

AXM First Level Support AI Automation

YOUR GLOBAL AI-DRIVEN
DYNAMICS PARTNER



Version History

No.	History	Editor	Date
0.1	Initial version	Anastasija Stefanovska	23/01/2026

Related Documents

Document Name	Document Type	Provided By	Last Update
Placeholder			

GLOSSARY OF TERMS

AXM365	AXM365 company is a Certified Microsoft Partner with the experience and knowledge to provide upgrade in business processes and technology.
AX	Microsoft Dynamics AX (Axapta), A global Microsoft ERP software product for enterprise-level companies.
Azure AD	Azure Active Directory is Microsoft's cloud-based identity and access management service, which helps your employees sign in and access resources.
AOS	Application Object Server – A server used for sharing application objects and information to increase application performance.
BI	Business Intelligence - A data analysis process that helps executives and managers make more informed business decisions.
CRM	Customer Relationship Management – D365 Product Line.
CSS	Microsoft Customer support – dedicated to providing quality service for Dynamics 365 for Finance and Operations.
D365	Microsoft Dynamics 365 is a set of intelligent business cloud-based applications that helps you run your entire business and deliver greater results through predictive, AI-driven insights.
D365 F&O	Microsoft Dynamics 365 Finance and Operations Module.
D365 CE	Dynamics 365 for Customer Engagement - the cloud-based online version of Dynamics CRM, specifically the functionality that deals with customer service, retention and support.
D365 BC	Dynamics 365 Business Central - the cloud-based version of NAV
ERP	Enterprise Resource Planning – D365 Product Line

KPI	Key Performance Indicator ¹ – A type of performance measurement that evaluates the success of an organization or of an activity it engages in.
LCS	Lifecycle Services (LCS) ² for Microsoft Dynamics is a collaboration portal that provides an environment and a set of regularly updated services that can help you manage the application lifecycle of your implementations of the Dynamics 365 Finance and Operations apps.
NAV	Microsoft Dynamics NAV is an enterprise resource planning (ERP) app from Microsoft Dynamics family.
Support incident	An issue with Dynamics 365 for Finance and Operations that the customer encounters while using the service
Tenant	Account you create in the Microsoft Online Services environment when you sign up for a Dynamics 365 (online) subscription. A tenant contains uniquely identified domains, users, security groups, and subscriptions and can contain multiple Dynamics 365 (online) instances. The tenant created for you has a domain name of <<account>>.onmicrosoft.com.
User	A single person consuming Dynamics 365 for Finance and Operations ³ , which is associated with a Customer's tenant.

¹ KPI – This is a footnote example.

² LCS – This is a footnote example that will offer further explanation for a word/phrase.

³ D365 F&O – This is a footnote example that will explain a term further and further and further and further and further.

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Introduction

AXM First Level Support AI Automation is a custom AI solution developed by AXM365 to enhance efficiency and consistency of first-level support. The solution is designed to assist support teams by providing an intelligent first point of analysis for incoming requests, helping to reduce manual effort and improve response times.

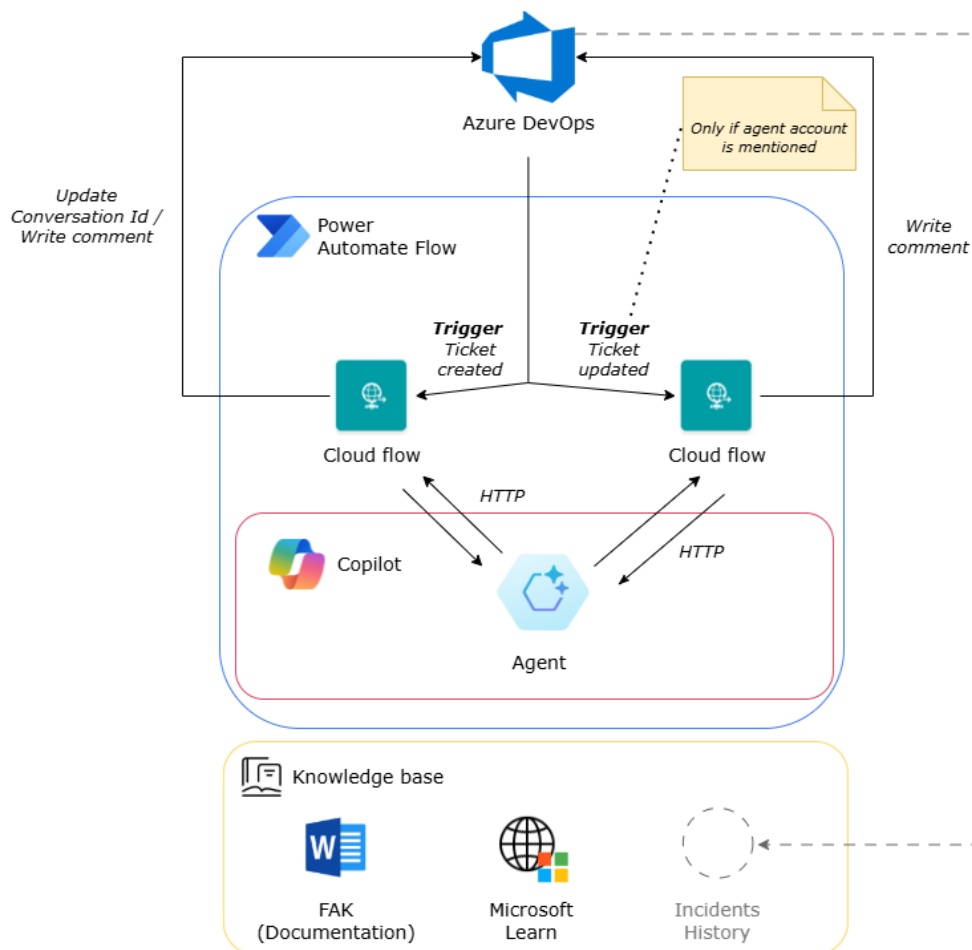
By analyzing support tickets created in Azure DevOps, the Support Automation Agent supports the identification of issue types and suggests appropriate next steps. It can distinguish between incidents and change requests, offer initial guidance or proposed solutions, and request additional information when required. This allows first-level support to focus on validation and execution rather than initial investigation.

The agent leverages knowledge from Microsoft Learn documentation and an internal knowledge base of historical issues and resolutions, enabling it to apply proven solutions and continuously improve over time. As a result, the Support Automation Agent acts as a scalable support assistant, strengthening first-level support while ensuring more consistent and informed responses.

Design overview

The Support Automation solution is composed of two main components: a Support Copilot Agent and a set of Power Automate flows that integrate the agent with Azure DevOps. Together, these components enable automated analysis, guided interaction, and consistent communication directly within support tickets.

The solution is designed to operate within the Azure DevOps ticket lifecycle. When a ticket is created or updated and explicitly assigned to the Support Automation Agent, the agent is activated through Power Automate. The ticket description is then forwarded to the agent for analysis, and all interactions are reflected into the ticket as comments.



The process begins with an initial ticket analysis. The agent first determines whether the request represents a change request or an incident. Change requests are identified by their intent (such as adding, removing, or modifying functionality). When a change request is detected, the agent does not consult its knowledge base and instead responds that the request is outside its scope and must be handled through the formal change process.

If the ticket is identified as an incident, the agent evaluates whether all required information is available. This includes error details, the scope of impact, and the affected environment. If any required information is missing, the agent responds by explicitly requesting the missing details. This ensures that incomplete tickets are clarified before further analysis is carried out.

Once sufficient information is provided, the agent proceeds with incident analysis. It summarizes the issue and searches its knowledge sources, which include Microsoft Learn documentation and an internal repository of historical DevOps tickets and resolutions. Based on this analysis, the agent either proposes a solution or, if no sufficiently reliable solution can be identified, indicates that the issue should be escalated to the support team.

All agent responses are written as comments on the Azure DevOps ticket. To maintain continuity, a dedicated Conversation ID field is used to preserve the context of the interaction. When the agent is mentioned in subsequent comments, it continues the conversation using the same context, allowing it to take previous exchanges into account.

Power Automate flows act as the orchestration layer of the solution. They manage the triggering of the agent, the exchange of messages, and the synchronization of responses back to Azure DevOps. The flows do not perform analysis themselves; their role is to facilitate communication between the agent and the support team while keeping all interactions visible within the ticket.

The solution also covers the final stage of the ticket lifecycle through a dedicated closure flow. When a ticket is resolved and closed in Azure DevOps, the resolution details are captured from the ticket and stored in the internal knowledge base together with the original issue description. This ensures that newly resolved issues become part of the agent's learning source. For new or previously unknown issues, it is therefore essential that the Resolution field is

properly populated at ticket closure, as this information enables the Support Automation Agent to recognize and propose an effective solution if the same issue occurs again in the future.

Prerequisites and initial setup

Before the Support Automation Agent can be used, several configuration steps must be completed to enable communication between Azure DevOps, Power Automate, and the agent itself. These prerequisites ensure that tickets can be analyzed, responses can be written back to DevOps, and knowledge can be retained for future use.

2.1 Authentication tokens

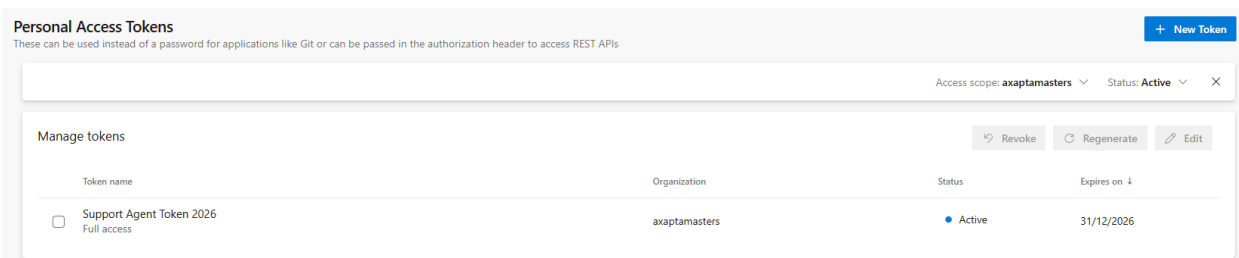
The solution requires two authentication tokens to function correctly:

- Azure DevOps Personal Access Token

A Personal Access Token (PAT) must be created in Azure DevOps to allow the Power Automate flows to securely interact with support tickets. This token is used to authenticate requests to Azure DevOps, enabling the solution to read ticket information and post comments directly on work items.

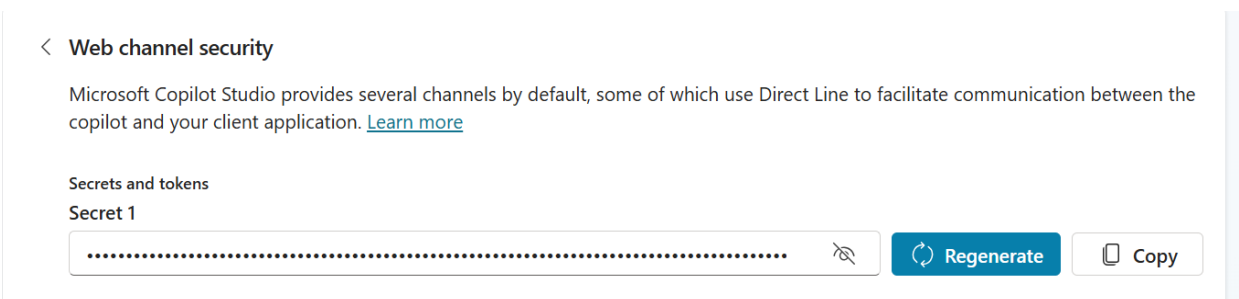
The token can be generated in Azure DevOps under User Settings → Security → Personal Access Tokens. Once created, it is stored as a variable within the solution and used by Power Automate flows whenever access to Azure DevOps is required.

The token must be configured with sufficient permission to ensure that ticket comments and updates can be performed successfully.



- Support Copilot Agent Token

This token is used to establish secure communication with the Support Automation Agent. It enables Power Automate to send ticket content to the agent and receive analysis and responses.



2.2 Required Azure DevOps Fields

To support conversation continuity and knowledge retention, additional fields must be available on the Azure DevOps work item type used for support tickets.

- Conversation ID

Conversation ID is a custom field used to store the identifier of the ongoing conversation with the Support Automation Agent. It allows the agent to maintain context across multiple interactions on the same ticket. When the agent is mentioned in subsequent comments, it continues the analysis using the existing conversation instead of starting a new one.

- Issue resolution

This field is used when closing a ticket to capture the final resolution. The content of this field is stored in the internal knowledge base together with the issue description, enabling the agent to recognize and resolve similar issues in the future.

Both fields must be created and added to the relevant work item layout before the agent is used.

SA Support Agent

5 Comments Add Tag

State Active

Area AXM Copilot Support

Reason New

Iteration AXM Copilot Support

Description

the batch job Inventory settlements cleanup ended in error.

Issue resolution

Click to add Issue resolution.

Discussion

SA Add a comment. Use # to link a work item, @ to mention a person, or ! to link a pull request.

switch to Markdown editor

Planning

Stack Rank

Priority 2

Due Date Select a date...

Conversation ID 36LuR0Y0KXzDATAfSU6shn-eu

Operational Scenarios

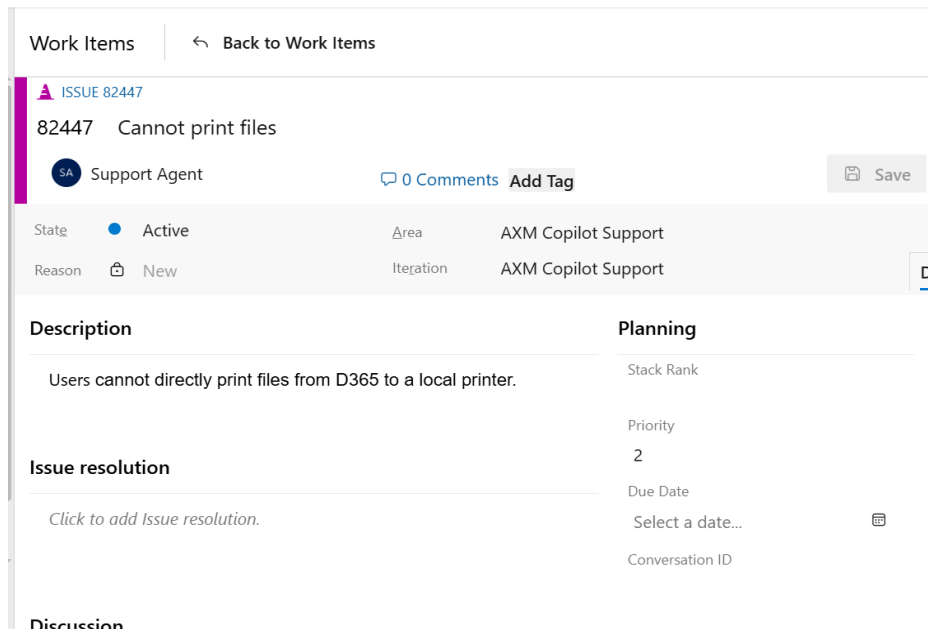
The Support Automation Agent can handle different types of tickets in multiple scenarios. The following examples illustrate how it analyzes, responds, and maintains context throughout the ticket lifecycle.

- Create a new issue

When creating a new issue, it is important to assign the ticket to the Support Agent so that the agent can begin the analysis. At this stage, the only required field is the description, which should contain as much

relevant information as possible about the issue. No additional fields are mandatory at creation time.

Initially, the Conversation ID field remains empty, indicating that no interaction with the agent has yet taken place. Once the issue is created and assigned, the ticket is sent to the agent automatically for analysis. The agent starts processing the issue immediately, and within a short time (typically less than one minute), the Conversation ID field is populated. This confirms that the agent has started analyzing the issue and that the conversation context has been established.



The screenshot shows a ticket interface for 'ISSUE 82447' with the title 'Cannot print files'. The ticket is assigned to 'Support Agent' and has '0 Comments'. The status is 'Active' and the reason is 'New'. The area and iteration are both 'AXM Copilot Support'. The description states: 'Users cannot directly print files from D365 to a local printer.' The planning section includes 'Stack Rank', 'Priority 2', 'Due Date' (with a 'Select a date...' button), and 'Conversation ID'. There is a 'Save' button in the top right corner.

From this point onward, all further interactions between the support team and the agent are linked to the same conversation, ensuring continuity throughout the ticket lifecycle.

- **Missing information**

If the issue described in the ticket does not contain sufficient information for analysis, the Support Automation Agent identifies the missing details and requests additional information. The agent responds by adding a comment to the ticket that clearly specifies what information is required to continue the analysis.

When the support team provides the requested information, the ticket update flow is triggered. This flow checks whether the Support Agent is mentioned in the new comment. If the agent is tagged, the additional

information is sent to the agent using the existing **Conversation ID**, ensuring that the context of the discussion is preserved. The agent then continues the analysis based on the newly provided details and searches the knowledge base for a suitable solution.

ISSUE 80922
80922 global update error
SA Support Agent 5 Comments Add Tag
State Active Area AXM Copilot Support
Reason New Iteration AXM Copilot Support

SA Support Agent commented 26 Dec 2025
[ACTION1:MISSING INFO] Thank you for reporting the issue. To assist you further, I need some additional information: 1. How many users are affected by this error? 2. In which environment are you experiencing this issue (e.g., Production, Test, Development)? Please provide these details so I can proceed with the analysis. AI-generated content may be incorrect

ISSUE 80922
80922 global update error
SA Support Agent 5 Comments Add Tag
State Active Area AXM Copilot Support
Reason New Iteration AXM Copilot Support

SA Support Agent commented 26 Dec 2025
@Support Agent 1 user was affected. This error occurred on a cloud hosted environment.

This process may repeat until all required information is available, allowing the agent to provide an accurate and informed response.

ISSUE 80922
80922 global update error
SA Support Agent 5 Comments Add Tag
State Active Area AXM Copilot Support
Reason New Iteration AXM Copilot Support

SA Support Agent commented 26 Dec 2025
[ACTION2:INCIDENT ANALYSIS] Summary: You are experiencing the error "GlobalUpdate script for service model: AOSService on machine: vmd365jovdev-1" in a cloud-hosted environment, affecting only one user. Analysis & Solution: Based on the available knowledge base and DevOps Tickets Table, this error typically occurs when there is a failure during the update or deployment process of the AOSService on the specified virtual machine. Common causes include: - Incomplete or failed deployment of service updates. - Temporary connectivity issues between the deployment service and the VM. - Insufficient permissions or locked files during the update process. Recommended Steps: 1. Restart the AOSService on the affected VM (vmd365jovdev-1) from the Lifecycle Services (LCS) portal. 2. If the issue persists, try redeploying the service update or package. 3. Check the event logs on the VM for more detailed error messages related to the GlobalUpdate script. 4. Ensure that there are no pending Windows updates or required reboots on the VM. 5. If none of the above steps resolve the issue, escalate to the support team with the full error logs for further investigation. If you need step-by-step guidance for any of the above actions, please let me know! AI-generated content may be incorrect

- Incident analysis

If the issue described in the ticket is sufficiently detailed and contains all required information, the Support Automation Agent proceeds directly with incident analysis. When the agent recognizes the issue based on previous cases or identifies a matching solution in the knowledge base, it does not request additional information.

In this scenario, the agent analyzes the issue, retrieves the relevant resolution, and posts the proposed solution directly as a comment on the ticket. This enables the support team to quickly review and apply the solution without additional back-and-forth, reducing resolution time and improving efficiency.

 **ISSUE 81641**

81641 Citrix error

 Support Agent

 1 Comment [Add Tag](#)

State  Active

Area AXM Copilot Support

Reason  New

Iteration AXM Copilot Support



Add a comment. Use # to link a work item, @ to mention a person, or ! to link a pull request.

 [Markdown supported.](#) Paste or select files to insert. [switch to HTML editor](#)

 **Support Agent** [commented 12 Jan](#)

[ACTION2:INCIDENT ANALYSIS] ****Issue Summary:**** A single user is unable to open AX due to the Citrix error: "There is no Citrix XenApp server configured at the specified address." This issue occurs across all environments. ****Resolution Steps:**** - For Citrix-related errors preventing access to AX, the recommended action is to assign the ticket to the ICT servicedesk, as they are responsible for handling Citrix server access issues. - The error indicates a configuration or connectivity problem with the Citrix XenApp server, which requires intervention from the appropriate IT support team with access to Citrix infrastructure. ****Next Steps:**** - Assign this ticket to the ICT servicedesk for further investigation and resolution [1]. [1]: cite:1 "Citation-1"

- No matching solution found

If the Support Automation Agent is unable to identify a suitable solution with sufficient confidence, it does not attempt to provide an uncertain answer. When the accuracy of available solutions is below the defined threshold (70%), the agent updates the ticket to indicate that the issue should be taken over by the support team.

Once the issue has been resolved manually, it is strongly recommended to populate the Issue Resolution field when closing the ticket. This information is stored in the knowledge base and enables the agent to recognize and resolve similar issues more effectively in the future.


ISSUE 81644

81644 'Object reference not set to an instance of an object' appears when changing sales order type


Support Agent

 1 Comment
Add Tag

State	● Active	Area	AXM Copilot Support
Reason	🔒 New	Iteration	AXM Copilot Support



Add a comment. Use # to link a work item, @ to mention a person, or ! to link a pull request.

 Markdown supported. Paste or select files to insert.
[switch to HTML editor](#)


Support Agent commented 12 Jan

[ACTION2:INCIDENT ANALYSIS] ****Issue Summary:**** When attempting to change the sales order type from journal to sales order, the error message "Object reference not set to an instance of an object" is encountered. ****Analysis and Solution:**** A review of recent DevOps tickets did not reveal any records mentioning this specific error or related issues. No relevant data was found in the DevOps Tickets Table regarding this error. Therefore, there is no documented solution available for this particular issue in the current knowledge base. A support ticket should be logged for the support team to handle this incident [1]. [1]: https://org7890cc3e.crm4.dynamics.com/main.aspx?forceUCI=1&newWindow=true&pagetype=entitylist&etn=new_table1 "new_Table1"



- Ticket closure
When a ticket is closed and the Issue Resolution field is populated, the issue description together with its resolution is stored in the agent’s knowledge base.

▲ ISSUE 81644

81644 'Object reference not set to an instance of an object' appears when changing sales order type

SA Support Agent

1 Comment Add Tag

State Closed

Reason Issue Resolved

Area AXM Copilot Support

Iteration AXM Copilot Support

Description

When changing sales order type from journal to sales order, the following error appears:
Object reference not set to an instance of an object

Issue resolution

The "Object reference not set to an instance of an object" error (a `NullReferenceException`) means you're trying to use an object that hasn't been created (is null). Common causes include forgetting to initialize a variable (using `new`), a method returning null, an empty array, or dealing with external data (like databases or files) that provides null values unexpectedly. The fix involves checking if the object is null before using it or ensuring it's properly instantiated with the new keyword.

Planning

Stack Rank

Priority 2

Due Date Select a date...

Conversation ID 9AMry0JwNJt6MoJ3aV3Vyl-eu

This ensures that newly resolved issues are immediately available for future analysis, enabling the Support Automation Agent to recognize the same issue and provide the correct solution directly if it occurs again.

▲ ISSUE 82448

82448 'Object reference not set to an instance of an object' appears when changing sales order type

SA Support Agent

1 Comment Add Tag

State Active

Reason New

Area AXM Copilot Support

Iteration AXM Copilot Support

SA

Add a comment. Use # to link a work item, @ to mention a person, or ! to link a pull request.

Markdown supported. Paste or select files to insert.

switch to HTML editor

SA Support Agent commented just now

[ACTION2:INCIDENT ANALYSIS] **Issue Summary:** You are encountering the error "Object reference not set to an instance of an object" when changing the sales order type.
Identified Solution: This error, also known as a `NullReferenceException`, typically occurs when the system tries to use an object that hasn't been created. The recommended resolution is to check for null values or ensure that all necessary objects are properly instantiated before attempting to change the sales order type. Reviewing the code or process to confirm that all required objects exist before they are accessed should resolve the issue [1]. [1]: https://org7890cc3e.crm4.dynamics.com/main.aspx?forceUCI=1&newWindow=true&pagetype=entitylist&etn=new_table1 "new_Table1"



- **Change request**
If the issue described in the ticket involves modifications, additions, or deletions of objects, the Support Automation Agent recognizes it as a change request. In this case, the agent does not attempt to provide a solution and instead responds that a formal Change Request should be opened for the appropriate team to handle the request.

ISSUE 81640

81640 Add toggle button

SA Support Agent

1 Comment Add Tag

State

Active

Area

AXM Copilot Support

Reason

New

Iteration

AXM Copilot Support

Description

We are looking to add a new toggle option on the transfer order header titled 'Collect'. This field should also be added to the work line details screen and be filterable. It should follow the same logic as the 'Urgent' toggle button.

Issue resolution

Click to add Issue resolution.

Discussion

SA

Add a comment. Use # to link a work item, @ to mention a person, or ! to link a pull request.

Markdown supported. Paste or select files to insert. [switch to HTML editor](#)

SA Support Agent commented 12 Jan

[ACTION3:CHANGE REQUEST] This request appears to be a change, which is outside my scope. A support ticket will be logged for the appropriate team to take over. AI-generated content may be incorrect

Planning

Stack Rank

Priority

2

Due Date

Select a date...

Conversation ID

L9VQg6fSFBF342k3ASLMYH-eu

These scenarios show how the Support Automation Agent interacts with tickets, requests missing information, provides solutions for known issues, and identifies change requests. By following these examples, users can understand how the agent supports the team throughout the ticket lifecycle and helps ensure consistent, efficient responses.