



EMAIL 2 CASE USING AI

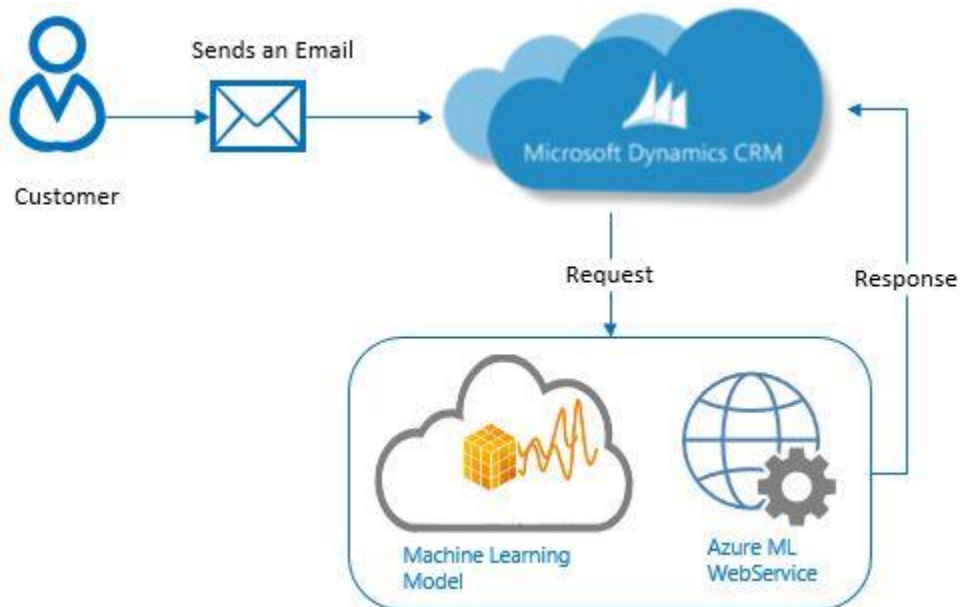
A Dynamics 365 CRM add-on feature that converts Email into a Case using AI

Contents

Introduction.....	1
Verify the solution after the Installation.....	2
Email Classification for Automated Support Ticket Generation.....	3
CRM Workflow Configuration.....	3
Functionality.....	4

Introduction

This solution provides an add-on feature that automatically converts Email into Case using AI prediction model provided by Azure WebServices.



The process goes as follows:

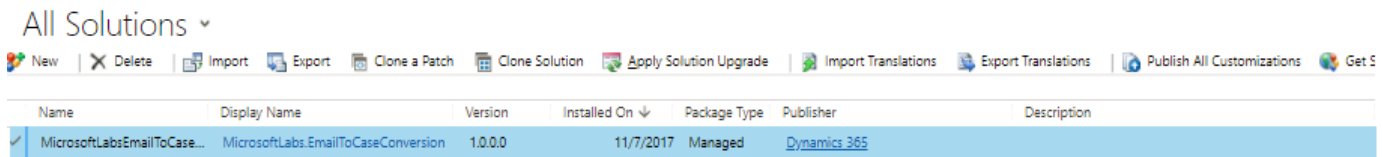
1. CRM feature reads the Email Subject and Body, and predicts the Case Type, Case Subject, and priority Queue.
2. Converts the email into Case in CRM. Through Machine Learning, it will continuously study and improve its' accuracy levels.

The salient features of this solution are:

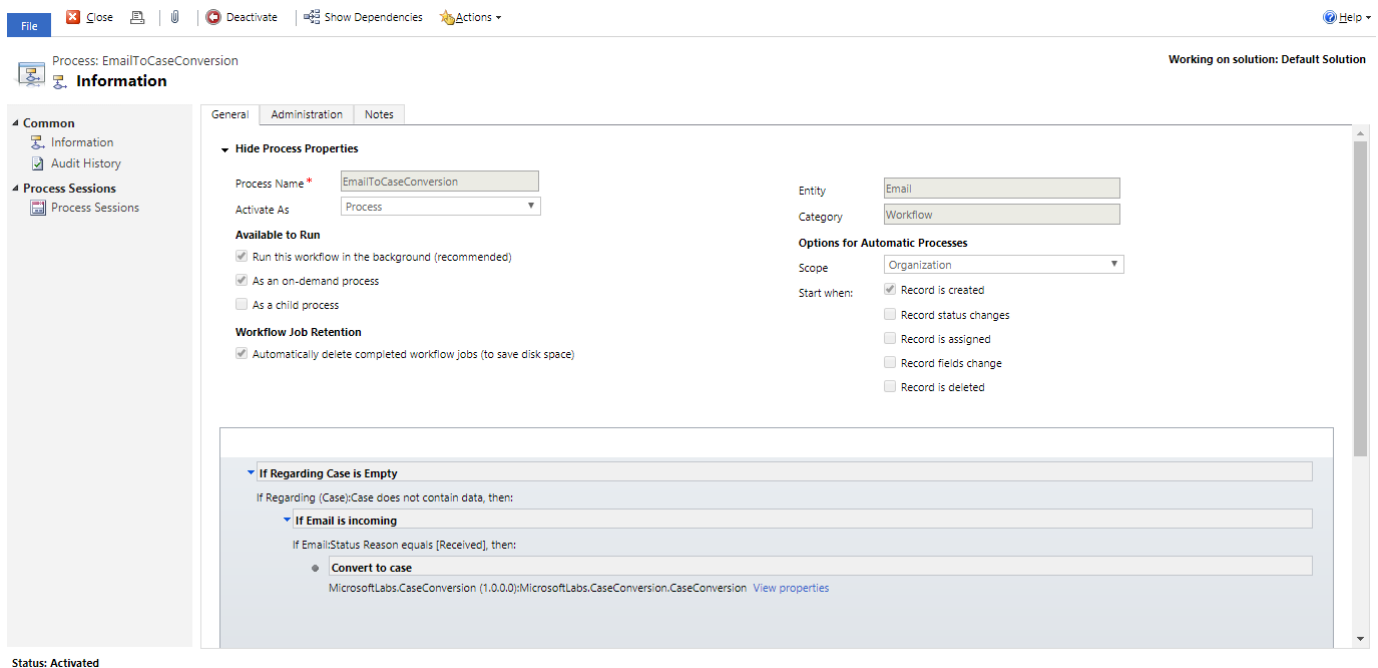
- Improved Productivity by reducing manual intervention for each new case
- Better accuracy and quicker performance of results
- Decreased case resolution times, leading to improved SLA's

Verify the solution after the Installation

After downloading the solution from <https://appsource.microsoft.com/en-us> the following components should be present in Dynamics 365.



Email-To-Case conversion workflow



Status: Activated

Email Classification for Automated Support Ticket Generation

The Email Classification Experiment assigns an email to one or more classes of a predefined set of classes or work queues, and is available as a 2-Part solution from Cortana Intelligence gallery. To get started, select each link, then click **Open in Studio** button.

1. Train and Evaluate Models:

<https://gallery.cortanaintelligence.com/Experiment/Email-Classification-for-Automated-Support-Ticket-Generation-Step-1-of-2-Train-and-Evaluate-Models-3>

2. Create Web Service with Trained Models:

<https://gallery.cortanaintelligence.com/Experiment/E-mail-Classification-for-Automated-Support-Ticket-Generation-Step-2-of-2-Create-Web-Service-with-Trained-Models-2>

This step provides the web API key which we need for configuration of the CRM workflow.

Publish as a web service, then continue with configuration.

CRM Workflow Configuration

Complete the input parameters to the workflow.

1. Set Custom Step Input Properties. Title, Description and Address are *dynamic values*.

- **Email Title:** Set dynamic value to capture "Email Subject". For example: "{Subject(Email)}" *without quotes*.
- **Email Description:** Set dynamic value to capture "Email Description". For example: "{Description(Email)}".
- **Sender's Email Address:** Set dynamic value to capture "Submitted By". For example: {Submitted By(Email)}".
- **Azure ML Web Service URL:** Set the Azure ML URL.
- **Azure API Key:** Set the Azure SAS key.

Property Name	Data Type	Required	Value
Email Title	Single Line of Text	Required	{Subject(Email)}
Email Description	Single Line of Text	Required	{Description(Email)}
Sender's Email Address	Single Line of Text	Required	{Submitted By(Email)}
Azure ML Web service URL	Single Line of Text	Required	
Azure API Key	Single Line of Text	Required	

Form Assistant

Dynamic Values

Dynamic Values

Operator: Set to

Look for: Email

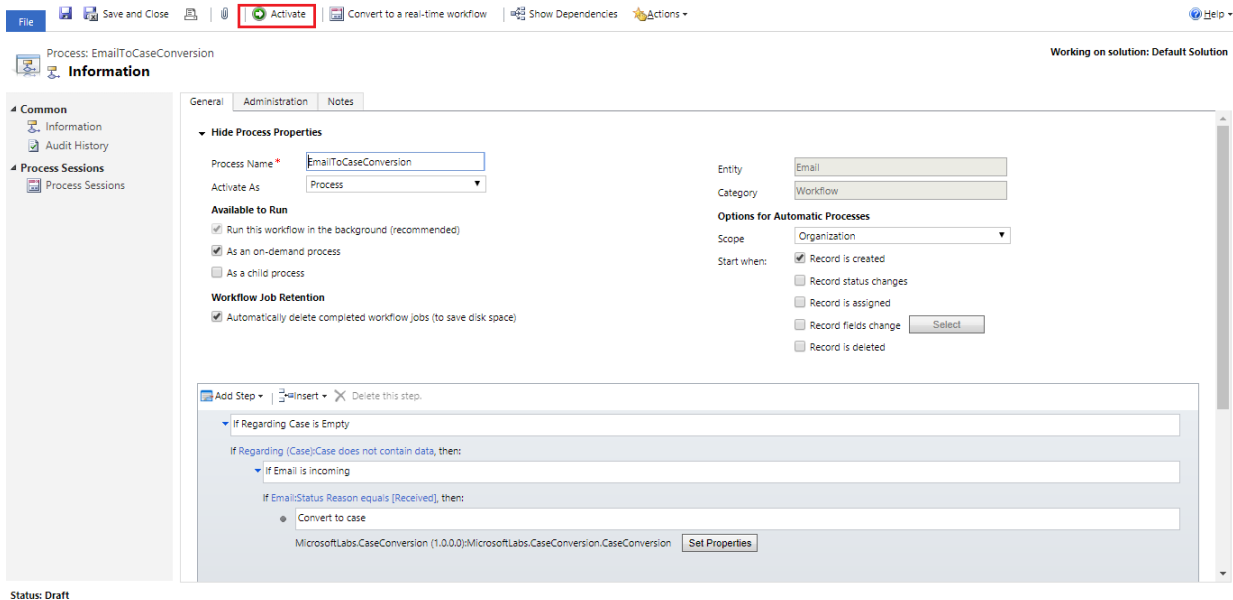
Activity Status: Email

Add

Default value:

OK

2. **Save** and **Close** the input parameters window. Enable the workflow by clicking the **Activate** button as shown in the upper blade.



Functionality

Scenario:

1. Send an email to CRM Queue (incoming mailbox) from Outlook.
2. A Case will be created with Case Type, Case Subject, and Queue details based on the data prediction.
3. The converted Case Prediction Accuracy will display in the Notes Section.
4. The Email received becomes part of the Case Activity.

End of Document