add (highlighted with a red box), Refresh.

Form Fields:

- Connect existing AI agent (radio button)
- Create new AI agent (radio button, selected and highlighted with a red box)
- Name: Omnicchannel PVA Demo B...

Bottom Right: Next button (highlighted with a red box).

[← 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

⌚ Name	Type	Published on	Modified on	Workstreams	Queues	Owner	Voice Status	Chat Status
CSAgentForIntentWork...	Copilot	never	few seconds ago			Rajeev Ku...	<input checked="" type="checkbox"/> Disabled	 Connected

AI Agents

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

Name	Type	Published on	Modified on
CSAgentForIntentWorkshop	Copilot	never	few seconds ago

CSAgentForIntentWorkshop

Type

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

Uses AI-generated intents
An intent based agent that is able to reason

Channel (i)

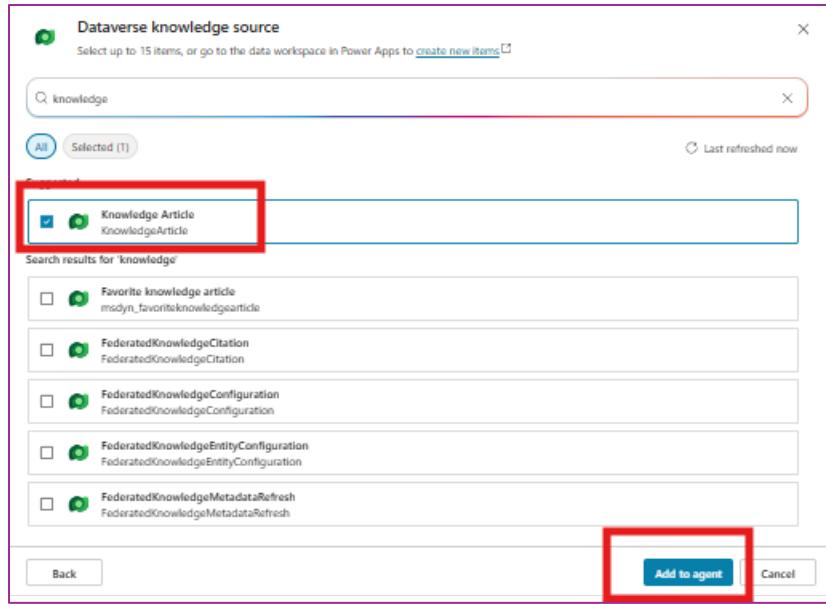
Digital only Voice only

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**

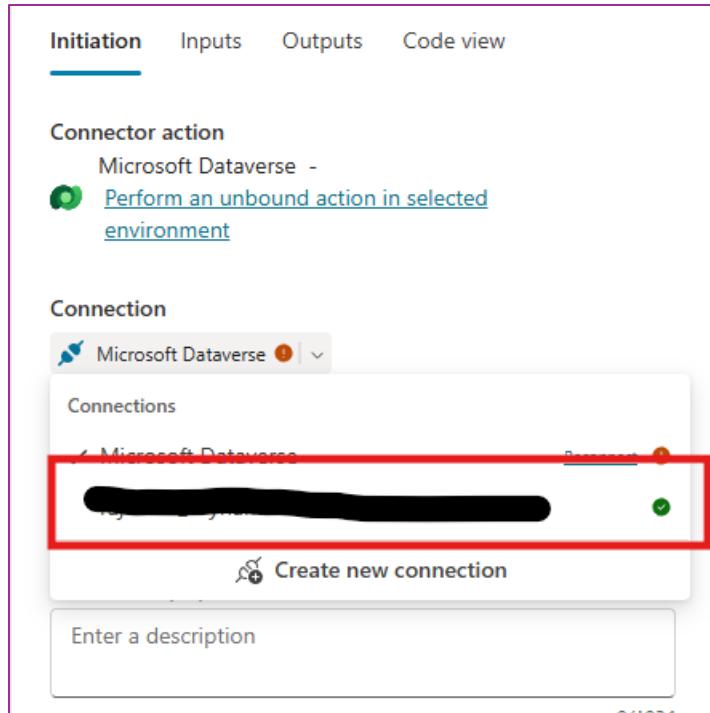
- Once saved, click on the agent name from the agent list. This will redirect to the Copilot Studio and opens the agent for configuration.
- Add Knowledge source related to Credit card cancellation guide



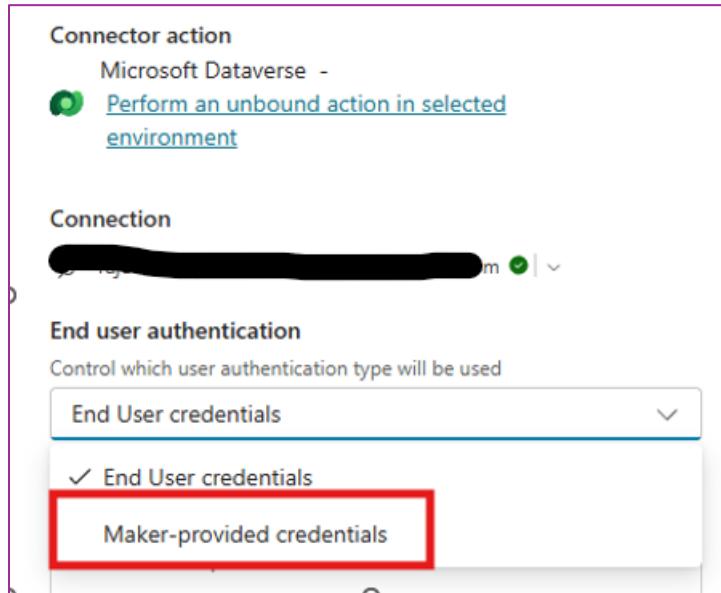
- Go to Topics -> Open Intent-based suggestions - Plugin

CSAgentForIntentWorkshop				
Overview Knowledge Tools Agents Topics Activity Evaluation				
+ Add a topic Custom (15) System (8)				
Name	Type	Trigger	Last modified	
Goodbye	Topic	Phrase	Rajeev Kumar 24 minut...	
Greeting	Topic	Phrase	Rajeev Kumar 24 minut...	
Intent-based suggestions - Configuration	Topic	Redirect	2 days ago	
Intent-based suggestions - Determination	Topic	Redirect	24 days ago	
Intent-based suggestions - Interview	Topic	Redirect	24 days ago	
Intent-based suggestions - Main	Topic	Redirect	2 days ago	
Intent-based suggestions - Plugin	Topic	Redirect	24 days ago	

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

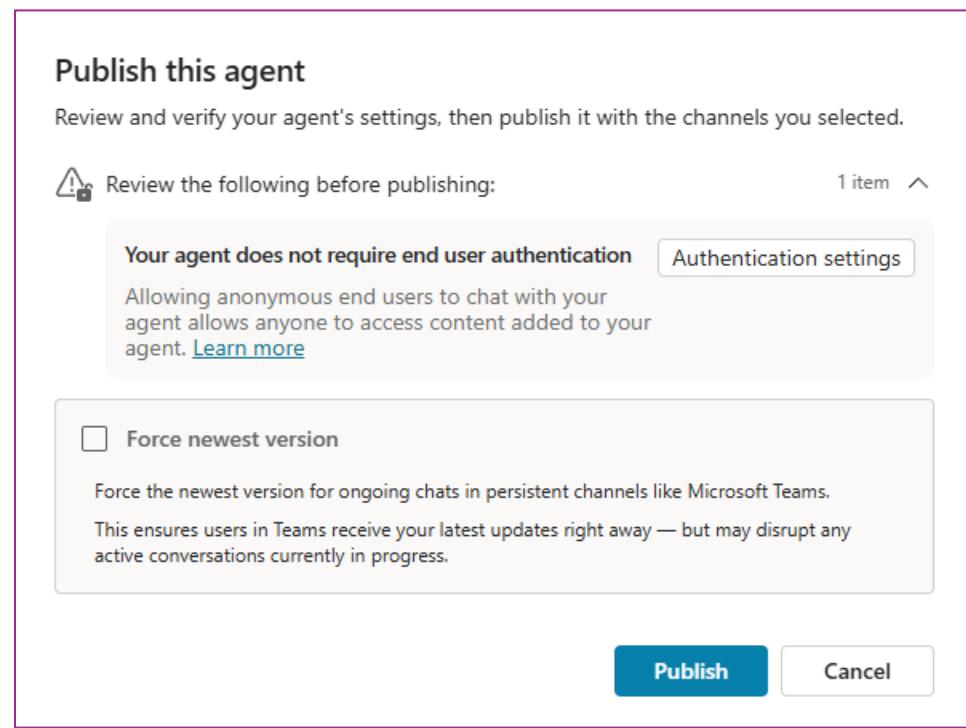


- In the [End user authentication] field select [Maker-provided credentials]. Save the changes.

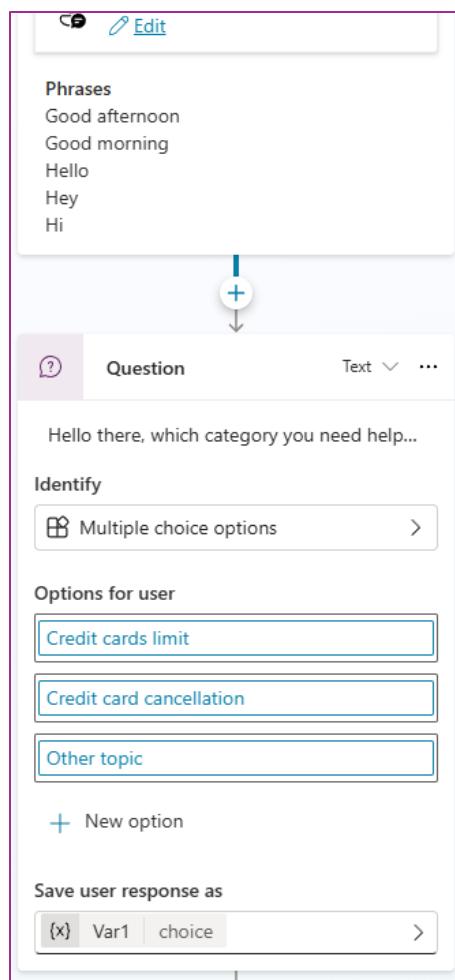


- Click on publish from the top right corner of the Copilot Studio -> Acknowledge the authentication alert and continue to publish from

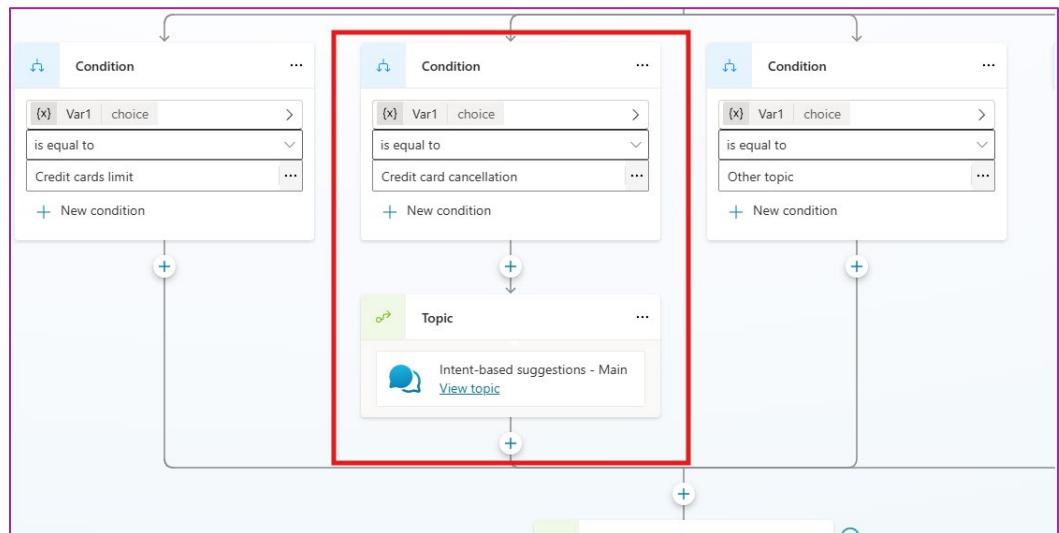
confirmation popup



- [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

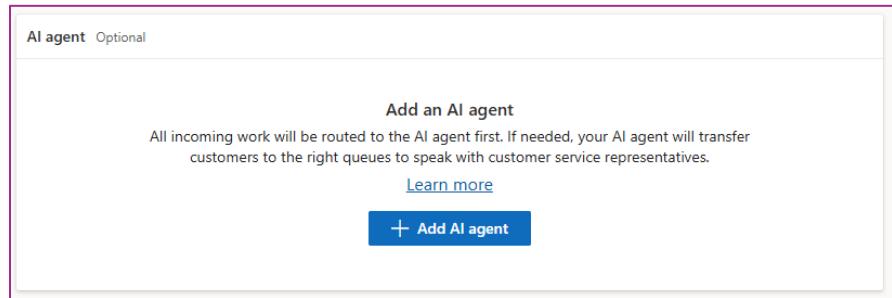


- Route to Intent suggestions [Intent-based suggestions - Main] for cancellation option to test the intent-based interaction behavior.



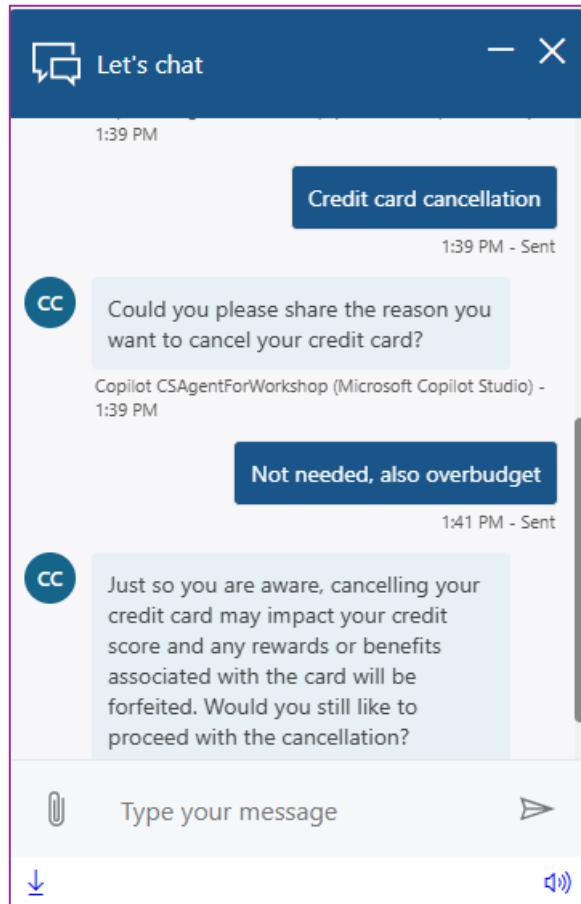
- Save and publish the agent

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

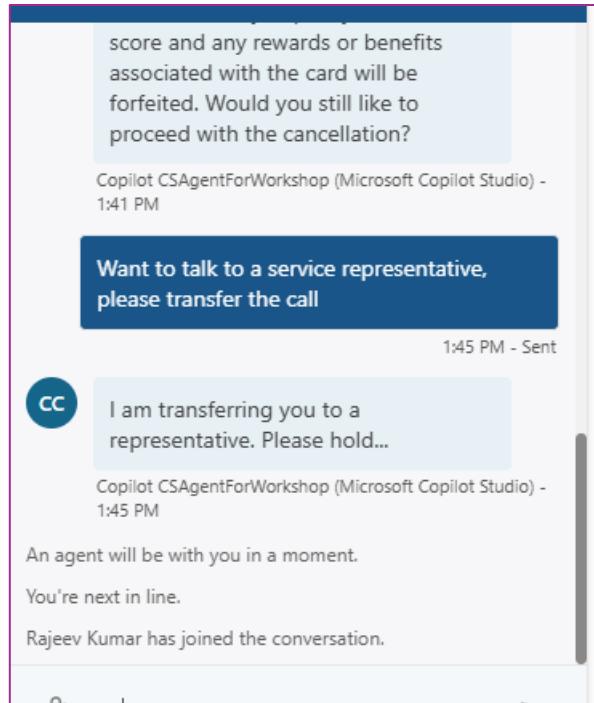


Steps – Scenario testing

- 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

The screenshot shows the Communication Panel with the conversation history and a detailed conversation summary at the bottom.

Communication Panel

Visitor 1
02:21 | ☺ Neutral **End**

Copilot CSAgentForW... 13/12 1:41 pm
Just so you are aware, cancelling your credit card may impact your credit score and any rewards or benefits associated with the card will be forfeited. Would you still like to proceed with the cancellation?

Customer 13/12 1:45 pm
cu Want to talk to a service representative, please transfer the call

Copilot CSAgentForW... 13/12 1:45 pm
cc I am transferring you to a representative. Please hold...

cc Customer transferred from agent to representative

Conversation summary Summarized 2 min ago **X**
The customer initiated a conversation with a virtual assistant regarding credit card cancellation. The assistant asked for the reason, and the customer responded that the card was not needed and they were over budget. The assistant informed the customer about potential impacts on credit score and loss of rewards if the card was canceled and asked if they wished to proceed. The customer requested to speak with a service representative, and the assistant transferred the call. The agent Rajeev Kumar then joined the conversation.

Copy

AI-generated content may be incorrect. Make sure AI-generated content is accurate and appropriate before using. [See terms](#)

Type your public message ...

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 Microsoft SharePoint Knowledge Article editor. The top navigation bar includes 'Credit Card Cancellation - Unsaved' and 'Knowledge Article'. The right side shows 'English - United States' as the language and 'Published' as the status reason. Below the navigation is a toolbar with 'New Process' (Active for 21 days), 'Author (21 D)', 'Review', 'Publish', and 'Form assist'. The main content area has tabs for 'Content', 'Summary', 'Analytics', and 'Related'. The 'Content' tab is selected, showing the word 'CONTENT'. Below this is a rich text editor toolbar with buttons for styles, fonts, and other document functions. The main content area contains the following text:

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.