USER GUIDE

Compliance Sentinel

RAND GROUP

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CONTENTS

1 ABOUT THE APP

The Custom Agents application enables organizations to deploy and manage AI-powered business monitoring agents directly within Microsoft Dynamics 365 Business Central.

The application provides a framework for installing, configuring, scheduling, and executing pre-loaded agents that analyze Business Central data and identify business conditions requiring user attention. Depending on the agent configuration, results can be delivered through Business Central tasks, email notifications, or both.

For more information, please go to:

https://www.randgroup.com/apps/microsoft/business-central/compliance-sentinel/

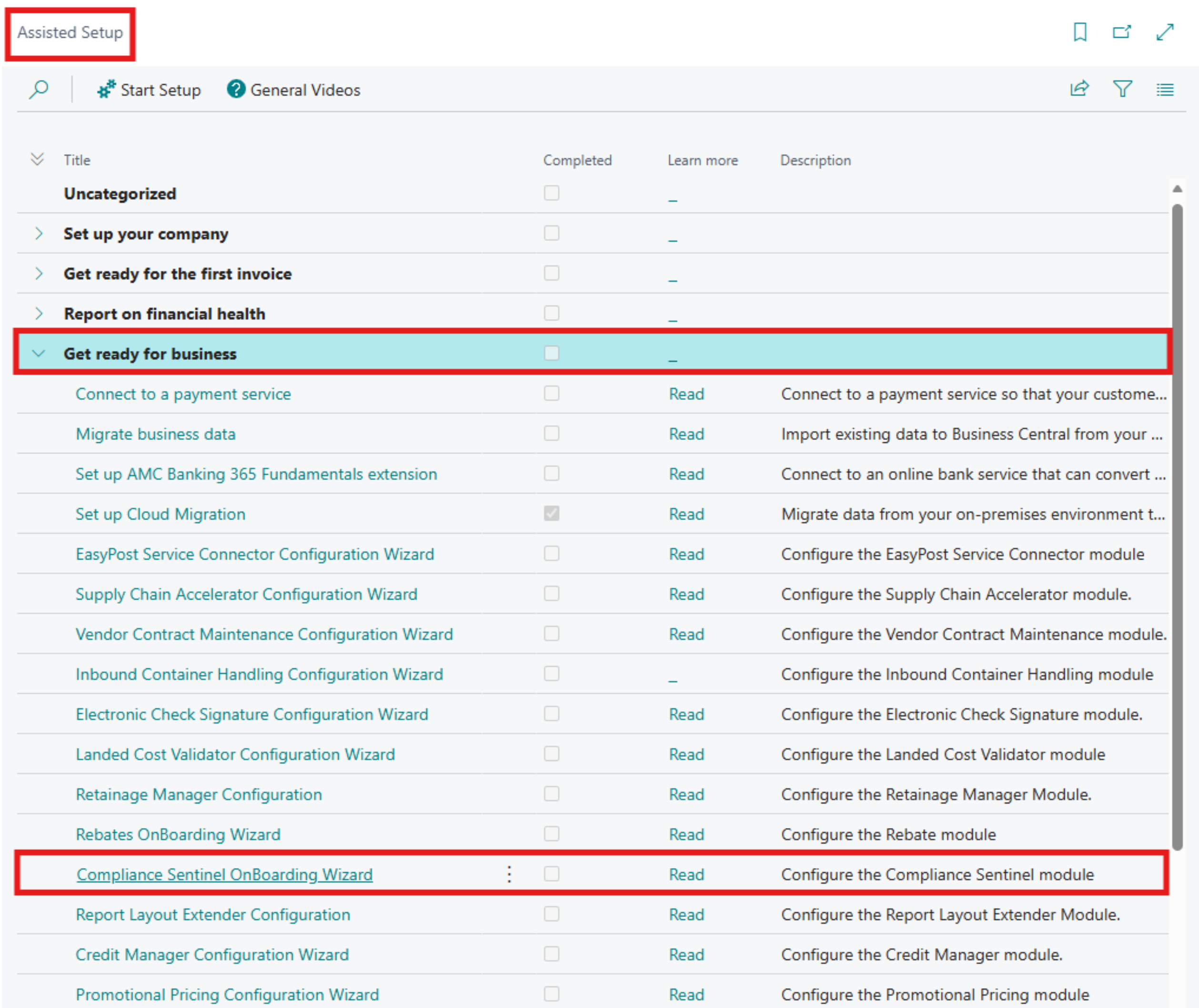
2 BASIC SETUP

This section covers the basic system setup needed to use the Compliance Sentinel application. These steps should be completed prior to using the app.

2.1 Onboarding Wizard

To configure the application using a guided step-by-step wizard:

1. Use the magnifying glass tool to go to the Assisted Setup window.
2. In the Assisted Setup window, go to the section “Get ready for business”, and select the Compliance Sentinel Configuration Wizard.



The Compliance Sentinel Configuration wizard will guide you through the installation steps of the application, including:

1. Submitting your client information to Rand Group (go to the Registration section of this document for more details)
2. Verifying that you have a valid license to start using the application (go to the Registration section of this document for more details)
3. Assigning user permissions (go to the Permissions section of this document for more details)

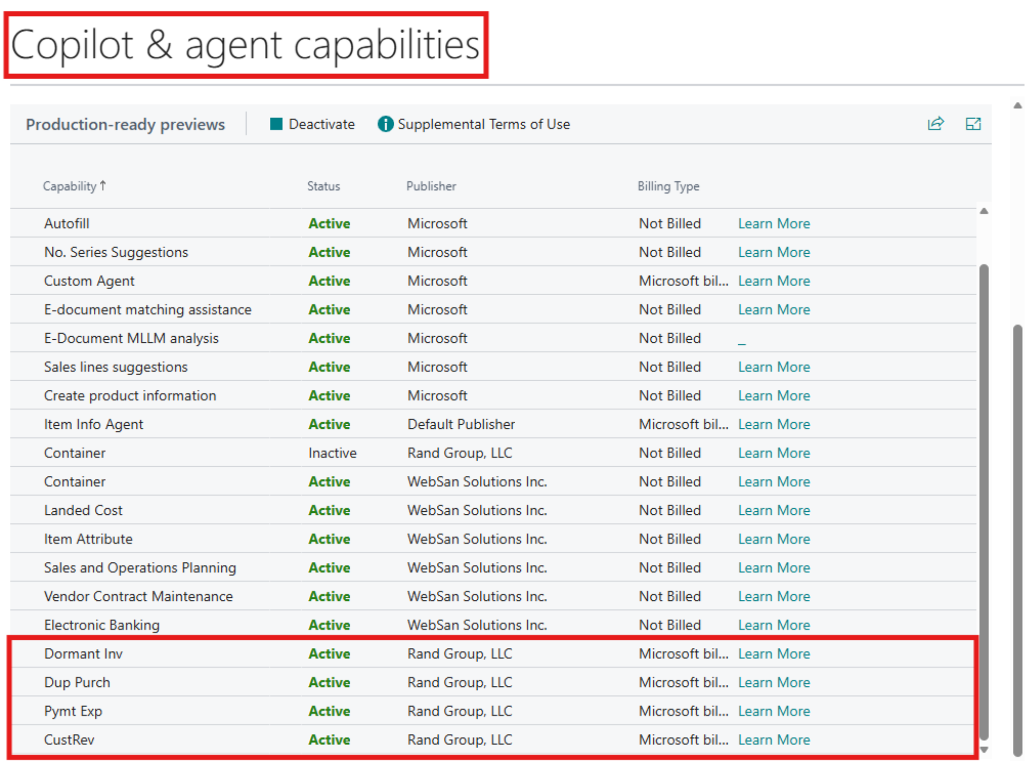
2.2 Configuration Overview

The Custom Agents application provides a collection of pre-loaded business monitoring agents that can be installed and configured within Microsoft Dynamics 365 Business Central.

Each agent is designed to analyze specific business data and identify conditions that may require user attention. Once installed, agents can be configured with agent-specific parameters, executed on demand, or scheduled to run automatically at predefined intervals.

The general workflow for using the application is:

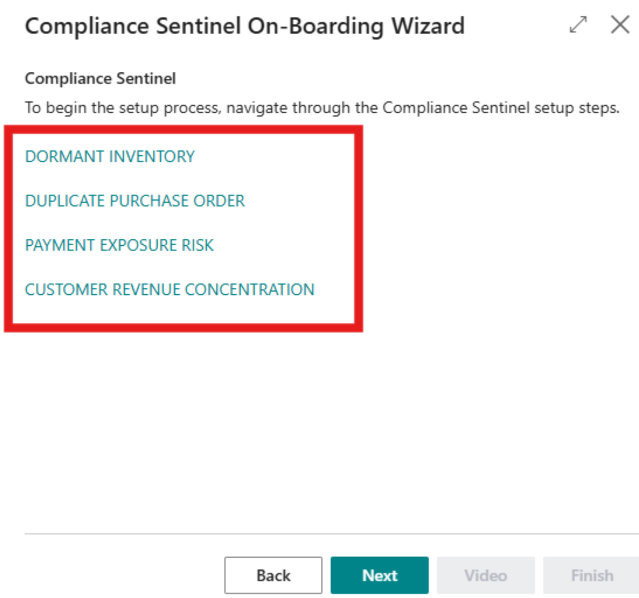
1. Enable the desired agents included with the Compliance Sentinel application.


Copilot & agent capabilities

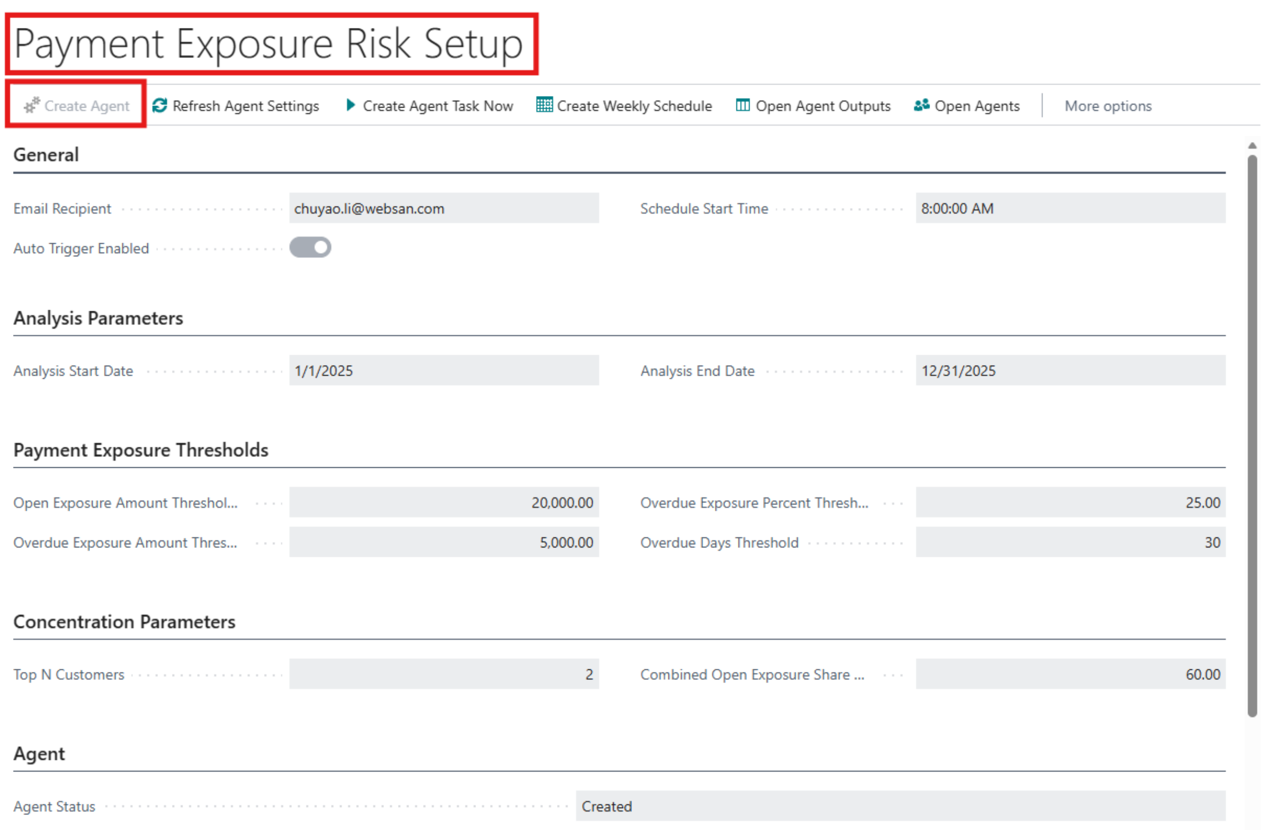
Production-ready previews | Deactivate | Supplemental Terms of Use

Capability ↑	Status	Publisher	Billing Type	
Autofill	Active	Microsoft	Not Billed	Learn More
No. Series Suggestions	Active	Microsoft	Not Billed	Learn More
Custom Agent	Active	Microsoft	Microsoft bil...	Learn More
E-document matching assistance	Active	Microsoft	Not Billed	Learn More
E-Document MLLM analysis	Active	Microsoft	Not Billed	_
Sales lines suggestions	Active	Microsoft	Not Billed	Learn More
Create product information	Active	Microsoft	Not Billed	Learn More
Item Info Agent	Active	Default Publisher	Microsoft bil...	Learn More
Container	Inactive	Rand Group, LLC	Not Billed	Learn More
Container	Active	WebSan Solutions Inc.	Not Billed	Learn More
Landed Cost	Active	WebSan Solutions Inc.	Not Billed	Learn More
Item Attribute	Active	WebSan Solutions Inc.	Not Billed	Learn More
Sales and Operations Planning	Active	WebSan Solutions Inc.	Not Billed	Learn More
Vendor Contract Maintenance	Active	WebSan Solutions Inc.	Not Billed	Learn More
Electronic Banking	Active	WebSan Solutions Inc.	Not Billed	Learn More
Dormant Inv	Active	Rand Group, LLC	Microsoft bil...	Learn More
Dup Purch	Active	Rand Group, LLC	Microsoft bil...	Learn More
Pymt Exp	Active	Rand Group, LLC	Microsoft bil...	Learn More
CustRev	Active	Rand Group, LLC	Microsoft bil...	Learn More

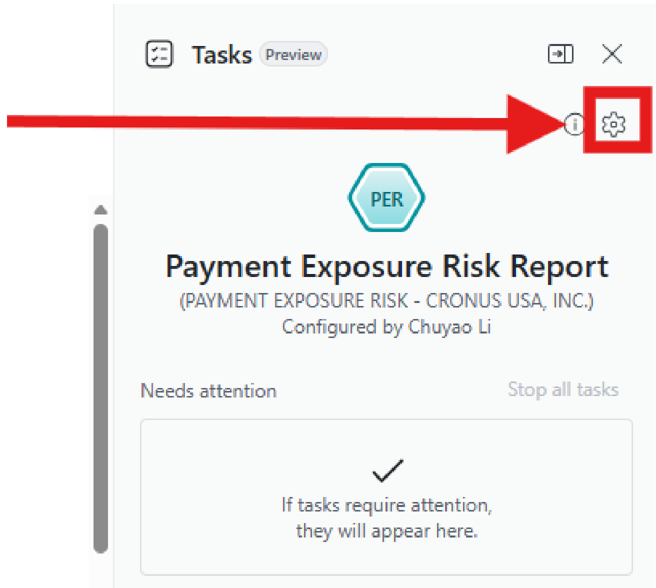
2. Open the Configuration Card for each of the agents that will be installed and configured. Note: each agent must be configured and activated individually.



3. After configuring the required settings, click Create Agent to install the selected agent.



4. If required, users can modify agent settings from the Agent Pane by selecting the settings icon.



5. Review generated tasks, notifications, and analysis results.

Once setup is complete, users can begin running agents and reviewing generated insights, notifications, and tasks.

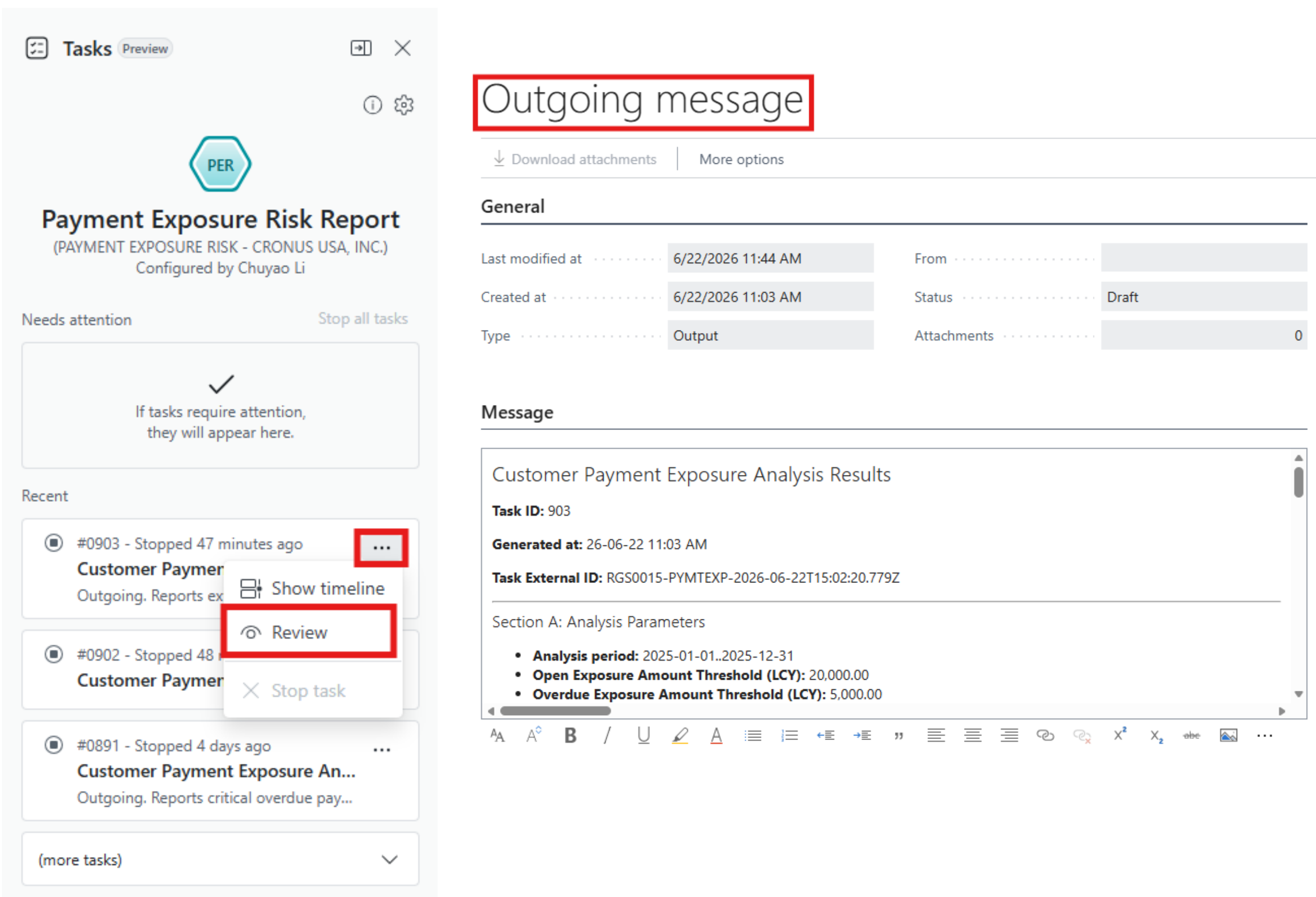
3 FUNCTIONALITY

The Agent Pane allows users to review agent-generated findings and take action directly from within Business Central.

Users can access the Agent Pane to:

- Review tasks generated by installed agents.
- View task status and execution activity.
- Open task details for further review.
- Access agent settings and configuration options.

The Agent Pane provides a centralized location for monitoring agent activity and reviewing agent-generated tasks within Microsoft Dynamics 365 Business Central.



Once reviewed, users can take the appropriate action on agent-generated tasks directly from the Agent Pane.

4 REPORTING

The Custom Agents application provides visibility into agent-generated outputs and execution history through the Agent Tasks and Agent Task Log pages.

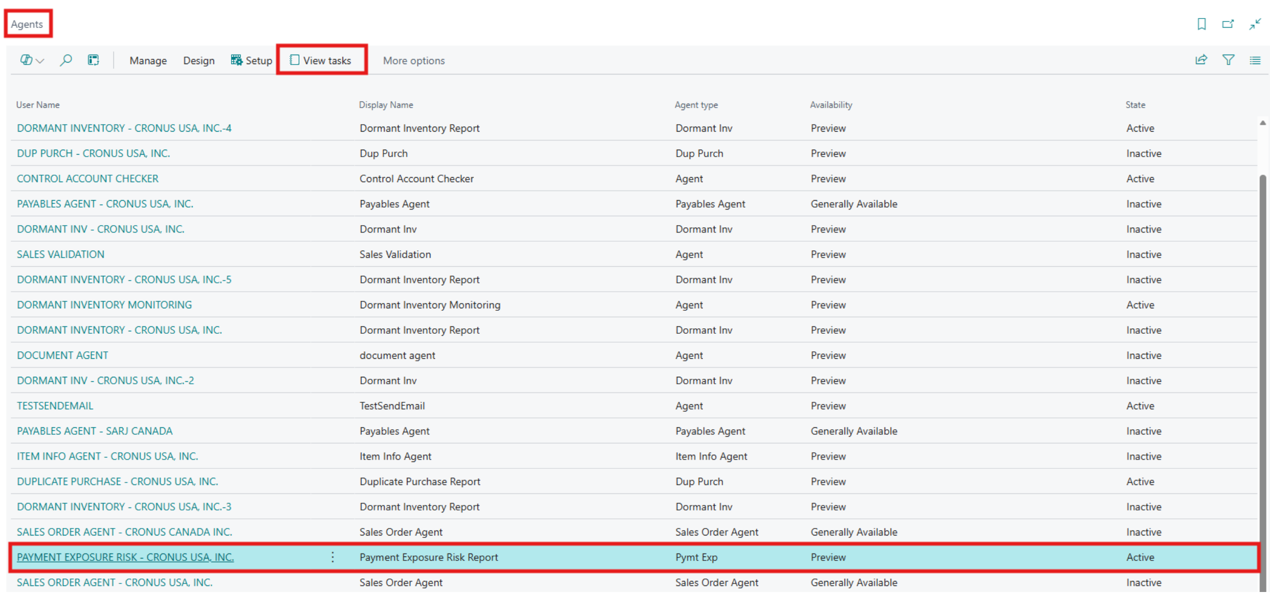
The **Agent Tasks** page displays tasks generated by installed agents and provides access to agent outputs, messages, and execution details.

Users can:

- Review tasks generated by individual agents.
- Access generated messages and outputs.
- Monitor task status and execution progress.
- View historical agent activity.

To access Agent Tasks:

1. Go to the Agents page. Select an Agent from the list and click View Tasks.

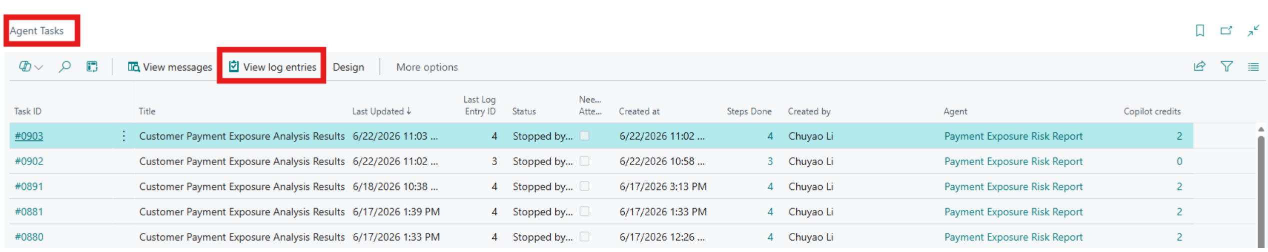


Agents

Manage Design Setup View tasks More options

User Name	Display Name	Agent type	Availability	State
DORMANT INVENTORY - CRONUS USA, INC.-4	Dormant Inventory Report	Dormant Inv	Preview	Active
DUP PURCH - CRONUS USA, INC.	Dup Purch	Dup Purch	Preview	Inactive
CONTROL ACCOUNT CHECKER	Control Account Checker	Agent	Preview	Active
PAYABLES AGENT - CRONUS USA, INC.	Payables Agent	Payables Agent	Generally Available	Inactive
DORMANT INV - CRONUS USA, INC.	Dormant Inv	Dormant Inv	Preview	Inactive
SALES VALIDATION	Sales Validation	Agent	Preview	Inactive
DORMANT INVENTORY - CRONUS USA, INC.-5	Dormant Inventory Report	Dormant Inv	Preview	Inactive
DORMANT INVENTORY MONITORING	Dormant Inventory Monitoring	Agent	Preview	Active
DORMANT INVENTORY - CRONUS USA, INC.	Dormant Inventory Report	Dormant Inv	Preview	Inactive
DOCUMENT AGENT	document agent	Agent	Preview	Inactive
DORMANT INV - CRONUS USA, INC.-2	Dormant Inv	Dormant Inv	Preview	Inactive
TESTSENDEMAIL	TestSendEmail	Agent	Preview	Active
PAYABLES AGENT - SARJ CANADA	Payables Agent	Payables Agent	Generally Available	Inactive
ITEM INFO AGENT - CRONUS USA, INC.	Item Info Agent	Item Info Agent	Preview	Inactive
DUPLICATE PURCHASE - CRONUS USA, INC.	Duplicate Purchase Report	Dup Purch	Preview	Active
DORMANT INVENTORY - CRONUS USA, INC.-3	Dormant Inventory Report	Dormant Inv	Preview	Inactive
SALES ORDER AGENT - CRONUS CANADA INC.	Sales Order Agent	Sales Order Agent	Generally Available	Inactive
PAYMENT EXPOSURE RISK - CRONUS USA, INC.	Payment Exposure Risk Report	Pymt Exp	Preview	Active
SALES ORDER AGENT - CRONUS USA, INC.	Sales Order Agent	Sales Order Agent	Generally Available	Inactive

2. The Agent Tasks page displays tasks generated by the selected agent, including task status, creation date and time, assigned user, execution details, and Copilot credit consumption.

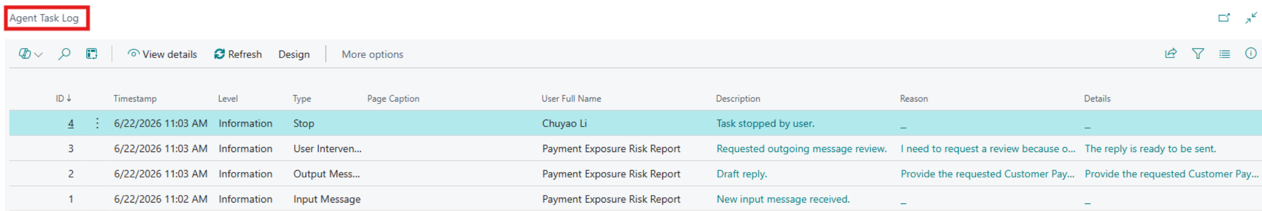


Agent Tasks

View messages View log entries Design More options

Task ID	Title	Last Updated ↓	Last Log Entry ID	Status	Nee... Atte...	Created at	Steps Done	Created by	Agent	Copilot credits
#0903	Customer Payment Exposure Analysis Results	6/22/2026 11:03 ...	4	Stopped by...		6/22/2026 11:02 ...	4	Chuyao Li	Payment Exposure Risk Report	2
#0902	Customer Payment Exposure Analysis Results	6/22/2026 11:02 ...	3	Stopped by...		6/22/2026 10:58 ...	3	Chuyao Li	Payment Exposure Risk Report	0
#0891	Customer Payment Exposure Analysis Results	6/18/2026 10:38 ...	4	Stopped by...		6/17/2026 3:13 PM	4	Chuyao Li	Payment Exposure Risk Report	2
#0881	Customer Payment Exposure Analysis Results	6/17/2026 1:39 PM	4	Stopped by...		6/17/2026 1:33 PM	4	Chuyao Li	Payment Exposure Risk Report	2
#0880	Customer Payment Exposure Analysis Results	6/17/2026 1:33 PM	4	Stopped by...		6/17/2026 12:26 ...	4	Chuyao Li	Payment Exposure Risk Report	2

3. From the Agent Tasks page, users can click View Log Entries to review the detailed execution history for a selected task. The Agent Task Log displays processing events, input and output messages, user intervention requests, execution status updates, and other system-generated information associated with the task.


Agent Task Log

View details Refresh Design More options

ID	Timestamp	Level	Type	Page Caption	User Full Name	Description	Reason	Details
4	6/22/2026 11:03 AM	Information	Stop		Chuyao Li	Task stopped by user.	_	_
3	6/22/2026 11:03 AM	Information	User Interven...		Payment Exposure Risk Report	Requested outgoing message review.	I need to request a review because o...	The reply is ready to be sent.
2	6/22/2026 11:03 AM	Information	Output Mess...		Payment Exposure Risk Report	Draft reply.	Provide the requested Customer Pay...	Provide the requested Customer Pay...
1	6/22/2026 11:02 AM	Information	Input Message		Payment Exposure Risk Report	New input message received.	_	_

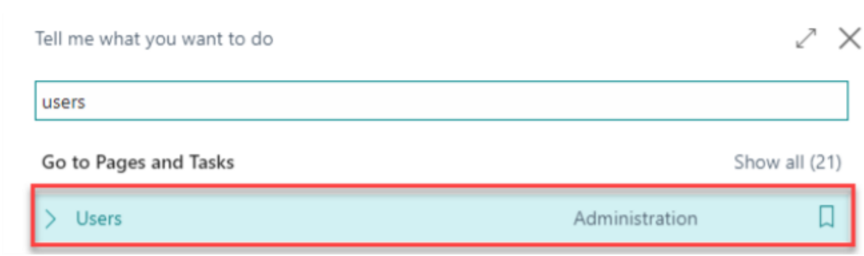
The Agent Tasks and Agent Task Log pages provide a complete audit trail of agent execution activities, generated outputs, and user interactions.

5 SECURITY

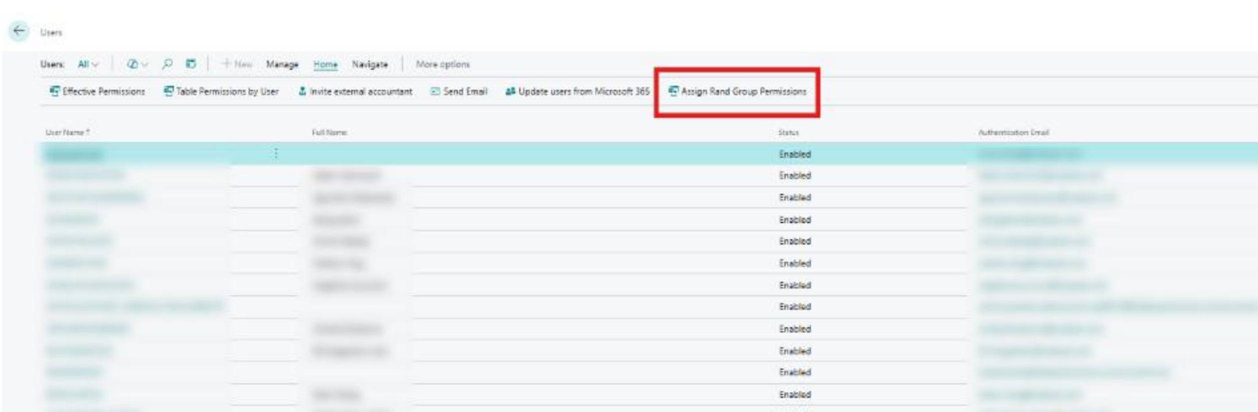
Once a Rand Group application is installed, it is essential to assign user permissions to grant access to pages, data, actions, and additional components integrated with and generated by the Rand Group applications.

The "Assign Rand Group Permissions" feature, accessible under the Home Menu within the Users page of Dynamics 365 Business Central, assigns the necessary permissions for all users to access the complete range of pages, data, actions, etc., provided by all Rand Group applications installed on the tenant.

To assign user permissions to the Rand Group apps, search and go to the User list.



In the Users window, select Assign Rand Group Permissions to assign all users the Rand Group Permission Set.



Note that only a user with the proper permissions (Super is recommended) will be able to Assign Rand Group Permissions.

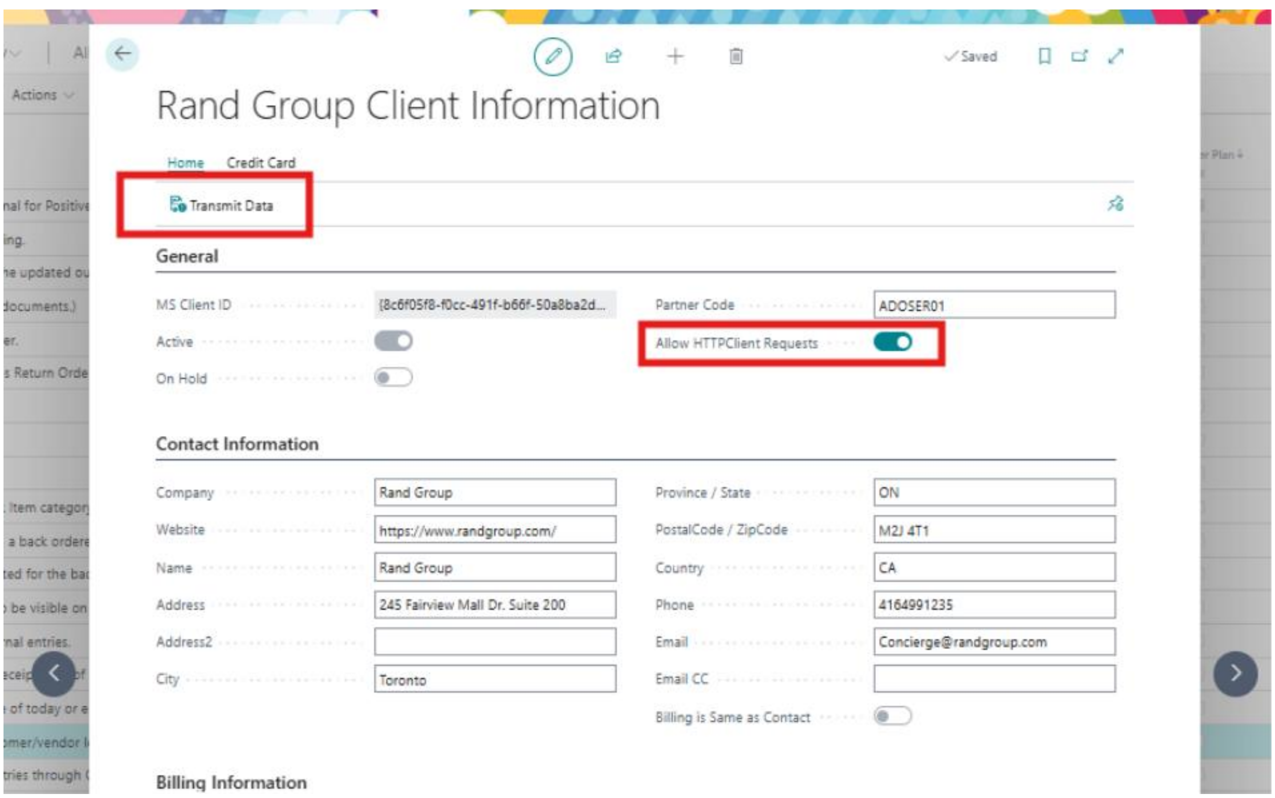
6 REGISTRATION

To use any application developed by Rand Group users must first provide their contact information as part of a registration process. This applies to all applications published by Rand Group.

Note: There is no cost to register an application. Users are only charged if they choose to purchase a license for a Production environment. Production licenses are not required in sandbox environments, allowing users to test Rand Group applications for an unlimited time without cost.

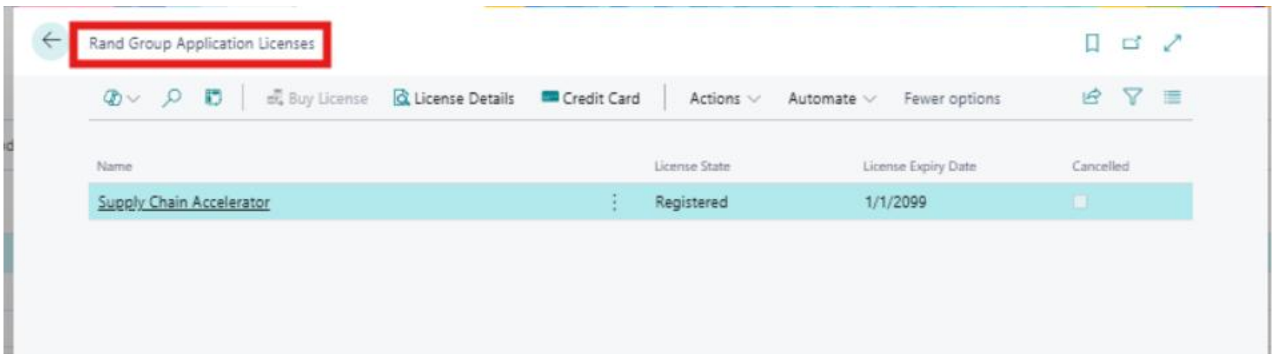
1. Submitting Rand Group client Information

To submit client information to Rand Group, in Dynamics 365 Business Central, navigate to the Rand Group Client Information page. Fill all required fields under the Contact Information and Billing Information FastTabs. Before selecting "Transmit Data," ensure that the "Allow HTTPClient Requests" setting is enabled. This is necessary for the data to be successfully transmitted to Rand Group.



2. Verifying License Status

Users can view, purchase, and refresh licenses for applications on the Rand Group Application Licenses page in Dynamics 365 Business Central. This window shows installed Rand Group applications and their license status.



It is important to note that Rand Group applications installed on Dynamics 365 Business Central sandbox environments do not require a production license. Instead, they only need a sandbox license that automatically renews prior to expiration; however, users must register the applications by submitting Client Information to Rand Group before utilizing any Rand Group app.

For more information about licensing and pricing, please visit: https://www.randgroup.com/apps/microsoft/business-central/compliance-sentinel/