

USER GUIDE

Compliance Sentinel



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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.

Assisted Setup

Start Setup

General Videos

Title	Completed	Learn more	Description
Uncategorized	☐	—	
> Set up your company	☐	—	
> Get ready for the first invoice	☐	—	
> Report on financial health	☐	—	
▼ Get ready for business	☐	—	
Connect to a payment service	☐	Read	Connect to a payment service so that your custome...
Migrate business data	☐	Read	Import existing data to Business Central from your ...
Set up AMC Banking 365 Fundamentals extension	☐	Read	Connect to an online bank service that can convert ...
Set up Cloud Migration	☒	Read	Migrate data from your on-premises environment t...
EasyPost Service Connector Configuration Wizard	☐	Read	Configure the EasyPost Service Connector module
Supply Chain Accelerator Configuration Wizard	☐	Read	Configure the Supply Chain Accelerator module.
Vendor Contract Maintenance Configuration Wizard	☐	Read	Configure the Vendor Contract Maintenance module.
Inbound Container Handling Configuration Wizard	☐	—	Configure the Inbound Container Handling module
Electronic Check Signature Configuration Wizard	☐	Read	Configure the Electronic Check Signature module.
Landed Cost Validator Configuration Wizard	☐	Read	Configure the Landed Cost Validator module
Retainage Manager Configuration	☐	Read	Configure the Retainage Manager Module.
Rebates OnBoarding Wizard	☐	Read	Configure the Rebate module
Compliance Sentinel OnBoarding Wizard	☐	Read	Configure the Compliance Sentinel module
Report Layout Extender Configuration	☐	Read	Configure the Report Layout Extender Module.
Credit Manager Configuration Wizard	☐	Read	Configure the Credit Manager module.
Promotional Pricing Configuration Wizard	☐	Read	Configure the Promotional Pricing module

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 Learn More
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.

Compliance Sentinel On-Boarding Wizard  

Compliance Sentinel
To begin the setup process, navigate through the Compliance Sentinel setup steps.

[DORMANT INVENTORY](#)
[DUPLICATE PURCHASE ORDER](#)
[PAYMENT EXPOSURE RISK](#)
[CUSTOMER REVENUE CONCENTRATION](#)

[Back](#) [Next](#) [Video](#) [Finish](#)

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

Payment Exposure Risk Setup

[* Create Agent](#) [Refresh Agent Settings](#) [Create Agent Task Now](#) [Create Weekly Schedule](#) [Open Agent Outputs](#) [Open Agents](#) [More options](#)

General

Email Recipient chuyao.li@websan.com Schedule Start Time 8:00:00 AM

Auto Trigger Enabled ☐

Analysis Parameters

Analysis Start Date 1/1/2025 Analysis End Date 12/31/2025

Payment Exposure Thresholds

Open Exposure Amount Threshol...	20,000.00	Overdue Exposure Percent Thresh...	25.00
Overdue Exposure Amount Thres...	5,000.00	Overdue Days Threshold	30

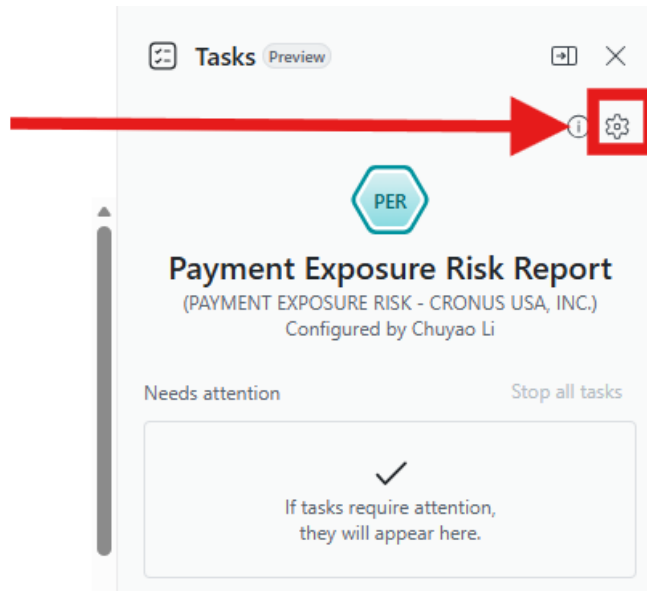
Concentration Parameters

Top N Customers	2	Combined Open Exposure Share ...	60.00
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Agent

Agent Status Created

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.

The screenshot displays the Agent Pane interface. On the left, the 'Tasks' pane shows a 'Payment Exposure Risk Report' (PAYMENT EXPOSURE RISK - CRONUS USA, INC.) configured by Chuyao Li. Below the report, a 'Needs attention' section indicates that tasks requiring attention will appear here. A 'Recent' list shows three tasks, with the first task, '#0903 - Stopped 47 minutes ago', having a 'Review' button highlighted. The right pane shows the 'Outgoing message' details for the selected task. The message is titled 'Customer Payment Exposure Analysis Results' and includes task ID, generated at, and task external ID information. The message content is divided into sections, including 'Section A: Analysis Parameters' which lists analysis period, open exposure amount threshold, and overdue exposure amount threshold.

Outgoing message

Download attachments | More options

General

Last modified at	6/22/2026 11:44 AM	From	
Created at	6/22/2026 11:03 AM	Status	Draft
Type	Output	Attachments	0

Message

Customer Payment Exposure Analysis Results

Task ID: 903

Generated at: 26-06-22 11:03 AM

Task External ID: RGS0015-PYMTEXP-2026-06-22T15:02:20.779Z

Section A: Analysis Parameters

- **Analysis period:** 2025-01-01..2025-12-31
- **Open Exposure Amount Threshold (LCY):** 20,000.00
- **Overdue Exposure Amount Threshold (LCY):** 5,000.00

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

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	Need...	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

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



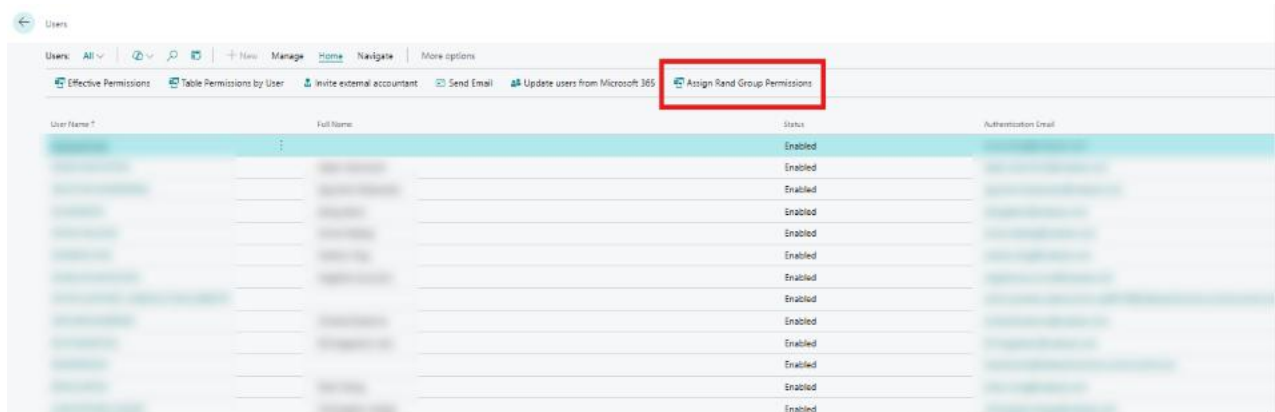
Once a Rand Group application is installed, it is essential to assign user permissions to grant access to pages, data, actions, and additional components integrated with and generated by the Rand Group applications.

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.

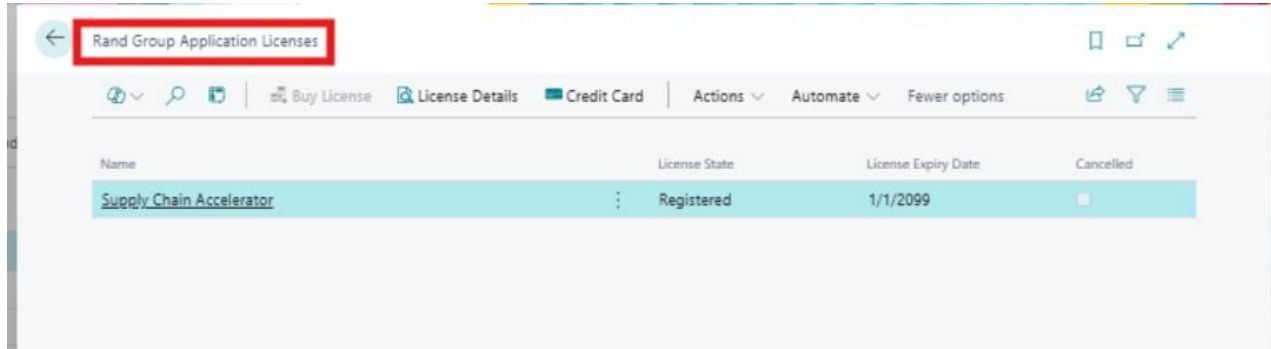
1. Submitting Rand Group client Information

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.

The screenshot displays the 'Rand Group Client Information' page. At the top, there is a navigation bar with 'Home' and 'Credit Card' tabs. Below this, a 'Transmit Data' button is highlighted with a red box. The main section is divided into three tabs: 'General', 'Contact Information', and 'Billing Information'. The 'General' tab is currently active, showing fields for 'MS Client ID' (with a GUID), 'Partner Code' (ADOSE01), 'Active' (toggle), and 'On Hold' (toggle). The 'Allow HTTPClient Requests' toggle is highlighted with a red box and is currently turned on. The 'Contact Information' tab contains fields for 'Company' (Rand Group), 'Website' (https://www.randgroup.com/), 'Name' (Rand Group), 'Address' (245 Fairview Mall Dr. Suite 200), 'City' (Toronto), 'Province / State' (ON), 'PostalCode / ZipCode' (M2J 4T1), 'Country' (CA), 'Phone' (4164991235), 'Email' (Concierge@randgroup.com), and 'Email CC'. The 'Billing Information' tab is partially visible at the bottom.

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/>