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:

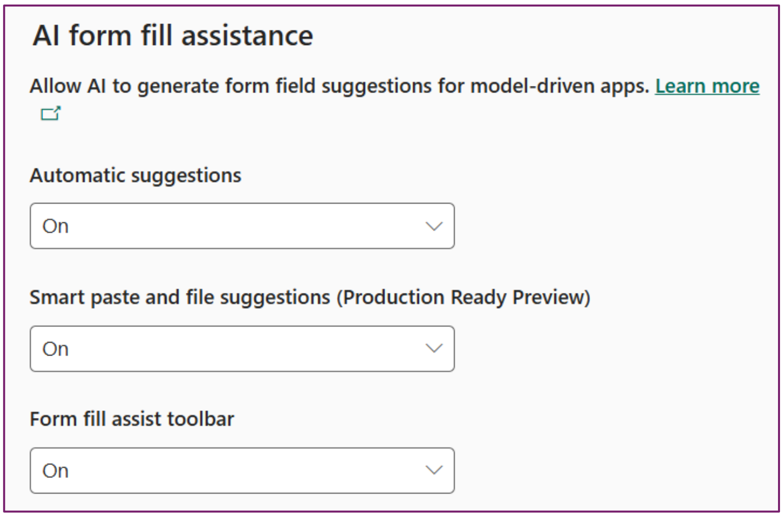
Learning Resources:

- Manage Customer Knowledge Management Agent | Microsoft Learn
- Review knowledge articles created by the Customer Knowledge Management Agent | Microsoft Learn

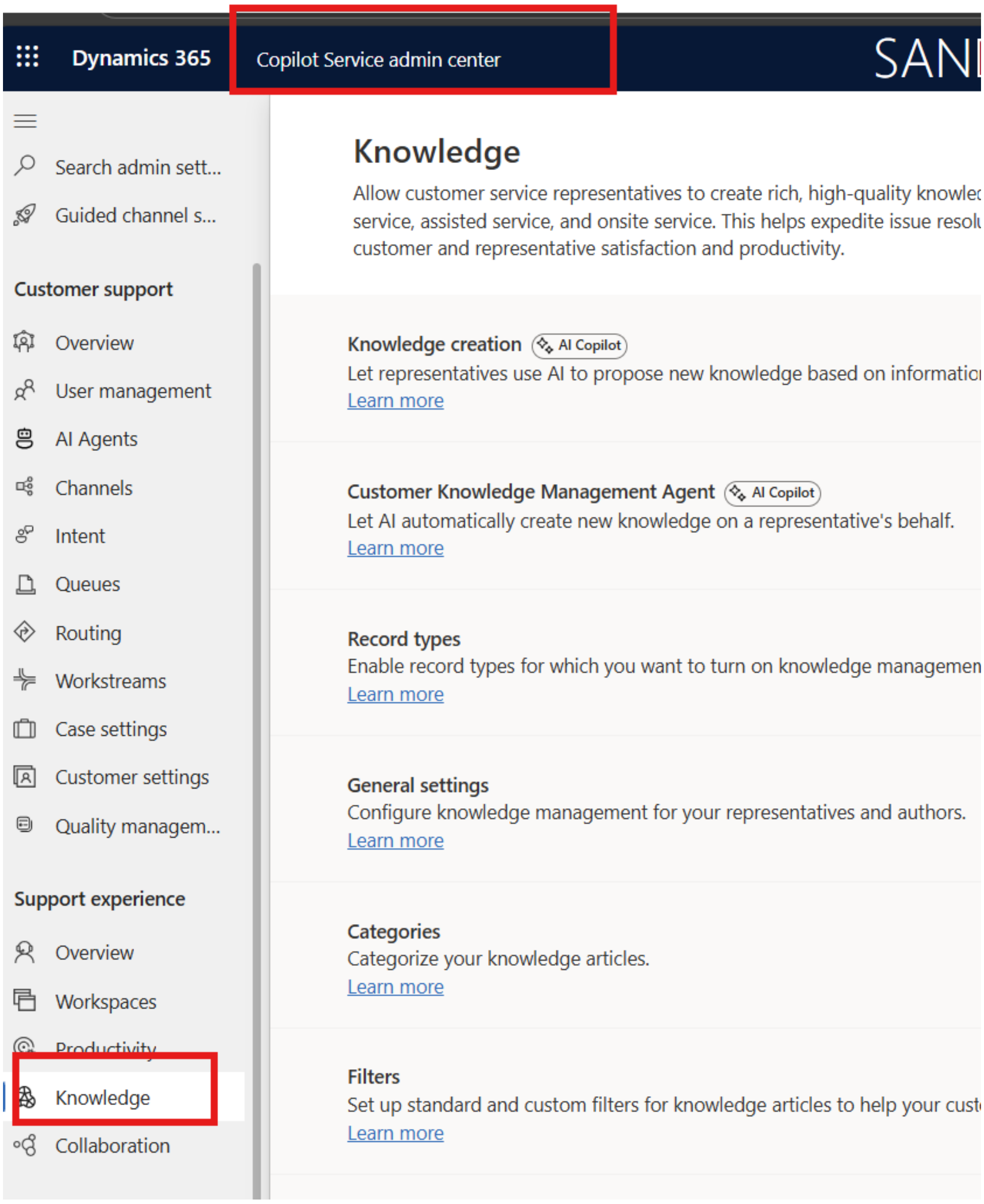
Prerequisites

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

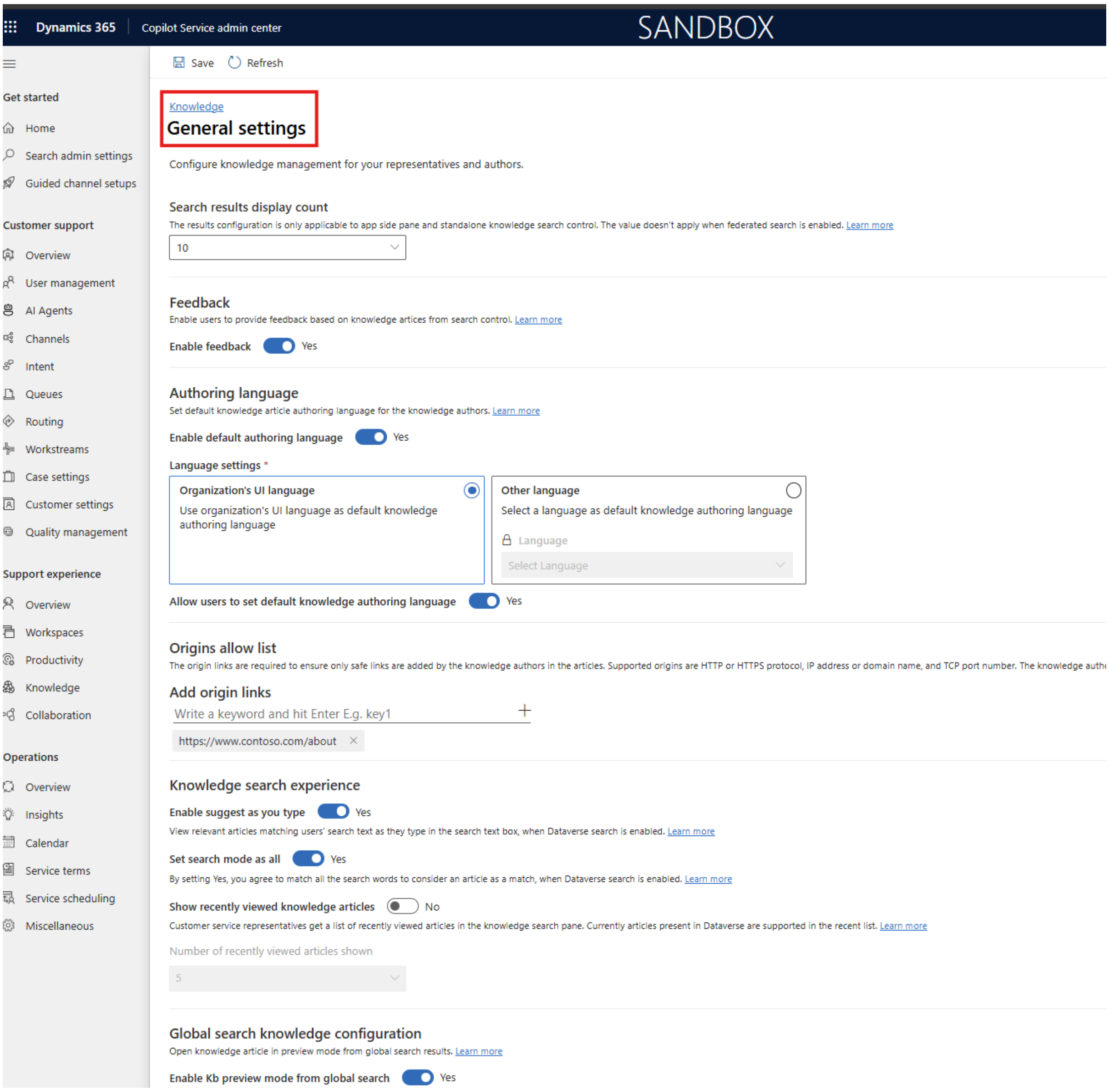
1. Ensure **Dynamics 365 Customer Service** is available.
2. Ensure **Form Fill assistance** is enabled. Navigate to the **Power Platform Admin Center** and then follow the instructions below:
    - Go to **Manage** > **Environments**. Select your environment then click on **Settings** > **Product**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



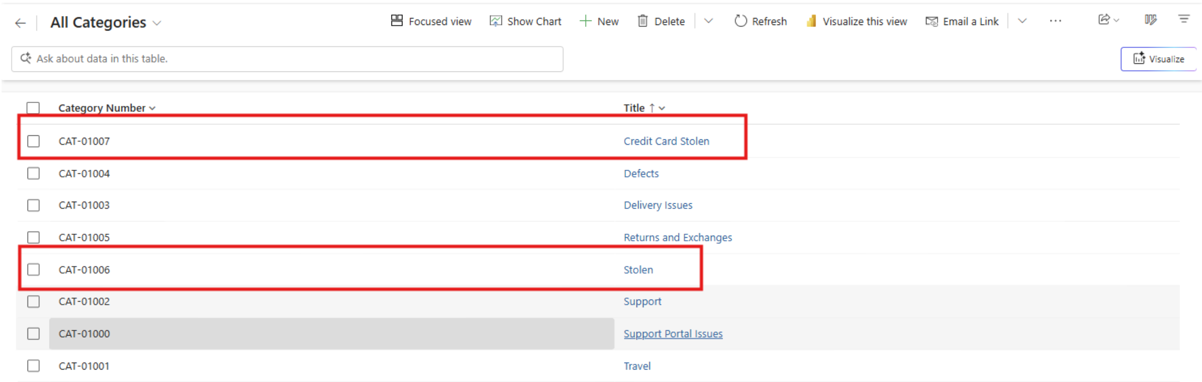
3. Dynamics 365 knowledge management is configured. [update]



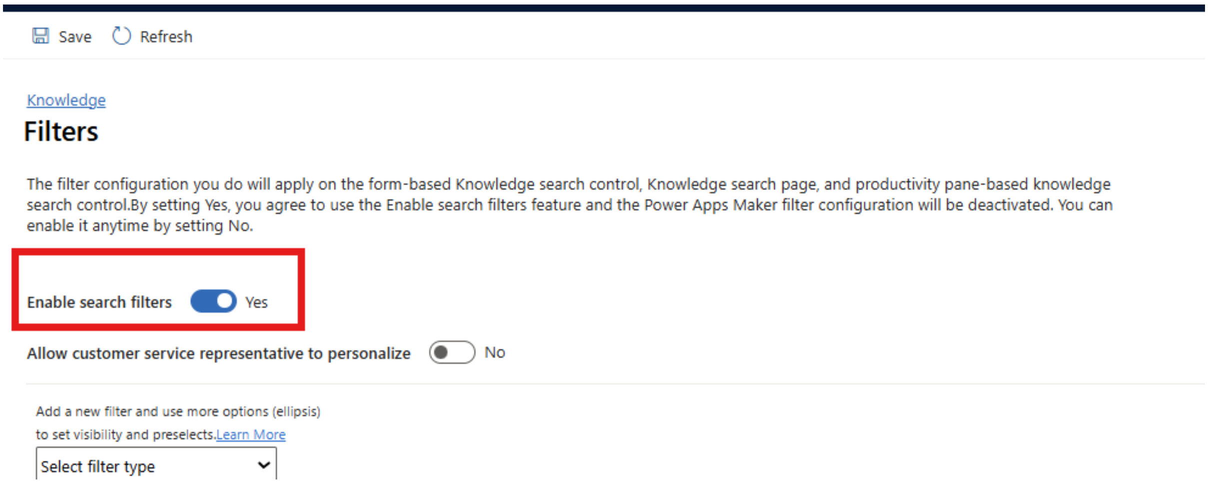
General Settings: Your configuration appears as shown in the screenshot below



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.

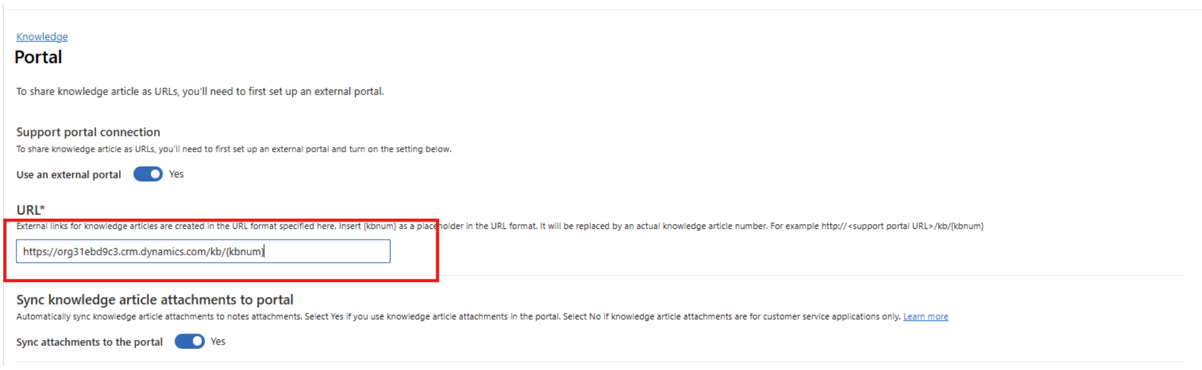


Filters: Enable search feature



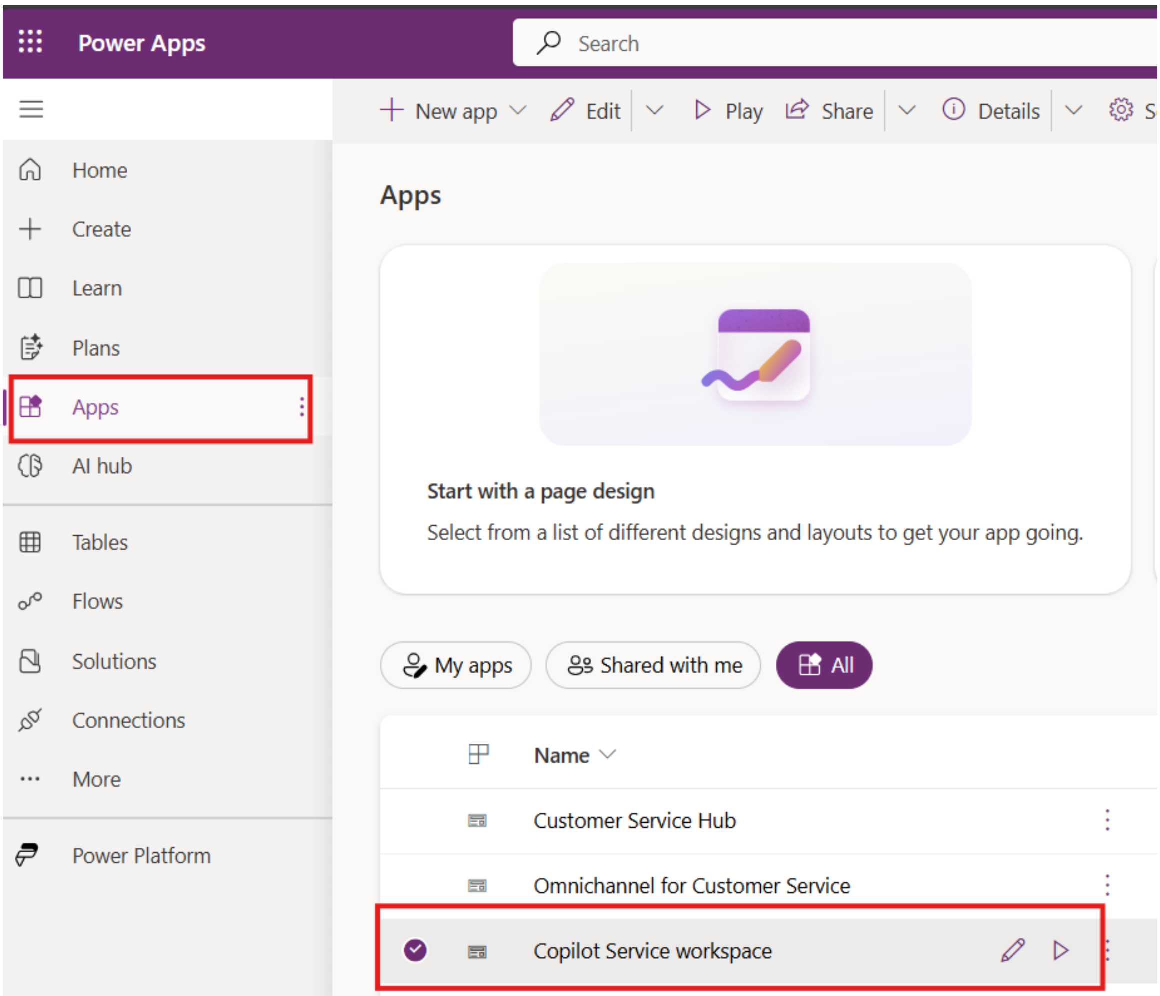
Portal: add the portal URL in the specified format as required for the configuration.

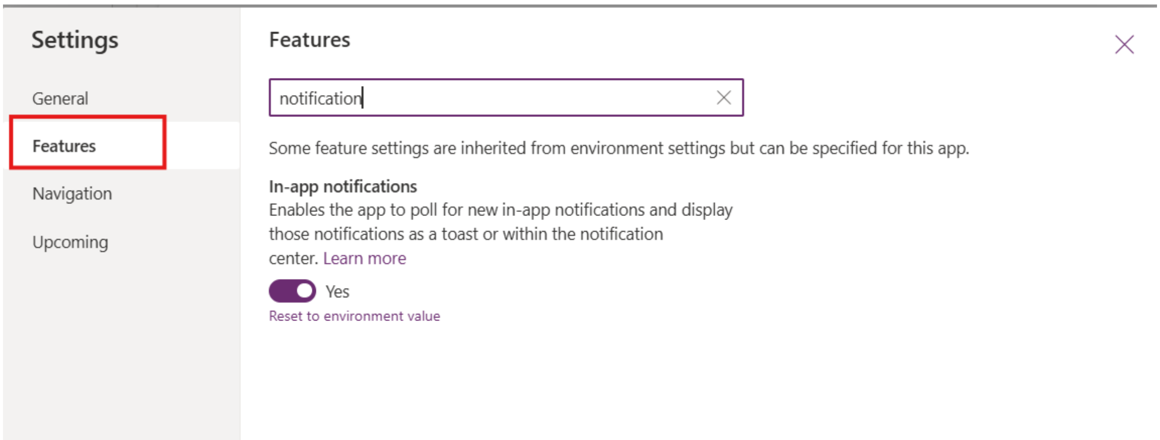
https://abc.crm.dynamics.com/kb/{kbnum}



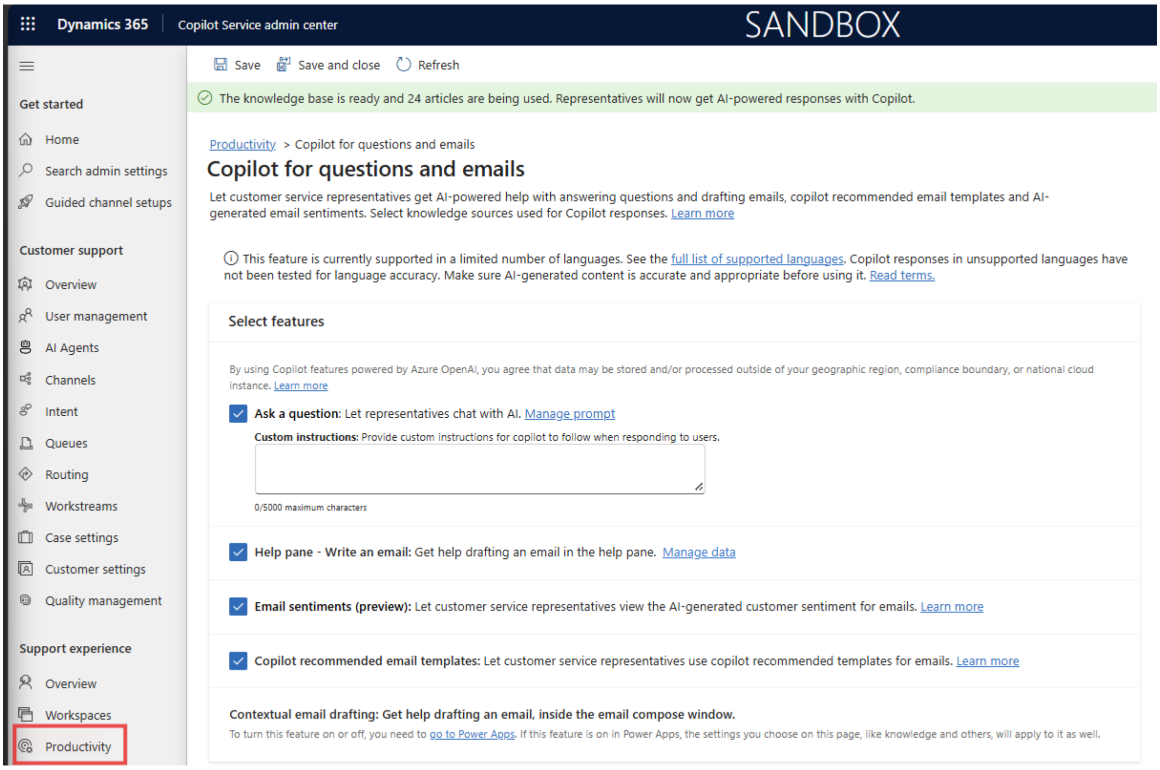
4. Enable in-app notifications for Customer Service Workspace app to notify about article creation.

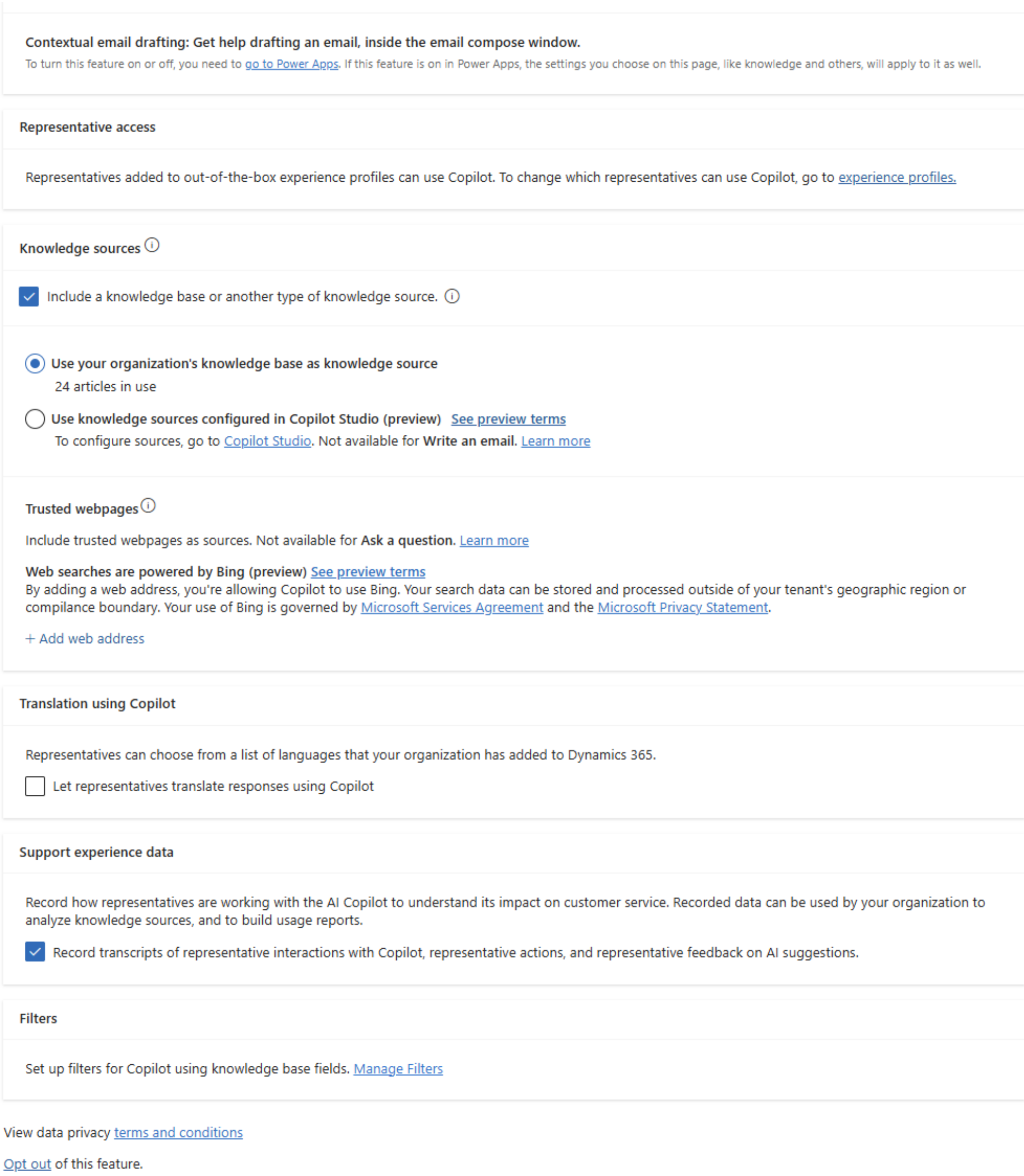
   - From the browser, navigate to https://make.powerapps.com
   - Go to **Apps** > Select the **Copilot Service Workspace** > **Settings** > **Feature** > search for **notification**
     Learn more in Enable in-app notifications for your organization.





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.
Get started
Home
Search admin settings
Guided channel setups
Customer support
Overview
User management
AI Agents
Channels
Intent
Queues
Routing
Workstreams
Case settings
Customer settings
Quality management
Support experience
Overview
Workspaces
Productivity
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.



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

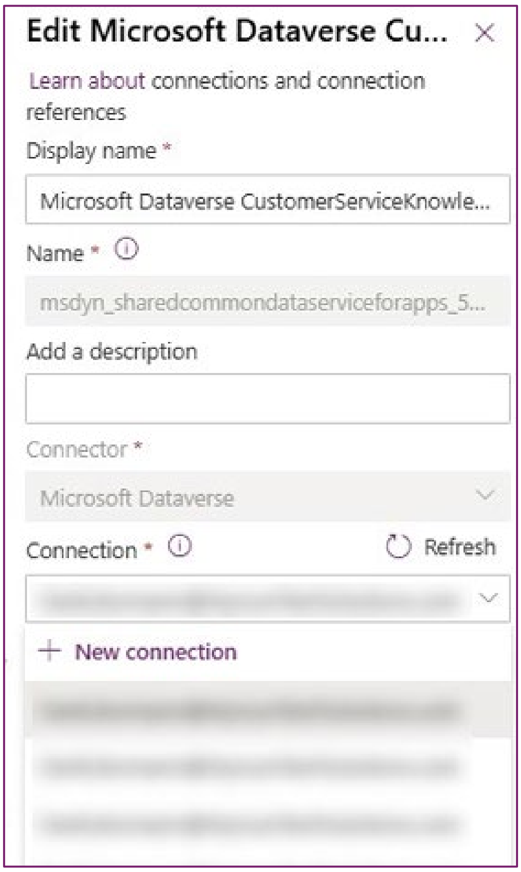
Setup & enable required connections and flows

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

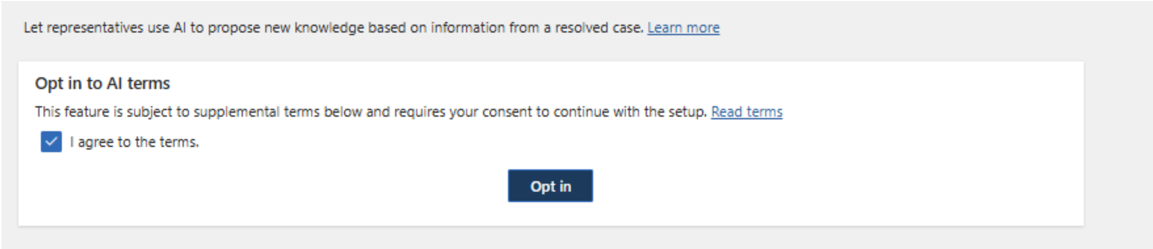
The **CustomerServiceKnowledgeHarvest** agent extracts content from cases to generate knowledge articles. By default, this feature is not enabled in the environment and so you will need to publish it.

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.

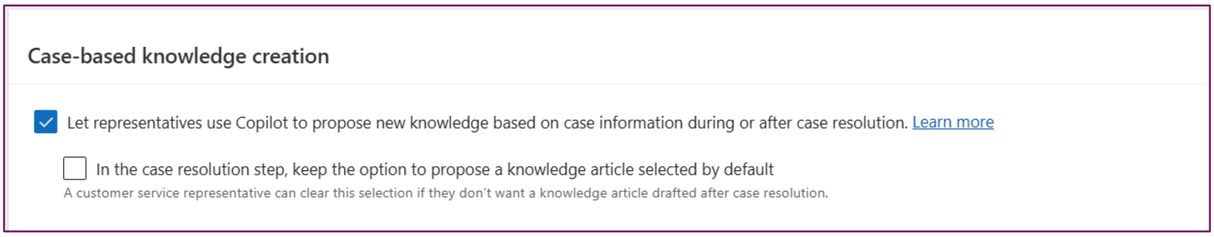
Verify Knowledge Management Setup

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.

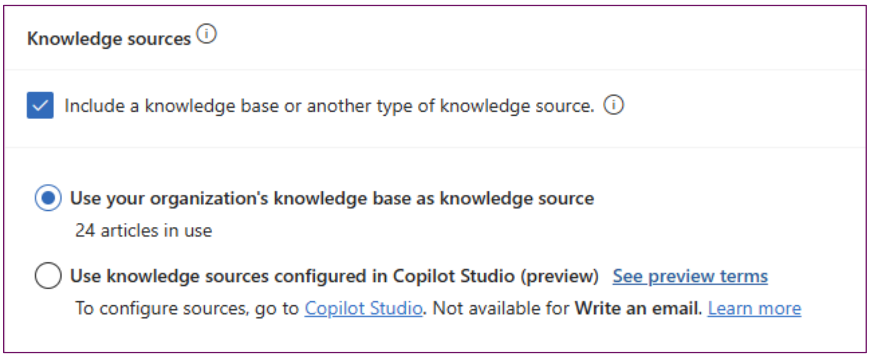


5. Select **Save and Close**

Verify Copilot Settings for Knowledge Sources

Ensure Knowledge Sources are configured to use organizations knowledge base.

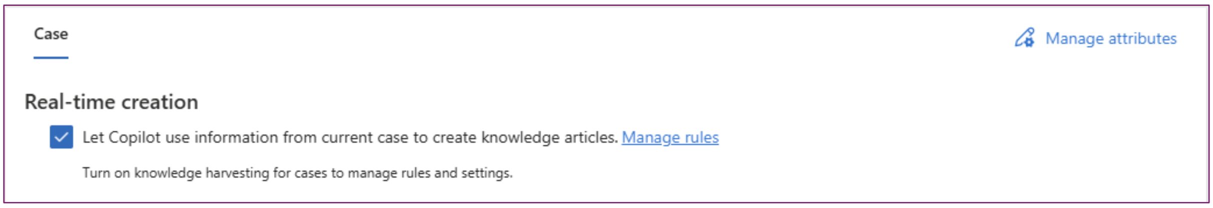
1. In the **Copilot Service admin center.**
2. Go to **Productivity**.
3. Locate **Copilot for Questions and email**, select **Manage**.
4. Under **knowledge sources,** ensure that below 2 settings are selected:
    - Include a knowledge base or another type of knowledge source
    - Use your organizations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



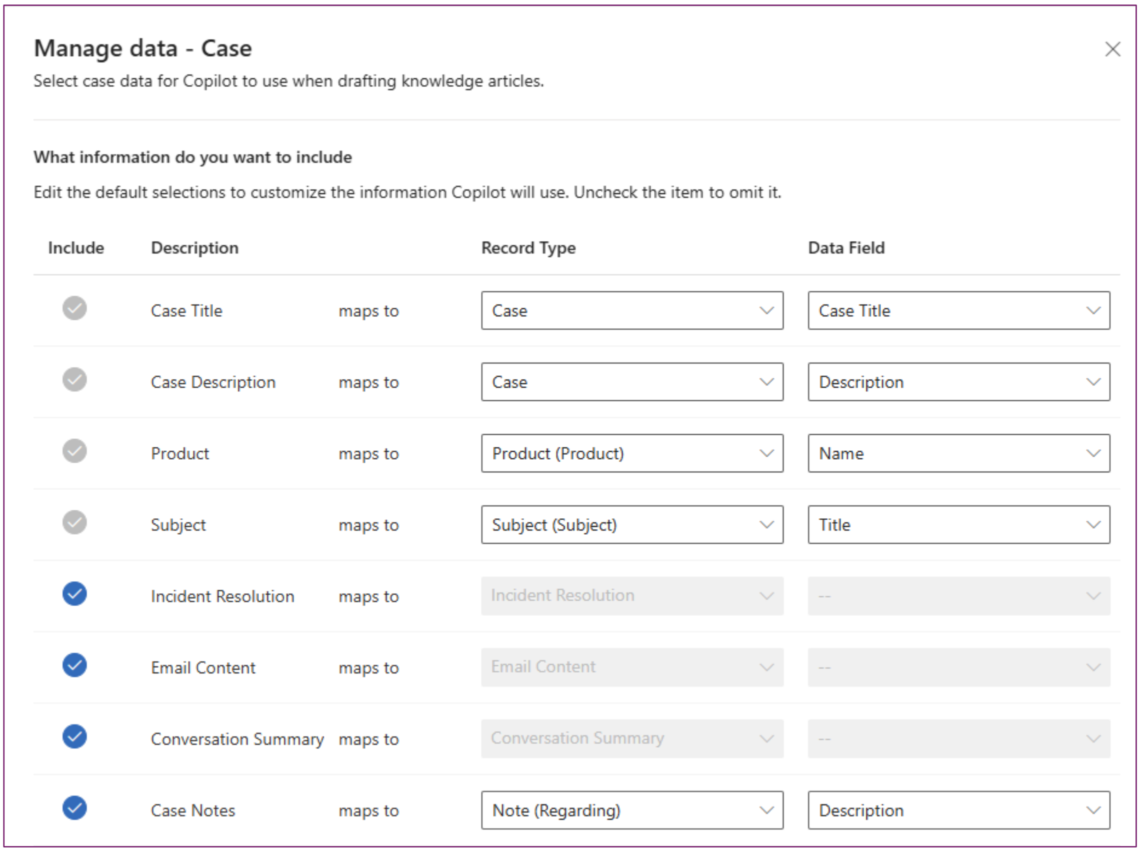
Setup the Knowledge Management Agent

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.**



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

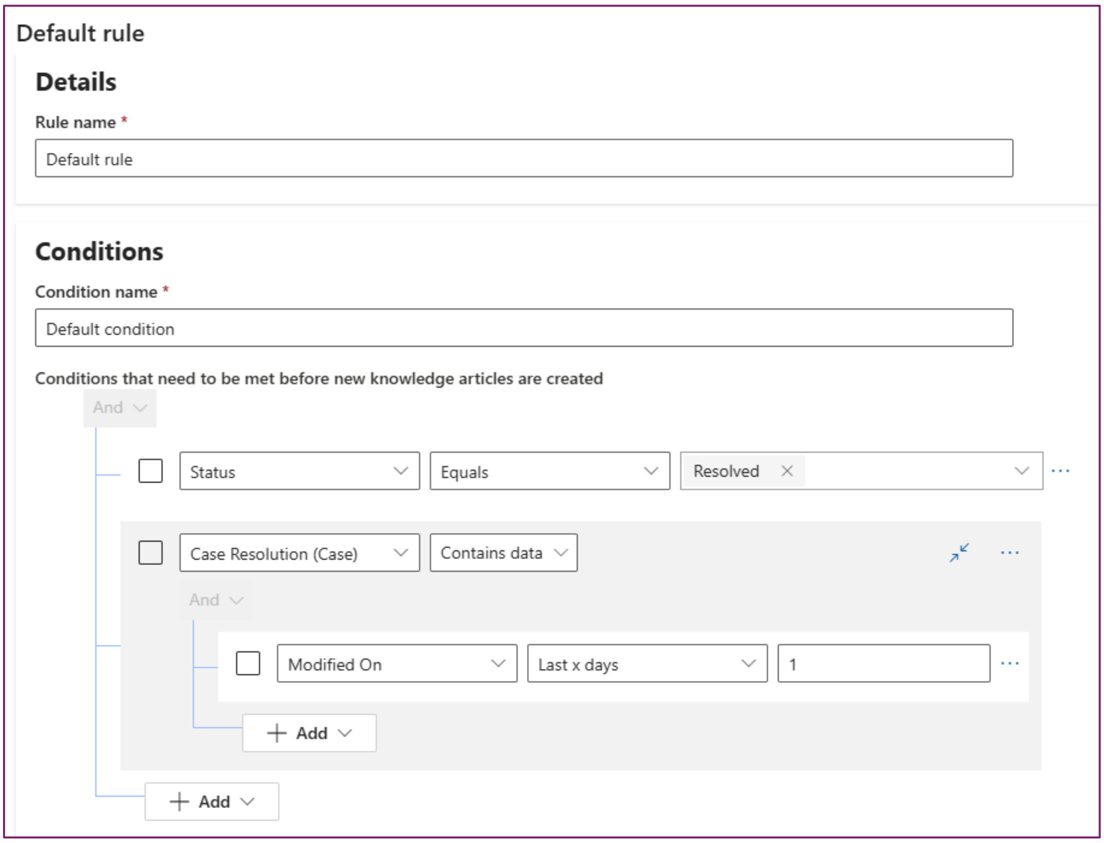


6. Select **Save.**

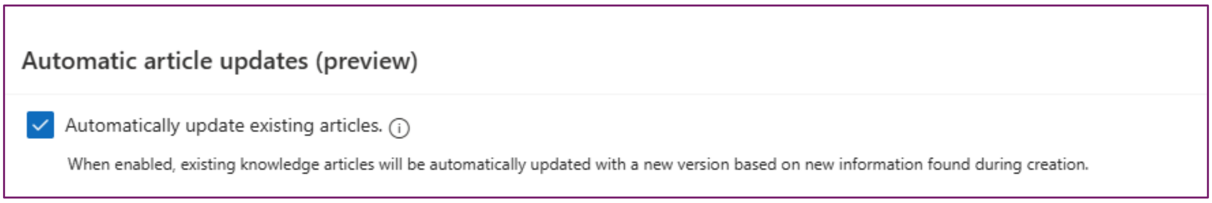
Task 2: Configure rules for real-time article creation

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**.



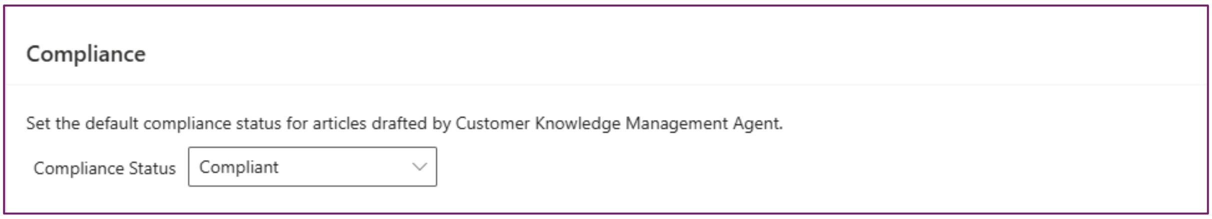
5. Select **Automatic article updates (preview)**



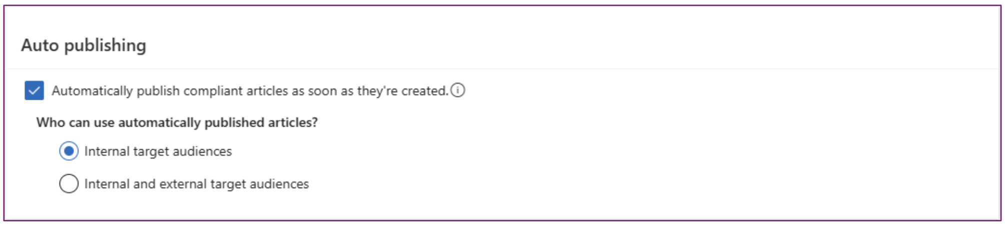
Task 3: Configure Article publishing rules

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**.



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?”.



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)

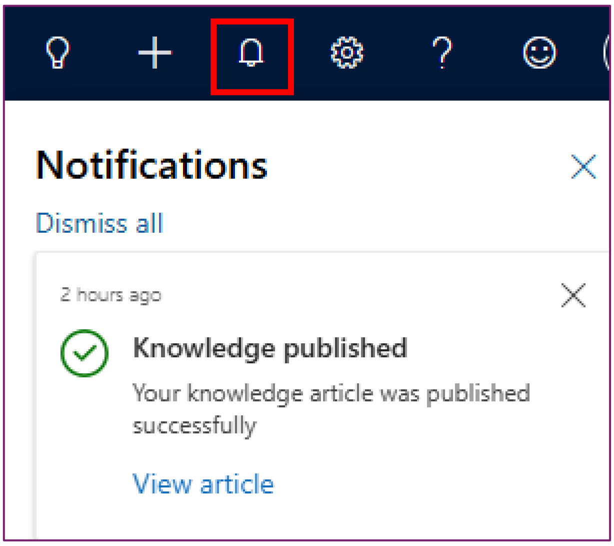
Claim submission Guidelines
You will be able to submit all the previous years and new policy year hospitalization claims by logging into the portal. Please select hospitalization claims for more details

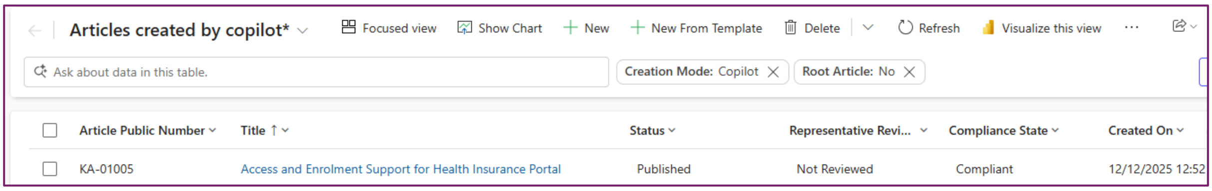
E-card
E-cards for the enrolled members are available in the Contoso portal. Newly enrolled members e-cards will be available after 45 days from the date of joining.
We hope that this information is helpful. Do reach out to us with any further questions or concerns.

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

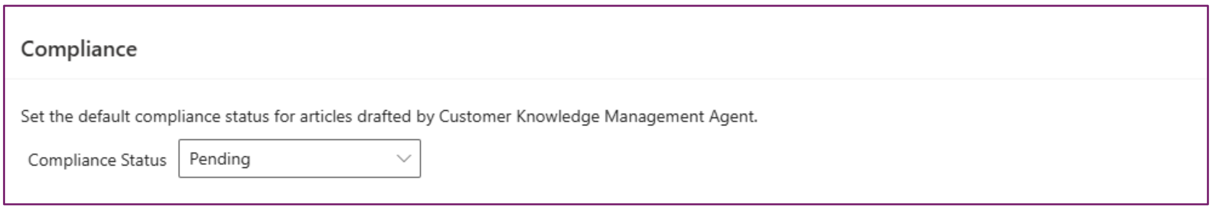
Regards,
Support Team

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.



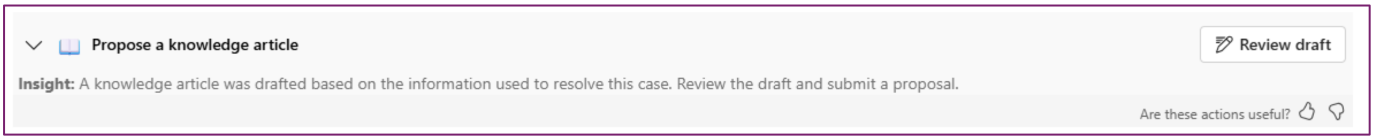


You do have option to configure the agent to create draft article and keep the option to review it before publishing. For this you need to update the Compliance setting as below:



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.)



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.