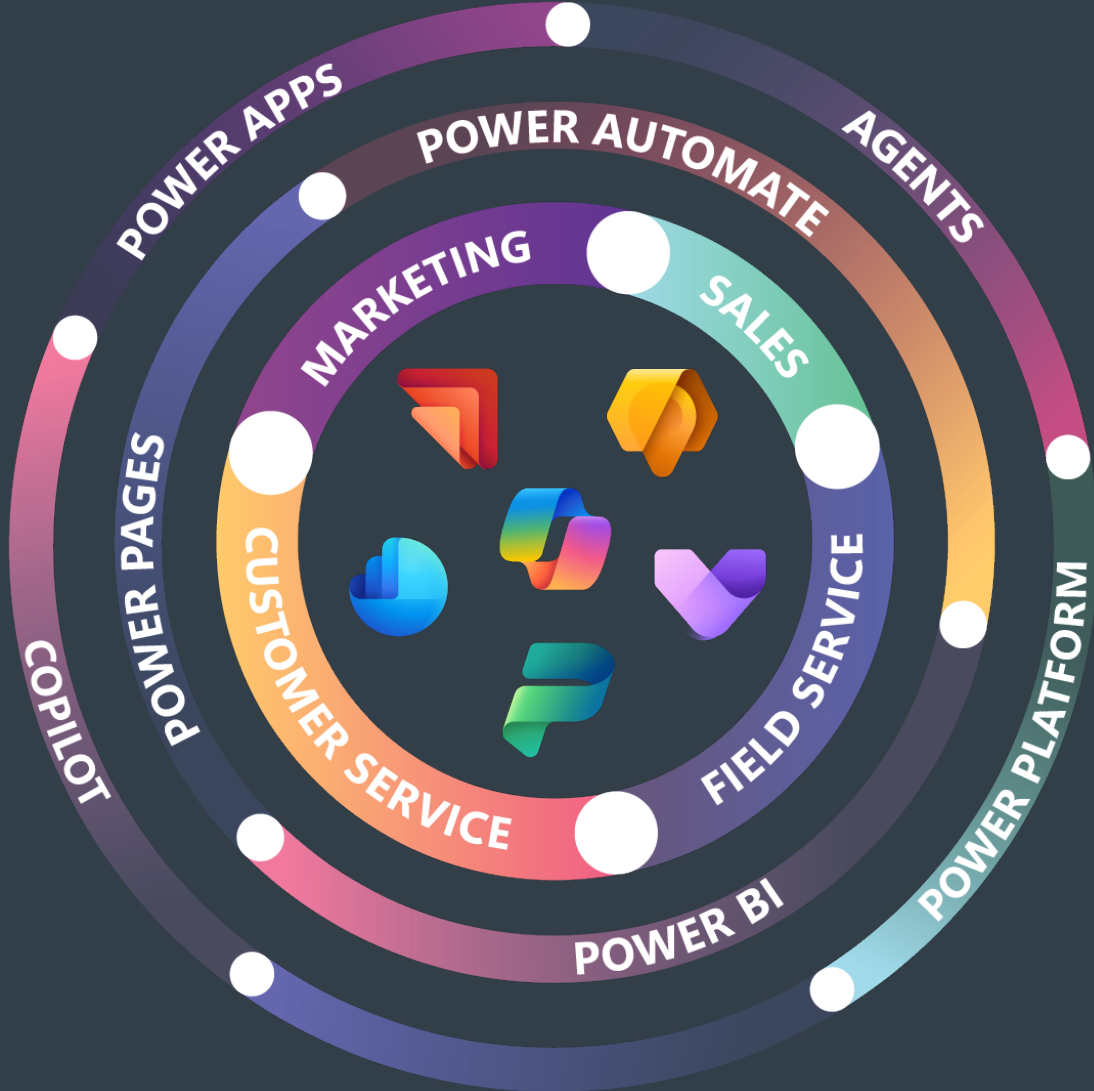


CRM connect

5 Customer Service Features and 4 AI Agents that transform your aftersales



4 Agents of D365 Customer Service you should be using



What we will cover:

- Case Management Agent
- Customer Knowledge Management Agent
- Customer Intent Agent
- Quality Evaluation Agent Enhancement

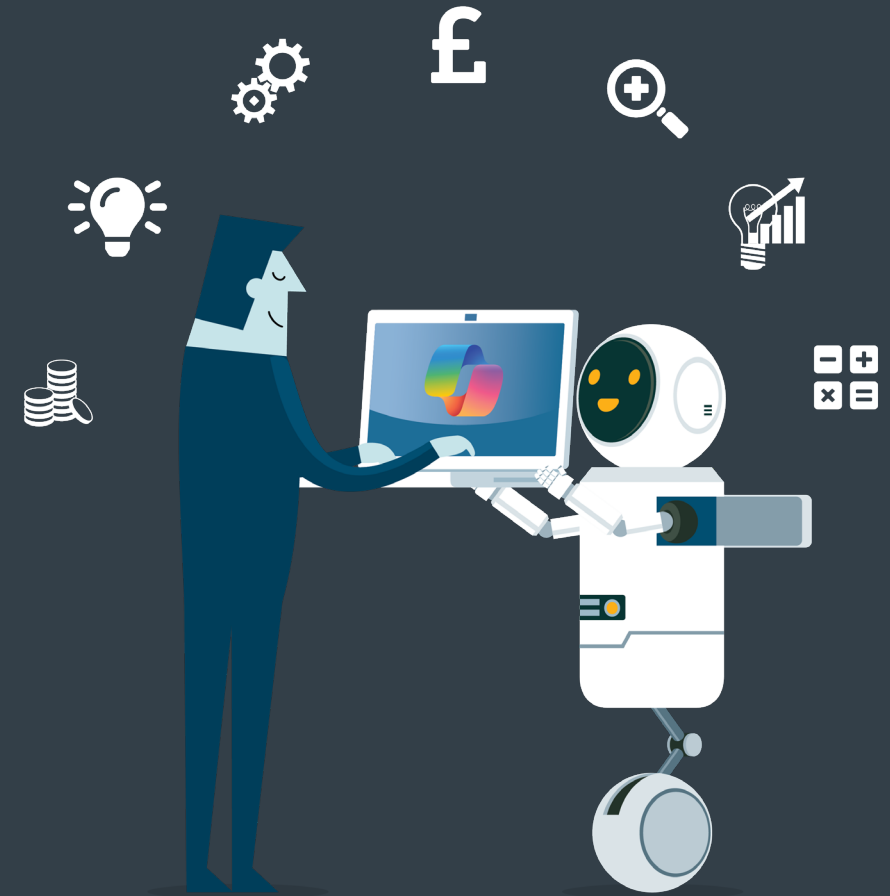


Features of D365 Customer Service you should be using



What we will cover:

- Form Fill Assist Toolbar / Smart Paste
- Visualise with Co-Pilot
- Natural Language Smart Grid
- Case-Level Sentiment Indicators
- Shadow Mode for Case Management Agent



Case Management Agent – Case Creation & Update

The screenshot displays a CRM Case Management Agent interface for a case titled "Late Delivery". The case is currently "Unsaved" and has a Case Number of "CAS-01025-C6W2Z6". It was created on "10/05/2026 10:28" by "Ben Humphries". The interface is divided into several sections:

- Case Information:** Case Title (Late Delivery), Customer (Ben.Humphries@outlook), Subject (---), Case Status (In Progress), and Product (---).
- Copilot Enabled Fields:** Priority (Normal), POD Reference (POD-999), Type (Problem), Serial Number (---), Email Address (BenHumphries@outlook.com), and Description (customer is complaining about a AM delivery not turning up. They have provided POD-12345).
- Case summary:** A section with a "Case summary" dropdown and a "Timeline" view. The timeline includes a "Highlights" section with two items: "The customer reported a late delivery issue and was asked to provide the Proof of Delivery (POD) reference number and the delivery company for verification." and "The customer responded with the POD reference POD-999 and indicated that Royal Mail was the delivery company involved." There are also "SLA Timers" for "First Response By S..." (22h:57m) and "Resolve By SLA KPI" (23h:27m).
- Recent:** A list of recent activities, including "Modified on: 10:30" and "Email from: Ben.Humphries@outlook" (Closed) with the subject "Re: Late Delivery CRM:0288022" and the message "Hi the POD ref is POD-999, I believe it was Royal mail w...".

A red box highlights a notification at the top: "Case contains saved AI changes based on emails".

- Autonomously applies updates to defined case fields from emails and conversations with field prediction.
- Cases 'can be' created automatically from Conversations.
- Works with Cases created from Conversations, Emails (ARC Rules) and manually created
- Allow AI to overwrite human inputs (overwrite fields or not) you decide
- Apply multiple granular Agent rules – e.g. if field x equals y now update other fields on the case.
- AI can update custom fields 😊.

Case Management Agent – Automatic Follow ups

- Creates between 1 and 5 follow ups (via email using AI generated content through different predefined email templates.
- Definable follow up schedule 5/24/48/72/96 Hours.
- Email follow ups can be fully automated or automatically generated and sent by a human.
- Follow ups can be triggered based on the status reason or based on email context
- Decide what fields from the case you want the agent to include in the follow up summary.

Case Management Agent – Automatic Case Resolution

The screenshot displays the Dynamics 365 Copilot Service workspace for a case titled "Late Delivery". The case number is CAS-01025-C6W226, created on 10/05/2026 at 10:28, and owned by Ben Humphries. The case is categorized as "Case for Multisession experience".

The left sidebar shows "Copilot Enabled Fields" with the following details:

- Priority: Normal
- POD Reference: POD-999
- Type: Problem
- Serial Number: ---
- Email Address: BenHumphries@outlook.com
- Description: customer is complaining about a AM delivery not turning up. They have provided POD-12345
- Last Interaction: ---
- Case Age: 1387

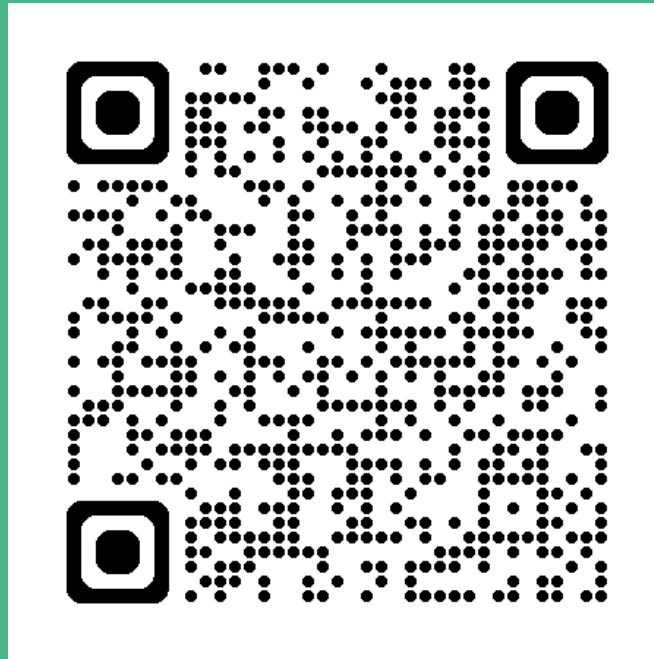
The main content area shows AI-generated highlights and a "Suggested actions" section. The "Resolve case" action is highlighted with a red box. The action includes an insight: "If there is no response from the customer until the scheduled SLA time is reached, close the case." and a scheduled time: "Happens automatically on 11/05/2026 at 3:48 pm".

The right sidebar shows "SLA Timers" with two timers: "First Response By S... Noncompliant" and "Resolve By SLA KPI 24m:01s".

The bottom section shows recent interactions, including an email from Ben Humphries with the subject "Late Delivery CRM:0288022" and a message: "Dear Ben Humphries @outlook, We are currently waiti...".

- Last email in the follow up process.
- Case Resolution can be 'Fully Automated' or 'Requires Human Interaction'.
- Based on one email template.
- Prompt for resolution about the timeline.

Case Management Agent Demonstration



Microsoft's overview of the Case Management Agent

Customer Knowledge Management Agent

Propose new knowledge (preview)
Review the knowledge proposal drafted by Copilot based on this case.
Review draft

Template (optional) Language

Delivery Issue Template English Regenerate draft

Styles Format Font Size **B** *I* U

Title: Delay in Scheduled AM Delivery

Problem The reported issue was that a scheduled AM delivery did not arrive as expected.

Root Cause information not provided in the case

Resolution The Proof of Delivery (POD) reference number and the delivery company details were requested from the customer. After receiving the POD reference (POD-999) and confirmation that the delivery was handled by Royal Mail, the issue was verified and resolved.

Prevention information not provided in the case

Related Information

- Case Reference: information not provided in the case
- POD Reference: POD-999

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

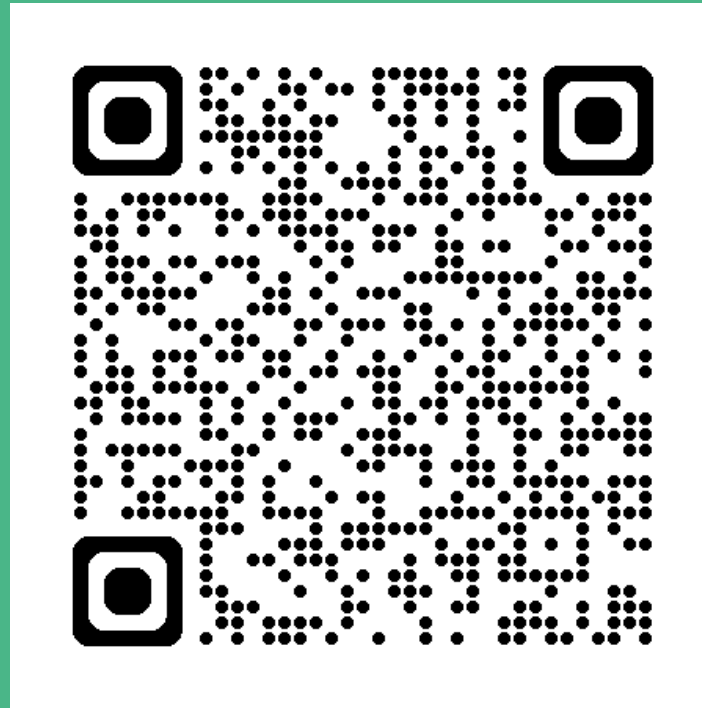
Revise with instructions

Describe how you want to change it. For example, "Add info about the warranty window and rewrite this as a procedure".

Create proposal Discard

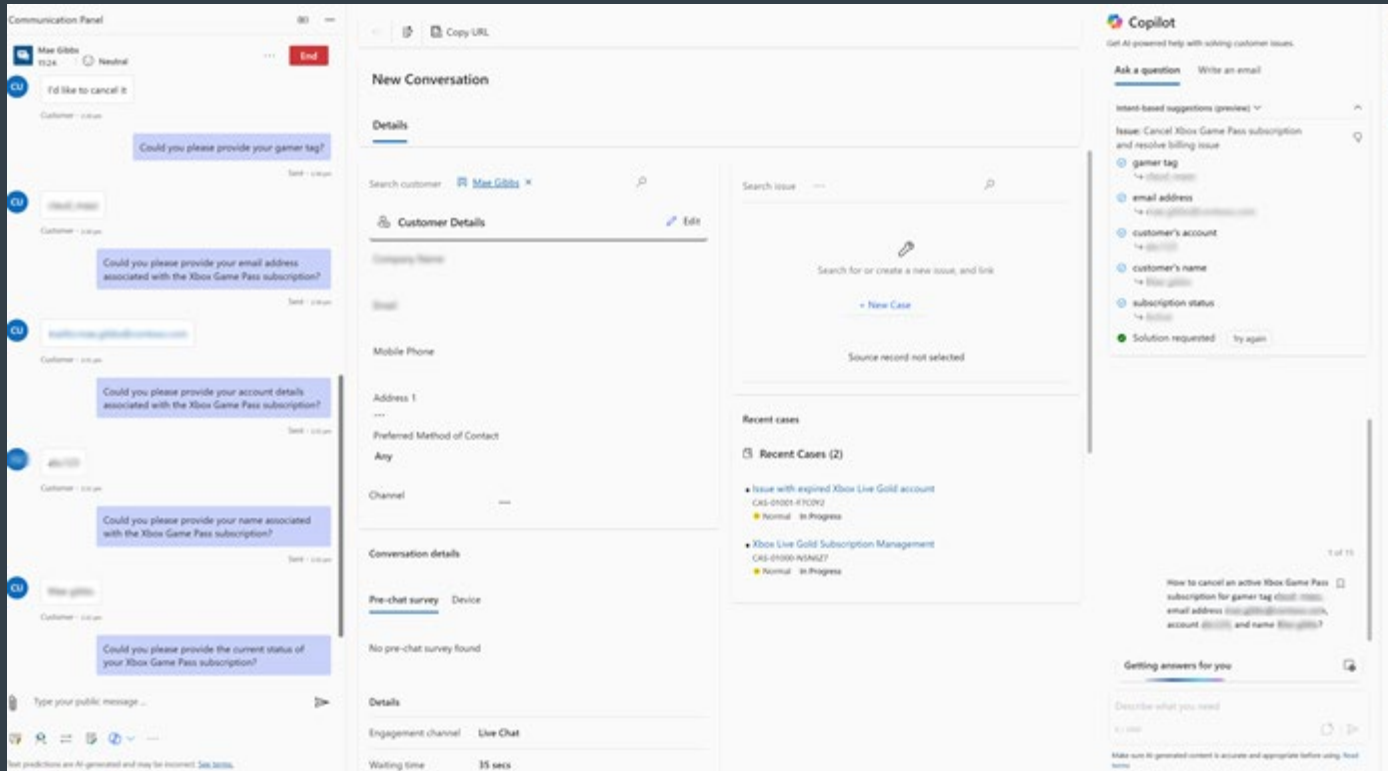
- Provides the user the ability to automatically create a KBA in real time from a resolved case.
- Copilot uses information from the case to prepopulate the KBA.
- Specify which fields the agent can use to generate the KBA.
- KBA can be structured based on one of many Knowledge article templates.
- Compliance options- KBA's can be created in Draft or Published State
- KBA's can be set for internal or internal and external access.
- Saves the team time in manually creating the KBA outside of the case, therefore saving time.

Customer Knowledge Agent Demonstration



Microsoft's overview of the Customer Knowledge Agent

Customer Intent Agent



- Imbedded Copilot pane assists the human with relevant questions they should ask the customer based on the context of an open conversation or case.
- **Enable Autonomous support (allows the agent to ask the questions autonomously.)**
- Questions are segregated into Intent Groups (e.g Delivery) then intents (e.g failed delivery) then attributes (questions that could be suggested)
- Intent questions are automatically generated by the system (on a schedule) from existing case/conversations.
- An attribute is automatically assigned an occurrence (the number of times the question has been asked)
- The higher the number means the agent is more likely to suggest the question.
- Intents can be linked to one or more Knowledge base articles and is used as a fall back if all questions have been exhausted.
- In the copilot pane, Questions are marked as complete once they have been asked.
- If no KBA is linked it falls back to all published KBA's.

Quality Evaluation Agent

All evaluations* ▼

Name	Record type	Related record	Score	Evaluation method
Evaluation-1037	Conversation	Mike Price: Demo voice call workstream	61/100	AI agent
Evaluation-1036	Case	Request for consultant replacement due to ex...	55/100	AI assisted
Evaluation-1035	Case	Migration to new tenant causing broken links	27/100	AI assisted
Evaluation-1034	Case	Temperature exceeded threshold limits	27/100	AI agent
Evaluation-1033	Case	Custom integration webhook not triggering	45/100	AI agent
Evaluation-1032	Case	Custom integration webhook not triggering	61/100	AI agent
Evaluation-1031	Case	Custom integration webhook not triggering	55/100	AI assisted
Evaluation-1030	Case	Migration to new tenant causing broken links	27/100	AI assisted
Evaluation-1011	Case	Request for consultant replacement due to ex...	27/100	AI agent
Evaluation-1010	Case	Request for consultant replacement due to ex...	45/100	AI assisted
Evaluation-1009	Case	Request for custom report and dashboard bu...	55/100	AI assisted
Evaluation-1005	Case	Request for custom report and dashboard bu...	61/100	AI assisted
Evaluation-1004	Case	Access revoked for external contractor account	45/100	AI assisted

- Evaluation criteria are defined for the organisation. These detail the questions, expected answers and appropriate scores for these answers.
- Interactions with customers are then compared to these criteria to score interactions.
- By default, these are done in bulk across the organisation to get an overall score.
- They can also be run in isolation on individual records to get a record's score.
- So does this help organisation identify where training is needed for Humans? Jon? That's my impression – let me go to teams.



Demonstration of

Form Fill Assist Toolbar / Smart Paste
Visualise with Co-Pilot
Natural Language Smart Grid

Overview of

Case-Level Sentiment Indicators
Shadow Mode for Case Management Agent

You should already have seen

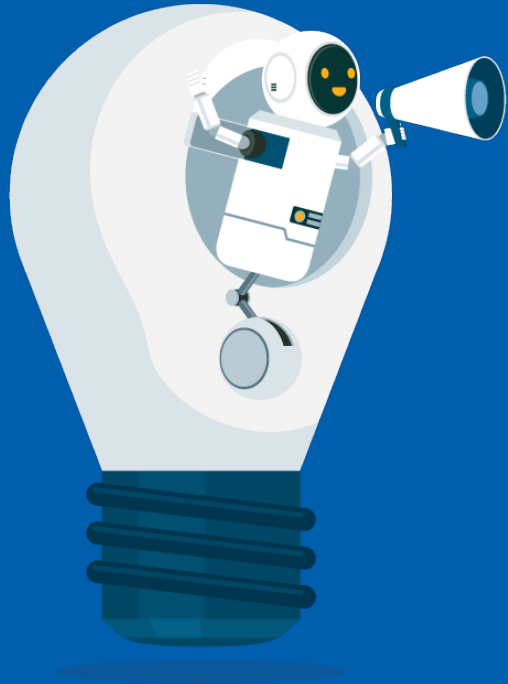
Case Summarisation and Timeline Highlights
AI Assisted Emails

Form Fill Assist Toolbar/Smart Paste

The screenshot shows a Dynamics 365 'New Case' form. At the top, there is a 'Form assist' toolbar with a 'Clipboard data' icon and a 'Drop files or smart paste for AI to make suggestions' button. The form fields include Case Title, Customer, Subject, Case Status, Product, Copilot Enabled Fields, Priority, POD Reference, Type, Serial Number, Email Address, and Description. The Description field contains the text: 'Two pallets with liquid damage affecting approx. 24 units of 3 Pin Plug - UK (Bamp)'. The 'Case summary' section shows 'Almost there' and 'Select Save to see your timeline.'. The right sidebar contains an AI chat interface with prompts like 'Summarize', 'Ask', and 'Discover'.

- Data in an unstructured format such as an email, word document or web page.
- We want to get this onto a record in Dynamics 365.
- With smart paste in the Form Fill Assist Toolbar, we can paste this information in (or upload a file) and AI form assist will analyse this and populate what it can.
- Human can Accept or reject the suggestions

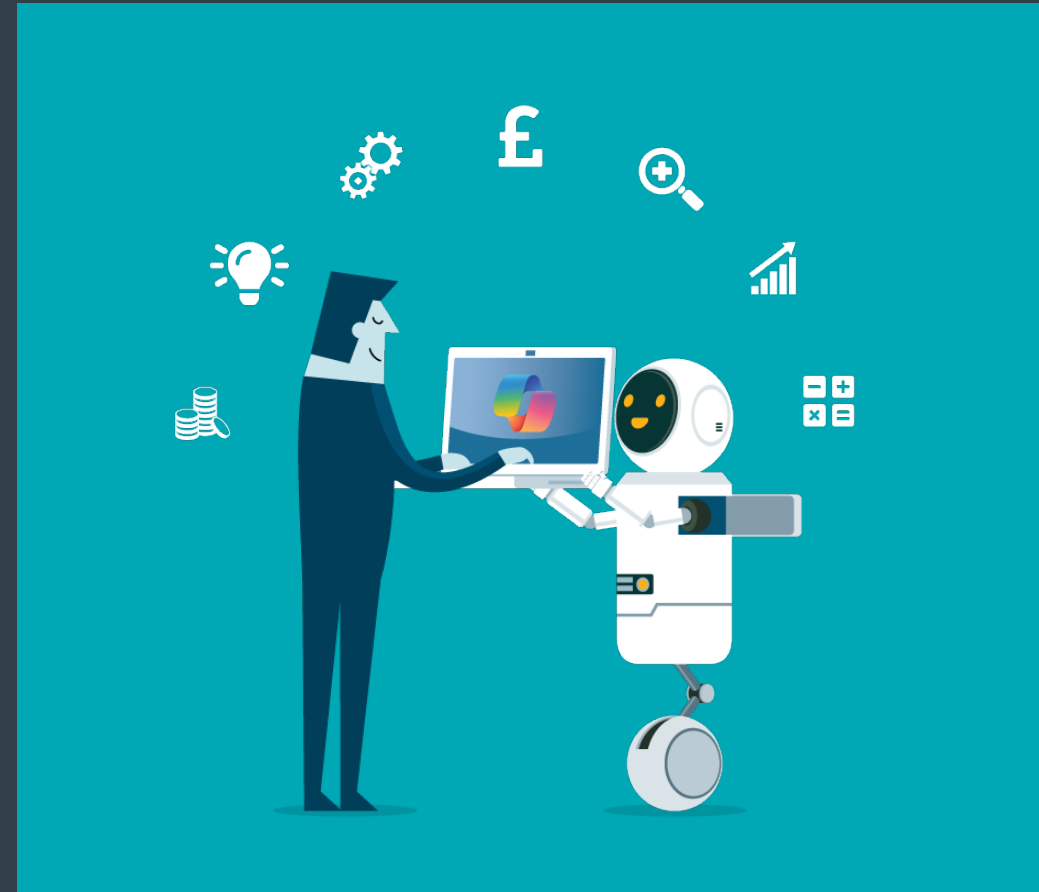
Visualise with Copilot



- We've had charts since CRM 2013 – they're getting an upgrade.
- Once enabled, we can click on the Visualise button on a view and we can see our charts.
- Now Copilot can make a suggestion based on the data in your view.

Natural Language Smart Grid

- The search tools on a table have been quick find and filtering/advanced find for a long time.
- Natural Language search arrived a couple of years ago but needed improvement.
- We could search for 'records owned by me' but it looked for a user called 'me'.
- Things seem to have got better, and ability to query CRM data just got easier.



Case-Level Sentiment Indicators

- Gives real time analysis of customer satisfaction.
- Copilot can predict the satisfaction level.
- Can send a notification when a customer's satisfaction drops below a certain level

Agent settings

Select a threshold for sentiment alerts. To turn this off, select **Don't show alerts**.

Show alerts when a customer's sentiment decreases to or below *

Slightly negative

Don't show alerts

Slightly negative

Negative

Very negative

Supervisor settings

Select a threshold for sentiment notifications. To turn this off, select **Don't send notifications**.

Supervisor settings

Select a threshold for sentiment notifications. To turn this off, select **Don't send notifications**.

Send notifications when a customer's sentiment decreases to or below *

Don't send notifications

Don't send notifications

Slightly negative

Negative

Very negative

Shadow mode for Case Management Agent

- When using the Case Management Agent, it can make decisions and take actions autonomously.
- We need to be sure that the actions it's taking at what we wanted to happen
- Shadow mode allows you to run simulations of what the agent would do without it actually committing the actions to the data.
- Allows you to test and build confidence before fully deploying the functionality.

Quality insights dashboard

Ask a data in a table.

⚠ Suggested actions based on overview of all evaluations

The overall quality score across all evaluations performed is 79/100. Immediate attention is required to address issues in communication effectiveness. In Evaluations Ec214 and Ec455, customers expressed concerns about the effectiveness of communication. Evaluations Ec499 and Ec678 indicated that customer service representatives did not show empathy and their emails were not personalized.

Suggested actions:

- Implement a training program focused on improving communication skills
- Reinforce the importance of personalization in customer interactions.

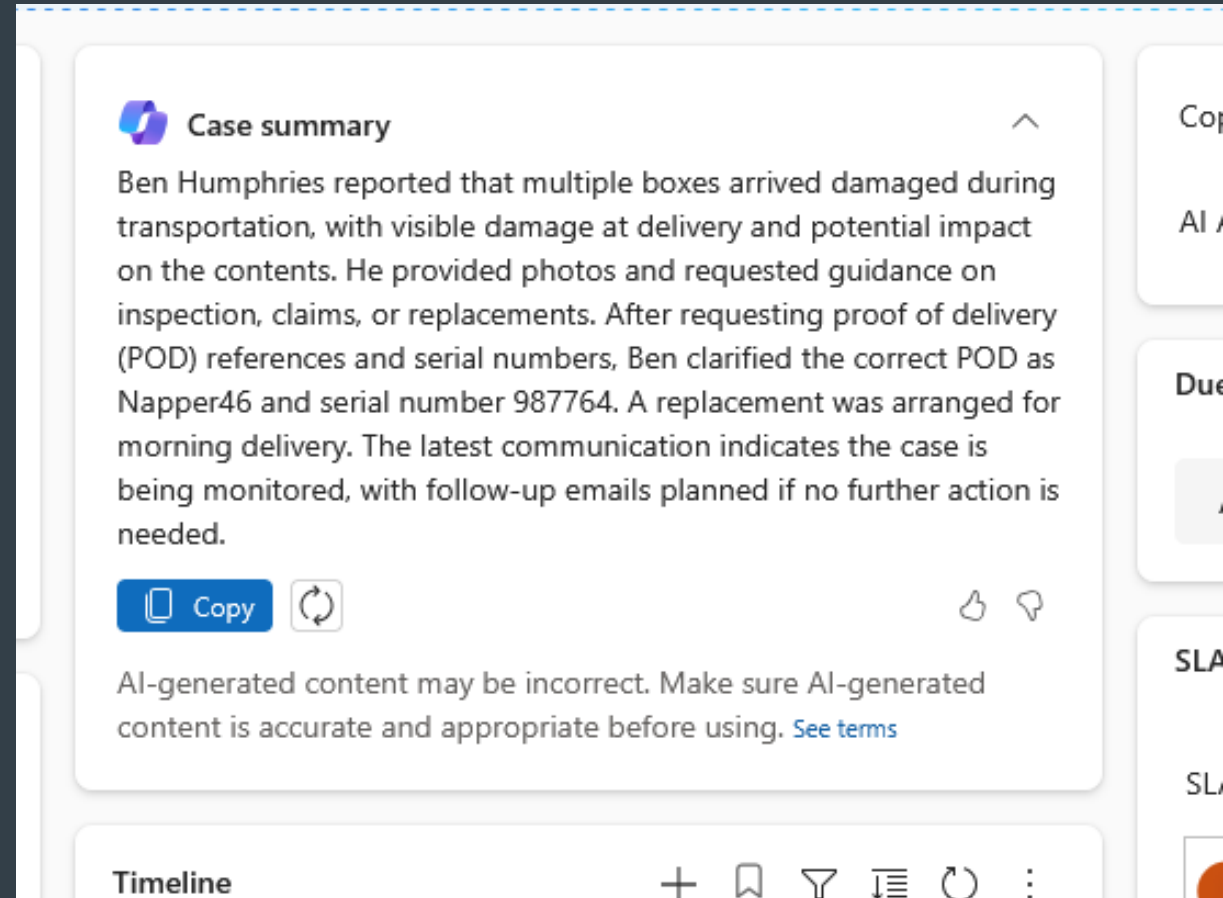
[Copy](#)

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

<input type="checkbox"/> Evaluation	Record type	Record title	Quality score	Evaluation method	Due date	Completion date	Evaluation
<input type="checkbox"/> Ec2414	Case	Missed credit card	34/100	Completed	01/12/25	01/12/25	Missed
<input type="checkbox"/> Ec455	Voice call	Unable to make call	47/100	Completed	01/22/25	01/22/25	Proce
<input type="checkbox"/> Ec499	Chat	Incorrect charge c	81/100	Completed	01/25/25	01/15/25	Policy
<input type="checkbox"/> Ec1113	Case	Error while upload	81/100	Completed	02/25/25	02/25/25	Resou
<input type="checkbox"/> Ec131	Case	Unable to reset p	81/100	Completed	05/26/25	05/29/25	Clarity
<input type="checkbox"/> Ec131	Case	Debit cancelled w	82/100	Completed	05/22/25	05/12/25	Empa
<input type="checkbox"/> Ec278	Case	Debit cancelled w	81/100	Completed	05/29/25	05/19/25	Syste
<input type="checkbox"/> Ec312	Chat	Voicemail not wor	90/100	Completed	07/18/25	07/18/25	Escala

Case Summarisation / Timeline Highlights

- Appears on the Case form and offers a summary for the user.
- Gets its information from the details entered on the Case as well as the Activities in the Timeline.
- Should be enabled in Customer Services installations of Dynamics 365.



The screenshot shows a 'Case summary' card in a Dynamics 365 interface. The card has a blue header with the text 'Case summary' and an upward-pointing arrow. The main text describes a case where Ben Humphries reported damaged boxes during transportation. It details the damage, the user's request for guidance, the provision of photos, and the request for proof of delivery (POD) references and serial numbers. It states that Ben clarified the correct POD as Napper46 and serial number 987764, and that a replacement was arranged for morning delivery. The card also mentions that the case is being monitored and follow-up emails are planned. Below the text, there is a blue 'Copy' button, a refresh icon, and thumbs up/down icons. At the bottom of the card, a disclaimer states: 'AI-generated content may be incorrect. Make sure AI-generated content is accurate and appropriate before using. [See terms](#)'. Below the card, a 'Timeline' section is partially visible with various icons for adding, bookmarking, filtering, and refreshing.

AI Assisted Emails

The screenshot shows the 'New Email' interface in Dynamics 365. At the top, it says 'New Email - Unsaved' and 'Email · Email'. Below this, there are fields for 'Bcc' and 'Subject'. The main body of the email is visible, showing a toolbar with 'Draft with Copilot', a font family dropdown set to 'Segoe UI', and a font size dropdown set to '9'. A 'Draft with Copilot' panel is open, featuring several buttons: 'Suggest a call', 'Request more information', 'Empathize with feedback', 'Provide product/service details', and 'Resolve customer's problem'. Below these buttons is a text input field with the placeholder text 'What do you want Copilot to draft?' and a 'Generate' button.

- When writing a new Email in Dynamics 365, the option appears for Draft with Copilot.
- Describe what you want and it will write the email for you.
- You can then use what's been written, ask for adjustments, even translate into another language

Thank you!



CRM 2026 App



CRM

connect

FOR ALL THINGS DYNAMICS 365 CRM & POWER
PLATFORM

