EMAIL 2 CASE USING AI

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

Contents

Introduction

This solution provides an add-on feature that automatically converts Email into Case using AI prediction model provided by Azure WebServices.
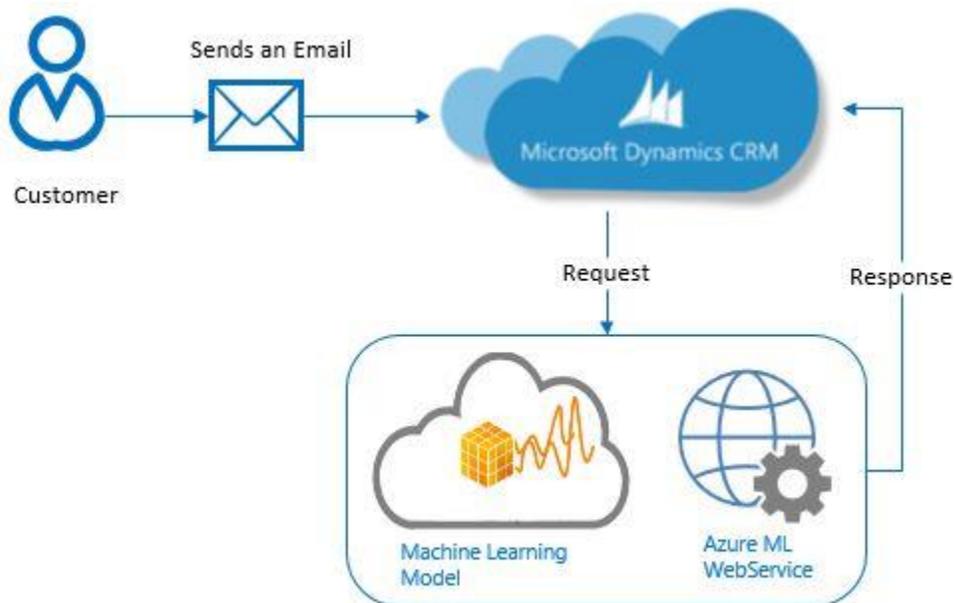
The process goes as follows:

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.
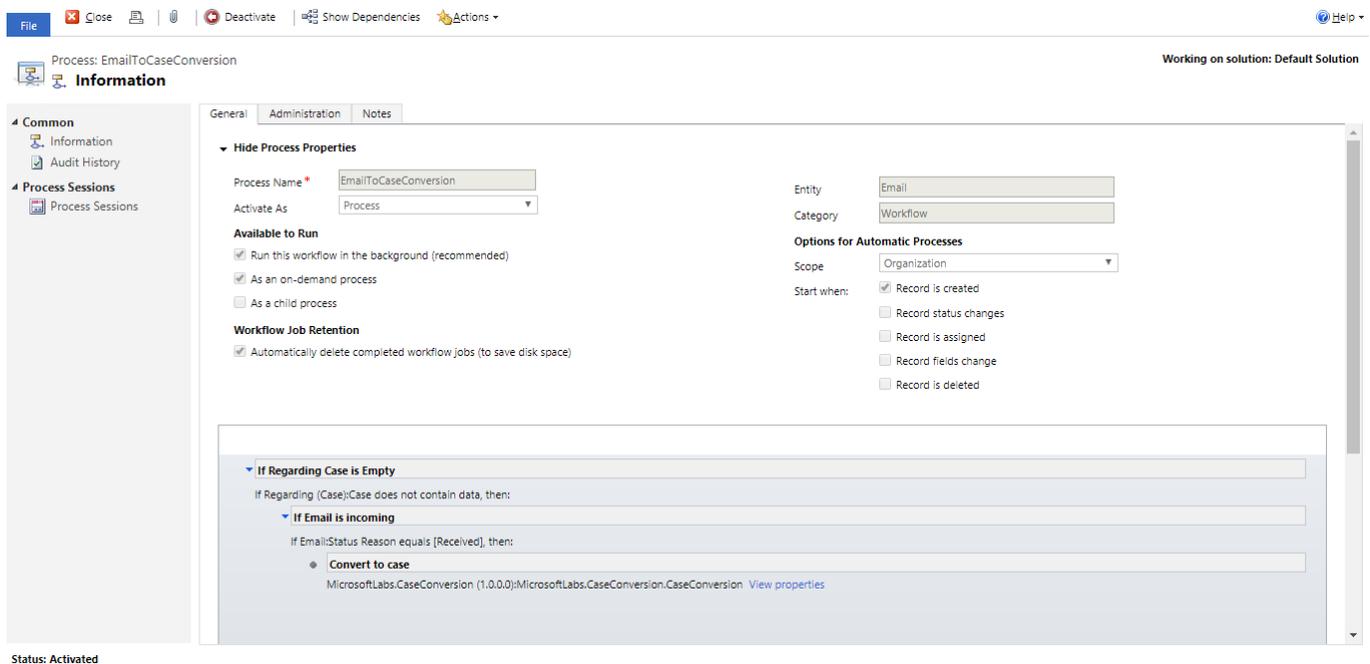
The salient features of this solution are:

- 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.

All Solutions

Name	Display Name	Version	Installed On	Package Type	Publisher	Description
MicrosoftLabsEmailToCase...	MicrosoftLabs.EmailToCaseConversion	1.0.0.0	11/7/2017	Managed	Dynamics 365	

Email-To-Case conversion workflow

Process: EmailToCaseConversion
Information

Working on solution: Default Solution

General   Administration   Notes

Hide Process Properties

Process Name: EmailToCaseConversion

Activate As: Process

Entity: Email

Category: Workflow

Available to Run

Options for Automatic Processes

Run this workflow in the background (recommended)

Scope: Organization

As an on-demand process

Start when:
- Record is created

As a child process
- Record status changes

Workflow Job Retention
- Record is assigned

Automatically delete completed workflow jobs (to save disk space)
- Record fields change
- Record is deleted

If Regarding Case is Empty

If Regarding (Case):Case does not contain data, then:

If Email is incoming

If Email:Status Reason equals [Received], then:

Convert to case

MicrosoftLabs.CaseConversion (1.0.0.0):MicrosoftLabs.CaseConversion.CaseConversion View properties

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.

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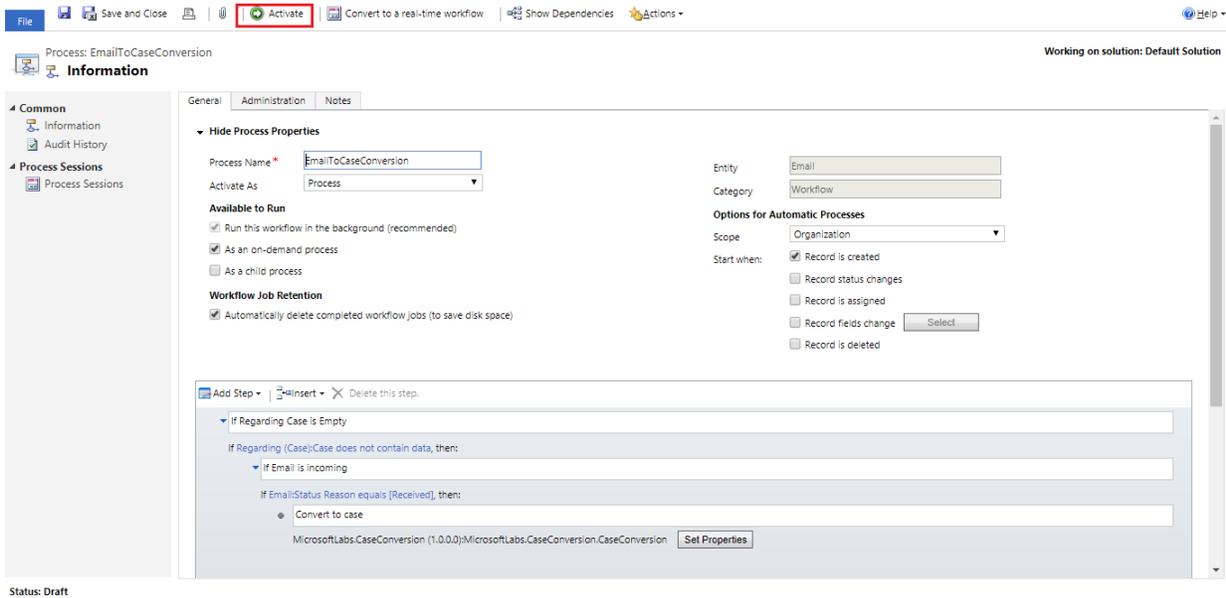
Functionality

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