

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

3. [Dynamics 365 knowledge management](#) is configured.
[update]

Dynamics 365

Copilot Service admin center

SAN

Search admin sett...

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Knowledge

Allow customer service representatives to create rich, high-quality knowledge articles for 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 customer interactions. [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 relevant information. [Learn more](#)

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

Dynamics 365

Copilot Service admin center

SANDBOX

Save

Refresh

Knowledge

General settings

Configure knowledge management for your representatives and authors.

Search results display count

The results configuration is only applicable to app side pane and standalone knowledge search control. The value doesn't apply when federated search is enabled. [Learn more](#)

10

Feedback

Enable users to provide feedback based on knowledge articles from search control. [Learn more](#)

Enable feedback ☒ Yes

Authoring language

Set default knowledge article authoring language for the knowledge authors. [Learn more](#)

Enable default authoring language ☒ Yes

Language settings *

Organization's UI language

Use organization's UI language as default knowledge authoring language

☒

Other language

Select a language as default knowledge authoring language

☐

Language

Select Language

Allow users to set default knowledge authoring language ☒ Yes

Origins allow list

The origin links are required to ensure only safe links are added by the knowledge authors in the articles. Supported origins are HTTP or HTTPS protocol, IP address or domain name, and TCP port number. The knowledge authoring user can add or remove links from the list. [Learn more](#)

Add origin links

Write a keyword and hit Enter E.g. key1

https://www.contoso.com/about

X

Knowledge search experience

Enable suggest as you type ☒ Yes

View relevant articles matching users' search text as they type in the search text box, when Dataverse search is enabled. [Learn more](#)

Set search mode as all ☒ Yes

By setting Yes, you agree to match all the search words to consider an article as a match, when Dataverse search is enabled. [Learn more](#)

Show recently viewed knowledge articles ☐ No

Customer service representatives get a list of recently viewed articles in the knowledge search pane. Currently articles present in Dataverse are supported in the recent list. [Learn more](#)

Number of recently viewed articles shown

5

Global search knowledge configuration

Open knowledge article in preview mode from global search results. [Learn more](#)

Enable Kb preview mode from global search ☒ Yes

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.



All Categories

Focused viewShow ChartNewDeleteRefreshVisualize this viewEmail a LinkVisualize

Ask about data in this table.

<input type="checkbox"/> Category Number	Title
<input type="checkbox"/> CAT-01007	Credit Card Stolen
<input type="checkbox"/> CAT-01004	Defects
<input type="checkbox"/> CAT-01003	Delivery Issues
<input type="checkbox"/> CAT-01005	Returns and Exchanges
<input type="checkbox"/> CAT-01006	Stolen
<input type="checkbox"/> CAT-01002	Support
<input type="checkbox"/> CAT-01000	Support Portal Issues
<input type="checkbox"/> CAT-01001	Travel

Filters: Enable search feature

 Save  Refresh

[Knowledge](#)

Filters

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}

[Knowledge](#)

Portal

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}

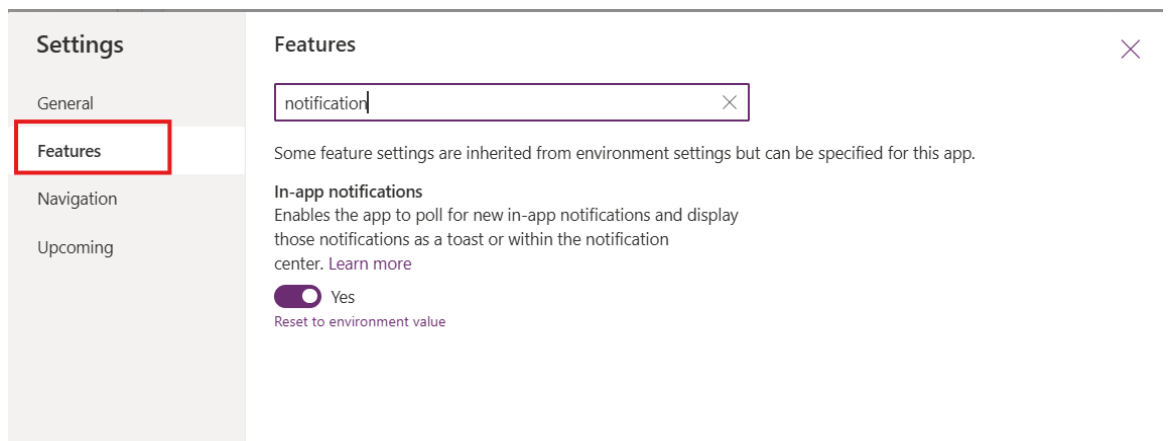
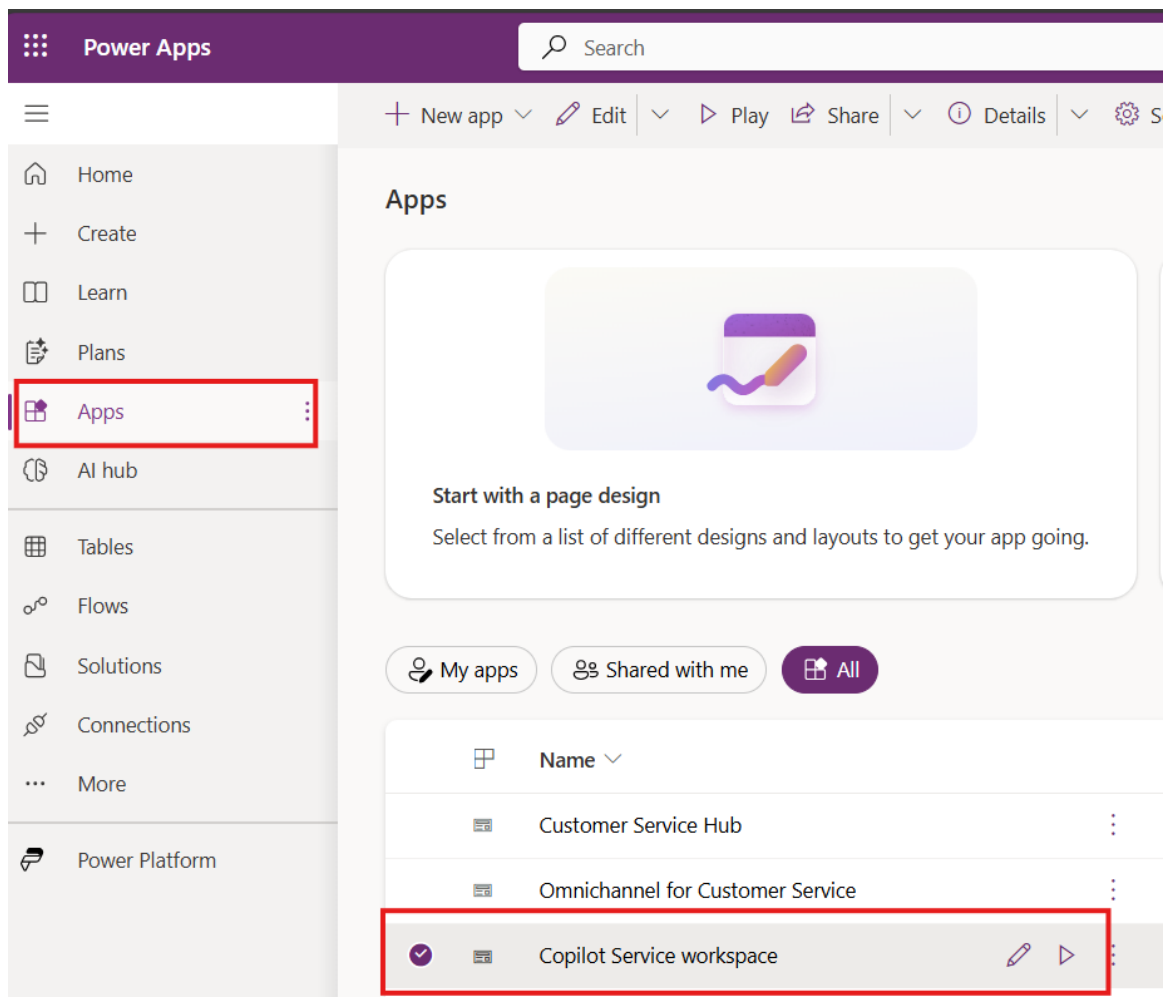
https://org31ebd9c3.crm.dynamics.com/kb/{kbnum}

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.

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



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.

Dynamics 365

Copilot Service admin center

SANDBOX

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.

Get started

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Contextual email drafting: Get help drafting an email, inside the email compose window.
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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.

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

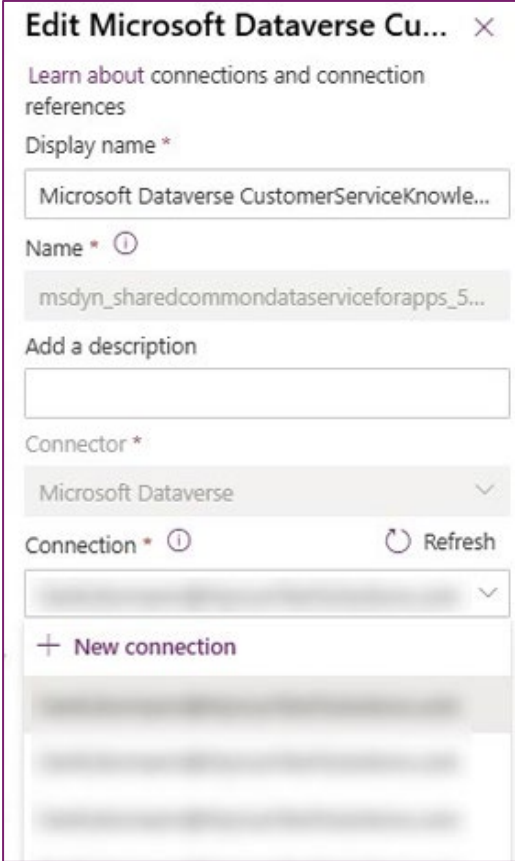
Setup & enable required connections and flows

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

- 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)



Edit Microsoft Dataverse CustomerServiceKnowledgeHarvest ✕

Learn about connections and connection references

Display name *

Microsoft Dataverse CustomerServiceKnowledgeHarvest

Name * ⓘ

msdyn_sharedcommondataserviceforapps_5...

Add a description

Connector *

Microsoft Dataverse ▼

Connection * ⓘ ⓘ Refresh

▼

+ New connection

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

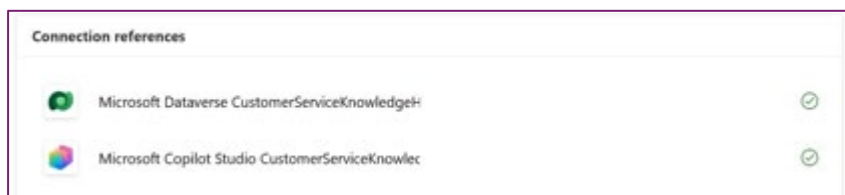
Now, we are going to repeat this process for another connector.

- 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

Let representatives use AI to propose new knowledge based on information from a resolved case. [Learn more](#)

Opt in to AI terms
This feature is subject to supplemental terms below and requires your consent to continue with the setup. [Read terms](#)

☒ I agree to the terms.

[Opt in](#)

- 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.

- Select **Save and Close**

Verify Copilot Settings for Knowledge Sources

Ensure Knowledge Sources are configured to use organizations knowledge base.

- In the **Copilot Service admin center**.
- Go to **Productivity**.
- Locate **Copilot for Questions and email**, select **Manage**.
- 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.

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](#)

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**.

Case

Manage attributes

Real-time creation

☒ Let Copilot use information from current case to create knowledge articles. [Manage rules](#)

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:

Manage data - Case

Select case data for Copilot to use when drafting knowledge articles.

What information do you want to include

Edit the default selections to customize the information Copilot will use. Uncheck the item to omit it.

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

The screenshot shows the 'Default rule' configuration interface. It has two main sections: 'Details' and 'Conditions'.

Details: The 'Rule name' field is set to 'Default rule'.

Conditions: The 'Condition name' field is set to 'Default condition'. Below this, a text label reads 'Conditions that need to be met before new knowledge articles are created'. The conditions are configured using a visual builder:

- A top-level condition is selected with a checkbox. It is defined as: **Status** **Equals** **Resolved**.
- A second condition is selected with a checkbox. It is defined as: **Case Resolution (Case)** **Contains data**.
- Inside the 'Contains data' condition, there is a sub-condition selected with a checkbox, defined as: **Modified On** **Last x days** **1**.

Each condition is added via a '+ Add' button. The interface uses a blue line to connect the sub-condition to its parent condition.

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

The screenshot shows the 'Automatic article updates (preview)' configuration page. It features a checkbox labeled 'Automatically update existing articles.' which is checked. Below the checkbox, a note states: '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

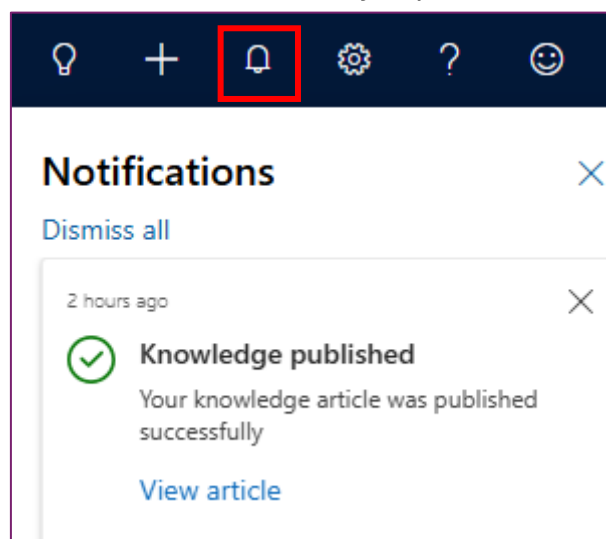
E-cards for the enrolled members are available in the Contoso portal. Newly enrolled members e-cards will be available after 45 days from the date of joining.

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* ▼					
<div> 🔍 Ask about data in this table. Creation Mode: Copilot × Root Article: No × </div>					
<input type="checkbox"/>	Article Public Number ▼	Title ↑ ▼	Status ▼	Representative Revi... ▼	Compliance State ▼
<input type="checkbox"/>	KA-01005	Access and Enrolment Support for Health Insurance Portal	Published	Not Reviewed	Compliant
Created On ▼					
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.